

## **Pesco Workflow:**

### **1. CRM/Sales Team**

- 1.1. Sales Manager/Administratore to generate lead pipeline of existing contact database.es team.
- 1.2. Telesales team has the provision to view only their leads
- 1.3. Random Calls from leads database by Telesales Team.
- 1.4. Call response updated against the contact as a note.
- 1.5. Create lead if the contact is interested. Hot/Cold etc
- 1.6. Allocate the lead pipeline to Telesale CRM Pipeline Status update at every stage - New, Qualified, Proposition, Won, Lost.
- 1.7 Monitor the pipeline and do repeated calls based on customer response.
- 1.8 Monitor the enquiries coming from website through contact page (Leads from all digital channels like Facebook, Instagram, Twitter, Linkedin etc should be redirected to the contact page of the website)
- 1.9 Send quotations to qualified Customers.
- 1.10 Sales confirmation from Customers - Create sales order.
- 1.11 Sales confirmation would lead to either a contract or a single time job.
- 1.1 Arrange meeting with the customer and update the meeting calendar.

### **2.Operation Team;**

- 2.1. Contract Creation from sales order Task Scheduling - Updating Task details, service area, Service Address, Driver, Team lead, Team Members, Time ,etc.,
- 2.2. Services details update.
- 2.3. Invoice scheduling based on the contract.
- 2.4. Monitor task calendar on a daily basis & confirm the tasks with the customer.
- 2.5. On the previous date of the scheduled job, verify the team allocation and update if required
- 2.6. Print the validated invoices by account team and hand over to the service team based on the contract.
- 2.7. Verify if the task details are updated by the service team after the job completion.
- 2.8. Enter verification remarks if any. Eg. Chemical used more than planned, more time consumed.

### **3.Service Team;**

- 3.1. Task Execution in Customer Service Address.

- 3.2. Service Report & Updating Task Status.
- 3.3. Service details-Chemical Usage,Timesheet entry,Recommendations,etc.
- 3.4. Supervisor to submit the invoice to customer
- 3.5. Update invoice submission status
- 3.6. Supervisor to collect the payments and hand it over to accounts team.

#### **4.Accounts Team;**

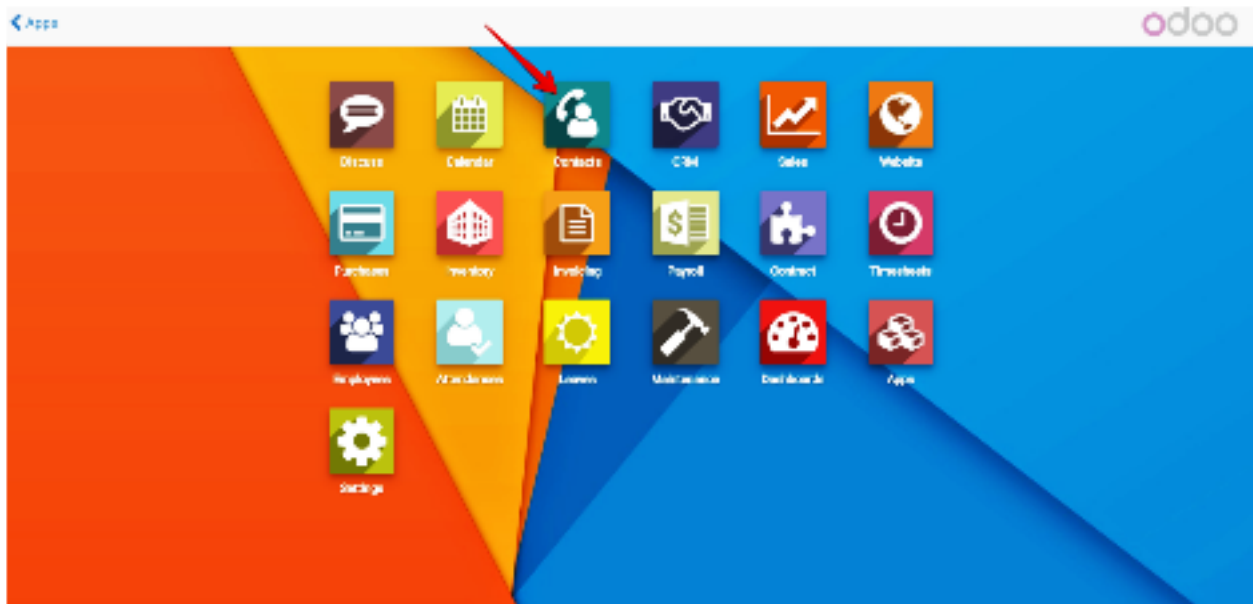
- 4.1. Monitor the scheduled invoices generated from all contracts.
- 4.2. Validate the scheduled draft invoice prior to the job.
- 4.3. Hand over the invoice to operations team/service team and get it submitted to the customer.
- 4.4. Verify the invoice submission status updated by supervisor.
- 4.5. Customer payment registration once the payment handed over by supervisor.

## **PESCO USER MANUAL**

#### **1.Sales Team;**

**1.1.Sales Manager/Administrator to generate lead pipeline of existing contact database.**

**1.2.Allocate the lead pipeline to Telesales team.**



Click on Contact from the apps screen

 This screenshot shows the 'Contacts / DEWA' page in Odoo. The page has a blue header with 'Contacts' and 'Configuration' tabs. The main content area is divided into two sections: 'Individual' (selected) and 'Company'. The 'Individual' section contains a form for creating a new contact. The form includes fields for Address (Business Bay, Z Tower, City: Dubai, ZIP, United Arab Emirates), Phone (044543210), Mobile, Email, Website (e.g. www.odoo.com), and Language (English). There are also checkboxes for 'Tax Applicable?' and 'RCM Applicable?'. The 'Company' section shows a summary of statistics: 1 Opportunities, 0 Meetings, 1 Sales, 1 Contract, 13 Tasks, and 1,538.46 AED Invoiced. A red arrow points to the 'Administrator' user icon in the top right corner.

Contact Creation Page

Contact Creation & allocate the lead to sales team By admin/ sales Manager.

Not secure | 46.163.77.93:6069/web?#id=1771&view\_type=form&model=res.partner&menu\_id=365&action=526

Contacts Configuration

Contacts / DEWA

SAVE DISCARD

1/4

Individual Company

DEWA

Address

Business Bay

Z Tower

City Dubai ZIP

United Arab Emirates

Tax Applicable?

RCM Applicable?

Tags

Zone

AC TEAM

Administrator

Alrais

Amrutha

Carmela

CARPENTRY TEAM

CIVIL TEAM

Search More...

Phone 044543210

Mobile

Email

Website e.g. www.odoo.com

Language English

Fax No

1 Opportunities

1 Contract

0 Meetings

13 Tasks

1 Sales

Active

1,538.46 AED Invoiced

Sale

Is a Customer Salesperson

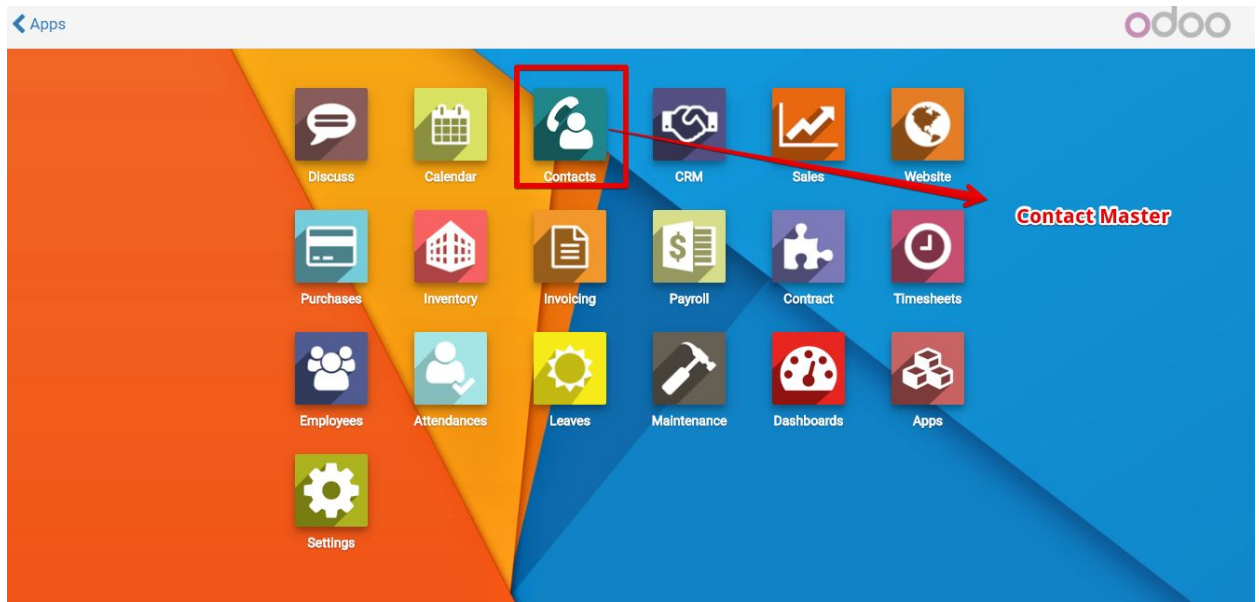
Purchase

Is a Vendor

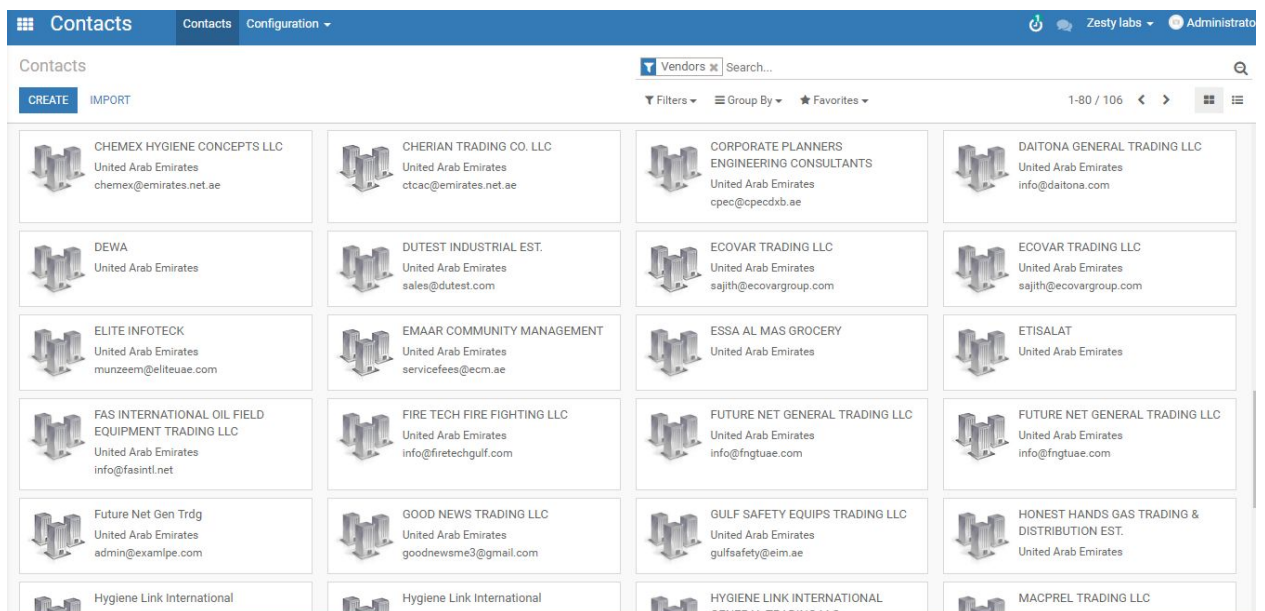
Salesperson assigning

Salesperson or sales team allocation

### 1.3.Random Calls from Contact Master by Telesales Team.



Click-> Contacts module




Contact list view

Select Customer to get contact details like phone number

**Contacts** | Contacts | Configuration ▾ | Zesty Labs | Administration

Contacts / DEWA

EDIT CREATE | Print ▾ | Attachment(s) ▾ | Action ▾ | 49 / 80 < >



0 Meetings

0 Purchases

0 Vendor Bills

0 Contract

Active

Address	Dubai P.O BOX 564 United Arab Emirates	Phone	04 6019999
Tax Applicable?	<input type="checkbox"/>	Mobile	
RCM Applicable?	<input type="checkbox"/>	Email	
Tags		Website	
Zone		Language	English
		Fax No	

Contacts & Addresses | Internal Notes | Sales & Purchases | Invoicing


Customer Contact Details

## 1.4.Call response updated against the contact as a note.

**Contacts** | Contacts | Configuration ▾ | Zesty Labs | Administration

Contacts / DEWA

SAVE DISCARD | 1 / 4 < >



1 Opportunities

0 Meetings

1 Sales

1 Contract

13 Tasks

Active

1,538.46 AED Invoiced

Address	Business Bay Z Tower City Dubai ZIP United Arab Emirates	Phone	044543210
Tax Applicable?	<input type="checkbox"/>	Mobile	
RCM Applicable?	<input type="checkbox"/>	Email	
Tags	Tags...	Website	e.g. www.odoo.com
Zone	Zone	Language	English
		Fax No	

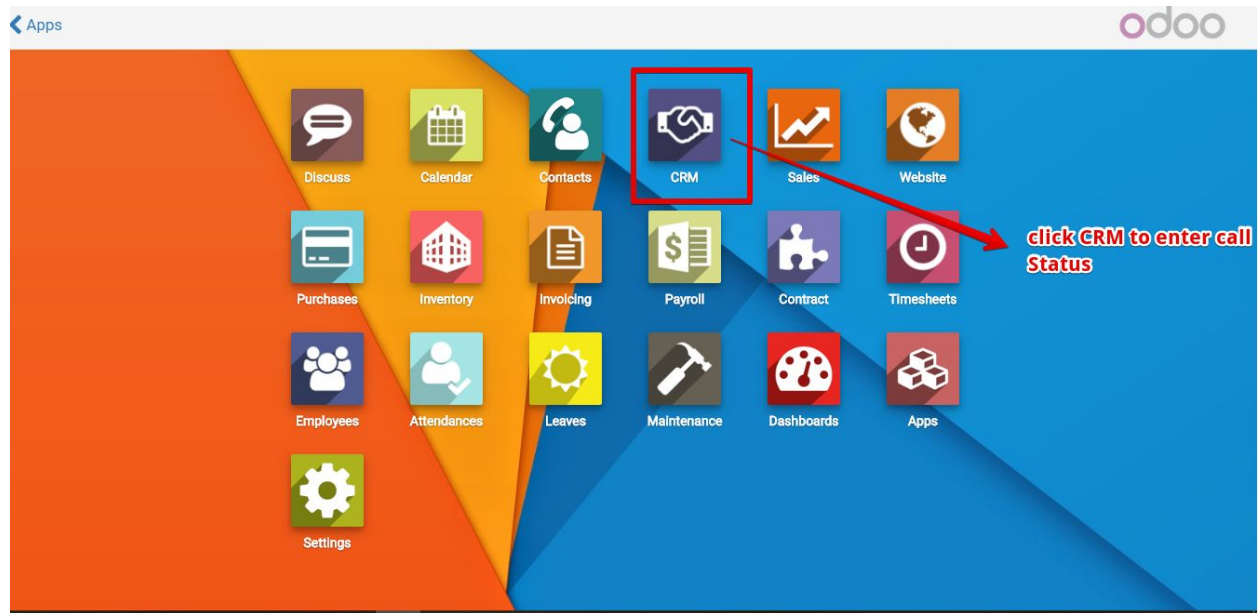
Contacts & Addresses | Internal Notes | Sales & Purchases | Invoicing

Please Share quotation to [info@abc.com](mailto:info@abc.com)

Call Notes

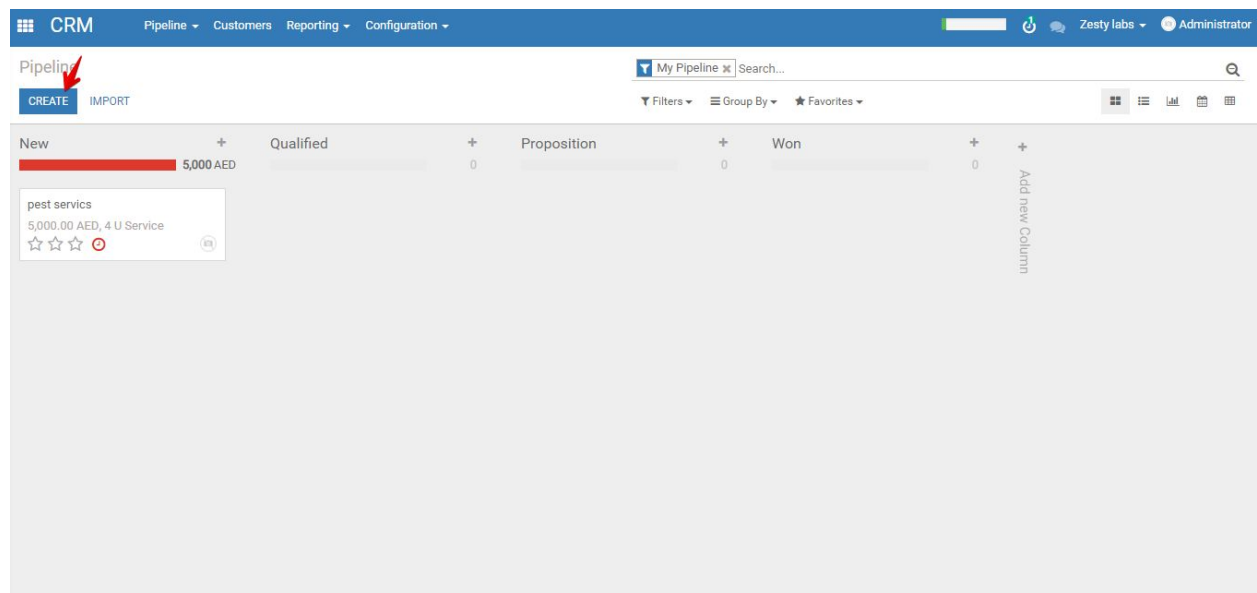
Call feedback entry in internal notes

**Based on the calls status updating into CRM Pipeline**



Click homepage CRM

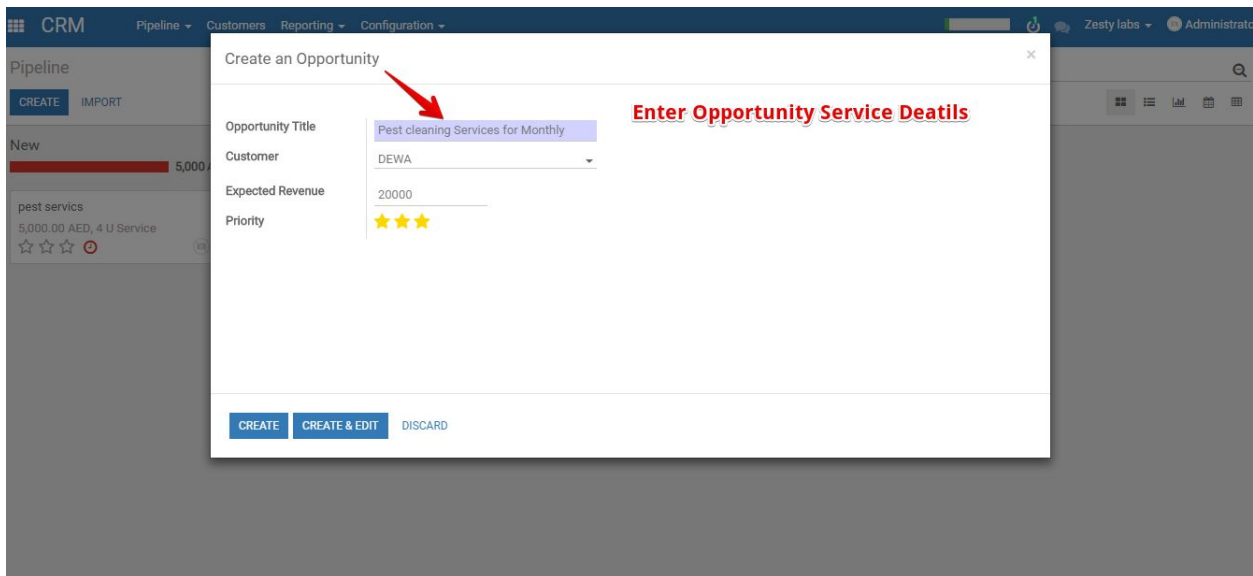
After the call conversation with customer , need update into CRM module sales pipeline.



Pipeline Creation

Create new pipeline for customer

## 1.5.Create lead if the contact is interested. Hot/Cold etc



CRM Pipeline Customers Reporting Configuration Zesty labs Administrator

Pipeline CREATE IMPORT

New 5,000

pest services 5,000.00 AED, 4 U Service ☆☆☆

Create an Opportunity

Opportunity Title Pest cleaning Services for Monthly

Customer DEWA

Expected Revenue 20000

Priority ☆☆☆

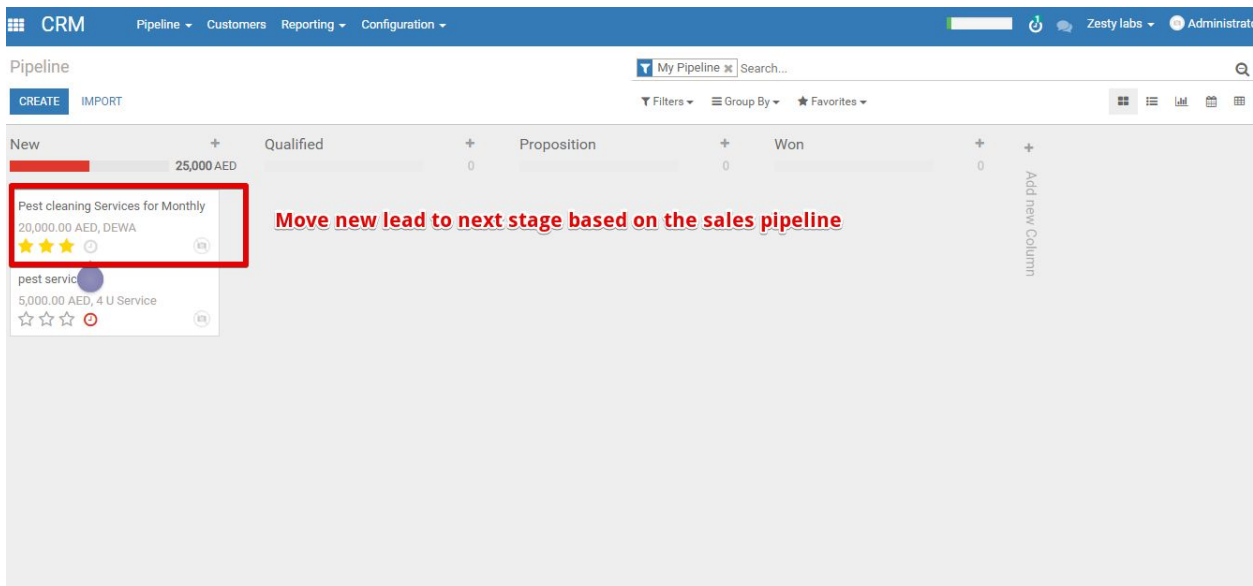
Enter Opportunity Service Deatils

CREATE CREATE & EDIT DISCARD

Lead Details

Enter Sales Opportunity Title , Expected Revenue and give priority of the lead.

## 1.6.CRM Pipeline Status update at every stage - New, Qualified,Proposition, Won,Lost



CRM Pipeline Customers Reporting Configuration Zesty labs Administrator

Pipeline My Pipeline Search...

CREATE IMPORT Filters Group By Favorites

New + Qualified + Proposition + Won +

25,000 AED

0 0 0

Pest cleaning Services for Monthly 20,000.00 AED, DEWA ☆☆☆

pest service 5,000.00 AED, 4 U Service ☆☆☆

Add new Column

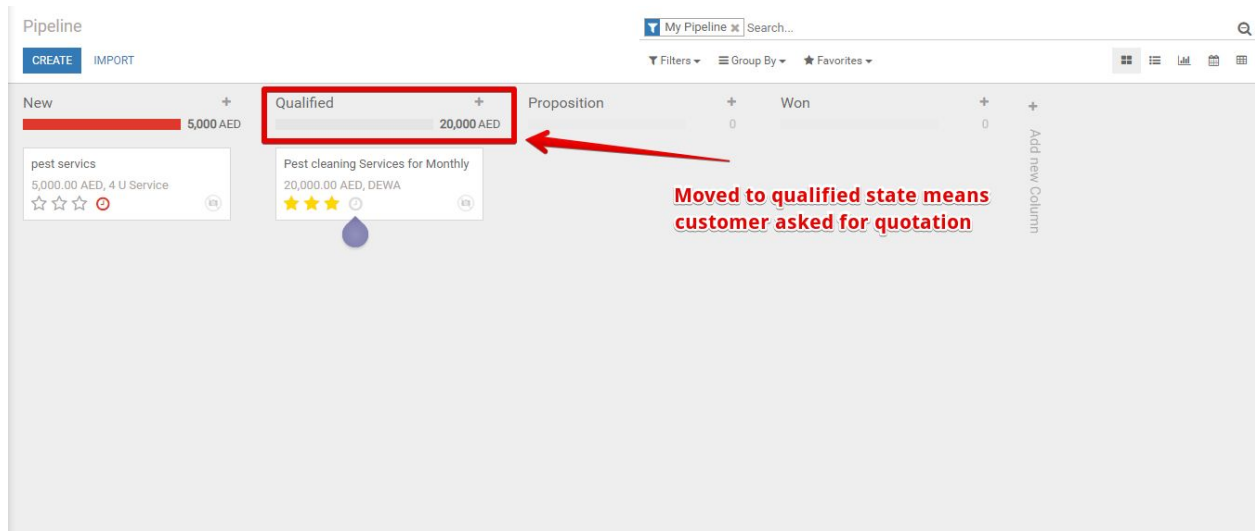
Move new lead to next stage based on the sales pipeline

Sales pipeline

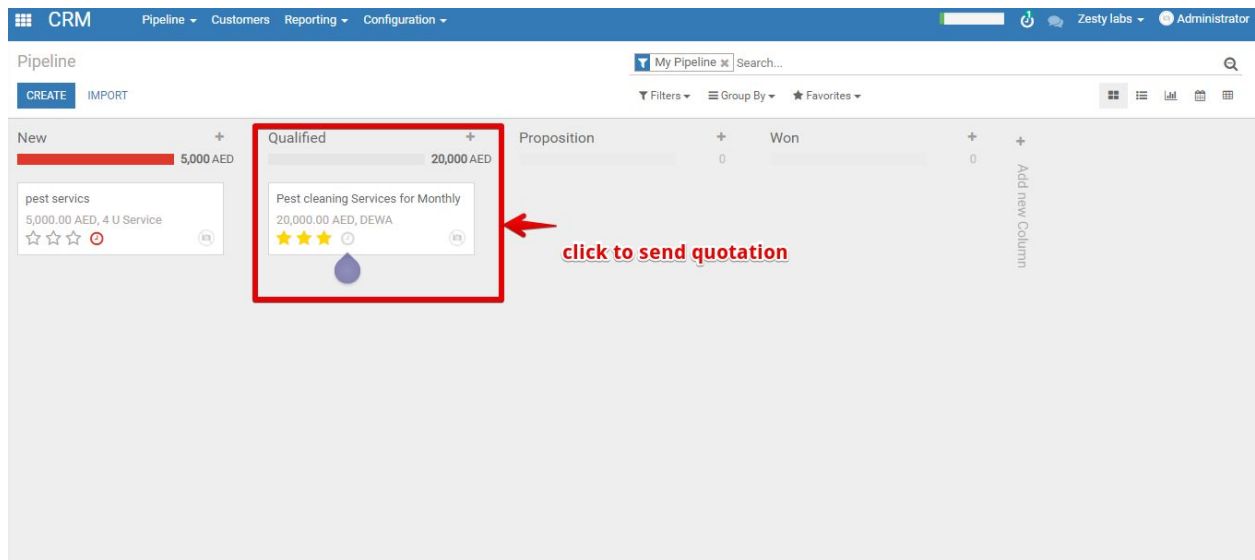
Moved to Qualified state , if customer asked for quotation.

**1.7. Monitor the pipeline and do repeated calls based on customer response.**

**1.8. Send quotations to qualified Customers.**



Just Drag it and move to qualified state



Click-> customer to open

CRM Pipeline Customers Reporting Configuration

Pipeline / Pest cleaning Services for Monthly

EDIT CREATE Attachment(s) Action 2 / 2

NEW QUOTATION MARK WON MARK LOST NEW QUALIFIED PROPOSITION WON

Pest cleaning Services for Monthly

20,000.00 AED at 30 %

Customer DEWA Expected Closing

Job Type

Email 044543210

Phone

Salesperson Administrator Priority ★★ ★

Sales Channel Security Services Tags

Internal Notes Contact Information

0 Meeting 0 Quotation(s)

Quotation Creation

Click new quotation

CRM Pipeline Customers Reporting Configuration

Pipeline / Pest cleaning Services for Monthly / New

SAVE DISCARD

New

Customer DEWA Expiration Date

TRN Number

Invoice Address DEWA Payment Terms

Delivery Address DEWA

Order Lines Other Information

Product	Description	Ordered Qty	Analytic Tags	Unit Price	Taxes	Subtotal
+ Pest-Control CC	Pest-Control CC Annual Contract - Monthly Cleaning Service 2019 to 2020	1.000		20,000.00	Output SR 5%	20,000.00 AED
Add an item						

Enter Service Details , unit price ,Tax

Untaxed Amount: 20,000.00 AED

Taxes: 1,000.00 AED

Total: 21,000.00 AED

Quotation Details

Click add an item to enter Product, Description , Unit price ,tax.

Pipeline / Pest cleaning Services for Monthly / SO039

**SAVE** DISCARD **Save and send quotation by mail to customer** 1 / 1 < >

**SEND BY EMAIL** **PRINT** CONFIRM SALE CANCEL

**QUOTATION** QUOTATION SENT SALES ORDER

**S0039**

Customer: DEWA Expiration Date:   
 TRN Number: DEWA Invoice Address: DEWA Payment Terms:   
 Delivery Address: DEWA

Order Lines Other Information

Product	Description	Ordered Qty	Analytic Tags	Unit Price	Taxes	Subtotal
+ Pest-Control CC	Pest-Control CC Annual Contract - Monthly Cleaning Service 2019 to 2020	1.000		20,000.00	Output SR 5%	20,000.00 AED

Add an item

Sent by mail option

After entering all the details, click save and send by mail .

CRM Pipeline Customers Reporting Configuration Zesty labs Administrator

Pipeline / Pest cleaning Services for Monthly / SO039

EDIT CREATE **Print** Attachment(s) Action

**SEND BY EMAIL** **PRINT** CONFIRM SALE CANCEL

**QUOTATION** QUOTATION SENT SALES ORDER

**S0039**

Customer: DEWA DU United Arab Emirates Expiration Date:   
 TRN Number: DEWA Invoice Address: DEWA Payment Terms:   
 Delivery Address: DEWA

Order Lines Other Information

Product	Description	Ordered Qty	Analytic Tags	Unit Price	Taxes	Subtotal
Pest-Control CC	Pest-Control CC Annual Contract - Monthly Cleaning Service 2019 to 2020	1.000		20,000.00	Output SR 5%	20,000.00 AED

Quotation print option

Click print to get quotation print or Pro- Forma Invoice

**Invoicing and shipping address:**

DEWA  
DU  
United Arab Emirates  
☎ 044543210

DEWA  
DU  
United Arab Emirates

## Quotation # SO039

**Quotation Date:**  
07/01/2019 11:54:03

**Salesperson:**  
Administrator


Description	Quantity	Unit Price	Taxes	Amount
Pest-Control CC Annual Contract - Monthly Cleaning Service 2019 to 2020	1.000	20,000.00	Output VAT 5%	20,000.00 AED
<b>Subtotal</b>				20,000.00 AED
Taxes on 20,000.00 AED				1,000.00 AED
<b>Total</b>				21,000.00 AED

Quotation Print

Sales Quotation Print

## 1.10.Sales confirmation from Customers - Create sales order.

Pipeline / Pest cleaning Services for Monthly / SO039

EDIT CREATE  Print Attachment(s) Action

SEND BY EMAIL PRINT CONFIRM SALE CANCEL QUOTATION QUOTATION SENT SALES ORDER

**SO039**

Customer: DEWA  
DU  
United Arab Emirates

TRN Number: DEWA  
Invoice Address: DEWA  
Delivery Address: DEWA

Expiration Date:   
Payment Terms:

Order Lines Other Information

Product	Description	Ordered Qty	Analytic Tags	Unit Price	Taxes	Subtotal
Pest-Control CC	Pest-Control CC Annual Contract - Monthly Cleaning Service 2019 to 2020	1.000		20,000.00	Output SR 5%	20,000.00 AED

Once Customer confirms the quotation then click confirm sale.

## 1.11.Sales confirmation would lead to either a contract or a single time job.

## 1.12.Arrange meeting with the customer and update the meeting calendar.

Contacts DEWA

EDIT CREATE Print Attachment(s) Action

1 Opportunities 0 Meetings 1 Sales  
1 Contract 13 Tasks Active  
1,538.46 AED Invoiced

Address: Business Bay  
Z Tower  
Dubai  
United Arab Emirates

Phone: 044543210  
Mobile:   
Email:   
Website:   
Language: English  
Fax No:

Tax Applicable? ☐  
RCM Applicable? ☐  
Tags:   
Zone:

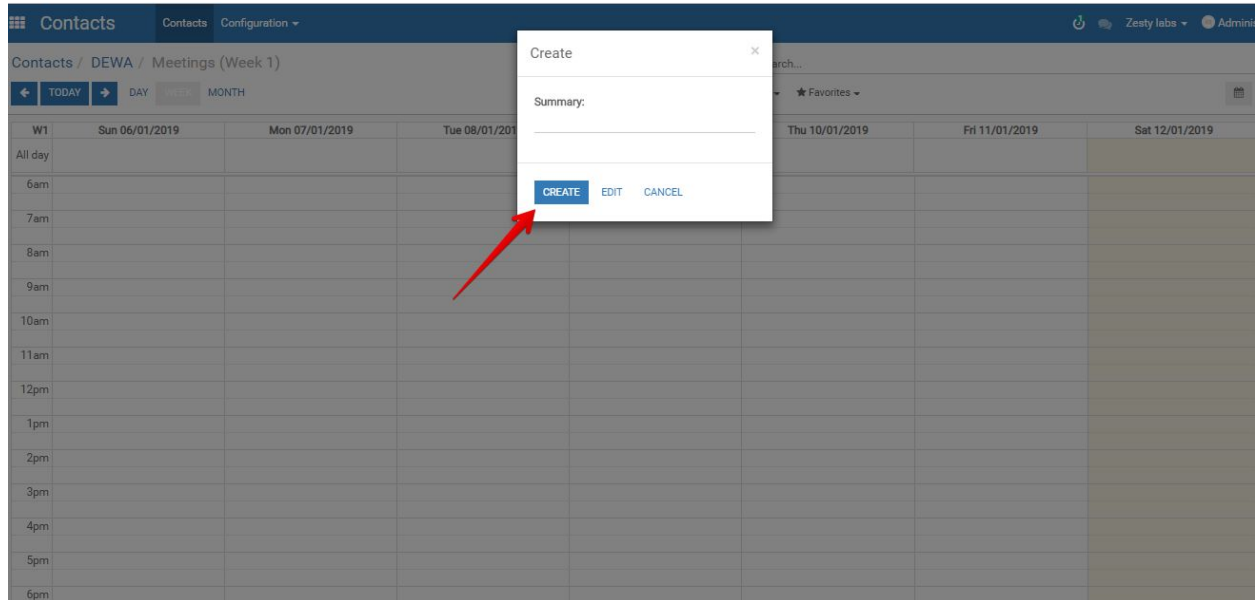
Contacts & Addresses Internal Notes Sales & Purchases Invoicing

Al Quoz  
Dubai United Arab Emirates

Rashidiya  
Dubai United Arab Emirates

Customer meetings

Go to Contact module, select customer and go to meetings tab

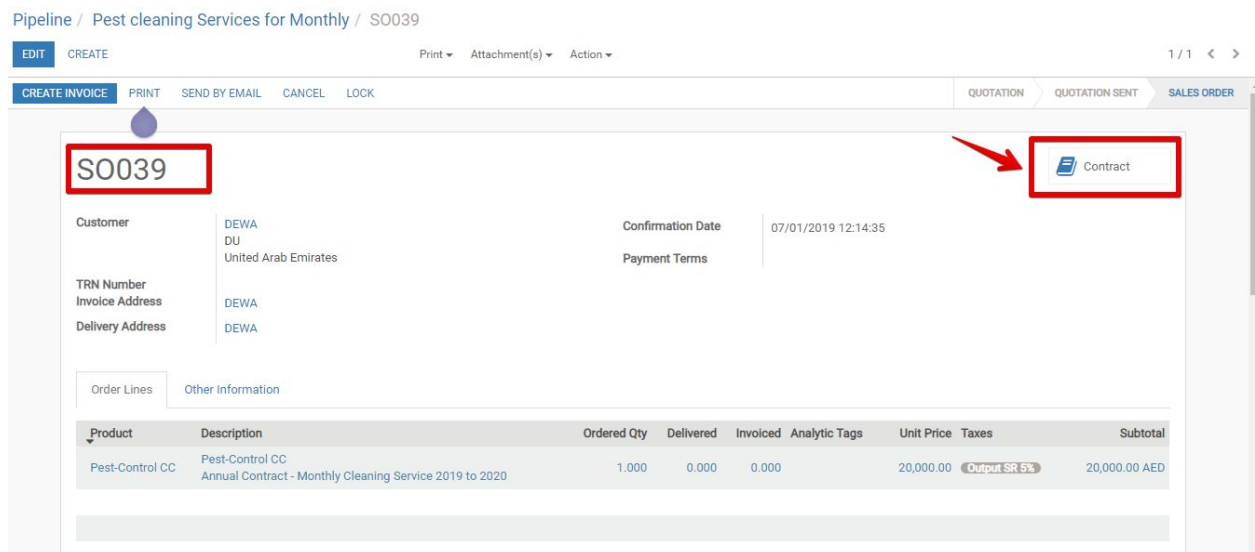


Calendar notes

Create meeting based on the customer convenience

## 2.Operation Team;

### 2.1.Contract Creation from sales order



Contract Creation

Quotation Changed to Sales order then click contract to make contract for the customer.

## 2.2.Task Scheduling - Updating Task details,service area,Service Address, Driver, Team lead, Team Members,Time ,etc.,

Pipeline / Pest cleaning Services for Monthly / S0039 / Contracts

Customer DEWA x Search...

CREATE Excel IMPORT

Filters Group By Favorites

Create a new project.  
Organize your activities (plan tasks, track issues, invoice timesheets) for internal, personal or customer projects.

Click create

CRM Pipeline Customers Reporting Configuration

Pipeline / Pest cleaning Services for Monthly / S0039 / Contracts / New

SAVE DISCARD

SEND BY EMAIL RENEW CONTRACT

DRAFT IN PROGRESS CONFIRMED CANCELLED

Contract Name

0 Documents 0 Tasks 0 Timesheets

Active 0 Invoices Cost/Revenue

Customer DEWA

Service Type

Invoice Address

Service Address

Start Date 06/12/2018

End Date

Contract Prepared date 07/01/2019

Related Order

Payment Term

Call Back Policy

Sales Team Security Services

Task Scheduling Emails Service Details Invoice Scheduling Contract Renewal History Print Template

SCHEDULE TASK

Pipeline / Pest cleaning Services for Monthly / S0039 / Contracts / New

SAVE

DISCARD

DEWA /0001/2019

0 Documents

0 Tasks

Timesheets

Active

0 Invoices

Cost/Revenue

Customer	DEWA	Related Order	
Service Type		Payment Term	15 Days
Invoice Address	DEWA, Rashidiya	Call Back Policy	With Call Back
Service Address	DEWA, Al Quoz	Sales Team	Security Services
Start Date	06/12/2018		
End Date	05/01/2020		
Contract Prepared date	07/01/2019		

Task Scheduling

Emails

Service Details

Invoice Scheduling

Contract Renewal History

Print Template

SCHEDULE TASK

Contract

Enter Contract Details name, Start and end date

Pipeline / Pest cleaning Services for Monthly / S0039 / Contracts / New

SAVE

DISCARD

DEWA /0001/2019

0 Documents

0 Tasks

Timesheets

Active

0 Invoices

Cost/Revenue

Customer	DEWA	Related Order	
Service Type		Payment Term	15 Days
Invoice Address	DEWA, Rashidiya	Call Back Policy	With Call Back
Service Address	DEWA, Al Quoz	Sales Team	Security Services
Start Date	06/12/2018		
End Date	05/01/2020		
Contract Prepared date	07/01/2019		

Task Scheduling

Emails

Service Details

Invoice Scheduling

Contract Renewal History

Print Template

SCHEDULE TASK

Title	Start Date	Start Time	Start Time Estimation	End Date	End Time	End Time Estimation	Planned Hours	Service Address	Service Area	Schedule Details
Add an item										

Click Add an item to schedule task for the contract

**Create Task schedule**

Title: DEWA- Monthly Pending Services

Start Date: 06/12/2018

End Date: 05/01/2020

Service Address: DEWA, Al Quoz

Zone:

Service Area: Meeting Room , Pantry, Restroom

Driver: zaheer

Service Team Lead: Zesty

Team Members: (BDS172) - ABDUL AWAL KAMAL P., (CHC664) - ABDUL ALIM ABDUR RA., (BDS220) - ABDUL JABBAR ABDUS.

Start Time: 08:00 AM

End Time: 10:00 AM Same Day

Planned Hours: 2.00

Buttons: SAVE & CLOSE, SAVE & NEW, DISCARD

Task schedule

Give Task Title, Start Date, End date, Service address, Service area, driver, Team lead, Team members, task start and end time then save and close.

**Create Task schedule**

Service Team Lead: Zesty

Team Members: (BDS172) - ABDUL AWAL KAMAL P., (CHC664) - ABDUL ALIM ABDUR RA., (BDS220) - ABDUL JABBAR ABDUS.

Start Time: 08:00 AM

End Time: 10:00 AM Same Day

Planned Hours: 2.00

**Schedule for**

Contract Frequency: Monthly

Date of the month: 10

Buttons: SAVE & CLOSE, SAVE & NEW, DISCARD

Select contract frequency like periodic, weekly, monthly, Fortnightly, Bi-monthly, quarterly, Tri-yearly, Bi-annually.

Option 1 ( Schedule Task for Date of the Month)

Mention contract frequency and enter date of the month which date customer need service in every month of the year

The screenshot shows a 'Create Task schedule' dialog box. At the top, it has fields for 'Start time' (08:00 AM), 'End Time' (10:00 AM), and 'Planned Hours' (2.00). Below this is a section titled 'Schedule for' with 'Contract Frequency' set to 'Monthly'. Under 'Date of the month', there is a table with two columns: 'Week' and 'Day'. The first row shows '2nd' and 'Tuesday'. A red rectangular box highlights this row. At the bottom of the dialog, there are three buttons: 'SAVE & CLOSE', 'SAVE & NEW', and 'DISCARD'.

Option 2: Schedule for ( Week & Day for Service )

This screenshot shows the same 'Create Task schedule' dialog box, but with 'Date of the month' set to '10'. A red arrow points to this field. The 'Week' and 'Day' table is empty. At the bottom, the 'SAVE & CLOSE' button is highlighted with a red rectangular box. The other buttons, 'SAVE & NEW' and 'DISCARD', are also visible.

Mention one condition for schedule task based on the customer request then click save and close.

**DEWA /0001/2019**

Documents 0 Tasks 0 Timesheets  
Active Invoices Cost/Revenue

Customer: DEWA  
Service Type:   
Invoice Address: DEWA, Rashidiya  
Service Address: DEWA, Al Quoz  
Start Date: 06/12/2018  
End Date: 05/01/2020  
Contract Prepared date: 07/01/2019

Related Order:   
Payment Term: 15 Days  
Call Back Policy: With Call Back  
Sales Team: Security Services

Task Scheduling | Emails | Service Details | Invoice Scheduling | Contract Renewal History | Print Template

**SCHEDULE TASK** Click to Schedule Task

Title	Start Date	Start Time	Start Time Estimation	End Date	End Time	End Time Estimation	Planned Hours	Service Address	Service Area	Schedule Details
DEWA- Monthly Pending Services	06/12/2018	08:00	AM	05/01/2020	10:00	AM	2.00	DEWA, Al Quoz	Meeting Room , Pantry, Restroom	Task will create on 10 in each Month.

Add an item

Click Schedule Task

**DEWA /0001/2019**  
**C0808**

Documents 0 Tasks 13 Timesheets  
Active Invoices Cost/Revenue

Customer: DEWA  
Service Type:   
Invoice Address: DEWA, Rashidiya  
Service Address: DEWA, Al Quoz  
Start Date: 06/12/2018  
End Date: 05/01/2020  
Contract Prepared date: 07/01/2019

Related Order:   
Payment Term: 15 Days  
Call Back Policy: With Call Back  
Sales Team: Security Services

Settings | Task Scheduling | Emails | Service Details | Invoice Scheduling | Contract Renewal History | Print Template

Task Details

It created tasks based on the details for the Contract

Pipeline / Pest cleaning Services for Monthly / SO039 / Contracts

Contract DEWA /0001/2019 x Search...

CREATE Excel IMPORT

Filters Group By Favorites

<input type="checkbox"/>	Task Number	Task Title	Customer	Services Address	Zone	Contact Person	Phone Number	Mobile Number	Job Type	Service Report No	Job card no	Point of Contact	Area/Flat No	Contract	Driver	Team Lead	Team Members	Start Date	Start Time	Start Time Estimation	End Date	End Time	End Time Estimation	Price
<input type="checkbox"/>	New (13)																							

Task

Created task for the contract.

Pipeline / Pest cleaning Services for Monthly / SO039 / Contracts

Contract DEWA /0001/2019 x Search...

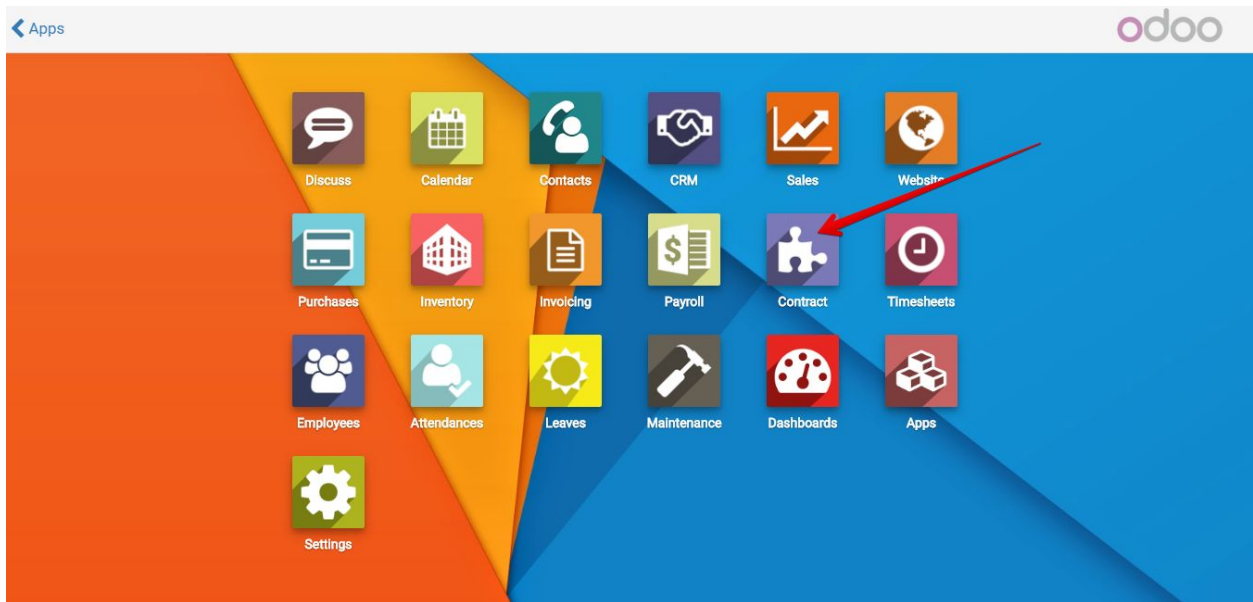
CREATE Excel IMPORT

Filters Group By Favorites

<input type="checkbox"/>	Task Number	Task Title	Customer	Services Address	Zone	Contact Person	Phone Number	Mobile Number	Job Type	Service Report No	Job card no	Point of Contact	Area/Flat No	Contract	Driver	Team Lead	Team Members	Start Date	Start Time	Start Time Estimation
<input type="checkbox"/>	T1098	DEWA-Monthly Pending Services	DEWA	DEWA, Al Quoz			044543210		Contract					DEWA /0001/2019	zaheer	Zesty	CHC564 - ABDUL ALIM ABDUR RA BDS172 - ABDUL AWAL KAMAL P BDS220 - ABDUL JABBAR ABDUS	10/12/2019	08:00	AM
<input type="checkbox"/>	T1097	DEWA-Monthly Pending Services	DEWA	DEWA, Al Quoz			044543210		Contract					DEWA /0001/2019	zaheer	Zesty	CHC564 - ABDUL ALIM ABDUR RA BDS172 - ABDUL AWAL KAMAL P BDS220 - ABDUL JABBAR ABDUS	10/11/2019	08:00	AM
<input type="checkbox"/>	T1096	DEWA-Monthly Pending Services	DEWA	DEWA, Al Quoz			044543210		Contract					DEWA /0001/2019	zaheer	Zesty	CHC564 - ABDUL ALIM ABDUR RA BDS172 - ABDUL AWAL KAMAL P BDS220 - ABDUL JABBAR ABDUS	10/10/2019	08:00	AM
<input type="checkbox"/>	T1095	DEWA-Monthly Pending Services	DEWA	DEWA, Al Quoz			044543210		Contract					DEWA /0001/2019	zaheer	Zesty	CHC564 - ABDUL ALIM ABDUR RA BDS172 - ABDUL AWAL KAMAL P BDS220 - ABDUL JABBAR ABDUS	10/09/2019	08:00	AM
<input type="checkbox"/>	T1094	DEWA-Monthly Pending	DEWA	DEWA, Al Quoz			044543210		Contract					DEWA /0001/2019	zaheer	Zesty	CHC564 - ABDUL ALIM ABDUR RA BDS172 - ABDUL AWAL KAMAL P BDS220 - ABDUL JABBAR ABDUS	10/08/2019	08:00	AM

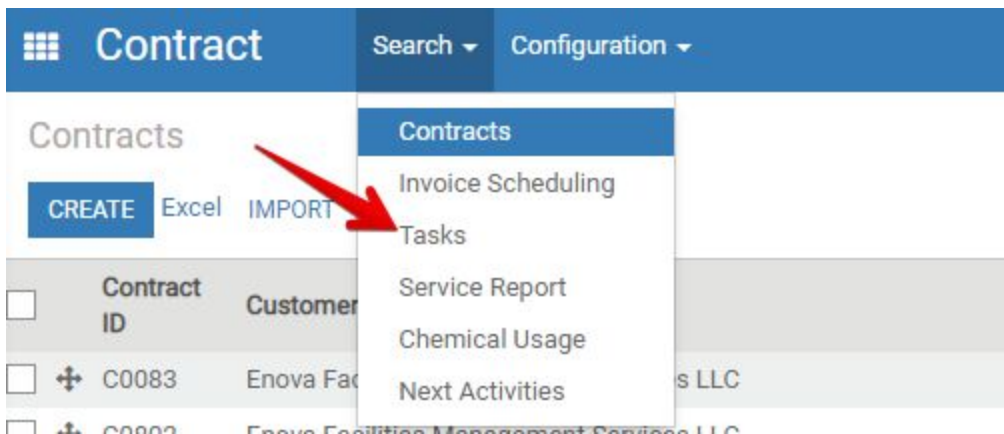
Task details for the contract

**2.3.Monitor task calendar on a daily basis & confirm the tasks with the customer.**

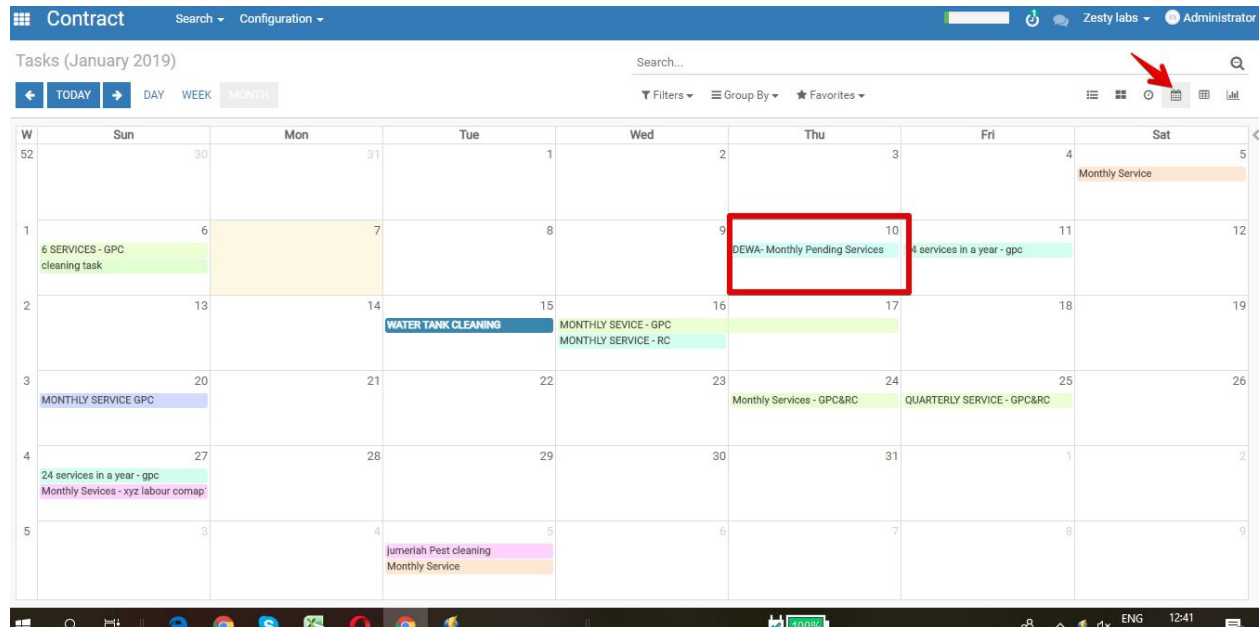


Homescreen

Click-> Contract Module



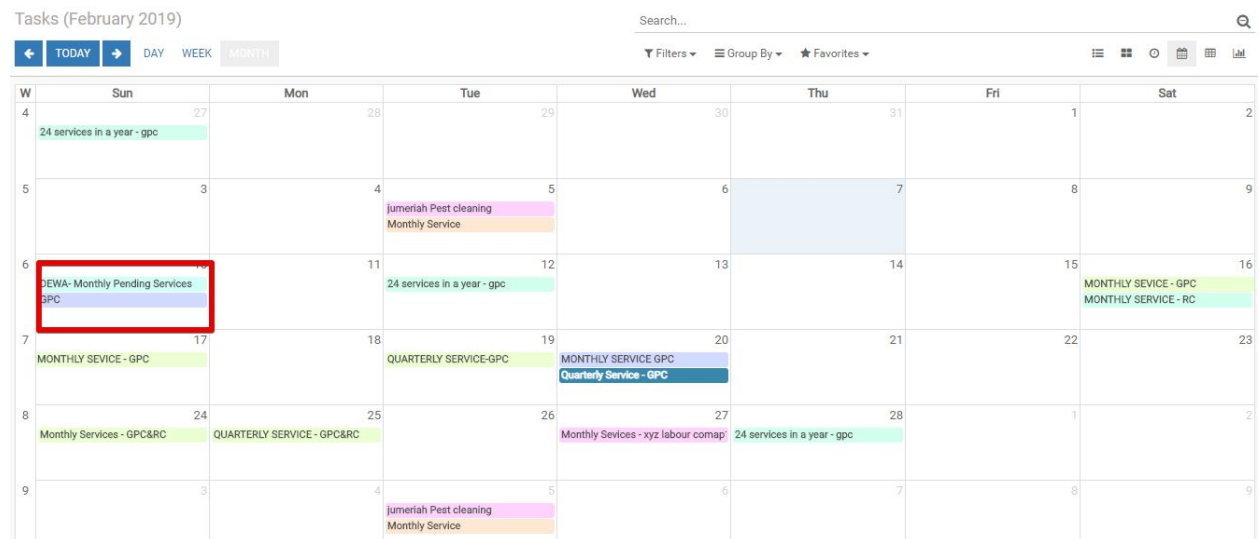
click->Search ->Tasks



Calendar view -month view

Click-> Calendar icon to calendar view

Scheduled contract task month View 1 ( 10-Jan)



Scheduled contract task month View 2 ( 10-Feb)

Tasks (March 2019)

Search...

← TODAY → DAY WEEK MONTH

Filters Group By Favorites

W	Sun	Mon	Tue	Wed	Thu	Fri	Sat
8	24 Monthly Services - GPC&RC	25 QUARTERLY SERVICE - GPC&RC	26 Monthly Services - xyz labour comap	27 24 services in a year - gpc		1	2
9	3	4 jumeriah Pest cleaning Monthly Service	5	6	7	8	9
10	10 6 SERVICES - GPC DEWA- Monthly Pending Services	11	12	13	14	15	16 MONTHLY SERVICE - GPC 24 services in a year - gpc MONTHLY SERVICE - RC
11	17 MONTHLY SERVICE - GPC	18	19 MONTHLY SERVICE GPC	20	21	22	23
12	24 Monthly Services - GPC&RC	25 QUARTERLY SERVICE - GPC&RC	26 Monthly Services - xyz labour comap	27	28	29	30
13	31 24 services in a year - gpc	1	2	3	4	5 jumeriah Pest cleaning Monthly Service	6

Scheduled contract task month View 3 ( 10-March)

## 2.3.Invoice Scheduling for the contract

Contract Search Configuration

Tasks (January 2019) / DEWA- Monthly Pending Services / DEWA /0001/2019

SAVE DISCARD

DEWA /0001/2019

C0808

Customer: DEWA

Service Type:

Invoice Address: DEWA, Rashidiya

Service Address: DEWA, Al Quoz

Start Date: 06/12/2018

End Date: 05/01/2020

Contract Prepared date: 07/01/2019

Related Order Payment Term: 15 Days

Call Back Policy: With Call Back

Sales Team: Security Services

0 Documents 13 Tasks Timesheets

Active 0 Invoices Cost/Revenue

Settings Task Scheduling Emails **Service Details** Invoice Scheduling Contract Renewal History Print Template

SCHEDULE INVOICES

Product	Areas Covered	Service Address	Quantity	Unit Price	Contract Value	No of Installments	First Invoice Date	Invoice interval(Days)
Add an item								

Click service details

Contract Configuration Search Zesty labs Administrator

Tasks (January 2019) / DE

SAVE DISCARD

Customer

Service Type

Invoice Address

Service Address

Start Date

End Date

Contract Prepared date

Settings Task Scheduler

SCHEDULE INVOICES

Product Areas Covered

Add an item

Create Product Order Details

Partner DEWA

Product Pest-Control CC

Description DEWA Monthly Pest Control Treatment

Service Address DEWA, Al Quoz

First Invoice Date 10/01/2019

Quantity 1.000

Unit Price 20000

Subtotal 20,000.00

Schedule for

Contract Frequency Monthly

Day of the month 10

Week

Sun ☐

Mon ☐

SAVE & CLOSE SAVE & NEW DISCARD

Enter Invoice details Description and first invoice date, Unit Price, No of installation, invoice interval days .

Contract Configuration Search Zesty labs Administrator

Tasks (January 2019) / DE

SAVE DISCARD

Customer

Service Type

Invoice Address

Service Address

Start Date

End Date

Contract Prepared date

Settings Task Scheduler

SCHEDULE INVOICES

Product Areas Covered

Add an item

Create Product Order Details

Service Address DEWA, Al Quoz

First Invoice Date 10/01/2019

Schedule for

Contract Frequency Monthly

Day of the month

Week 2nd

Sun ☐

Mon ☐

Tue ☐

Wed ☒

Thu ☐

Fri ☐

Sat ☐

SAVE & CLOSE SAVE & NEW DISCARD

Select Invoice Schedule frequency periodic, weekly, monthly, Fortnightly, Bi-monthly, quarterly, Tri-yearly, Bi- annually.

Tasks (January 2019) / DEWA- Monthly Pending Services / DEWA /0001/2019

[SAVE](#) [DISCARD](#) 1 / 1 < >

Customer	DEWA	Related Order	
Service Type		Payment Term	15 Days
Invoice Address	DEWA, Rashidiya	Call Back Policy	With Call Back
Service Address	DEWA, Al Quoz	Sales Team	Security Services
Start Date	06/12/2018		
End Date	05/01/2020		
Contract Prepared date	07/01/2019		

[Settings](#) [Task Scheduling](#) [Emails](#) [Service Details](#) [Invoice Scheduling](#) [Contract Renewal History](#) [Print Template](#)

**SCHEDULE INVOICES**

Product	Areas Coverd	Service Address	Quantity	Unit Price	Contract Value	No of instalments	First Invoice Date	Invoice interval(Days)
Pest-Control CC	DEWA Monthly Pest Control Treatment	DEWA, Al Quoz	1.000	20,000.00	20,000.00	0	10/01/2019	0

[Add an item](#)

Invoice Schedule

Click Scheduled invoice to schedule invoice for the contract.

**2.4.Print the validated invoices by account team and hand over to the service team based on the contract.**

Contract

Search Configuration

Zesty labs

Administra

Tasks (January 2019) / DEWA- Monthly Pending Services / DEWA /0001/2019

EDIT

CREATE

Attachment(s)

Action

1 / 1

End Date

05/01/2020

Contract Prepared date

07/01/2019

Settings

Task Scheduling

Emails

Service Details

Invoice Scheduling

Contract Renewal History

Print Template

Schedule No	Contract	Invoice Date	Amount	Invoice
DEWA /0001/2019/C0808 [10-01-2019] - 1	DEWA /0001/2019	10/01/2019	1,538.46	<div>CREATE INVOICE</div> <div>CREATE AND EDIT INVOICE</div>
DEWA /0001/2019/C0808 [10-02-2019] - 2	DEWA /0001/2019	10/02/2019	1,538.46	<div>CREATE INVOICE</div> <div>CREATE AND EDIT INVOICE</div>
DEWA /0001/2019/C0808 [10-03-2019] - 3	DEWA /0001/2019	10/03/2019	1,538.46	<div>CREATE INVOICE</div> <div>CREATE AND EDIT INVOICE</div>
DEWA /0001/2019/C0808 [10-04-2019] - 4	DEWA /0001/2019	10/04/2019	1,538.46	<div>CREATE INVOICE</div> <div>CREATE AND EDIT INVOICE</div>
DEWA /0001/2019/C0808 [10-05-2019] - 5	DEWA /0001/2019	10/05/2019	1,538.46	<div>CREATE INVOICE</div> <div>CREATE AND EDIT INVOICE</div>
DEWA /0001/2019/C0808 [10-06-2019] - 6	DEWA /0001/2019	10/06/2019	1,538.46	<div>CREATE INVOICE</div> <div>CREATE AND EDIT INVOICE</div>
DEWA /0001/2019/C0808 [10-07-2019] - 7	DEWA /0001/2019	10/07/2019	1,538.46	<div>CREATE INVOICE</div> <div>CREATE AND EDIT INVOICE</div>
DEWA /0001/2019/C0808 [10-08-2019] - 8	DEWA /0001/2019	10/08/2019	1,538.46	<div>CREATE INVOICE</div> <div>CREATE AND EDIT INVOICE</div>
DEWA /0001/2019/C0808 [10-09-2019] - 9	DEWA /0001/2019	10/09/2019	1,538.46	<div>CREATE INVOICE</div> <div>CREATE AND EDIT INVOICE</div>
DEWA /0001/2019/C0808 [10-10-2019] - 10	DEWA /0001/2019	10/10/2019	1,538.46	<div>CREATE INVOICE</div> <div>CREATE AND EDIT INVOICE</div>

Click invoice scheduling , it show all draft invoice of the contract

Contract

Search Configuration

Zesty labs

Administra

Tasks (January 2019) / DEWA- Monthly Pending Services / DEWA /0001/2019

EDIT

CREATE

Attachment(s)

Action

1 / 1

End Date

05/01/2020

Contract Prepared date

07/01/2019

Settings

Task Scheduling

Emails

Service Details

Invoice Scheduling

Contract Renewal History

Print Template

Schedule No	Contract	Invoice Date	Amount	Invoice
DEWA /0001/2019/C0808 [10-01-2019] - 1	DEWA /0001/2019	10/01/2019	1,538.46	<div>Draft Invoice</div> <div>CREATE INVOICE</div> <div>CREATE AND EDIT INVOICE</div>
DEWA /0001/2019/C0808 [10-02-2019] - 2	DEWA /0001/2019	10/02/2019	1,538.46	<div>CREATE INVOICE</div> <div>CREATE AND EDIT INVOICE</div>
DEWA /0001/2019/C0808 [10-03-2019] - 3	DEWA /0001/2019	10/03/2019	1,538.46	<div>CREATE INVOICE</div> <div>CREATE AND EDIT INVOICE</div>
DEWA /0001/2019/C0808 [10-04-2019] - 4	DEWA /0001/2019	10/04/2019	1,538.46	<div>CREATE INVOICE</div> <div>CREATE AND EDIT INVOICE</div>
DEWA /0001/2019/C0808 [10-05-2019] - 5	DEWA /0001/2019	10/05/2019	1,538.46	<div>CREATE INVOICE</div> <div>CREATE AND EDIT INVOICE</div>
DEWA /0001/2019/C0808 [10-06-2019] - 6	DEWA /0001/2019	10/06/2019	1,538.46	<div>CREATE INVOICE</div> <div>CREATE AND EDIT INVOICE</div>
DEWA /0001/2019/C0808 [10-07-2019] - 7	DEWA /0001/2019	10/07/2019	1,538.46	<div>CREATE INVOICE</div> <div>CREATE AND EDIT INVOICE</div>
DEWA /0001/2019/C0808 [10-08-2019] - 8	DEWA /0001/2019	10/08/2019	1,538.46	<div>CREATE INVOICE</div> <div>CREATE AND EDIT INVOICE</div>
DEWA /0001/2019/C0808 [10-09-2019] - 9	DEWA /0001/2019	10/09/2019	1,538.46	<div>CREATE INVOICE</div> <div>CREATE AND EDIT INVOICE</div>
DEWA /0001/2019/C0808 [10-10-2019] - 10	DEWA /0001/2019	10/10/2019	1,538.46	<div>CREATE INVOICE</div> <div>CREATE AND EDIT INVOICE</div>

Contract

Search

Configuration

Zesty labs

Administra

Tasks (January 2019) / DEWA- Monthly Pending Services / DEWA /0001/2019

EDIT

CREATE

Attachment(s)

Action

1 / 1

End Date

05/01/2020

Contract Prepared date

07/01/2019

Settings

Task Scheduling

Emails

Service Details

Invoice Scheduling

Contract Renewal History

Print Template

Schedule No	Contract	Invoice Date	Amount	Invoice		
DEWA /0001/2019/C0808 [10-01-2019] - 1	DEWA /0001/2019	10/01/2019	1,538.46	Draft Invoice	CREATE INVOICE	CREATE AND EDIT INVOICE
DEWA /0001/2019/C0808 [10-02-2019] - 2	DEWA /0001/2019	10/02/2019	1,538.46		CREATE INVOICE	CREATE AND EDIT INVOICE
DEWA /0001/2019/C0808 [10-03-2019] - 3	DEWA /0001/2019	10/03/2019	1,538.46		CREATE INVOICE	CREATE AND EDIT INVOICE
DEWA /0001/2019/C0808 [10-04-2019] - 4	DEWA /0001/2019	10/04/2019	1,538.46		CREATE INVOICE	CREATE AND EDIT INVOICE
DEWA /0001/2019/C0808 [10-05-2019] - 5	DEWA /0001/2019	10/05/2019	1,538.46		CREATE INVOICE	CREATE AND EDIT INVOICE
DEWA /0001/2019/C0808 [10-06-2019] - 6	DEWA /0001/2019	10/06/2019	1,538.46		CREATE INVOICE	CREATE AND EDIT INVOICE
DEWA /0001/2019/C0808 [10-07-2019] - 7	DEWA /0001/2019	10/07/2019	1,538.46		CREATE INVOICE	CREATE AND EDIT INVOICE
DEWA /0001/2019/C0808 [10-08-2019] - 8	DEWA /0001/2019	10/08/2019	1,538.46		CREATE INVOICE	CREATE AND EDIT INVOICE
DEWA /0001/2019/C0808 [10-09-2019] - 9	DEWA /0001/2019	10/09/2019	1,538.46		CREATE INVOICE	CREATE AND EDIT INVOICE
DEWA /0001/2019/C0808 [10-10-2019] - 10	DEWA /0001/2019	10/10/2019	1,538.46		CREATE INVOICE	CREATE AND EDIT INVOICE
DEWA /0001/2019/C0808 [10-11-2019] - 11	DEWA /0001/2019	10/11/2019	1,538.46		CREATE INVOICE	CREATE AND EDIT INVOICE

Invoice Create and edit

For Invoice create , click create and edit invoice

Tasks (January 2019) / DE	Edit Invoice		VALIDATE CANCEL INVOICE		DRAFT OPEN PAID
End Date	Draft Invoice				
Contract Prepared date	Customer	DEWA	Invoice Date	10/01/2019	
Settings Task Scheduling	Ship To		Task Number		
Schedule No	Address	Business Bay,Z Tower Dubai,United Arab Emirates PH-044543210	Due Date		
DEWA /0001/2019/C0808	Type	Contract	LPO Number		
DEWA /0001/2019/C0808	Contact Person		Salesman Code		
DEWA /0001/2019/C0808	TRN Number		Related Order		
DEWA /0001/2019/C0808	Delivery Address	DEWA, Al Quoz	Related Contract	DEWA /0001/2019	
DEWA /0001/2019/C0808	Invoice Address		Related Task		
DEWA /0001/2019/C0808	Payment Terms		Salesperson	Administrator	
DEWA /0001/2019/C0808			Sales Channel	Security Services	
DEWA /0001/2019/C0808			Emirate	Dubai	
DEWA /0001/2019/C0808	SAVE DISCARD				

Enter the mandatory details and check all the invoice details

**Contract** Search Configuration Zesty labs Admin

PH-044543210

**Edit Invoice**

Type: Contract

Contact Person:

TRN Number:

Delivery Address: DEWA, Al Quoz

Invoice Address:

Payment Terms:

Salesman Code:

Related Order:

Related Contract: DEWA /0001/2019

Related Task:

Salesperson: Administrator

Sales Channel: Security Services

Emirate: Dubai

Invoice Lines Other Info

Invoice schedule	Product	Contract Ref	Description	Account	Analytic Account	Analytic Tags	Quantity	Unit Price	Taxes	Subtotal
DEWA /0001/2019/C0808 [10-01-2019] - 1	Pest-Control CC		Monthly Pest Control Treatment	401100 Sales Account			1.000	1,538.46		1,538.46 AED

Add an item

SAVE DISCARD

Click ->save & Validate .

**Contract** Search Configuration Zesty labs Admin

PH-044543210

**Open: Invoice Schedule**

Schedule No: DEWA /0001/2019/C0808 [10-01-2019] - 1

Value: 1,538.46

Invoice Date: 10/01/2019

Product order line: Monthly Pest Control Treatment

Customer: DEWA

Project: DEWA /0001/2019

state: Draft

Location:

Phone/Mobile:

Contact Person:

Remarks:

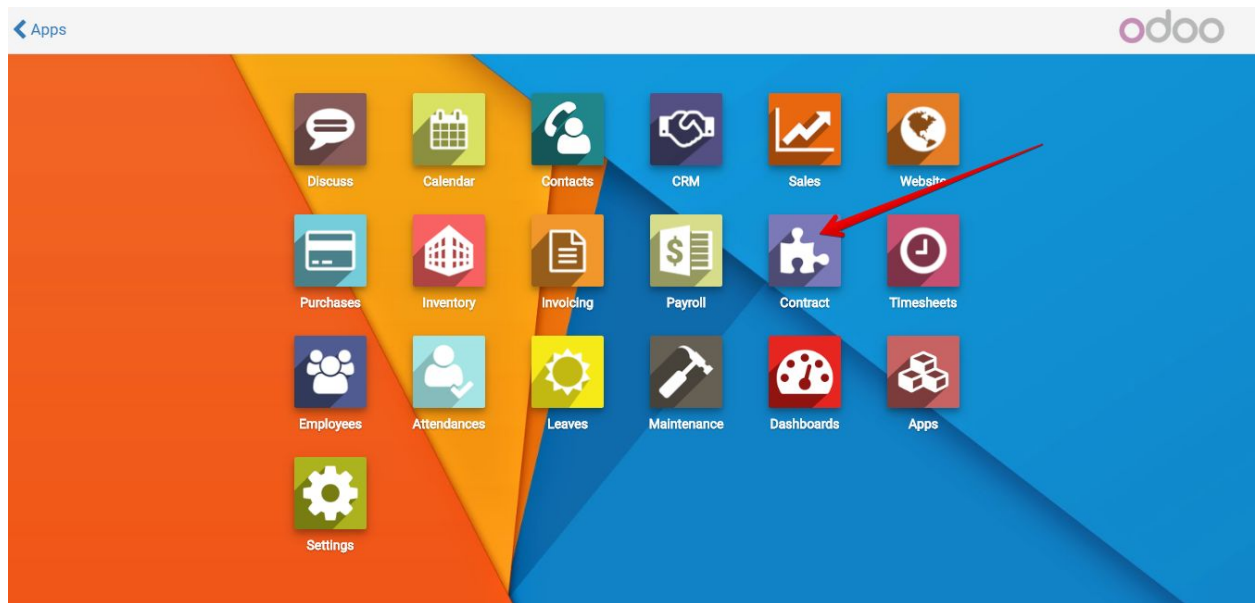
Sr#: 0

CLOSE

Invoice created for customer

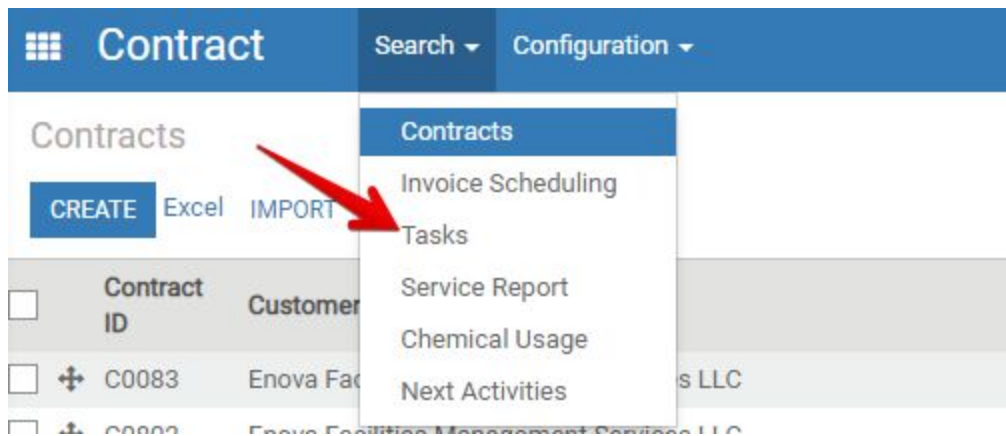
**2.5. Monitor task calendar on a daily basis & confirm the tasks with the customer.**

## Task

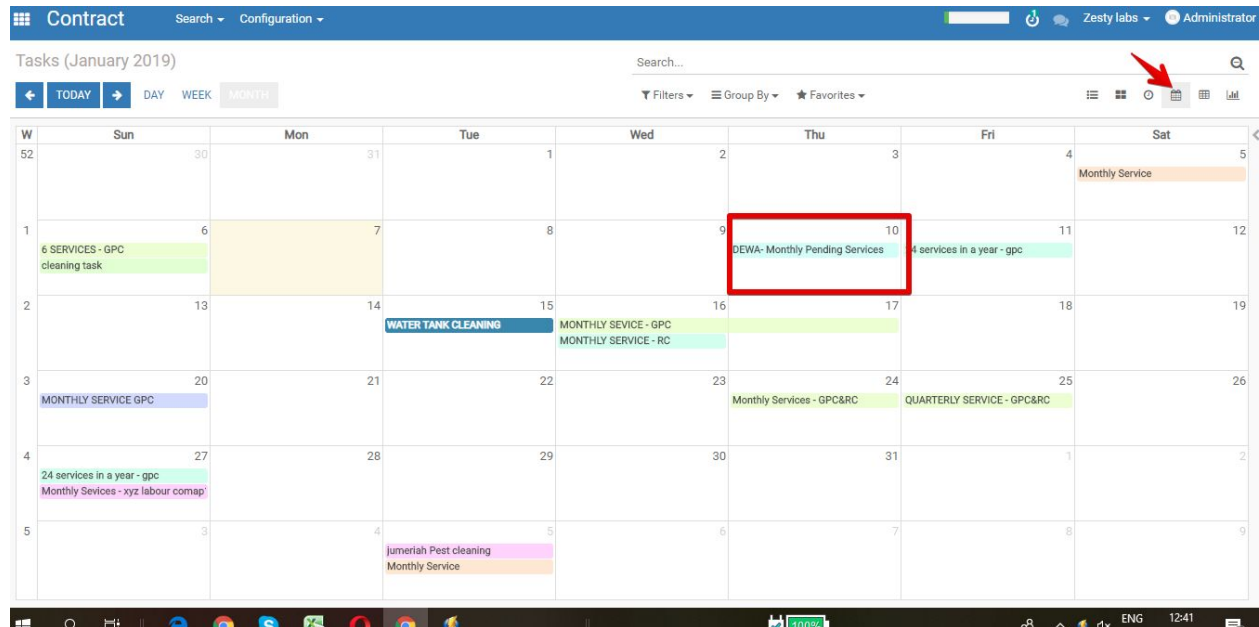


Homepage

Click -> Contract Module



Click->Search -> Tasks



Click ->Task

**2.6.if the task details are updated by the service team after the job completion.**

**2.7.Enter verification remarks if any. Eg. Chemical used more than planned, more time consumed.**

Tasks (January 2019) / DEWA- Monthly Pending Services

[EDIT](#) [CREATE](#) Attachment(s) Action 1 / 1 <

[SEND MAIL](#) [CREATE INVOICE](#) [NEW](#) [INPROGRESS](#) [COMPLETED](#) [CANCELLED](#)

☆ DEWA- Monthly Pending Services

T1087

Active

Invoices0

Job Type	Contract	Deadline	10/01/2019
Sales Team	Security Services	Action Taken	
Warranty Type		Payment Terms	15 Days
Contract	DEWA /0001/2019	Location	
Customer	DEWA	Price	0.00
Services Address	DEWA, Al Quoz	Permit	
Zone			
Service Report No			
Job card no			
Area/Fiat No			
Contact Person			
Point of Contact			
Phone No	044543210		
Mobile No			

Task Details

Click Edit to update task status

**2.8.Enter verification remarks if any. Eg. Chemical used more than planned, more time consumed.**

Tasks (January 2019) / DEWA- Monthly Pending Services

[SAVE](#) [DISCARD](#) 1 / 1 <

Phone No	044543210
Mobile No	
Driver	zaheer
Service Team Lead	Zesty
Team Members	<div>CHC564 - ABDUL ALIM ABDUR RA... ✕</div> <div>BDSS172 - ABDUL AWAL KAMAL P... ✕</div> <div>BDSS220 - ABDUL JABBAR ABDUS... ✕</div>

### Time

Start Date	10/01/2019	Start Time	08:00	<input checked="" type="radio"/> AM
End Date	10/01/2019	End Time	10:00	<input checked="" type="radio"/> AM

[Reports](#) [Service](#) [Timesheets](#) [Chemical Usage](#) [Extra Info](#) [Recommendation](#) [Service Area](#) [Pest Issue](#) [Infestated Area](#) [Infestation Level](#) [Techniques](#)

Click Reports to Enter Task Report

SAVE

DISCARD

1 / 1 <

### Time

Start Date: 10/01/2019  
End Date: 10/01/2019

Start Time: 08:00 AM  
End Time: 10:00 AM

Initially Planned Hours: 02:00  
Progress: 100%

Reports Service **Timesheets** Chemical Usage Extra Info Recommendation Service Area Pest Issue Infested Area Infestation Level Techniques

Date	Employee	Description	Duration
10/01/2019	[CHC1316] - ABDUL GHAFAR MISRY KHAN	Pest Treatment	02:00

Add an item

Timesheet

Timesheet to enter each employees Task Duration

Contract Search Configuration Zesty labs Admin

Tasks (January 2019) / DEWA- Monthly Pending Services

SAVE DISCARD 1 / 1 <

### Time

Start Date: 10/01/2019  
End Date: 10/01/2019

Start Time: 08:00 AM  
End Time: 10:00 AM

Reports Service Timesheets **Chemical Usage** Extra Info Recommendation Service Area Pest Issue Infested Area Infestation Level Techniques

Technician Name	Chemical Name	Uom	Quantity	Unit Cost	Total Cost
Administrator	ANICHEM (RC-1)	Liter(s)	1.00	50.00	50.00

Add an item

Click-> Chemical usage to enter chemical usage and cost by technician

SAVE DISCARD 1/1 < >

### Time

Start Date: 10/01/2019 Start Time: 08:00 ☒ AM ☐ PM

End Date: 10/01/2019 End Time: 10:00 ☒ AM ☐ PM

Reports Service Timesheets Chemical Usage Extra Info **Recommendation** Service Area Pest Issue Infested Area Infestation Level Techniques

### Recommendation

Recommendations to customer

Contract Search Configuration Zesty labs Administration

Tasks (January 2019) / DEWA- Monthly Pending Services

EDIT CREATE Attachment(s) Action 1/1 < >

SEND EMAIL CREATE INVOICE NEW INPROGRESS **COMPLETED** CANCELLED

☆ DEWA- Monthly Pending Services

T1087

Job Type: Contract

Sales Team: Security Services

Warranty Type: DEWA /0001/2019

Contract: DEWA

Customer: DEWA, Al Quoz

Services Address: DEWA, Al Quoz

Zone:

Service Report No:

Job card no:

Area/Flat No:

Contact Person:

Point of Contact:

Phone No: 044543210

Mobile No:

Deadline: 10/01/2019

Action Taken:

Payment Terms: 15 Days

Location:

Price: 0.00

Permit:

Active Invoices0

Once all the details entered change task status from new to completed

### 3. Service Team

#### 3.1.Task Execution in Customer Service Address.

Tasks / DEWA- Monthly Pending Services

EDIT CREATE Attachment(s) Action 1 / 13 < >

SEND EMAIL CREATE INVOICE NEW INPROGRESS COMPLETED CANCELLED

☆ DEWA- Monthly Pending Services  
T1086

Active

Invoices0

Job Type	Contract	Deadline	10/12/2018
Sales Team	Security Services	Action Taken	
Warranty Type		Payment Terms	15 Days
Contract	DEWA /0001/2019	Location	
Customer	DEWA	Price	0.00
Services Address	DEWA, Al Quoz	Permit	
Zone			
Service Report No			
Job card no			
Area/Flat No			
Contact Person			
Point of Contact	044543210		
Phone No			
Mobile No			
Driver	zaheer		
Service Team Lead	Zesty		
Team Members	<div> <div>CHICK</div> <div>ABUL ABU ABU ABU</div> <div>BOSS172</div> <div>ABUL AWAL KAMAL</div> </div> <div> <div>BOSS220</div> <div>ABUL ABU ABU ABU</div> </div>		

Task Execution in Customer Service location

### 3.2.Service Report & Updating Task Status.

Tasks / DEWA- Monthly Pending Services

EDIT CREATE Attachment(s) Action 1 / 1:

Services Address	DEWA, Al Quoz	Permit	
Zone			
Service Report No			
Job card no			
Area/Flat No			
Contact Person			
Point of Contact	044543210		
Phone No			
Mobile No			
Driver	zaheer		
Service Team Lead	Zesty		
Team Members	<div> <div>CHICK</div> <div>ABUL ABU ABU ABU</div> <div>BOSS172</div> <div>ABUL AWAL KAMAL</div> </div> <div> <div>BOSS220</div> <div>ABUL ABU ABU ABU</div> </div>		

Time

Start Date	10/12/2018	Start Time	08:00 AM
End Date	10/12/2018	End Time	10:00 AM

Reports

Service

Timesheets

Chemical Usage

Extra Info

Recommendation

Service Area

Pest Issue

Infested Area

Infestation Level

Techniques

Reports

Update service details & Report.

**Contract** Search Configuration Zesty labs Admin

Tasks / DEWA- Monthly Pending Services

SAVE DISCARD 1 / 13

SEND EMAIL CREATE INVOICE NEW INPROGRESS **COMPLETED** CANCEL

☆ DEWA- Monthly Pending T1086

Active Invoices0

Job Type	Contract	Deadline	10/12/2018
Sales Team	Security Services	Action Taken	
Warranty Type		Payment Terms	15 Days
Contract	DEWA /0001/2019	Location	<input type="radio"/> Villa <input type="radio"/> Flat <input type="radio"/> Shop <input type="radio"/> Office/Warehouse <input type="radio"/> Hotel/Building
Customer	DEWA	Price	0.00
Services Address	DEWA, Al Quoz	Permit	
Zone			
Service Report No			
Job card no			
Area/Flat No			
Contact Person			
Point of Contact			
Phone No	044543210		
Mobile No			

Task status updation

### 3.3.Service details-Chemical Usage,Timesheet entry,Recommendations,etc.

Tasks / DEWA- Monthly Pending Services

EDIT CREATE Attachment(s) Action 1 / 1:

Services Address	DEWA, Al Quoz	Permit	
Zone			
Service Report No			
Job card no			
Area/Flat No			
Contact Person			
Point of Contact			
Phone No	044543210		
Mobile No			
Driver	zaheer		
Service Team Lead	Zesty		
Team Members	<input type="radio"/> CHIRAG <input type="radio"/> ABUL FATH <input type="radio"/> ABUL RAHMAN <input type="radio"/> ABDUSSEEM <input type="radio"/> ABUL FATH <input type="radio"/> KAMAL <input type="radio"/> ABDUSSEEM <input type="radio"/> ABUL FATH <input type="radio"/> ABUL RAHMAN		

**Time**

Start Date	10/12/2018	Start Time	08:00 AM
End Date	10/12/2018	End Time	10:00 AM

Reports Service Timesheets Chemical Usage Extra Info Recommendation Service Area Pest Issue Infested Area Infestation Level Techniques

3.4.Supervisor to submit the invoice to customer.

3.5.Update invoice submission status.

**3.6. Supervisor to collect the payments and hand it over to accounts team.**

## **4.Accounts**

**4.1. Monitor the scheduled invoices generated from all contracts.**



**Click contract module**

Contract

Search Configuration

Invoice Schedule

Contracts

Invoice Scheduling

Tasks

Service Report

Chemical Usage

Next Activities

Invoice not created or Invoice draft

Search...

Filters

Group By

Favorites

1-80 / 1551

Schedule No	Contract	Customer	Invoice	Invoice Date	Amount
<input type="checkbox"/> NCA/AMAA/GPC/AAQ/03	8] -1	NCA/AMAA/GPC/AAQ/038/01/18	Alam Al Qahwa Cafe LLC	01/01/2018	150.00
<input type="checkbox"/> NCA/AMAA/GPC/AAQ/03	8] -2	NCA/AMAA/GPC/AAQ/038/01/18	Alam Al Qahwa Cafe LLC	01/02/2018	150.00
<input type="checkbox"/> NCA/AMAA/GPC/AAQ/038/01/18 /C0025 [04-03-2018] - 3		NCA/AMAA/GPC/AAQ/038/01/18	Alam Al Qahwa Cafe LLC	04/03/2018	150.00
<input type="checkbox"/> NCA/AMAA/GPC/AAQ/038/01/18 /C0025 [04-04-2018] - 4		NCA/AMAA/GPC/AAQ/038/01/18	Alam Al Qahwa Cafe LLC	04/04/2018	150.00
<input type="checkbox"/> NCA/AMAA/GPC/AAQ/038/01/18 /C0025 [05-05-2018] - 5		NCA/AMAA/GPC/AAQ/038/01/18	Alam Al Qahwa Cafe LLC	05/05/2018	150.00
<input type="checkbox"/> NCA/AMAA/GPC/AAQ/038/01/18 /C0025 [05-06-2018] - 6		NCA/AMAA/GPC/AAQ/038/01/18	Alam Al Qahwa Cafe LLC	05/06/2018	150.00
<input type="checkbox"/> NCA/AMAA/GPC/AAQ/038/01/18 /C0025 [06-07-2018] - 7		NCA/AMAA/GPC/AAQ/038/01/18	Alam Al Qahwa Cafe LLC	06/07/2018	150.00
<input type="checkbox"/> NCA/AMAA/GPC/AAQ/038/01/18 /C0025 [06-08-2018] - 8		NCA/AMAA/GPC/AAQ/038/01/18	Alam Al Qahwa Cafe LLC	06/08/2018	150.00
<input type="checkbox"/> NCA/AMAA/GPC/AAQ/038/01/18 /C0025 [06-09-2018] - 9		NCA/AMAA/GPC/AAQ/038/01/18	Alam Al Qahwa Cafe LLC	06/09/2018	150.00
<input type="checkbox"/> NCA/AMAA/GPC/AAQ/038/01/18 /C0025 [07-10-2018] - 10		NCA/AMAA/GPC/AAQ/038/01/18	Alam Al Qahwa Cafe LLC	07/10/2018	150.00
<input type="checkbox"/> NCA/AMAA/GPC/AAQ/038/01/18 /C0025 [07-11-2018] - 11		NCA/AMAA/GPC/AAQ/038/01/18	Alam Al Qahwa Cafe LLC	07/11/2018	150.00
<input type="checkbox"/> NCA/AMAA/GPC/AAQ/038/01/18 /C0025 [08-12-2018] - 12		NCA/AMAA/GPC/AAQ/038/01/18	Alam Al Qahwa Cafe LLC	08/12/2018	150.00
<input type="checkbox"/> RCA3/BDGM/GPC-RC/ANG-271014878/308/10/17/C0199 [25-10-2017] - 1		RCA3/BDGM/GPC-RC/ANG-271014878/308/10/17 AL NAHDA 2 DUBAI	AL NAYLI GROUP	25/10/2017	4000.00
<input type="checkbox"/> RCA3/BDGM/GPC-RC/ANG-271014878/308/10/17/C0199 [25-04-2018] - 2		RCA3/BDGM/GPC-RC/ANG-271014878/308/10/17 AL NAHDA 2 DUBAI	AL NAYLI GROUP	25/04/2018	4000.00
<input type="checkbox"/> RCA2/BDGM/GPC/ANG-231015335/345/10/17/C0294 [27-10-2017] - 1		RCA2/BDGM/GPC/ANG-231015335/345/10/17 SILICON OASIS	AL NAYLI GROUP	27/10/2017	2000.00

Click search & Invoice Scheduling will see all the scheduled draft invoice for the customers

## 4.2. Validate the scheduled draft invoice prior to the job.

Contract						
Contracts / DEWA /0001/2019		Zesty labs Administrator				
EDIT CREATE		Attachment(s) Action				
SEND BY EMAIL RENEW CONTRACT		DRAFT IN PROGRESS CONFIRMED CANCELLED				
DEWA /0001/2019C0808		0 Documents 13 Tasks Timesheets Active 1 Invoices Cost/Revenue				
Customer DEWA		Related Order Payment Term 15 Days				
Service Type DEWA, Rashidiya		With Call Back				
Invoice Address DEWA, Al Quoz		Security Services				
Service Address						
Start Date 06/12/2018						
End Date 05/01/2020						
Contract Prepared date 07/01/2019						
Settings Task Scheduling Emails Service Details Invoice Scheduling Contract Renewal History Print Template						
Schedule No	Contract	Invoice Date	Amount	Invoice		
DEWA /0001/2019/C0808 [10-01-2019] - 1	DEWA /0001/2019	10/01/2019	1,538.46	IN-BDGM/2019/0002	CREATE INVOICE	CREATE AND EDIT INVOICE
DEWA /0001/2019/C0808 [10-02-2019] - 2	DEWA /0001/2019	10/02/2019	1,538.46		CREATE INVOICE	CREATE AND EDIT INVOICE
DEWA /0001/2019/C0808 [10-03-2019] - 3	DEWA /0001/2019	10/03/2019	1,538.46		CREATE INVOICE	CREATE AND EDIT INVOICE
DEWA /0001/2019/C0808 [10-04-2019] - 4	DEWA /0001/2019	10/04/2019	1,538.46		CREATE INVOICE	CREATE AND EDIT INVOICE

**Contract** Search Configuration

Contracts / DEWA /0001/2019

EDIT CREATE

SEND BY EMAIL RENEW CONTRACT

**DEWA /0001/2019**

Customer: DEWA  
 Service Type: DEWA, R  
 Invoice Address: DEWA, R  
 Service Address: DEWA, R  
 Start Date: 06/12/2019  
 End Date: 05/01/2020  
 Contract Prepared date: 07/01/2020

Settings Task Scheduling

**Schedule No**

Schedule No	Product	Contract	Preparation	Assess	Analytic	Analytic	Quantity	Unit	Price	Subtotal
DEWA /0001/2019/C0808 [10-01-2020]										
DEWA /0001/2019/C0808 [10-02-2020]										
DEWA /0001/2019/C0808 [10-03-2020]										
DEWA /0001/2019/C0808 [10-04-2020]										

**Edit Invoice**

VALIDATE CANCEL INVOICE DRAFT OPEN PAID

**Draft Invoice**

Customer: DEWA  
 Ship To:   
 Address: Business Bay ,Z Tower  
 Dubai,United Arab Emirates  
 PH-044543210  
 Type: Contract  
 Contact Person:   
 TRN Number:   
 Delivery Address: DEWA, Al Quoz  
 Invoice Address:   
 Payment Terms:   
 Invoice Date: 10/01/2019  
 Task Number:   
 Due Date:   
 LPO Number:   
 Salesman Code:   
 Related Order:   
 Related Contract: DEWA /0001/2019  
 Related Task:   
 Salesperson: Administrator  
 Sales Channel: Security Services  
 Emirate: Dubai

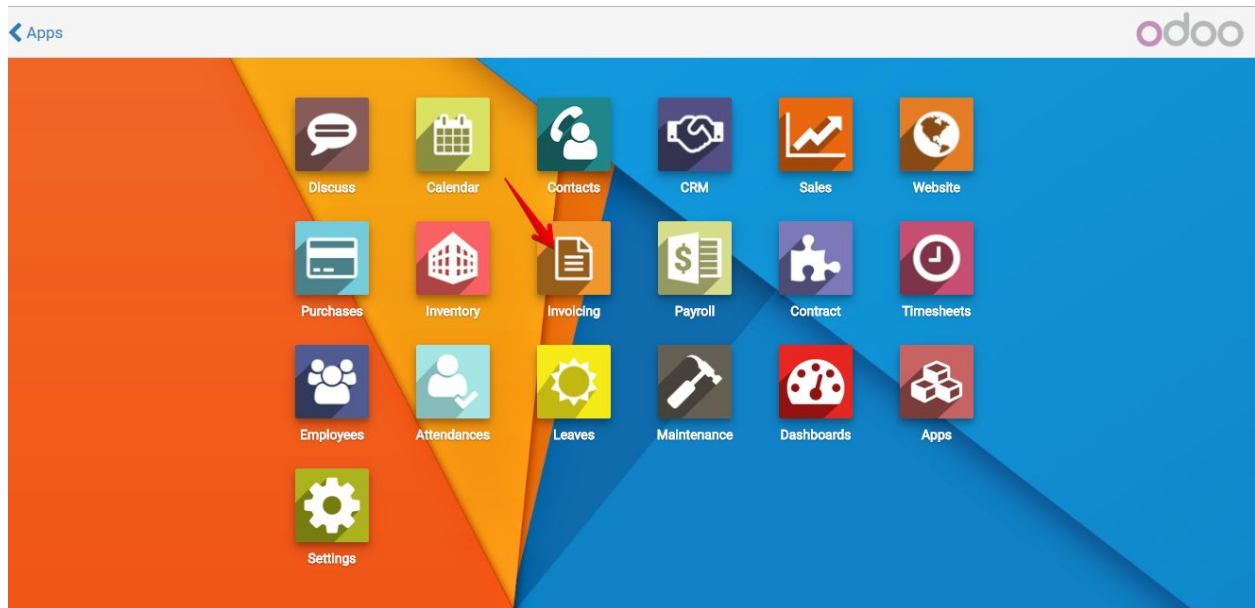
Invoice Lines Other Info

SAVE DISCARD

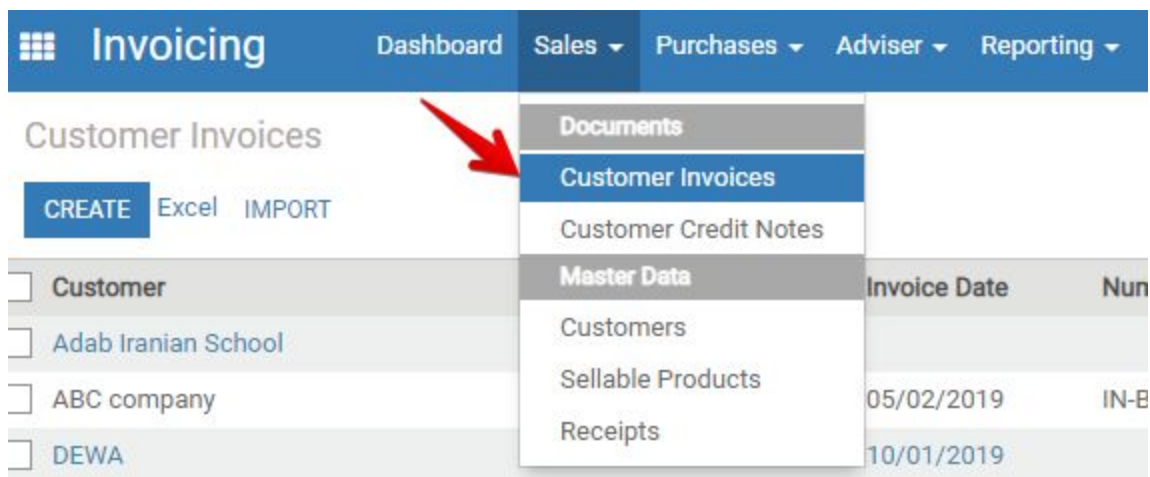
**Edit and validate invoice.**

**4.3.Hand over the invoice to operations team/service team and get it submitted to the customer.**

**4.4.Verify the invoice submission status updated by supervisor.**



Click-> Invoicing (Accounts Module)



Click-> sales-> Customer Invoices

**Invoicing** Dashboard Sales Purchases Adviser Reporting Configuration

Customer Invoices

CREATE Excel IMPORT

Customer	Invoice Date	Number
<input type="checkbox"/> Adab Iranian School		
<input type="checkbox"/> ABC company	05/02/2019	IN-BDGM/2019/0001
<input type="checkbox"/> DEWA	10/01/2019	
<input type="checkbox"/> 4 U Service	20/10/2018	

Search dropdown menu (searched for 'dewa'):

- Search Invoice for: dewa
- Search Journal for: dewa
- Search Partner for: dewa**
- Search Salesperson for: dewa
- Search Contract for: dewa
- Search Task/Service Report No for: dewa
- Search Sales Channel for: dewa

Search by Partner (Partner- Customer)

**Invoicing** Dashboard Sales Purchases Adviser Reporting Configuration

Customer Invoices / Draft Invoice

EDIT CREATE Print Attachment(s) Action 3 / 15

VALIDATE CANCEL INVOICE DRAFT OPEN PAID

**Draft Invoice**

Customer	DEWA	Invoice Date	10/01/2019
Ship To Address Type	Contract	Task Number	
Contact Person		Due Date	
TRN Number		LPO Number	
Delivery Address		Salesman Code	
Invoice Address		Related Order	
Payment Terms		Related Contract	DEWA /0001/2019
		Related Task	
		Salesperson	Security Services
		Sales Channel	
		Emirate	Dubai

Invoice Lines Other Info

Invoice schedule	Product	Contract Ref	Description	Account	Analytic Account	Analytic Tags	Quantity	Unit Price	Taxes	Subtotal
DEWA /0001/2019/C0808 [10-01-2019] - 1	Pest-Control CC		Pest-Control CC	401100 Sales Account	DEWA /0001/2019 - DEWA		1.000	1,538.46		1,538.46 AED

Select customer invoice and validate , before validation check all the detail in invoice.

**Invoicing** Dashboard Sales Purchases Adviser Reporting Configuration

Customer Invoices / IN-BDGM/2019/0002

EDIT CREATE **Print** Attachment(s) Action 3 / 15

SEND BY EMAIL PRINT INVOICE REGISTER PAYMENT ADD CREDIT

**IN-BDGM/2019/0002**

**Customer** DEWA

Ship To Address Type Contract

Contact Person TRN Number Delivery Address Invoice Address Payment Terms

**Invoice Date** 10/01/2019

**Task Number**

**Due Date** 10/01/2019

**LPO Number**

**Salesman Code**

**Related Order**

**Related Contract** DEWA /0001/2019

**Related Task**

**Salesperson**

**Sales Channel** Security Services

**Emirate** Dubai

Invoice Lines Other Info

Invoice	Product	Contract	Description	Account	Analytic Account	Analytic	Quantity	Unit	Price	Amount
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Click ->Print Invoice

## Tax Invoice

TRN:100238468100003

Bill To:  
DEWA

Ship To:

Invoice # IN-BDGM/2019/0002  
Date 10/01/2019  
Payment Due -  
Ref # -  
Contact Person -  
Tel # -

Item #	Item Description	Qty	Rate	Discount	Amount Excluding VAT	VAT %	VAT	Amount Including VAT
1	Pest-Control CC	1.000	1,538.46	0.00	1,538.46		0.00	1,538.46
TOTAL					1,538.46		0.00	1,538.46

(Dirhams One Thousand, Five Hundred Thirty-Eight and Forty-Six Fils Only )

THANK YOU FOR YOUR CONTINUED BUSINESS WITH US.

For Zesty labs  
(Authorized Signatory)

Customer invoice Print submit to customer.

**4.5.Customer payment registration once the payment handed over by supervisor.**

EDIT CREATE Print Attachment(s) Action 3 / 15

SEND BY EMAIL PRINT INVOICE REGISTER PAYMENT ADD CREDIT NOTE CANCEL INVOICE DRAFT OPEN PAID

## IN-BDGM/2019/0002

Customer	DEWA	Invoice Date	10/01/2019
Ship To Address		Task Number	
Type	Contract	Due Date	10/01/2019
Contact Person		LPO Number	
TRN Number		Salesman Code	
Delivery Address		Related Order	
Invoice Address		Related Contract	DEWA /0001/2019
Payment Terms		Related Task	
		Salesperson	Security Services
		Sales Channel	
		Emirate	Dubai

Invoice Lines Other Info

Invoice schedule	Product	Contract Ref	Description	Account	Analytic Account	Analytic Tags	Quantity	Unit Price	Taxes	Subtotal
------------------	---------	--------------	-------------	---------	------------------	---------------	----------	------------	-------	----------

Click -> Register Payment

Register Payment

Payment Amount	1,538.46 AED	Payment Date	07/01/2019
Payment Journal	Bank (AED)	Memo	IN-BDGM/2019/0002

VALIDATE CANCEL

Click Validate and submit.