Service Providers - Back-office operations

Planon Software Suite

Version: L126

About this Document

Intended Audience

This document is intended for *Planon Software Suite* users.

Contacting us

If you have any comments or questions regarding this document, please send them to: support@planonsoftware.com.

Document Conventions

Bold
Names of menus, options, tabs, fields and buttons are displayed in bold type.

Italic text
Application names are displayed in italics.

CAPITALS
Names of keys are displayed in upper case.

Special symbols

	Text preceded by this symbol references additional information or a tip.
⚠	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

Table of Contents

About Service Providers - Back-office operations

The **Service Providers** solution mode in Planon ProCenter is especially designed for companies that provide full or partial business process outsourcing. Typically, this outsourcing includes non-core services off-site, such as administrative tasks, customer services, IT services and technical maintenance support.

Service Providers is one of two solution modes available in Planon ProCenter . The other solution mode is the default **Workplace** solution mode. The Service Provider TSIs come with their own licenses. You must have at least one TSI licensed with one of the Service Provider licenses before switching to the Service Provider mode.

> The **Service Provider** solution mode can be set in **System Settings** after the installation of Planon, even in a running system. Be aware that selecting this mode is *irreversible*!

This documentation focuses on the back-office operations that are typical for the **Service Providers** solution. Since much of the back-office operations in Planon ProCenter are about the registration and processing of the revenues that ensue from contractual work (both from customer contracts and from subcontractor contracts), the main TSI that is used is the Work Orders TSI. The topics in this documentation deal with the various processes in and around that TSI.

Adding an order - automatic detection of applicable contract line

When adding an order for a customer contract in the Work Orders TSI, the unique combination of data you enter for:

- customer
- service location
- service agreement service
- service level

ensures that the applicable contract line is *automatically detected*.

> **i** Even if an order is - strictly speaking - not part of the contractually agreed work, because Proactive reporting of contractual work applies, the corresponding contract line will be detected automatically by the system.

The following conditions must be met for Planon to find the right contract line:

1. There are active contract(s), with the *customer of the order as the accepting party*.
2. In these contract(s), there are active standard SLA contract lines that are linked to the property specified on the order.
3. Among these contract lines(s), there are contract line(s) that are linked to the service agreement service specified on the order.
4. Among these contract lines, there is a contract line that matches exactly with the service level of the order.

If no service level is entered on the order, for example for non-contractual work or preventive maintenance,

- ◦ first only those contract lines that do not have any service level are taken into account.
- ◦ if there are no matching contract lines, contract lines are searched based on customer, property and service agreement service (ignoring the service level). If one or more contract lines are found, and these contain service levels, you must specify the service level (on a main order or request).

This detection process will find exactly one applicable contract line. In case multiple contract lines or no contract lines are found, you will receive a warning on saving the order. In that case, additional configuration may be required.

i

> The date and time on which the main order is added is used to find the applicable contract line.

Example: a service location P1 with Service agreement service SAS1, is linked to the following customers, contract lines and linked service levels:

Customer	Contract line	Linked service level
Cust1	CL1	Gold
Cust1	CL2	Silver
Cust1	CL3	None
Cust2	CL4	Gold

When adding an order, the applicable contract line is found as follows:

Order	Customer	Service level	Contract line
100.00	Cust1	Gold	CL1
101.00	Cust1	Silver	CL2
102.00	Cust1	Bronze	None
103.00	Cust1	Empty	CL3
104.00	Cust2	Empty	None

Adding revenue estimation lines

After creating an order in Planon and moving this order to the **Estimation required** status, you can add the corresponding revenue estimation line(s).

Procedure

1. At the Orders selection level, select the order to which you want to add the estimation lines.

2. Go to Order details **>** Revenue estimation lines.

3. On the action panel, select the type of revenue estimation line you want to add.

   the following types of revenue estimation lines are available:

   ○ General revenue estimation

   ○ Labor hour revenue estimation

   ○ Subcontractor revenue estimation

   ○ Material revenue estimation

> ℹ The calculation of **material revenue estimation lines** is either based on the linked **Terms for materials** or - when applicable - on specific **Product unit prices** agreed upon in the customer contract. The system will first check *per line* if product unit pricing applies, and if that is the case, will also take into account any volume discounts and exceptions to the contract's unit price. If no product unit price is configured for a product, the terms for materials are applied. For information on working with **Product unit pricing**, refer to the Planon Webhelp, from About product unit pricing.

4. Complete the fields on the data panel.

   For more information on the available fields, refer to Revenue estimation lines - fields.

5. Click Save.

Based on the total revenues in the estimation lines, the order will be picked up directly or need further attention.

Adding customer quotations

If an order is moved to the **Quotation required** status, you can create a quotation for the order and then add quotation line(s).

Procedure

1. At the Orders selection level, select the order to which you want to add the quotation.
2. Go to Order details > Customer quotations.
3. On the action panel, click Add.
4. Complete the fields on the data panel.

   Some fields are automatically populated by the system.
   For information on the available fields, refer to Customer quotation fields.

5. Click Save.

Based on the costs in the quotation lines, the final quotation is either accepted or rejected by the customer.

> ℹ️ If a quotation has a fixed price quotation line and the quotation is in the **Accepted** status, clicking the **Generate revenues** action in **Orders** will create a fixed price order revenue for this order.

> ℹ️ You can configure web definitions (online Self-Service forms) that support the workflow of customer quotations. These definitions will enable your customers to review, approve or reject quotations on their customer portal. They can also consult any additional information (communication logs and and quotation lines). See Configuring 'Customer quotation' workflows for the customer portal, if you want to configure a web-based customer quotation workflow for your customers.

Adding customer quotation lines

You can add quotation line(s) to a customer quotation.

Procedure

1. Go to Order details > Customer quotations.
2. Select the customer quotation to which you want to add the quotation lines.
3. Go to Order subdetails.
4. On the action panel, select the type of quotation line you want to add.

the following types of quotation lines are available:

- ◦ General revenue quotation lines
- ◦ Labor hour quotation lines
- ◦ Subcontractor quotation lines
- ◦ Material cost quotation lines

> **ℹ** The calculation of **material cost quotation lines** is either based on the
>
> - • linked **Terms for materials** … or (when applicable),
> - • specific **Product unit prices** agreed upon in the associated customer contract.
>
> When creating material quotation lines, the system will first check if product unit pricing applies and use that for the calculations. If it does not apply, the system will fall back to the terms for materials for the calculations. For more information on working with **Product unit pricing**, which is a licensed Planon product, refer to the Planon Webhelp, from About product unit pricing. When you use **Product unit pricing** for your customer contracts, the products' applicable **(contract) unit prices** (including any volume discounts and price exceptions) are taken into account first. If no unit price is configured for a product, the terms for materials are used for the calculations.

5. Complete the fields on the data panel.

   For information on the available fields, refer to Customer quotation lines - fields.

6. Click Save.

You have now added a quotation line.

Applying terms for time (KPIs) to orders

Changing one of the service components on the order, such as *service agreement service*, *customer*, *property*, *space*, *asset* or *contract line*, may cause different **Terms for time** to apply (or even a different contract line). A new search is performed for a contract line and applicable terms for time. Any existing KPIs on the order may be overwritten.

Terms for time are detected in a similar way as the terms that are required to generate revenues. For more information, refer to Generating revenues.

Additionally, once terms for time are found, another check is performed to find (unique) *sub-terms for time*. The moment of adding the order should be within the working hours of the validity calendar. If such a sub-time terms exist, they will be applied. If not, the main time terms are applied.

In the Service Providers solution mode, terms for time are applied in a similar way as SLAs in the IWMS system, except that the applicable KPIs are derived from the detected **Terms for time**. The mapping of the KPI fields on the time terms and the corresponding fields on Orders are given below:

Terms for time KPIs	Order KPIs
Time to respond (TTR)	Requested response date-time
Time to attend (TTA)	Requested date-time to attend
Time to fix (TTF)	Requested date-time to fix
Time to complete (TTC)	Priority

Results of applying terms for time:

- The **Time term** field on the order is updated with the found **Terms for time**.
- The **Priority** field of the order is updated with the TTC of the **Terms for time**.
- The **Weighting** field of the order is updated with the weighting from the **Terms for time**.
- The KPIs (requested TTR/TTA/TTF/TTC) are recalculated.
- Any applicable bonus-malus arrangements that are included in the **Terms for time**, will be reflected in the order revenues.

The KPIs on an order are by default read-only, unless the corresponding KPI fields on the time term have no value selected. In that case the KPIs are determined on the basis of mutual agreement and can be entered manually on the order.

For requests and move requests, the TTA and TTF are ignored, since they only apply to work orders / move orders.

Order revenues

There are various types of revenues that are calculated via the terms that belong to the service agreement(s) linked to the order.

The following types of order revenues are available:

- Labor hour revenues
- Subcontractor revenues
- Material revenues
- Travel revenues
- Bonus-malus revenues
- General revenues

Generating revenues

Finding the correct services and terms is essential for correctly calculating order revenues. This may be difficult to do in an environment featuring multiple customers and a multitude of service agreement services and terms. Planon applies smart filtering to derive the relevant set of terms.

Procedure

1. On Orders, click Generate revenues on the action panel.

This action will initiate an intricate search mechanism that scans for services and terms based on Asset, Space and Property as shown in the diagram given below.

Finding the correct set of services and terms starts with finding the right contract line.

- For reactive orders, the combination of order fields **Property**, **Customer**, **Services** uniquely identifies the contract line.

- For PPM (sub) orders, the **Original start date-time** field is used to find the correct life cycle of the service agreement.

The contract line is linked to both the service agreement service and to the service location (which is equal to the property). Based on the parameters specified in the diagram given below, it should be possible to find the correct set of services and terms. If this is not possible, please check your configuration.

In the diagram, SA stands for service agreement.

> i To find the right **Terms for labor hours**, additional search criteria are included. See the diagram in Finding applicable terms for labor hours.
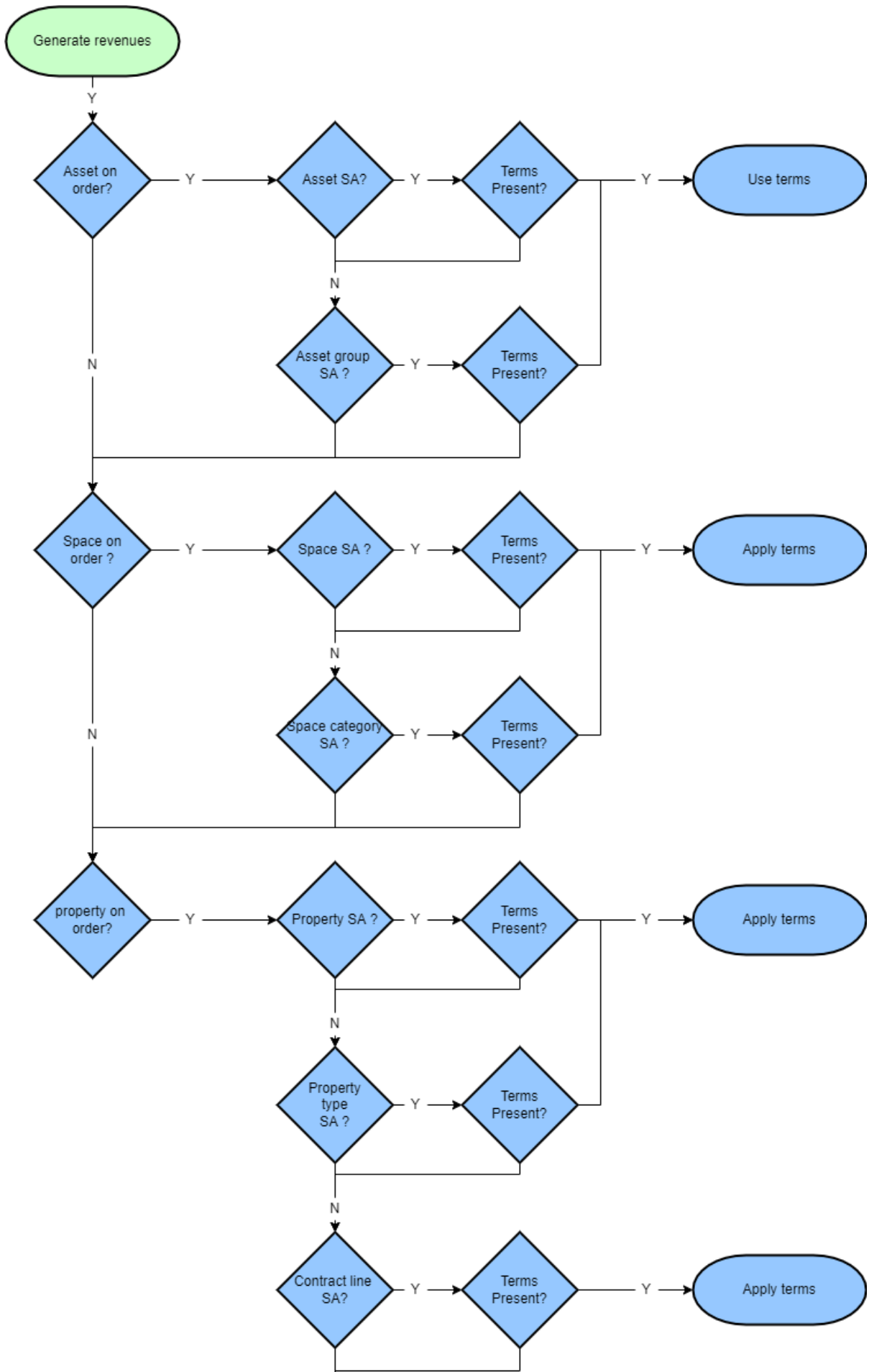
> ℹ️ If you use Customer budgets , it is recommended not to generate revenues too often in succession. It will lead to an excessive number of transactions, in spite of the fact that transactions are created in a smart and lean way.

Finding applicable terms for labor hours

An additional search mechanism is applied to find the correct services and terms for labor hours on an order. The search starts as explained in Generating revenues, using the search mechanism that scans for services and terms based on **Asset**, **Space** and **Property**. Next, additional search criteria are applied that are specific to finding labor hour terms.

The following diagram below displays the search mechanism used for finding applicable labor hour terms on an order. It complements the diagram in Generating revenues, which explains the general, cascading search mechanism for finding the correct services and terms. The diagram below is an additional layer within this generic search mechanism, aimed at finding applicable labor hours terms. Keep in mind that the **Tradesperson category** or **Trade** are searched per **Service agreement type**, until a result is found. So, first **Asset service agreements** are completely searched for these two criteria. If there is no result, the search process is repeated for **Asset group service agreements**, **Space service agreements** etc.

```
                                    ┌──────────────────────────────────────┐
                                    │ Does Order have a reference to:      │
                          ◇ Order   │ Asset / Asset group                  │
                          ◇          │ Space / Space category               │
                                    │ Property / Service location          │
                          Yes       │ Contract line                        │
                                    └──────────────────────────────────────┘

                          ◇ Lines   ┌──────────────────────────────────────┐
                                    │ Is a Tradesperson category specified │
                                    │ in Order revenue lines, Revenue      │
                                    │ estimation lines or Customer         │
                                    │ quotation lines?                     │

                          ◇ TPC     ┌──────────────────────────────────────┐
                   No       Yes     │ Labor hour term found                │

                          ◇ Lines   ┌──────────────────────────────────────┐
                                    │ Do the lines specify a Trade?        │

                          ◇ Trade   ┌──────────────────────────────────────┐
                   No       Yes     │ Labor hour term found                │

                          ◇ Standard? ┌────────────────────────────────────┐
                                    │ Is there a term with Standard =      │
                                    │ Yes enabled?                         │
                          Yes

   ┌───────────────┐      ◇ Term    ┌──────────────────────────────────────┐
   │ No term found │ No              │ Standard term found                  │
   └───────────────┘

                                    ┌──────────────────────────┐
                                    │ Repeat search            │
                                    │ cycle for all            │
                                    │ types of service         │
                                    │ agreements               │
                                    └──────────────────────────┘
```

Finding applicable terms for labor hours

Calculating order revenues for general terms

After you click the **Generate revenues** action, the 'specific' terms are applied first, followed by the general terms.

> **i**
> - Suborders of PPM orders are not included in the revenue calculation of the main order. The main PPM order and each individual suborder will have their own separate calculations.
>
> - On the general terms, system administrators can configure a 'fixed fee' for cases in which no 'real' revenues are generated. Such a fixed fee may, in appropriate cases, cover the time a service desk employee spends completing the order, for example. If a fixed amount is configured, this will be applied in the revenue line of the order, but only in case no other revenues are generated. See General terms - fields for more information.

General terms are applied in the following sequence:

1. A check is done on all the revenues (labor hours, materials, travel and subcontractors), whether they should be invoiced or not (Invoiceable? setting).

2. The Warranty check required? setting is applied.

3. The Usage check required? setting is applied.

4. The Minimum no. of hours setting is applied, This setting determines a minimum number of hours that should be charged.

5. The Standard deductible […], Administrative fee […] and Risk percentage […] settings are applied in the defined calculation sequence. (Calc. sequence […] fields)

   From the **Standard deductible**, **Administrative fee** and **Risk percentage** fields on the general terms, the one with lowest sequence value is applied first. If there is no sequence value, they are applied in the following order: Administrative fee, Risk percentage and Standard deductible.

   Example:

   There are 10 revenue lines with a combined value of 1,000 euros.

   ◦ Risk percentage - 10%, sequence value 3

   ◦ Administrative fee - 100 euros, sequence value 2

   ◦ Standard deductible - 200 euros, sequence value 1

Based on the defined calculation sequence, standard deductible is subtracted first from the total revenue, which is 1,000 - 200= 800. To this 800, an administrative fee of 100 euros is added, which will be 800 + 100= 900. A risk percentage of 10% is applied on this 900, which will be 900 + 90= 990. Note that a new revenue line is created for every term that is applied.

> **i** For more information on these fields, refer to General terms - fields. If you use **Product unit pricing**, there are specific settings on the general terms to include / exclude the resulting product prices in / from the **Administrative fee** and / or **Risk percentage** revenue calculations.

6. Finally, the Invoice threshold is applied.

> **i** Refer to the **Service Providers - Customer budgets** documentation for information about working with **Customer budgets** (a.k.a 'Bank of Money') and the calculations performed as a result of generating order revenues.

Excluding orders from revenue calculation

If you do not want revenues to be calculated for a specific order, you can exclude these orders from revenue calculation.

1. Go to Work Orders (Work overview).
2. At the Orders selection level add a new order or select an existing order.
3. Set the Exclude from revenue calculation field to Yes.

> **i** If the order is a PPM orders with suborders, the setting **Exclude from revenue calculation** must be manually set for each individual suborder. The suborders are not impacted by the same setting on the main order.

4. Click Save.

   You have now excluded an order from revenue calculation. All existing revenues for this order, if any, will be deleted.

Applying fixed price agreements

If you want to charge your customer an agreed fixed price on a specific order and not invoice the costs separately, use the following procedure:

Procedure

1. Go to Work Orders .
2. At the Work orders selection level, select the order to which you want to apply a fixed price.

3. Go to Work order details **>** Order revenues.

4. On the action panel, click Add **>** General order revenues.

5. On the data panel, enter data in the relevant fields.

   See Order revenues - fields for more information.

6. In the Revenue type field select Fixed price.

   When revenues are generated, the field Invoiceable? is automatically set to No on the other revenue records linked to this order.

7. Click Save.

   Only the fixed price will be invoiced to the customer. The data from the other revenue records can be used for analysis and internal reporting, but will not be invoiced.

> ℹ️ The fixed price agreement does not overrule a **Usage check** or **Warranty check**. If the **Fixed price** field is set to **No** due to a usage or warranty check, the fixed price agreement is not applied.

Manually adding order revenues

After you created an order in Planon, you can use the **Generate revenues** action to generate revenues for the order. However, you can also *manually* add order revenues to include any additional revenues.

Procedure

1. On the Orders selection level, select the order to which you want to add order revenues.

2. Go to Order details **>** Order revenues.

3. On the action panel, select the type of order revenues you want to add.

   The following types of order revenues are available:

   ○ Order revenues - travel

   ○ Order revenues - bonus-malus (not for PPM orders)

   ○ Order revenues - labor hours

   ○ Order revenues - materials

   ○ Order revenues - subcontractors

   ○ General order revenues

4. Complete the fields on the data panel.

   For more information on the available fields, see Order revenues - fields.

5. Click Save.

You have now manually added order revenues for an order.

> ℹ️ With regard to overlapping labor hours:
>
> - if the end date is empty or if the labor hours overlap, zero revenue lines will be created. Hence, you will not be able to generate correct labor hour revenues until the data is amended.
>
> - if the **Subcontractor** field is filled in and the **Internal tradesperson** field is empty, labor hours can overlap without any errors.

Calculating material revenues when product unit pricing applies

If you work with Product unit pricing, you have defined unit price lists in a 'library' and linked these price lists to customers contracts. These contractually binding product unit prices (including any volume discounts and price exceptions) are used for the material revenue calculations when the back-office generates order revenues.

If product unit pricing is configured, the following revenue calculations for materials are affected by product unit pricing (applies to work orders and PPM orders):

- Revenue estimation lines
- Order revenue lines
- Customer quotation lines

When performing revenue calculations on an order, the system will:

- check if **Product unit pricing** applies to the materials (product) used on the **Order lines** of the order. This check is done per order line. It is even possible that some lines will result in revenues calculated via product unit pricing, while other lines are calculated based on terms for materials. If product unit pricing applies, the system will do further checks for applicable product unit prices, price exceptions and volume discounts.

> ℹ️ If the fields, levels and steps that are used on the order lines and revenue lines are configured correctly in the following TSIs, the appropriate product prices are automatically applied in the material revenue calculations, including any volume discounts and price exceptions.
>
> - **Products** - set the field **Allow purchase via order line?** field to **Yes** for all relevant products, in the in the **Products** TSI. For more configuration information, see Product unit pricing and subsequent topics in the WebHelp.
>
> - **Product unit pricing** - see the above links to the information about setting up the unit pricing library and creating the links to the customer contracts.

- **Customer contracts** - add the **Contract price lists step** to the **Service contract line** level. On the **Service agreements** level, add the **Linked UPL products** and **Linked properties (contract price list)** steps. Finally, add the **Product exceptions** step to the **Service terms** level.

- **Orders** - add the **Product** reference field to the layouts of: **Order lines**, **Revenue estimation lines** and **Customer quotation lines (materials)**. In addition, add the following snapshot fields to the layouts of: **Order revenues - materials** and **Customer quotation lines - materials**:

1. **Product price - snapshot**,
2. **Product price volume - snapshot**,
3. **Product exception (contract) - snapshot**,
4. **Contract price exception (volume) - snapshot**.

> ⚠️ In case of incorrect values / incorrect configuration of product unit pricing, no revenues can be generated!

- If product unit pricing does not apply to an ordered product, the system will check which **Terms for materials** are present on the order and apply these to the revenue calculations.

> ℹ️ If you generate material revenues for a work order with suborders, the system will group equal suborders to come to a total volume used for the discount calculations. This grouping principle does not apply to PPM orders.

Total revenues overview

On the Order details > Order revenues, an overview is displayed with all the applicable order revenues that are invoiceable along with costs, margin and markup percentage for the order. This enables service managers to understand the profit/loss on an order at a glance. The following fields are displayed in the overview:

- Type

- Total revenues excl. tax / VAT

- Tax / VAT amount

- Total revenues incl. tax / VAT

- Total costs excl. tax / VAT

- Tax / VAT amount total costs

- Total costs incl. tax / VAT

- Margin

- Markup percentage

Example:

Type	Total revenues excl.	VAT amount	Total revenues incl.	Total costs excl. VAT	Total costs VAT amount	Total costs incl. VAT	Margin	Markup percentage
Man-hour revenues	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Subcontractor revenues	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Material revenues	€ 109.78	€ 0.00	€ 109.78	€ 99.80	€ 0.00	€ 99.80	€ 9.98	10
Travel revenues	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Administrative fee - amount	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Risk contingency	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Standard deductible amount	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Other	€ 225.00	€ 45.00	€ 270.00	€ 150.00	€ 0.00	€ 150.00	€ 75.00	50
Totals	€ 334.78	€ 45.00	€ 379.78	€ 249.80	€ 0.00	€ 249.80	€ 84.98	34.02

Per order revenue type, the overview provides the breakdown of total revenues, total costs with margin and markup percentage for the order.

Generating overhead revenues for a quotation

Selecting the **Generate overhead revenues** action at **Order details** > **Customer quotation**, will generate revenues on the total value of all quotation lines. While calculating the revenues, the fields **Administrative costs on quotation**, **Risk percentage on quotation** and **Standard deductible on quotation** from the general terms will also be taken into account. The quotation lines will be created based on the calculation sequence and value selected on the general terms.

> ℹ️ If the main order is a PPM order, any suborders are treated independently for the generation of overhead revenues.

> ℹ️ For more information on how these fields are applied, see Calculating order revenues for general terms. For more information on the fields of general terms, see .

Calculating subcontractor travel revenues

If travel revenues must be calculated for subcontractors, you have to select the following options:

- At the **Terms for subcontractors** step, select **Yes** in the **Charge travel costs?** field. Also, enter a value in **Charge for one-way travel**.

- In the **Subcontractor lines**, enter the **No. of times traveled** and **Travel costs**.

When the subcontractor revenues are generated, a separate revenue line will be created for subcontractor travel. In this revenue line, the **Revenue type** field is automatically set to **Travel**. The **Total revenue excl. VAT** is calculated by multiplying the **No. of times traveled** in the subcontractor line with the **Charge for one-way travel** of the applicable subcontractor term.

An overview of the total costs and travel costs is displayed as a table on the subcontractor lines. The overview contains **Total costs excl. tax**, **Total costs incl. tax**, **Travel costs**, **Travel costs incl. VAT**, **Total + travel excl. tax** and **Total + travel incl. tax**. This table provides a quick summary of the revenues coming from all the subcontractor lines.

> **i** For more information on the travel related fields, see Terms for subcontractors - fields and Subcontractor lines - fields. For more information on adding order revenues and revenue type field, see Manually adding order revenues and Order revenues - fields.

Calculating order revenues with bonus-malus terms

There are two calculations methods you can use to calculate order revenues to which a bonus-malus applies via the linked terms for time:

- a calculation method including a *base amount*, *variable amount* and an optional *weighting factor*.
- a calculation method that only includes a *variable amount*.

Depending on the detected terms for time that include the bonus-malus settings, the correct calculation method is applied to calculate the **Total revenue excl. tax / VAT**.

> If a malus applies, this is in fact a discount for your customer, so the associated revenue will be a negative amount. This amount is linked to the *main* order. There can only one discount amount per order.

> **i** If the **Incident class** and **Defect type** fields are filled in on the order, this is considered as a bonus-malus term. These fields are used to find the appropriate **Terms for time**, so that the correct KPIs are filled in on the order and the correct discount is calculated.

> **i** There can only be one discount per order. Therefore if an order has multiple suborders, the suborder with the combination of the highest **Incident class** and a negative KPI score (KPI not on time) is used for the discount calculation. The related terms for time (bonus-malus fields) from the Defect type / Incident class combination are used for the revenue calculation.

> The **Incident class** is applied in the following order, with 1 being the highest priority:

1. Health & Safety
2. Regulations & law
3. Availability
4. Comfort
5. Representation

> **i** See *Service Providers data set-up* > *Terms for time - fields* to find out more about bonus-malus settings.

Subcontractor lines

As a service provider, you want to register operational data on subcontractors (such as the ensuing costs) with the order, so that you can calculate both costs and revenues. Subcontractor costs are registered on an order in the **Work Orders** (Work overview) TSI on Order details > Subcontractor lines.

Once registered on the order, the subcontractor costs can subsequently be charged to your customer and used to calculate order revenues, based on:

- the contract, linked to the order via a contract line;
- the applicable terms for subcontractors, linked to this contract via the service agreement.

You can keep track of changes made to subcontractor lines, by enabling the **History** functionality. History includes the user who changed the value in a field, the old and new values of the field and the time and date at which the value was changed. You can select which data fields of the subcontractor line you want to keep a history on. Your application manager can enable an automatic **History** option for individual fields belonging to subcontractor lines in **Field Definer**. Once this option is enabled, changes to that field's value are saved automatically. These changes can then be viewed on the associated **History** selection step at **Order subdetails** in the **Work Orders** (Work overview) TSI.

If you add a subcontractor line and the associated **Terms for subcontractors** have **Labor hours** selected as calculation basis, you must also enter labor hours in the **Work Orders** (Work overview) TSI for that subcontractor. Planon will remind you to do so. If you proceed without adding the labor hours, zero revenue will be generated.

Configuring 'Customer quotation' workflows for the customer portal

You can configure web definitions (online forms) that support the workflow of customer quotations. These definitions will enable end users (your customers) to review, approve or reject quotations on their customer portal. They can also consult any additional information (communication logs and and quotation lines).

Preconditions

The **Customer quotation workflow** configuration in Web Configuration must connect to the customer quotation configuration of your back-office. Therefore the following *preconditions* have to be met:

- user-defined business objects must be configured for the **Customer quotations** business object in Field definer . This is important because a **Details** page is always based on a user-defined **Customer quotation**.

- relevant user-defined statuses and status transitions must be configured for the **Customer quotations** business object in Field definer .

> Example: **In preparation** (under system status: In preparation), **Ready for approval** (under system status: Completed), **Approved** (under system status: Accepted), **Rejected** (under system status: Refused), Withdrawn (under system status: Withdrawn).

- relevant user-defined business objects must be configured for the **Communication logs** business object in Field definer .

Web definitions

The following *web definitions* are involved in the workflow configuration:

- **Customer quotation list** - creates a list form with a search bar, for viewing and searching customer quotations. On the list definition's action panel, you can add a *sub*, creating a:

- **Customer quotations details** page.

  - On this page you can either:

    - define the fields and bars which are visible on the **Details** page when viewing a selected customer quotation.

    - choose to *add* blocks and actions (creating a **Workflow subdetails** and a **Workflow edit** page) that are unique to this web definition

    - or you can *link* 'stand-alone', reusable **Customer quotation subdetails** and **Customer quotation edit** web definitions, which will have the same

effect (see below: these reusable definitions can be used for multiple other **Customer quotation list** web definitions).

- **Customer quotation subdetails** - web definition with detailed information that can either be *linked* as 'stand-alone' definition to multiple **Customer quotation list** definitions, via a reference on the **Details** page > **Blocks** > **Workflow subdetails definition** field, or can be *added* as a subdetails block to a **Customer quotations details** definition.

- **Customer quotation edit** - web definition that can either be *linked* as 'stand-alone' definition to multiple **Customer quotation list** definitions, via a reference on the **Details** page > **Actions** > **Workflow edit definition** field, or can be *added* as a sub edit block to a **Customer quotations details** definition. It allows customers to make status changes and add comments to the quotations and upload these to the Service Provider's back-office.

Customer quotation list definition

The **Customer quotation list** is a web definition that gives your customers direct access, via their own customer portal, to the various quotations that are relevant to them. In the customer quotation list, they can review and edit quotations.

> **i** The quotation types on display represent the configured, user-defined **Customer quotations** in Field definer .

The **Customer quotation list** definition shows the customer quotations that await customer approval. Customers can select, view and modify them. Fixed filters can be applied to limit the display of customer quotations.

- The list is always based on the user-defined **Customer quotations** business objects.

- The list always contains a **Search block** and **List block**. As Planon administrator, you can:

  ◦ configure search fields on the search block and specify whether the search should occur immediately.

  ◦ configure list fields on the list block, which are the 'columns' shown on the customer quotation form.

  ◦ apply a fixed filter to the list block, to limit which customer quotations are visible. For example, only show customer quotations that are in the status 'Waiting for approval'.

- The customer can search on the fields made available, after which the relevant customer quotations are shown on the **List block**.

- When customers select a quotation from the list, they will be directed to a **Customer quotation details** page (if configured).

Go to Adding a customer quotation list definition for information on how to configure the web definition.

Adding a customer quotation list definition

You can enable customers to view and modify their pending quotations in a browser on their customer portal.

A **Customer quotation list** definition must be based on a user-defined **Customer quotations** business object.

Procedure

1. Go to Self-Service modules **>** Customer quotation workflows.
2. On the action panel, click Add Customer quotation list.
3. Click the Customer quotation list node.
4. On the data panel, complete the relevant fields. For a description of these fields, refer to Customer quotation workflow - list fields - Web configuration and Customer quotation workflow - list /search block - Web configuration.
5. Click Save.

   Your list definition, with a List page, List block and a Search block, is created.

6. Click Save.

   You can now proceed with Adding a Customer quotation details page.

Adding a Customer quotation details page

The **Customer quotation details** definition shows the (read-only) details of a selected customer quotation to customers. You can define multiple **Customer quotation details** pages per user-defined customer quotation. Depending on the user-defined business object's type and status flow, customers can be directed to specific details pages, configured with the fields, actions and blocks that are appropriate for the selected type / status.

If you do not configure a **Customer quotation details** page for a combination of user-defined business object and status, end users will get an error message upon selecting a quotation type missing the configuration. The details web definition is only available on the parent **Customer quotation list** definition. Each details page is created as a 'sub' of a **Customer quotation list** definition.

Procedure

1. Select the relevant Customer quotation list definition.
2. On the action panel, click Add sub Customer quotation details.
3. From the Business object definition dialog, select the relevant user-defined customer quotation and click OK.

4. On the data panel, enter a relevant code, description and icon for the workflow details.

Also see Customer quotation workflow - details fields - Web configuration.

5. In the Allowed status field, select the statuses that will be available to the customer. The details of quotations that are assigned an allowed status can be viewed by end users.

6. In the Blocks section click the plus icon to add detail blocks for Communication logs and Quotation lines.

7. Under Block properties, in the Workflow subdetails field, either click the Add sub button to add a new subdetails definition or click the Select a value button to link an existing, reusable subdetails definition.

8. Click Save.

   You have added a Details page with subdetails for the selected user-defined customer quotation. You can now proceed with Adding a Customer quotation edit page. Repeat this procedure to create more details pages for this Customer quotation details definition, as required.

Adding a Customer quotation edit page

The **Customer quotation edit** definitions are used to configure the edit pages which are presented to customers to allow them to edit the customer quotation details and/or change the status. This definition consists of the following blocks:

- Edit block
- Upload block

Procedure

1. Select the relevant Customer quotation details definition.

2. On the data panel > Workflow details tab, scroll down to the bottom of the panel.

3. On the Actions section, click the plus icon.

4. From the Add actions dialog, select the relevant status on which end users are allowed to perform Accept or Reject or other actions.

5. On the Action properties tab, in the Workflow edit definition field, either click the Add sub button to add a new edit definition, or click the Select a value button to link an existing, reusable edit definition.

6. Click Save.

   You have added a Edit page for the selected user-defined customer quotation. For more information on the fields on the Edit page, Edit block and Upload block, see Customer quotation workflow - edit fields - Web configuration.

Field descriptions

This chapter includes the field descriptions for the main concepts in the Service Providers solution.

Order fields referring to Life cycle aware terms

All types of service terms are 'life cycle aware'. This means that you can have multiple versions of the same terms, which are valid at different points in time. Fields referring to these terms, for example on **Orders**, are called 'snapshot reference' fields. They show the terms that actually apply to the selected order. Consequently, these are not necessarily the terms that apply on the reference date. For each type of term, snapshot reference fields exist, referring to the actual terms applied. For more information on the snapshot fields, see Order revenues - fields and Work Orders - Service Provider fields .

Work Orders - Service Provider fields

Field	Description
Terms for time	This field is automatically populated with the terms for time. These terms are linked to the service agreement that was found for the service agreement service.
	Terms for time are 'life cycle aware'. Note that the **Terms for time** field shows the terms that apply on the *reference date*. These may not always be identical to the terms for time that were applied to the order, since they may have been updated. The actual applied terms are shown in the **Terms for time - snapshot** field.
Terms for time - snapshot	This field is automatically populated with the terms for time actually applied to the order (updated only after saving the order).
Defect type *(life cycle aware field, only available on Requests, Move requests, Work orders, Move orders)*	Select the applicable defect type for bonus-malus from the list. Select one of the following options: • **Availability**: a penalty applies if there is insufficient availability of the service. The lack of availability is measured against the selected **Incident class**.

Field	Description
	• **Performance**: a penalty applies if the execution of the service is below the agreed standard.
Incident class *(life cycle aware field, only available on Requests, Move requests, Work orders, Move orders)*	Select the applicable incident class for bonus-malus from the list. If a defect type is filled in, this field is mandatory. The following incident classes are available: **01 Health & safety**, **02 Laws & regulations**, **03 Availability**, **04 Comfort** and **05 Representation**. **01 Health & safety** will induce the severest penalty, the second item **02 Laws & regulations** will induce the second severest penalty etc. The combined selected values in the **Defect type** and **Incident class** fields determine which penalty applies in case of under-performance.
Service agreement service	Select a service agreement service that is relevant to the order. A service agreement service refers to the particular services you deliver. ℹ This field is available only on requests, move requests, work orders and move orders.
Qualification of usage	Select one of the following options from the list to indicate the usage of the service component on the order: 1. Normal - nothing is done. 2. Incorrect - the revenues will be invoiced as the field **Invoiceable?** is set to **Yes** for all order revenues (on both main and suborders).
Exclude from revenue calculation	Select **Yes** to exclude the revenue calculations for this order. In case there are existing revenues, they will be deleted. **No** is selected by default.
Exclude from invoice approval	Select **Yes** to exclude the order from the invoice approval process. **No** is selected by default. ℹ If the main order is a PPM order, this field is set to **Yes** and made read-only for all suborders.
Include in revenue estimations	Select **No** to exclude the order from the revenue estimation process. **Yes** is selected by default. If there are suborders, you can only add estimations on the sub. Then this field is automatically set to

Field	Description
	No and you cannot edit this field until there are subs.
Service level	Select a service level from the list.
Customer	Select a relevant customer from the list. The customer needs to be specified on the order so that a unique contract(line) can be found for the service and service location of the order. ⓘ For a PPM order, this field will be automatically populated with the customer on the contract that is linked to the order.
Grouped invoice	Indicates if the invoices for a customer should be grouped or not. This field is read-only if there is a general term linked to the contract line of the order. If there is no general term linked to the contract line, this field is editable. The displayed value reflects the value selected in the **Grouped invoice** field on the **General term**. For suborders, this field is not editable, but inherited from the main order.

Subcontractor related fields

Field	Description
Subcontractor	This field is only available on planned maintenance (PPM) orders. It is a reference to the subcontractor by whom the PPM order is carried out. The link with the PPM order comes from an **Outsourced assignment** (= subcontractor contract line) on a **Subcontractor contract**.
Outsourced assignment	This field is only available on planned maintenance (PPM) orders. It is a reference to an **Outsourced assignment** on a contract with a subcontractor.

Team allocation agreement related fields

ⓘ this information only applies to **Work orders** and not to other order system types!

Field	Description
On-call team	This field is auto-populated with the applicable on-call team if **Allocation agreements** for automatic team detection are configured and linked to the contract line.
Service agreement service	This field is a generic service provider field and not exclusive to **Allocation agreements**, but the

Field	Description
	service you select here plays an important part in detecting a (on-call) team for a work order, if it has a link to an allocation agreement.
Team	This field is auto-populated with the applicable team if **Allocation agreements** for automatic team detection are configured and linked to the contract line.
Trade	This field is a generic order field and not exclusive to **Allocation agreements**, but the trade you select here plays an important part in detecting a (on-call) team, if it has a link to an allocation agreement.

Revenue estimation lines - fields

Field	Description
General	
Description	Enter a description for the revenue estimation line.
Exclude from revenue estimations	Indicate whether or not the revenue line must be excluded/included from the revenue estimation process. This field can be used if you want assess the total costs incurred, even though you do not intend to charge them to your customer.
Order	Displays the order from which you drilled down. You can also select another order to which you can add estimation lines.
Customer budget	Reference to the customer budget for which budget calculations are processed. This customer budget is detected and filled in automatically, but can be manually overwritten by selecting another applicable budget from the pop-up. For more information Service Providers - Customer budgets > Budget transactions.

Field	Description
Manual budget?	If **Yes** is displayed in this field, the budget is selected manually in the **Customer budget** field. If **No** is displayed, the customer budget is detected and filled in automatically.

> ℹ️ Typically, a manually selected budget is not overwritten when new revenues are generated, unless 'key information' on the order was *changed* in such a way that the budget is no longer valid. For example: changes to the **Customer**, **Service agreement service** or **Contract line** fields, whether or not in combination, might clear the **Customer budget** field and reset the **Manual budget?** field. If any of these fields' values are *deleted*, the reference to the customer budget is always cleared and the value in this field is reset to the default value (**No**).

Labor hour costs & revenues

Field	Description
Applied surcharge	Displays the applied surcharge record (if applicable).
Hour count	Enter the number of hours required to complete the work.
Hourly wage	Enter the approximate hourly wage.
Hours	Displays the number of hours worked.
Hours tariff	Enter tariff per hour. You can also select one of the predefined tariff rates.
Trade	Select the trade of the person working on the order. On the revenue estimation line, either this field or the **Tradesperson category** field should mandatory.
Tradesperson category	If applicable in your configuration, this field displays the linked **Tradesperson category** (via the labor hour terms or internal tradesperson) used for labor hour revenue calculations. On the revenue estimation line, either this field or the **Trade** field should be mandatory.

Field	Description
	See Tradesperson categories in the Service Providers documentation for more information.

Material costs & revenues

Field	Description
Item costs excl. tax / VAT	Enter the costs for the materials used.
Material type	Select the type of material used for the order.
Product	In case Product unit pricing applies, the selected product selected is used for the calculation of the 'material' revenue estimation lines, including any price exceptions or volume discounts made via the customer contract.

> ℹ The field **Allow purchase via order line?** on the **Product** field (in the **Products** TSI) must be set to **Yes**, to make the product selectable.
>
> Good to know: even if product unit pricing does not apply to the product, it is still shown on the revenue estimation lines.

Field	Description
Purchase item	Select an item from the list that was purchased as material for this order.
Quantity	Enter the quantity of the material that is approximately required.
Vendor catalog price	Enter the price stated in the vendor's catalog.

General costs & revenues

Field	Description
General costs excl. tax / VAT	Enter the general costs that can approximately be incurred on the order.
General revenues excl. tax / VAT	Enter the general revenues that can approximately be expected on the order.

Subcontractor costs & revenues

Field	Description
Subcontractor	Select a subcontractor from the list.

Field	Description
Subcontractor costs	Enter the expected subcontractor costs for work on the order.

Customer quotation fields

Field	Description
General	
Order	Displays the order to which the quotation belongs. You can also select another order here.
Code	Enter a unique code to identify the quotation. The code must be unique across all orders.
Name	Enter a relevant description for the quotation.
Active?	Indicate whether or not the customer quotation created must be active. **Yes** is selected by default. Only one quotation can be active on an order. If you try to add another quotation with this field selected to **Yes**, the earlier quotation's **Active?** field is automatically moved to **No**. You cannot edit this field in the **Accepted** status.
Fixed price?	This field is automatically set to **Yes** if a fixed quotation line is added to the quotation.
Dates	
Valid up to and including	Select a date until which the quotation is treated as valid.
Completion date-time	Enter the date-time on which the quotation is completed.
Response date-time	Enter the date-time on which the sales / contact person responded.

Field	Description
Sent by	Select the sales person who prepared the quotation.

Costs & revenues

Field	Description
Total costs excl. VAT / tax	This calculated field displays the total amount of the costs excluding VAT.
Total revenue excl. VAT / tax	This calculated field displays the total amount of the revenue excluding VAT.
Total revenue incl. VAT / tax	This calculated field displays the total amount of the revenue including VAT.

Order revenues - fields

Field	Description
Code	Enter a code for the order revenue line.
Name	Enter a description for the order revenue line.
Order	Displays the order from which you navigated to this step.
Customer budget	Reference to the customer budget for which budget calculations are processed. This customer budget is detected and filled in automatically, but can be manually overwritten by selecting another applicable budget from the pop-up. For more information on working with customer budgets, see the relevant topics in Service Providers - Customer budgets.
Invoiceable?	Specify whether or not the order revenues must be invoiced.

> ℹ If you use the **Customer budgets** feature, you can use this field in combination with the **Subtracted from budget?** field, to create a filter that finds amounts which should be invoiced separately, because they could not be subtracted from the customer budget for some reason. The reason for an amount not being subtracted depends on your customer budget settings and on any budget thresholds that might be applicable to the order revenues at that point in time. See Threshold behavior for more information on these settings.

Field	Description
Manual?	This field is automatically set to **Yes** if you enter order revenues manually.
Manual budget?	If **Yes** is displayed in this field, the budget has been selected manually in the **Customer budget** field. If **No** is displayed, the customer budget is detected and filled in automatically.

> Typically, a manually selected budget is not overwritten when new revenues are generated, unless key information on the order was *changed* in such a way that the budget is no longer valid. For example: changes to the **Customer**, **Service agreement service** or **Contract line** fields, whether or not in combination, might clear the **Customer budget** field and reset the **Manual budget?** field. If any of these fields' values are *deleted*, the reference to the customer budget is always cleared and the value in this field is reset to the default value (**No**).

Field	Description
Margin	The **Margin** is a calculated field that displays the profit / loss on the order. The calculation is done as follows: **Total revenue excl. tax / VAT** - **Total cost excl. tax / VAT**.
Markup percentage	The percentage of increase in the cost price is displayed as markup percentage. The formula is as follows: **Margin** / **Total cost excl. tax / VAT** x 100.
Subtracted from budget?	This field is automatically set by Planon. It indicates whether or not an **Order revenue line** amount has been subtracted from the customer budget or not. This field might be updated periodically to reflect any intermediate changes that affect the customer budget calculations. For information on finding revenues that should be invoiced separately, see the note in the **Invoiceable** field.
Tax / VAT amount	Enter the tax / VAT amount for the selected order revenue.
Tax / VAT amount total costs	This calculated field displays the tax / VAT amount of the total costs.
Tax / VAT tariff	Select a tax / VAT tariff applicable to the order revenue.
Total costs excl. tax / VAT	This calculated field displays the total amount of costs excluding tax / VAT.

Field	Description
	ℹ This field becomes editable when adding **General order revenues**.
Total costs incl. tax / VAT	This calculated field displays the total amount of costs including tax / VAT.
Total revenue incl. tax / VAT	This calculated field displays the total amount of revenues including tax / VAT.
Total revenues excl. tax /VAT	Specify an estimated value of the total amount of revenues excluding tax / VAT.

General order revenues

Field	Description
Applied general terms	Displays the applied general terms information irrespective of the order insert moment (based on the reference date). Note: these may or may not be the actual terms applied.
General terms - snapshot	Displays the actual general terms applied to this order the moment the order was added (based on the **Reported on** field).
Quotation	Displays an amount that indicates the source for the 'Fixed price' order revenue.
Revenue type	Select a relevant revenue type for the general order revenues. You can select the following options:

- **Standard deductible**
- **Administrative fee**,
- **Risk contingency**,
- **Minimum hours**,
- **Fixed price**
- **Fixed fee (no generated revenues)**

For more information on revenue types and their configuration, see *Service providers - data setup >* General terms - fields.

Order revenues - time / bonus-malus

Field	Description
No. of penalty intervals	Specify the maximum number of penalty intervals allowed.

Field	Description
Revenue type	Select a relevant revenue type for the order revenue. You can select **Availability** or **Performance**.
Time terms - snapshot	Displays the actual time terms applied to this order, the moment the order was added (based on the **Reported on** field). The applied time terms also include any bonus-malus arrangements.

Order revenues - travel

Field	Description
Applied surcharge tariff	Reference to the calculated applied surcharge tariff from the **Terms for labor hours** and the related surcharge terms (in case travel revenues are calculated based on labor hours. This field is not mandatory, because it can be empty if the travel revenues are not calculated from labor hours).
Applied tariff	Displays the tariff amount generated from **Terms for travel** if the **Actual travel time** is selected as calculation basis. You can also enter a different tariff amount.
Applied tariff	The calculated tariff from the **Terms for labor hours** and the related surcharge terms (if travel revenues are calculated from labor hours. This field is not mandatory because it can be empty if the travel revenues are not calculated from labor hours).
Applied travel terms	Displays the applied travel terms information irrespective of the moment the order was added (based on the reference date). Note: these may or may not be the actual terms applied.
End date-time	Specify the end date and time for order revenue calculation.
Hours	The calculated hours from the **Terms for labor hours** (Start date-time — End date-time) and the related surcharge terms (if travel revenues are calculated from labor hours. This field is not mandatory because it can be empty if the travel revenues are not calculated from labor hours).
Revenue type	Select a relevant revenue type for the order revenues. You can select **Allowance**, **Allowance of service location** or **Travel**.
Start date-time	Specify the start date and time for order revenue calculation.

Field	Description
Surcharge tariff - snapshot	Reference to the calculated applied surcharge tariff snapshot from the **Terms for labor hours** and the related surcharge terms (in case travel is calculated based on labor hours. This field is not mandatory, because it can be empty if the travel revenues are not calculated from labor hours).
Travel terms - snapshot	Displays the actual travel terms applied to this order the moment the order was added (based on the **Reported on** field).

Order revenues - materials (Terms for materials)

Field	Description
Applied material terms	Displays the applied material terms information irrespective of the moment the order was added (based on the reference date). Note: these may or may not be the actual terms applied.
Applied surcharge (amount)	Enter a surcharge amount that can be applied to the material revenues.
Applied surcharge (percentage)	Enter a surcharge percentage that can be applied to the material revenues.
Base price	Enter a base price for the material revenues.
Material terms - snapshot	Displays the actual material terms applied to this order the moment the order was added (based on the **Reported on** field).
Order line	Select an appropriate order line for the material revenues.

Snapshot fields - related to Product unit pricing (alternative material revenue calculation) also see: Calculating material revenues when product unit pricing applies.

Field	Description
Product price - snapshot	In case product unit pricing applies, this read-only field displays the product's unit price currently used in the material revenue calculation. See Product unit pricing for more information.
Product price volume - snapshot	In case product volumes are configured for product unit pricing, this read-only field displays the current applicable volume for the linked product. The volume price calculation is either **Percentage-based** or **Price-based**.

Field	Description
Product exception (contract) - snapshot	In case product unit pricing applies, this read-only field displays the current contractual product price exception used for the material revenue calculation.
Contract price exception (volume)	In case product unit pricing applies, this read-only field displays the current applicable volume for the contractual price exception. It will be applied to the material revenue calculation for the linked contract. The volume price calculation is either **Percentage-based** or **Price-based**.

Order revenues - subcontractors

Field	Description
Applied subcontractor terms	Displays the applied subcontractor terms information irrespective of the moment the order was added (based on the reference date). Note: these may or may not be the actual terms applied.
Invoice amount	Specify an amount to be invoiced.
Invoice date	Select the relevant invoice date.
Revenue type	Select a relevant revenue type for the order revenues. You can select **Work** or **Travel**. If you want to add travel costs or travel revenues of the subcontractor to the order, select **Travel**. If travel revenues are generated via **Generate revenues**, this field will be automatically set to **Travel**.
Subcontractor line	Select an appropriate subcontractor line for the subcontractor revenues.
Sub-contractor terms - snapshot	Displays the actual subcontractor terms applied to this order the moment the order was added (based on the **Reported on** field).

Order revenues - labor hours

Field	Description
Applied labor hour terms	Displays the applied labor hour terms information irrespective of the moment the order was added (based on the reference date). Note: these may or may not be the actual terms applied.
Applied tariff	Displays the **Hourly wage** on the **Terms for labor hours**. You can also enter a different tariff.
End date-time	Specify the end date and time for order revenue calculation.

Field	Description
Labor hour terms - snapshot	Displays the actual **Terms for labor hours** applied to this order the moment the order was added (based on the **Reported on** field).
Revenue type	Select a relevant revenue type for the order revenue. You can select **Work** or **Wait**.
Start date-time	Specify the start date and time for order revenue calculation.
Subcontractor	If the labor hours were registered for a subcontractor, this read-only field refers to that subcontractor.
Surcharge rate	If a surcharge rate is linked to the applicable **Terms for labor hours**, this field displays the applicable surcharge rate. Surcharge rates can be defined in the **Surcharge terms** TSI.

Customer quotation lines - fields

Field	Description
General	
Customer quotation	Displays the selected customer quotation. You can also select a different customer quotation to which you can add quotation lines.
Description	Enter a description for the quotation line.
General quotation line type	Select from • Administrative costs • Risk percentage • Standard deductible • Travel • Fixed price Selecting **Fixed price** in this field will create fixed quotation lines. All other quotation lines (if any) created for the quotation will be deleted.
Customer budget	Reference to the customer budget for which budget calculations are processed.

Field	Description
	This customer budget is detected and filled in automatically, but can be manually overwritten by selecting another applicable budget from the pop-up. For more information on working with customer budgets, see the Service Providers - Customer budgets documentation.
Manual budget?	If **Yes** is displayed in this field, the budget is selected manually in the **Customer budget** field. If **No** is displayed, the customer budget is detected and filled in automatically.

> ⓘ Typically, a manually selected budget is not overwritten when new revenues are generated, unless 'key information' on the order was *changed* in such a way that the budget is no longer valid. For example: changes to the **Customer**, **Service agreement service** or **Contract line** fields, whether or not in combination, might clear the **Customer budget** field and reset the **Manual budget?** field. If any of these fields' values are *deleted*, the reference to the customer budget is always cleared and the value in this field is reset to the default value (**No**).

Subcontractor

Subcontractor	Select a subcontractor from the list.

Labor hours

Hour count	Enter the number of hours required to complete the work.
Hourly wage	Enter the approximate hourly wage.
Tariff group	Enter tariff per hour. You can also select one of the predefined tariff rates.
Trade	Select the trade of the person working on the order. On the customer quotation line, either this field or the **Tradesperson category** field should be mandatory.
Tradesperson category	If applicable in your configuration, this field displays the linked **Tradesperson category** (via the labor hour terms or

Field	Description
	internal tradesperson) used for labor hour revenue calculations. On the customer quotation line, either this field or the **Trade** field should be mandatory.
	See Tradesperson categories in the Service Providers documentation for more information.

Materials

Field	Description
Base price	Enter the base price of the material that is approximately required.
Commercial margin amount	Enter the approximate extra amount required to make a profit on the order.
Commercial margin percentage	Enter the approximate percentage required to make a profit on the order.

Costs & revenues

Field	Description
General costs excl. tax / VAT	Enter the general costs that can approximately be incurred on the order.
Item costs excl. tax / VAT	Enter the costs for the materials used.
Material type	Select the type of material used for the order.
Product	In case Product unit pricing applies, the price of the product selected here is used for the price calculation in the quotation lines, including any price exceptions made via the customer contract.

> ℹ️ The field **Allow purchase via order line?** on the **Product** field (in the **Products** TSI) must be set to **Yes**, to make the product selectable.
>
> Good to know: even if product unit pricing does not apply to the product, it is still shown on the customer quotation lines.

Field	Description
Purchase item	Select an item from the list to include it as purchased material in this quotation line.
Quantity	Enter the quantity of the material that is approximately required.

Field	Description
Total cost excl. tax / VAT	This calculated field displays the total costs excluding tax /VAT.
Total net revenue excl. tax /VAT	When saving the quotation, this value is calculated automatically (based on the terms found). It is possible change this value.
Tax / VAT amount	Enter the tax / VAT amount for the quotation line.
Tax / VAT tariff	Select a tax / VAT tariff applicable to the quotation line.

> **i** Either enter a **Tax / VAT amount** or a **Tax / VAT tariff** for the quotation line. You cannot add both.

Field	Description
Vendor catalog price	Enter the price stated in the vendor's catalog.

Snapshot fields related to Product unit pricing (alternative material revenue calculation)
also see: Calculating material revenues when product unit pricing applies.

Field	Description
Product price - snapshot	In case product unit pricing applies, this read-only field displays the product's unit price currently used in the material revenue calculation. See Product unit pricing for more information.
Product price volume - snapshot	In case product volumes are configured for product unit pricing, this read-only field displays the current applicable volume for the linked product. The volume price calculation is either **Percentage-based** or **Price-based**.
Product exception (contract) - snapshot	In case product unit pricing applies, this read-only field displays the current contractual product price exception used for the material revenue calculation.
Contract price exception (volume)	In case product unit pricing applies, this read-only field displays the current applicable volume for the contractual price exception. It will be applied to the material revenue calculation for the linked contract. The volume price calculation is either **Percentage-based** or **Price-based**.

Customer quotation workflow - list fields - Web configuration

Field	Description
Workflow list tab	
Navigation names	Enter navigation names in the relevant languages for the workflow list definition.
Code	Enter a code for the workflow list definition.
Description	Enter a description for the workflow list definition.
Allow direct link to details page	Select **Yes** if you want to enable a direct link access to the workflow details page.
Comment tab	
	Specify any remarks that are important to note down for future reference. The remarks entered here are only visible to Planon Administrator(s).
	In **CSS classes** you can specify your customized CSS class. If this field remains empty, the default CSS styling is applied. If this field contains a reference to a CSS class that is specified on the site, this styling will be applied.
	For more information, see the Web Configuration user documentation.
General tab	This tab displays the XML make-up of the web definition.

Customer quotation workflow - list /search block - Web configuration

Page/block	Description
List page	Specify the page properties (title, help text and styling). On the **Actions** tab, customize the names of the **Print all** action.

Page/block	Description
Search block	The initial page that enables users to view orders assigned to them. If you click **Yes** in the **Search immediately** field, the search results will immediately be available to the user on displaying the form (in this case, the search will be non-specific). For usability, it is recommended to turn **Search immediately** on. However, this may impact the performance of the system. On the **Search fields** tab, add the search fields you want to display initially. On the **Actions** tab, customize the names of the available actions. On the **Styling** tab, specify the custom styling, if any.
List block	Add the fields for which results are returned to the user when clicking **Search** on the **Search** page.
Fixed filter	Create and add a filter. Filtering provides powerful functionality to pinpoint the list definition to a: • specific work order type • specific person, and so on… For fields on a list block you may want to include javascript to influence the dynamic behavior of question fields.
Layout	Select the layout in which the results will be displayed.
Max. number of rows	Specify the number of results to be displayed on a single web page. If the number of results exceeds the specified number, buttons will be displayed on the web form to navigate through the list.
Display number of results	Click **Yes** to display a count of the results on the web form. The count and navigation arrows are displayed at the top of the list. For usability, it is recommended to turn the navigation count on. However, this may impact the performance of the system.

Customer quotation workflow - details fields - Web configuration

Field	Description
Workflow details	
Code	Enter a code for the workflow details definition.
Description	Enter a description for the workflow details definition.
Allowed status	Select the statuses that will be available to the end users. The details of orders that are assigned an allowed status can be viewed by end users.
Comment tab	
Comment	Specify any remarks that are important for future reference. These remarks are only visible to Planon Administrator(s).
General styling tab	
	In CSS classes you can specify your customized CSS class. If this field remains empty, the default CSS styling is applied. If this field contains a reference to a CSS class that is specified on the site, this styling will be applied.
	For more information, see the Web Configuration user documentation.
General tab	
	This tab displays the XML make-up of the web definition.

Customer quotation workflow - edit fields - Web configuration

Field	Description
Workflow edit tab	
Code	Enter a code for the **Workflow edit** definition.
Description	Enter a description for the **Workflow edit** definition.

Field	Description
Icon	Select a relevant icon the **Workflow edit** definition.
Comment tab	
	Specify any remarks that are important for future reference. The remarks entered here are only visible to Planon Administrator(s).
General styling tab	
	In **CSS classes** you can specify your customized CSS class. If this field remains empty, the default CSS styling is applied. If this field contains a reference to a CSS class that is specified on the site, this styling will be applied.
General tab	
	This tab displays the XML make-up of the web definition.
Edit page	
Edit block	The initial form that is displayed to the customers if they want to edit the details of their assigned quotations.

> **i** Make sure you only add editable fields to the grid.

> **i** To allow customers to add comments to a quotation, add the **Comments** field.

On the **Styling** tab, you can specify your customized CSS class. If this field remains empty, the default CSS styling is applied. If this field contains a reference to a CSS class that is specified on the site, this styling will be applied.

On the **Javascript** tab, provide your script for enabling dynamic forms.

| Upload block | Configure the settings and styling for the **Upload** block. Here, you can enable uploading, select the relevant communication log type for storing the uploaded files, specify upload sizes and labels. |

Subcontractor lines - fields

Field	Description
Code	Enter a code for the subcontractor line.
Name	Enter a name for the subcontractor line.
Order	This field refers to the selected order.
No. of times traveled	Enter the number of trips taken by the subcontractor to get the work done. For example, back and forth is counted as 2.
Travel costs	Enter the total travel costs.
Subcontractor	Select the relevant subcontractor from the list.
Total costs excl. VAT	Enter the total costs excluding VAT.
Total costs incl. VAT	This field displays the costs including VAT, based on the selected VAT tariff.
Invoice date	Enter the date stated on the subcontractor's invoice.
Invoice number	Enter the number of the subcontractor's invoice.
VAT amount	This field displays the VAT costs.
VAT tariff	Select the relevant VAT tariff.

Index