

Authorisation on EWM System :-

Once a job has been logged and completed on EWM system for our customers this will go into Authorisation Jobs, this is the process we will need to follow:-

1.) Go to Jobs and select Authorisation Jobs. This will take you to this page:-

Job Ref	Job Type	Customer	Purchase Order Ref	Short Description	Site	Appointments	Project Name	Completed On
267340	New Job	Collinghams		unblock sink drain	Collinghams Flat 2 Derris Court Apartment 62-72 Derrisborough Terrace London W2 3SU	P. Szwarczak - 04/11/2020 15:30 - 16:30 Initial - Completed		04/11/2020 Completed
267325	New Job	Draker		windows repair and the leak damage?	13C Whittington Road London SW6 4ED	Finance Department - 03/11/2020 14:30 - 16:30 Provide quote on site - Cancelled Eve Cockayne - 03/11/2020 14:30 - 14:30 Provide quote on site - Cancelled Eve Cockayne - 03/11/2020 14:30 - 15:30 Provide quote on site - Cancelled P. Szwarczak - 04/11/2020 16:30 - 17:00 Provide quote on site - Completed		04/11/2020 Completed
267320	New Job	Mountgrange Heritage		Replace toilet seat	49d Leckham Gardens London W6 5AL	P. Szwarczak - 04/11/2020 13:00 - 14:00 Initial - Completed		04/11/2020 Completed
267302	New Job	Martin & Co		Mice Proofing	6, 14 Elm Park Gardens, Chelsea, London, SW10 9PD London SW10 9PD	Viviane Brato - 25/10/2020 17:00 - 18:00 Abend approved quote - Completed		04/11/2020 Completed
267337	New Job	Purple Bricks		Leak	Flat 2, 136 Queen Street, W8 3JH W8 3JH	Daniel Edward Pope - 03/11/2020 19:00 - 20:00 Abend with spending limit - Completed		03/11/2020 Completed
267566	New Job	Rainbowred		Hub issue & no hot water from the taps.	Flat 2, 61a Howardgate, AL8 6BB Hertfordshire AL8 6BB	Connor Corbett - 09/10/2020 08:00 - 09:00 Attend with spending limit - Follow Up		03/11/2020 Completed
267703	New Job	Matthew James Property Services		The drain pipe at the front of the house	Ground Floor 8 St. James Road Croydon CR2 4LH	Eve Cockayne - 03/11/2020 13:35 - 15:45 Provide quote on site - Completed		03/11/2020 Completed
267597	New Job	T.H. Woodhouse & Co		OSC	7 Oldham Road, Delph, OL3 5EB Delph OL3 5EB	Connor Corbett - 09/10/2020 15:30 - 16:30 Initial - No Access		24/10/2020 Completed

2.) You must go on the authorisation job list from bottom to top; this is where you will find the most recent at the top which can be done closer to the end as they will have just been **“completed”**.

3.) You are now in the job (e.g. 267597)- you must check that the following details are inputted correctly:

- The short description and long description match with the job.
- The prices are correct on the products and they match with the approved quote and the invoice from the operative.

- The managers notes are all filled in correctly explaining the findings and the outcomes. (E.g. found toilet blocked, unblocked toilet, all ok) - keep it sweet, short and simple.
- Make sure there is a tenant signature (This is to ensure that the tenant is happy with the job completed and there are no problems and so the customer can pay the invoice).

If there is no signature from the tenant please make sure this is done before authorising any jobs on the system.

To make sure we get the tenant's signature, you would go into the Appointment and select the "A" Where you will send the SMS to the tenant and get the signature completed. This "A" will go Green.

- Make sure there are pictures/certificates on the jobs for the works which are completed - we like to make sure there are BEFORE and AFTER photos. If this is an EICR, the satisfactory/unsatisfactory report is attached for the customers.
- Make sure expenses are filled in, this is where you would put the cost of the operatives' work so any invoices from them which we would pay.

When putting invoices into expenses, we always make sure that this is called "CONTRACTOR INVOICE", Select **UNBILLABLE, unticked** (This is important!), and authorise this if the prices are correct and click not paid if they haven't been paid yet.

Once you have all of the above products select - SEND FOR INVOICING.

Once this has been saved and selected to send for invoicing you would then move onto your next job on the list and carry out the same procedure through.