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Customer Contracts

Introduction

The Customer Contracts (also known as Contract Layers) module simplifies managing multiple contracts for a single customer, covering both maintenance contracts and reactive works.

It enables you to link contracts to specific jobs, ensuring accurate and streamlined service management across various customer sites.

This guide provides step-by-step instructions for setting up contracts, assigning permissions, linking contracts to jobs, and searching for contracts within the system.

It also covers important features like user group management, contract renewals, and linking PPM (Planned Preventative Maintenance) contracts.

Initial set up

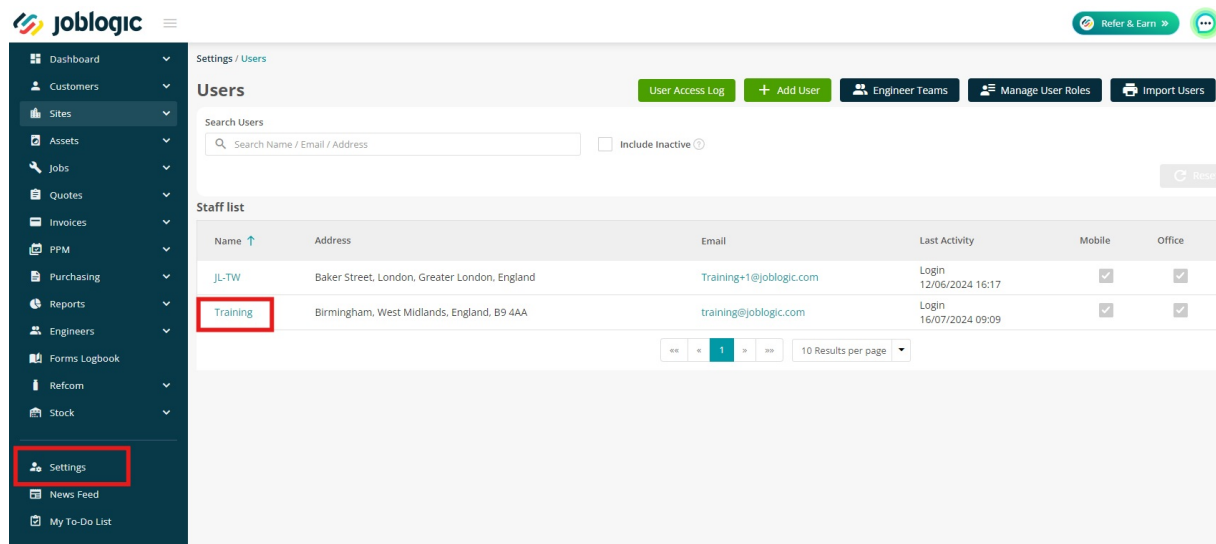
This is a paid feature, so you will need to firstly contact your customer success manager to get this turned on.

- 0800 326 5561
- Customersuccess@joblogic.com
- Or individual email/contact details for your assigned customer success manager, if you have them

Once you have activated the feature, you'll be able to start adding your contracts.

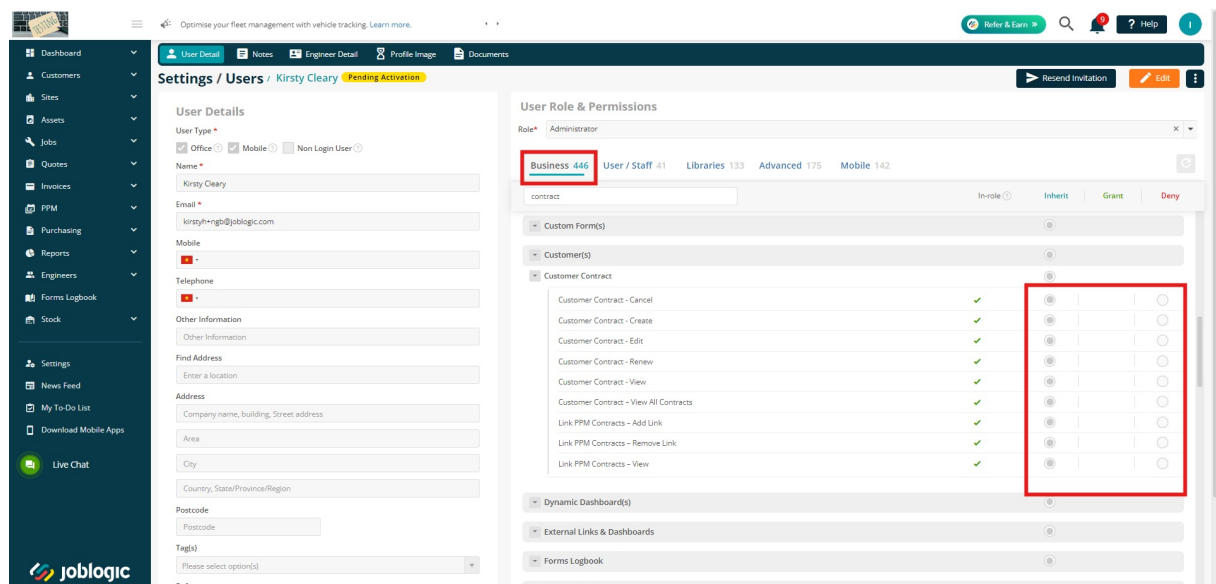
Permissions

To set permissions on a user-by-user basis, navigate to Settings > Staff > click staff name



Next, click Edit in the top right and then choose the Business tab and search for Customer contract, to filter down the list.

Amend permissions as needed, and then click Save.

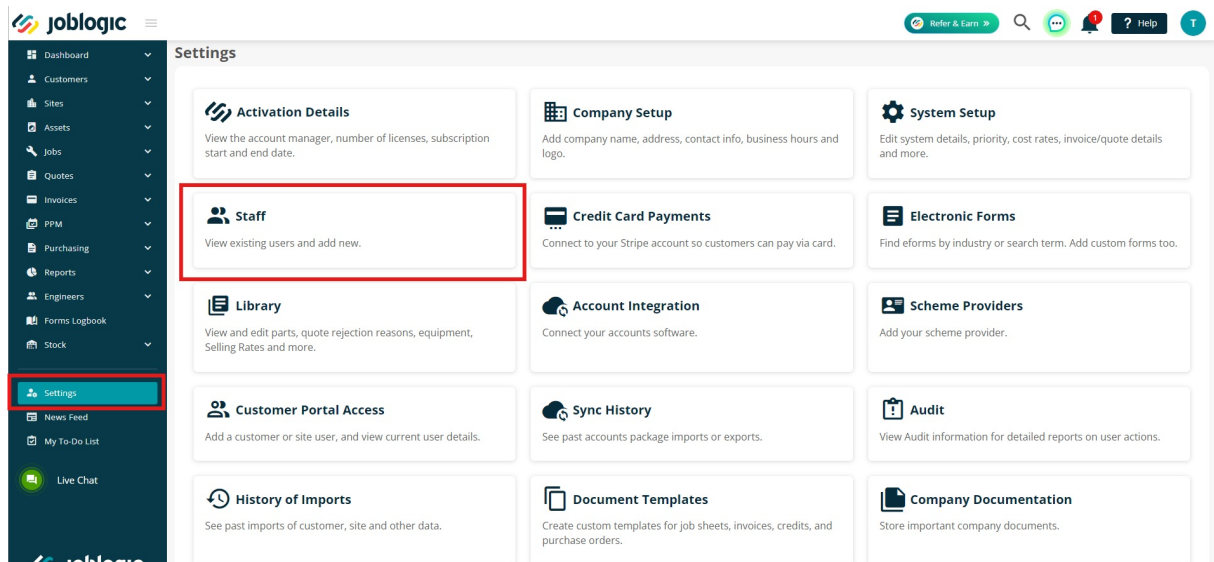


The Customer Contract - View All Contracts permission simply means this user will be able to view all customer contracts.

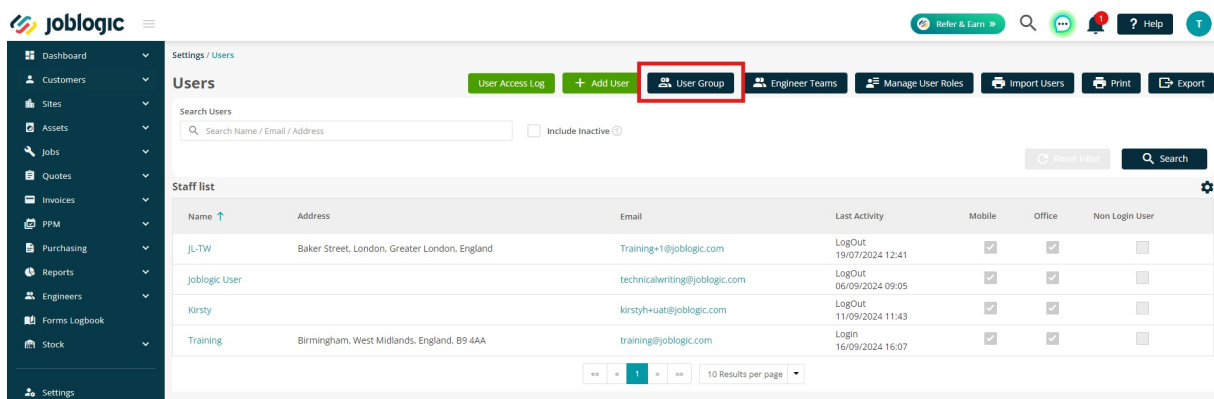
If this is not enabled, they will only be able to view contracts assigned to them (this will be discussed further during the 'Adding a Contract' section)

Setting up User Groups

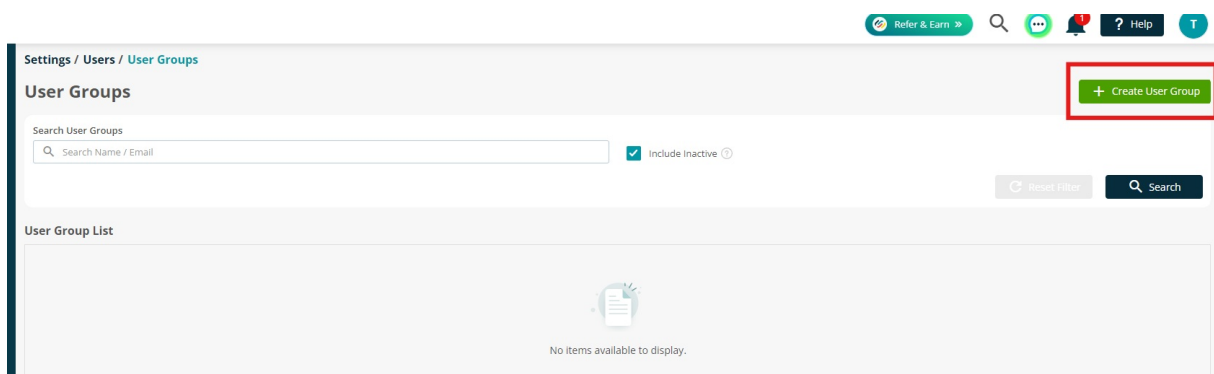
When assigning a Contract, you can assign it to an individual user, or a group. To set these groups up, firstly navigate to Settings > Staff



Next, click the User Group button at the top of the page



Click Create User Group



Give the Group a name, and then tick the users you'd like to add to this group.

Click Save.

Settings / Users / User Groups

Create User Group

User Group Details

Group Name* Tags

Member List

Search by user name / email

3 of 8 selected ☐ Show selected only

| <input type="checkbox"/> | Name | Email |
|-------------------------------------|------------------|----------------------------------|
| <input type="checkbox"/> | Apprentice | abcd@123.com |
| <input type="checkbox"/> | Engineer 1 | technicalwriting+22@joblogic.com |
| <input type="checkbox"/> | f | technicalwriting+21@joblogic.com |
| <input checked="" type="checkbox"/> | JL-TW | Training+1@joblogic.com |
| <input type="checkbox"/> | Joblogic User | technicalwriting@joblogic.com |
| <input checked="" type="checkbox"/> | Kirsty | kirstyh+uat@joblogic.com |
| <input checked="" type="checkbox"/> | Technical Writer | Training+2@joblogic.com |
| <input type="checkbox"/> | Training | training@joblogic.com |

Cancel

Adding a Contract

To add a contract, navigate to your Customer via Customer > All Customers > click Customer Name

joblogic

Customers

Hide Filter

Search Customers

Show Advanced

Active (6) Suspended (1) All (7)

| Name | Account Manager | Account Number | Address | Postcode | Contact Name | Telephone | Email |
|---|-----------------|----------------|--|----------|-------------------|---------------|-----------------------|
| Joblogic® - Field Service Management Software | | | Birmingham, West Midlands, England | B9 4AA | | | |
| MJ Enterprises | | | 16 Hagley Road, Birmingham | B16 9PJ | | | |
| Morrisons B'Ham | | | 280 Coventry Rd, Small Heath, Birmingham | B10 0XA | | | |
| Tesco B'Ham | | | Rsvp Bar, Old Square, Corporation St, Birmingham | B4 6TB | | | |
| Test Account | | 123456 | 123, ABC Road, Birmingham | B94AA | Training Team | 8003265561 | 123@abc.com |
| Tracer Management Systems | JL-TW | | Gibb Street, Digbeth, Birmingham, West Midlands | B9 4AA | Managing Director | +448003265561 | Training@joblogic.com |

10 Results per page

Next, click the Contracts tab

joblogic

Customers / Joblogic® - Field Serv...

Details

Tag(s)

Total Receivable Balance £178,825.01

Name* Joblogic® - Field Service Management Software

Customer Type Commercial

Address

Postcode Telephone

Contact Telephone Email

Account Manager

Active ☒

Exclude PPM Invoices ☐

Log Job Log Quote Add Invoice Edit

Click Add Contract

The screenshot displays the Joblogic software interface. On the left is a dark sidebar with a menu including Dashboard, Customers, Sites, Assets, Jobs, Quotes, Invoices, PPM, Purchasing, Reports, Engineers, Forms Logbook, Refcom, Stock, and Settings. The main header area contains navigation tabs: Details, Sites, Contacts, History, Info, Refcom, Billing, Invoice Details, Base Configuration, and Contracts. The 'Contracts' tab is active. Below the header, there's a section titled 'Customers / Joblogic® - Field Serv...' with a '+ Add Contract' button highlighted in a red box. Other buttons like 'Log Job', 'Log Quote', and 'Add Invoice' are also visible. Below this is a search bar and several date selection fields for 'Contract Start Date', 'Contract End Date', 'Date Created', and 'Review Date'. There are checkboxes for 'Include Completed' and 'Include Cancelled'. At the bottom, a table shows contract details with columns for Contract Number, Contract Description, Sub Division, Site, Customer Order Number, Contract Start Date, Contract End Date, Date Created, Review Date, and Renewed From. The table lists two contracts: '001 Annual visit' and '002 Gold Contract', both with a 'View Sites' link. A pagination bar at the bottom indicates '1' of 2 results and '10 Results per page'.

Here you can enter your contract details, including the Description, Contract Number and Start Date.

You can add a Review Date if you wish to receive a notification for the scheduled review of your customer contract.

You will also be able to assign the contract to an individual user, or a user group. This will specify who can view the contract.

Unless the user has the *Customer Contract - View All Contracts* permission, they will only be able to view contracts assigned to them specifically.

Fields with a red * are mandatory and will need to be filled in before you can Save the contract.

Add Contract

Contract Details

Contract Description *

0/4000

Enter your value

Contract Number *

Enter your value

Sub Division

Enter your value

Start Date *

24/09/2024

End Date ?

DD/MM/YYYY

Review Date ?

DD/MM/YYYY

Customer Order Number ?

Enter your value

Assign *

☒ User

☐ User Group

Please select option(s)

☐ Use Customer Configuration ?

Cancel

Save

If you tick the 'Use Customer Configuration' option, the details from your Customer's Base Configuration will auto populate the Contract details.

Add Contract

Contract Details

Contract Description * 0/4000

Enter your value

Contract Number * Enter your value

Sub Division Enter your value

Start Date * 24/09/2024

End Date ? DD/MM/YYYY

Review Date ? DD/MM/YYYY

Customer Order Number ? Enter your value

Assign *

☒ User ☐ User Group

Please select option(s)

☒ Use Customer Configuration ?

Cancel Save

When you have saved your contract, you'll be able to edit the contract further, and add more information where required.

Joblogic

Customer / Joblogic® - Field Service Management Software / 003

Contract Details

Contract Description * Contract1 9/4000

Contract Number * 003

Sub Division Enter your value

Start Date * 19/07/2024

End Date ? DD/MM/YYYY

Review Date ? DD/MM/YYYY

Customer Order Number ? Enter your value

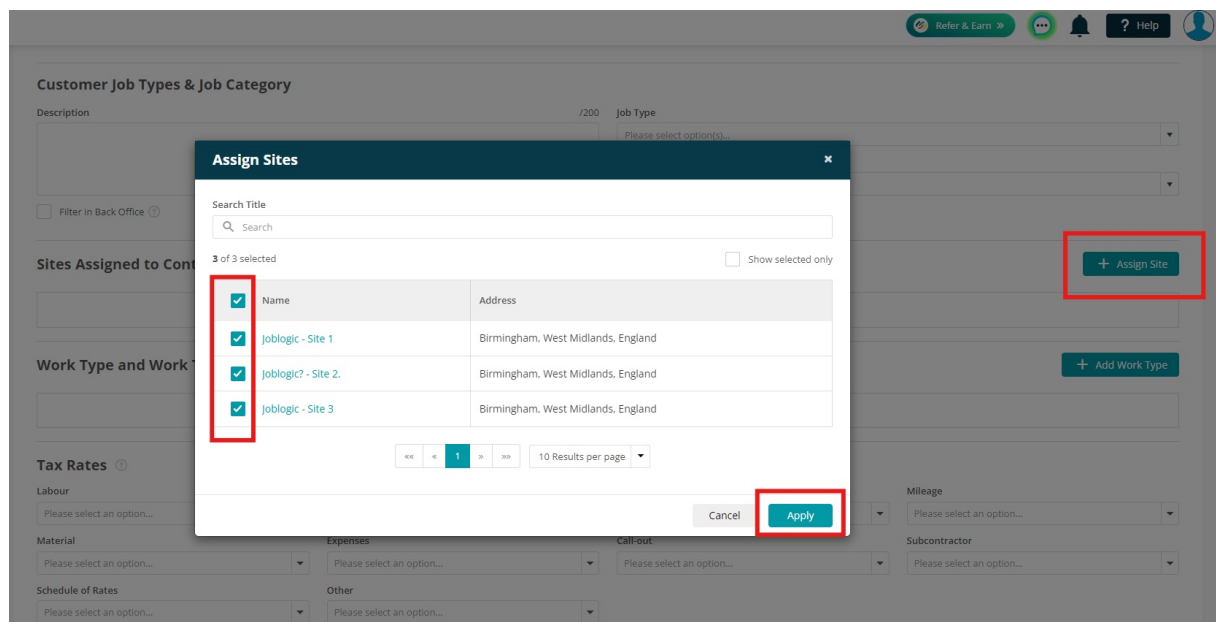
Job Order Number

☐ Is Mandatory ?

Edit

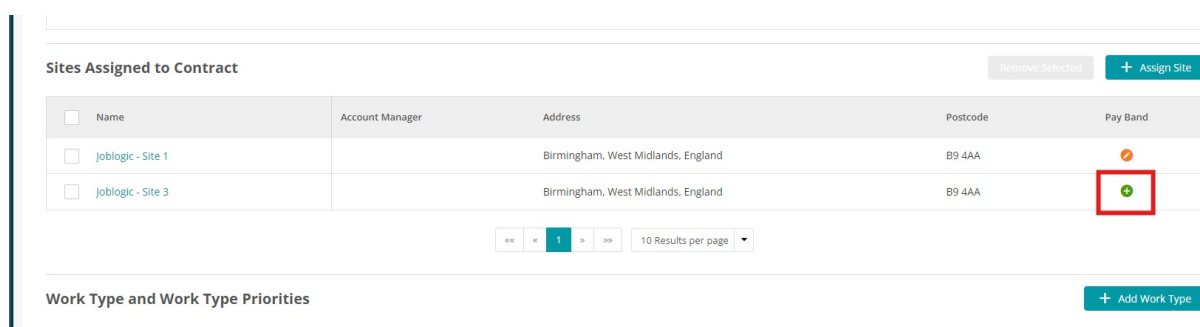
Here, you can assign your chosen sites to your contract. The contract will only be visible for these selected sites.

Click Assign Sites, and then tick the relevant sites before clicking Apply.

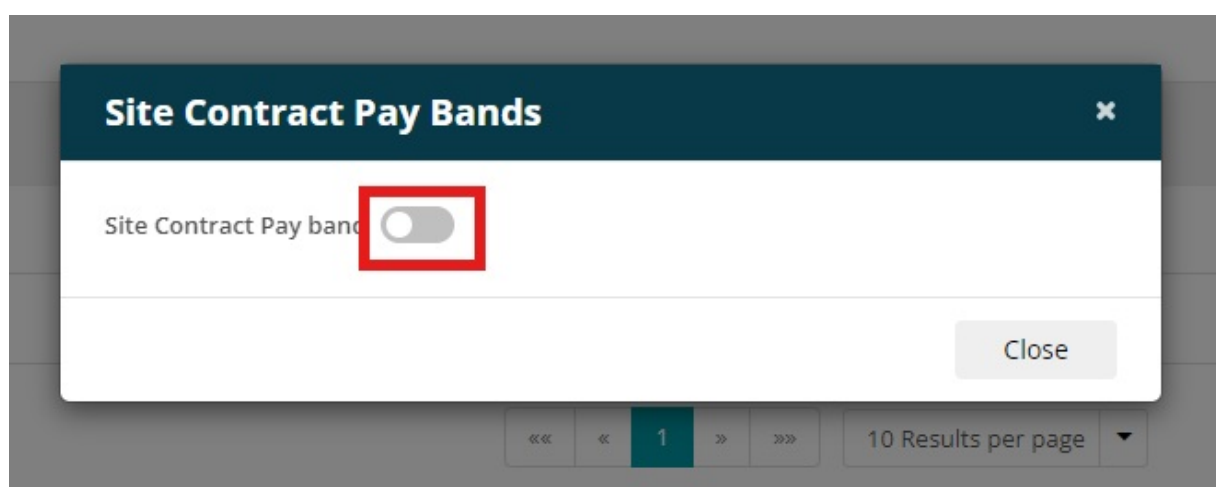


Once you have added the Site(s), you'll have the option to add a Payband against each site.

Click the green + button to get started.



Toggle Site Contract Pay band



You'll be shown your System default payband settings. You can make amendments to the table as required and the changes will be applied for this site only.

To look at updating your paybands, click [here](#).

Site Contract Pay Bands

Site Contract Pay band

Pay Band Times

The blank spaces on the grid below use the Basic Pay Band values by default. You may specify time periods where a different Pay Band will be applied

| | 00:00 | 01:00 | 02:00 | 03:00 | 04:00 | 05:00 | 06:00 | 07:00 | 08:00 | 09:00 | 10:00 | 11:00 | 12:00 | 13:00 | 14:00 | 15:00 | 16:00 | 17:00 | 18:00 | 19:00 | 20:00 | 21:00 | 22:00 | 23:00 |
|-----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Monday | | | | | | | | | | | | | | | | | | | | | | | | |
| Tuesday | | | | | | | | | | | | | | | | | | | | | | | | |
| Wednesday | | | | | | | | | | | | | | | | | | | | | | | | |
| Thursday | | | | | | | | | | | | | | | | | | | | | | | | |
| Friday | | | | | | | | | | | | | | | | | | | | | | | | |
| Saturday | | | | | | | | | | | | | | | | | | | | | | | | |
| Sunday | | | | | | | | | | | | | | | | | | | | | | | | |

Site Rates

You can overwrite the values set up in your Pay Bands library here, allowing you to specify different Pay Band rates for this Site.

To reset the Site Pay Band rates according to those defined in the Settings / Library section

| Description | Labour Cost Rate | Travel Cost Rate | Mileage Cost Rate | Colour |
|--------------|------------------|------------------|-------------------|--------|
| Basic | £30.00 | £0.00 | £0.00 | |
| Overtime | £40.00 | £0.00 | £0.00 | |
| Weekend rate | £55.00 | £15.00 | £1.00 | |

Close

If you need to remove any sites from the contract, simply tick the box and then select Remove Selected.

Sites Assigned to Contract

Remove Selected

+ Assign Site

| Name | Account Manager | Address | Postcode | Pay Band |
|---|-----------------|------------------------------------|----------|----------|
| <input checked="" type="checkbox"/> Joblogic - Site 1 | | Birmingham, West Midlands, England | B9 4AA | |
| <input type="checkbox"/> Joblogic? - Site 2. | | Birmingham, West Midlands, England | B9 4AA | |
| <input type="checkbox"/> Joblogic - Site 3 | | Birmingham, West Midlands, England | B9 4AA | |

1

10 Results per page

Next, you can assign your Work Types. Add your Description and assign your Job Types and Selling Rates.

Add Work Type

Description *

Enter your value

Job Types *

Select options

Any jobs logged using this contract and selected job types will adopt this configuration.

Selling Rate *

Select an option

External Project Number

Enter your value

Work Type Priorities

Establish different selling rates for job categories and priorities for contractual jobs.

No items available to display.

+ Add Priority

Cancel Save

+ Add Work Type

You can add multiple Job Types by ticking as many as required.

Add Work Type

Description *

Enter your value

Job Types *

Installation Maintenance Repair

Installation

Maintenance

Repair

Service

Survey

If you wish to, you can also add a Project Number and Work Type Priorities. These are not mandatory and can be left blank if required.

When adding a Work Type Priority, you can choose your Job Category, and then select the Priority and Selling Rate to go along with it.

No data to display

to Cont

Work

Travel

Add Work Type

Description *

Job Types *

ⓘ Any jobs logged using this contract and selected job types will adopt this configuration.

Selling Rate *

External Project Number

Work Type Priorities

Establish different selling rates for job categories and priorities for contractual jobs.

| Job Category * | Priority * | Selling Rate * |
|---------------------|------------------|------------------|
| Alarm sounding | Select an option | Select an option |
| AC - Leak | | |
| Boiler - Leak | | |
| Boiler Service | | |
| CCT | | |
| Garden Maintenance | | |
| Heating | | |
| HVAC | | |
| Plumbing | | |
| Requested Follow Up | | |
| Roof - Leak | | |

+ Add Priority

Cancel Save

Logging your Contracts across the system

You can then log Jobs, Quotes, PPM Contracts or PPM Quotes to your Customer Contract.

This will automatically pull through the selling rates you have set up against your contract for your various job types/categories, saving you time and effort.

- Jobs > Log Job
- Quotes > Log Quote
- PPM > Add PPM > PPM Quote
- PPM > Add PPM > PPM Contract

This field will be greyed out until a relevant Site is selected. Once the site is selected, the Customer Contract dropdown will populate with any contracts associated to the site.

The Customer Contracts can also be added retrospectively. If you click into a Job, Quote, PPM Quote or PPM Contract, you'll be able to click Edit and choose a contract from the dropdown.

- Jobs > All Jobs > click a job number > Edit
- Quotes > All Quotes > click a quote number > Edit
- PPM > All PPM Quotes > click PM Number > Edit
- PPM > All PPM Contracts > click PM Number > Edit

Linking PPM Contracts

Alternatively, you can view or link your PPM contracts within the Contracts page.

Customer > All Customers > *select your customer* > Contracts tab > *select your contract* > PPM Contracts tab

Joblogic

Refer & Earn

Detail PPM Contracts

Customer / Joblogic® - Field Service Management Software / 01010

Link PPM Contract

Search PPM Contracts

PPM Contract No. / Site / Description / Account Manager

Date Created

Start Date

End Date

Contract Start Date

Start Date

End Date

Contract End Date

Start Date

End Date

Reset Filter Search

In Progress (2) Completed (0) Suspended (0) All (2)

| Number | Site | Account Manager | Start Date | End Date | Progress | Description | Tags | Date Created |
|-----------|-------------------|-----------------|------------|------------|----------|-------------------|------|------------------|
| PM0000006 | Joblogic - Site 1 | | 23/07/2021 | 22/07/2022 | 91.67% | Maintenance Work | | 22/07/2021 15:42 |
| PM0000010 | Joblogic - Site 1 | | 24/07/2021 | 23/07/2022 | 0% | Plumbing Contract | | 23/07/2021 10:18 |

10 Results per page

Click Link PPM Contract

Joblogic

Refer & Earn

Detail PPM Contracts

Customer / Joblogic® - Field Service Management Software / 01010

Link PPM Contract

Search PPM Contracts

PPM Contract No. / Site / Description / Account Manager

Date Created

Start Date

End Date

Contract Start Date

Start Date

End Date

Contract End Date

Start Date

End Date

Reset Filter Search

In Progress (2) Completed (0) Suspended (0) All (2)

| Number | Site | Account Manager | Start Date | End Date | Progress | Description | Tags | Date Created |
|-----------|-------------------|-----------------|------------|------------|----------|-------------------|------|------------------|
| PM0000006 | Joblogic - Site 1 | | 23/07/2021 | 22/07/2022 | 91.67% | Maintenance Work | | 22/07/2021 15:42 |
| PM0000010 | Joblogic - Site 1 | | 24/07/2021 | 23/07/2022 | 0% | Plumbing Contract | | 23/07/2021 10:18 |

10 Results per page

Tick the PPM contracts that you'd like to link to your Customer Contract, and then click Link.

Link PPM Contract

Customer Contract: 01010

Contract Dates:

Search PPM Contracts

Reset Filter

Search

☐ Show matching date PPM contracts only

PPM Contract List

2 of 25 selected

Show selected only

| | Number | Site | Account Manager | Start Date | End Date | Progress | Description |
|-------------------------------------|-----------|-------------------|-----------------|------------|------------|----------|--------------------|
| <input checked="" type="checkbox"/> | PM0000019 | Joblogic - Site 1 | | 27/07/2021 | 26/07/2022 | 0% | Service check Cont |
| <input type="checkbox"/> | PM0000018 | Joblogic - Site 1 | | 27/07/2021 | 26/07/2022 | 0% | Service check Cont |
| <input checked="" type="checkbox"/> | PM0000017 | Joblogic - Site 1 | | 27/07/2021 | 26/07/2022 | 0% | Service and Mainte |
| <input type="checkbox"/> | PM0000023 | Joblogic - Site 1 | | 05/10/2021 | 04/10/2022 | 0% | |
| <input type="checkbox"/> | PM0000022 | Joblogic - Site 1 | | 05/10/2021 | 04/10/2022 | 0% | PPM Quote |
| <input type="checkbox"/> | PM0000024 | Joblogic - Site 1 | | 06/10/2021 | 05/10/2022 | 0% | Monthly visits |

<<

<

1

2

3

>

>>

10 Results per page

Cancel

Link

Searching for your Contracts

You can easily search for any Jobs, Quotes and PPMs that are assigned to a Customer Contract, by using the filters on the following screens:

- Jobs > All Jobs
- Quotes > All Quotes
- PPM > All PPM Contracts

The Customer Contract dropdown will be available under the Show Advanced option.

Jobs

Hide Filter ⊕

Search Jobs

Customer / Site / Job Number / Contact / Description / Order No. / Reference / Priority Description / External Project Num

Date Logged: 01/01/2024

End Date

Show Advanced

Status: Please select option(s)

Appointment Date: Start Date, End Date

Filters are applied Reset Filter Search

Quick Filters

All (182) Open (165) In Jeopardy (3) Requires Allocation (71) Completed Today (0) Requires Invoicing (1) Requires Revisit (0) Suspended (0) Requires Approval (3) Approved (0)

| Job No. | Customer Name | Site Name | Description | Area(s) | Status | Visits | Job Owner | Contact | Priority | Remaining |
|----------|---------------|---------------------------------|--------------|---------|-----------|--------|-----------|---------|-----------------|--------------|
| C0000050 | Air Con Ltd | Air Con Ltd - 112B Baker Street | Annual check | South | Allocated | ✓ | Training | | 4-hour Response | -182d 0h -1m |

Jobs

- Log Job
- All Jobs
- Service Job Letters

Quotes

Invoices

PPM

Purchasing

Reports

Engineers

Forms Logbook

Refcom

Stock

Settings

News Feed

My To-Do List

Live Chat

Start Date

End Date

Next Contact Date

Start Date

End Date

Job Owner

Please select option(s)

Job Category

Please select option(s)

Job Trade(s)

Please select option(s)

Priority

Please select option(s)

Area

Please select option(s)

Tag(s)

With Please

Customer Type

Please select option(s)

Subcontractor

Please select option(s)

Customer Contract(s)

001

002

003

Showing top 3 (item/items)

Job No. ↑

Customer Name

Site Name

You will also be able to view your Contracts via Sites > All Sites > click Site Name > Related Contracts tab

Joblogic

Details Assets Contacts History Info Refcom Related Sites **Related Contracts** Billing Configuration Service Job

Sites / Joblogic - Site 1

Log Job Log Quote

Search Contracts

Contract Number / Contract Description / Sub Division / Customer Order Number / Site

Contract Start Date: 17/07/2023

End Date

Contract End Date: Start Date, End Date

Date Created: Start Date, End Date

Review Date: Start Date, End Date

☒ Include Completed ☐ Include Cancelled

Reset Filter Search

In Progress (3) Completed (0) Cancelled (0) All (3)

| Contract Number | Contract Description | Sub Division | Site | Customer Order Number | Contract Start Date | Contract End Date | Date Created | Review Date | Renewed From |
|-----------------|----------------------|--------------|------------|-----------------------|---------------------|-------------------|--------------|-------------|--------------|
| 001 | Annual visit | | View Sites | | 17/07/2024 | 19/07/2024 | 16/07/2024 | 18/07/2024 | |
| 002 | Gold Contract | | View Sites | | 17/07/2024 | | 16/07/2024 | | |
| 003 | Contract1 | | View Sites | | 18/07/2024 | | 17/07/2024 | | |

10 Results per page

Renewing your Contract

If you leave the End date blank, corresponding 1-year PPM Contracts will automatically renew upon expiration.

If a Review Date is entered for contracts, the system will generate a review notification. You can search your contracts by Review Date to check for any upcoming reviews, if needed. The one year contracts with no end date will automatically renew at the end of the specified review date to ensure continuity of the overarching contracts.

If an End Date is entered, you'll then see an option to Renew Contract in the top right of your main Contract screen.

The screenshot shows the Joblogic Field Service Management Software interface. On the left is a dark sidebar with a menu including Dashboard, Customers, Sites, Assets, Jobs, Quotes, Invoices, PPM, Purchasing, Reports, Engineers, Forms Logbook, Refcom, and Stock. The main content area is titled 'Contract Details' and contains several input fields: Contract Description (Annual visit), Contract Number (001), Sub Division (Enter your value), Start Date (17/07/2024), End Date (19/07/2024), Review Date (18/07/2024), Customer Order Number (Enter your value), Job Order Number (with an 'Is Mandatory' checkbox), and Rounding Option/Duration (both dropdown menus). In the top right corner of the main area, there are two buttons: 'Edit' and 'Renew Contract'. The 'Renew Contract' button is highlighted with a red rectangular box.

When you click this, you'll be able to enter a new Contract Number, and amend other details as needed.

Se

Renew Contract

×

1

Contract Information

2

Filter Matching & Exception Contracts

Renewing Contract from: Joblogic® - Field Service Management Software - 001

Original Contract Dates: 17/07/2024 - 19/07/2024

Contract Details

Contract Number *

Sub Division

Customer Order No.

Contract Number

Sub Division

Customer Order Number

Start Date *

End Date *

Review Date ?

20/07/2024

22/07/2024

22/07/2024

☐ Consider leap year

Contract Description *

29/4000

[Renewal of 001] Annual visit

ⓘ There are current PPM contracts for the Sites included in this agreement. Please evaluate the listed contracts on the next step to determine which ones will be extended through this agreement and which ones will not, given that they have been established for varying durations.

Cancel

Next

On the next screen you'll be able to see which PPM Contracts will be renewed too.

Only PPM contracts with the same dates as the Customer Contract will show in the Matching Contracts list, and be renewed.

Any other PPM Contracts will show in the Contracts with Exception tab, and won't be renewed.

Click Finish to start the renewal

Renew Contract

Contract Information — 2 Filter Matching & Exception Contracts

Renewing Contract from: Joblogic® - Field Service Management Software - 004

Original Contract Dates: 20/07/2024 - 22/07/2024 Contract Renewal Date: 23/07/2024 - 25/07/2024

PPM Contracts

Only matching contracts will be renewed.

Matching Contracts (1) Contracts with Exception (0) **Not Renewed**

PM0000056 Start Date: 20/07/2024 End Date: 22/07/2024 >

Site: Joblogic - Site 1

Description: [Renewal of PM0000056]

«« « 1 » »» 10 Results per page ▼

← Back Cancel Finish

You'll then be asked to confirm your renewal. You will not be able to make changes once you click Confirm

Contract Renewal Confirmation

The renewal process cannot be stopped once started. You will be taken back to the customer contracts list screen, and we'll send you a notification once the renewal is completed.

Please press Confirm once you are sure that all renewal details are correct.

← Back Cancel Confirm

Once the renewal has been completed, the Renewed From field will be populated so you can easily see which contract is linked to the current contract, for historical purposes.

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Help

Contracts

Customers / Joblogic® - Field Serv...

+ Add Contract

Log Job

Log Quote

Add Invoice

Search Contracts

Contract Number / Contract Description / Sub Division / Customer Order Number / Site.

Contract Start Date

Contract End Date

Date Created

Review Date

Include Completed

Include Cancelled

Reset Filter

Search

In Progress (4)

Completed (0)

Cancelled (0)

All (4)

| Contract Number | Contract Description | Sub Division | Site | Customer Order Number | Contract Start Date | Contract End Date | Date Created | Review Date | Renewed From |
|-----------------|-------------------------------|--------------|------------|-----------------------|---------------------|-------------------|--------------|-------------|--------------|
| 001 | Annual visit | | View Sites | | 17/07/2024 | 19/07/2024 | 16/07/2024 | 18/07/2024 | |
| 002 | Gold Contract | | View Sites | | 17/07/2024 | | 16/07/2024 | | |
| 003 | Contract1 | | View Sites | | 18/07/2024 | | 17/07/2024 | | |
| 004 | [Renewal of 001] Annual visit | | View Sites | | 20/07/2024 | 22/07/2024 | 17/07/2024 | 22/07/2024 | 001 |

10 Results per page

Cancelling your Contract

Navigate to your Customer Contract (Customer > All Customers > select customer > Contracts tab > select Contract)

Click the 3 dots in the top right corner and select Cancel Customer Contract

joblogic

Refer & Earn

Help

Detail

PPM Contracts

Customer / Joblogic® - Field Service Management Software / 001

Edit

Cancel Customer Contract

Suspend Customer Contract

Contract Details

Contract Description *

Enter your value

Contract Number *

Enter your value

Sub Division

Enter your value

Start Date *

DD/MM/YYYY

End Date

DD/MM/YYYY

Review Date

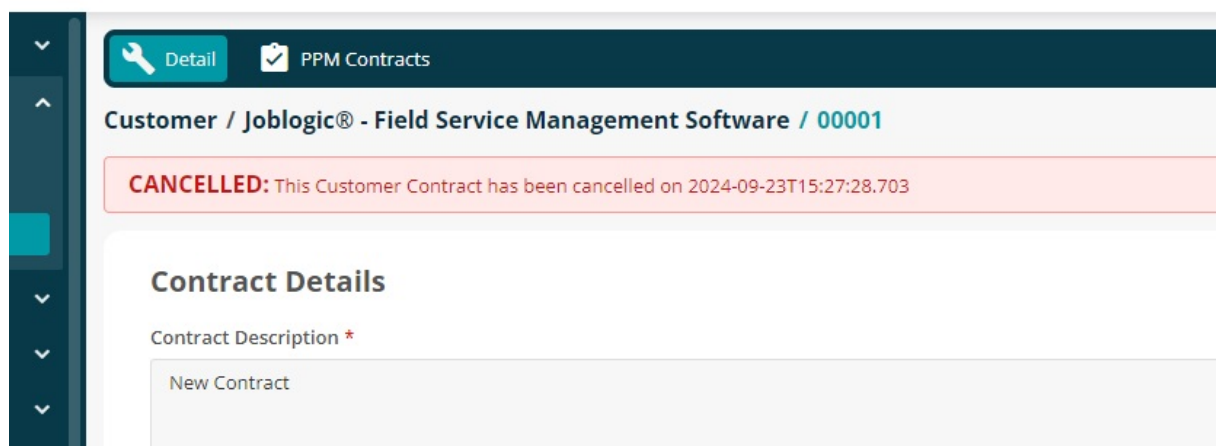
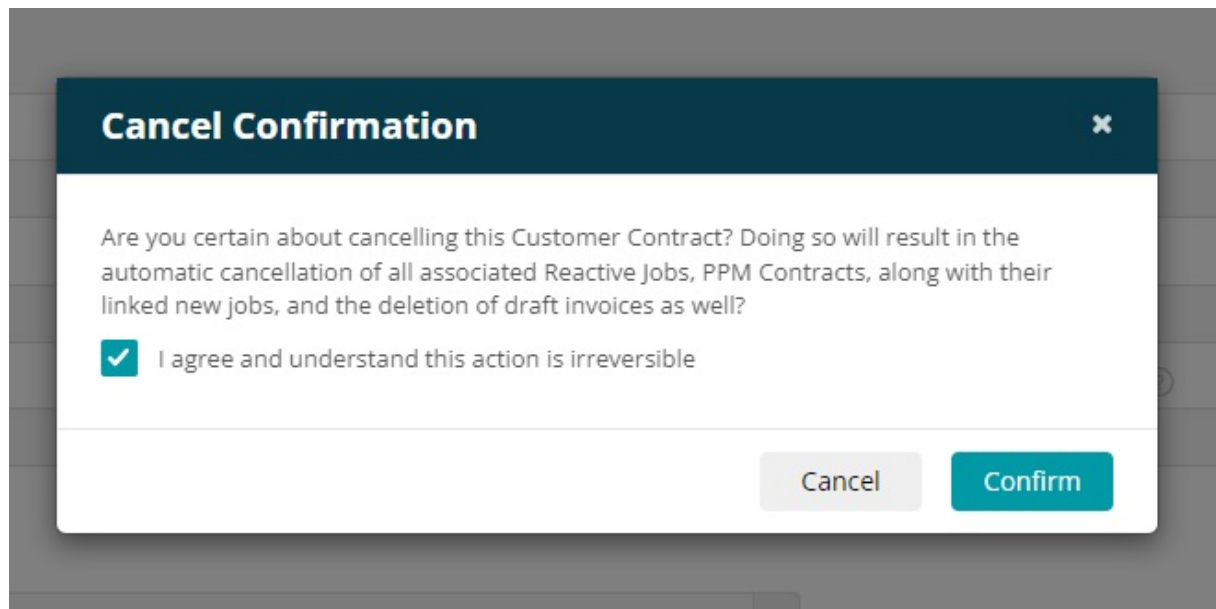
DD/MM/YYYY

Customer Order Number

Enter your value

Assign *

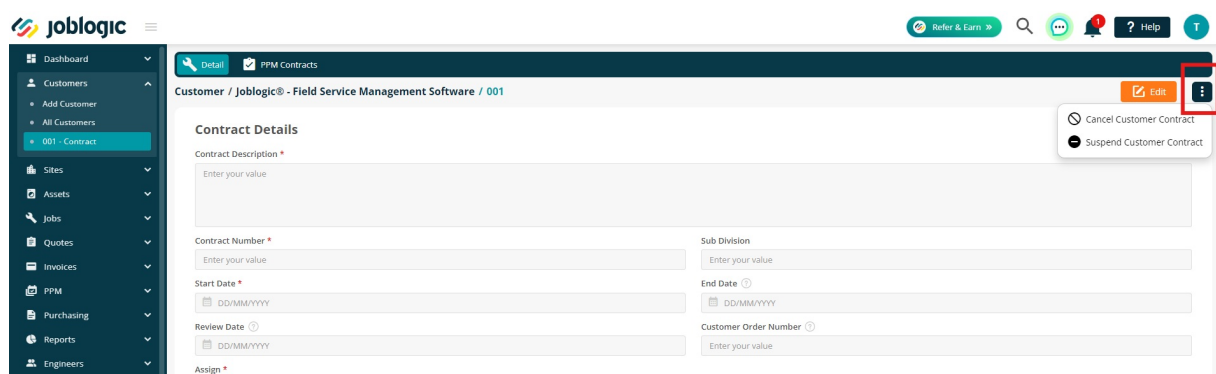
You will need to confirm the cancellation. Read through the text, tick to agree, and then click Confirm.



Suspending/Reactivating your Contract

Navigate to your Customer Contract (Customer > All Customers > select customer > Contracts tab > select Contract)

Click the 3 dots in the top right corner and select Suspend Customer Contract



You'll be transferred to a new page where you can enter your Reason for Suspending.

Click Save.

The screenshot shows the 'Suspend Customer Contract' page in the Joblogic system. The left sidebar contains navigation links for Dashboard, Customers, Sites, Assets, Jobs, Quotes, Invoices, PPM, Purchasing, Reports, Engineers, Forms Logbook, Stock, Settings, News Feed, My To-Do List, and Live Chat. The main content area is titled 'Suspend Customer Contract' and includes a 'Contract Details' section with fields for 'Suspend Customer Contract: 002' and 'Original Contract Dates: 17/07/2024'. Below this is a 'Reason for Suspending' field with a placeholder 'Enter your value', which is highlighted with a red box. A note below the field states: 'Suspending this Customer Contract will also suspend the related PPM Contracts and the related new PPM Jobs, Draft Invoices and Not Applicable POs will be Frozen and no Action will be performed against them.' The 'Suspend Details' section shows 'Reactive Jobs (0)' and 'PPM Contracts (0)'. At the bottom right, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box.

Confirm the suspension, by clicking Confirm on the pop up box.

The screenshot shows a 'Suspend Confirmation' pop-up box. The title bar is dark blue with the text 'Suspend Confirmation' and a close button (X). The main text asks: 'Are you sure you would like to suspend this Customer Contract with its related PPM contracts and reactive jobs?'. At the bottom right, there are two buttons: 'Cancel' and 'Confirm'. The 'Confirm' button is highlighted with a red box.

The screenshot shows a 'Suspension is In Progress' pop-up box. The title bar is dark blue with the text 'Suspension is In Progress' and a close button (X). The main text states: 'The suspension of Customer contract 1234 is in progress. You will be notified once the process is completed.' At the bottom right, there is a 'Close' button, which is highlighted with a red box.

To reactivate this contract, click Reactivate Customer Contract

Refer & Earn Search Chat Help

Detail PPM Contracts

Customer / Joblogic® - Field Service Management Software / 1234

This Customer Contract has been suspended.

Contract Details

Contract Description * 10/4000

Contract 2

Contract Number * Sub Division

Check over your details, and make any amendments as needed before clicking the **Save** button in the bottom right.

Reactivate Customer Contract

Contract Details

Reactivate Customer Contract: 1234

Original Contract Dates: 24/09/2024

Start Date * 23/09/2024 End Date DD/MM/YYYY

Review Date DD/MM/YYYY

Contract Description *

Contract 2

Suspended contracts will be reactivated.
Frozen Jobs will be reactivated with a status of 'New Job'.
The Purchase order associated with the Reactive and PPM Jobs will also be reactivated.

Reactivate Details

Reactive Jobs (0)

Cancel Save

Confirm your Reactivation.

Reactivate Confirmation

Are you sure you would like to reactivate this customer contract, its related PPM contracts and reactive jobs?

Cancel Confirm

Further Support

For further information or assistance with the above, contact our Support Team on 0800 326 5561 or email support@joblogic.com. Alternatively, our Customer Success Management team can be reached by emailing customersuccess@joblogic.com

Publishing Details

This document was written and produced by Joblogic's Technical Writing team and was last updated on the date specified above. Be aware that the information provided may be subject to change following further updates on the matter becoming available. Additionally, details within the guide may vary depending on your Joblogic account's user permissions.

