5.0 User Guide

C/S Codes Manager

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Codes Manager

Codes Manager combines most of the smaller codes forms into a single access point.

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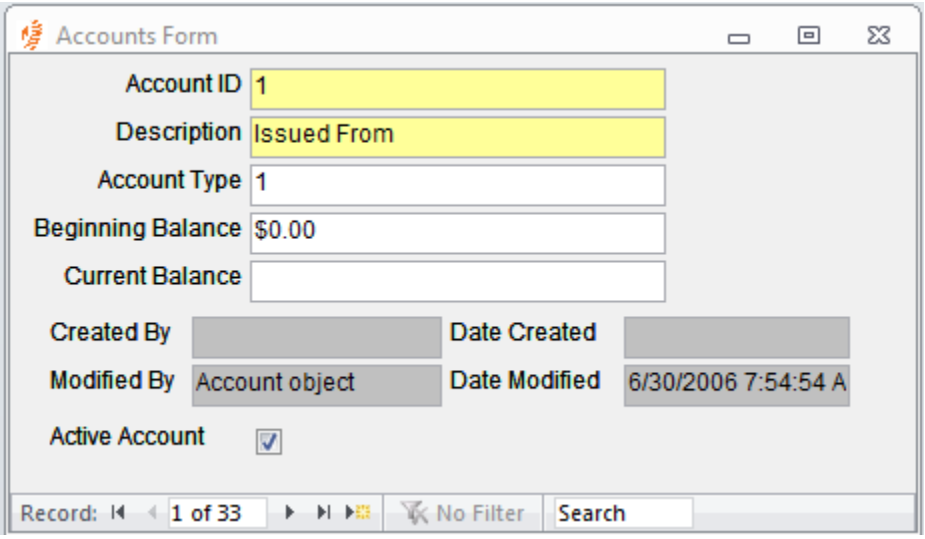
Forms

Accounts Codes

Add account codes for charging money accounts. Adding an account code here populates the Paid From and Charged To drop-down boxes



- Account ID – enter an account Number for this account
- Description – enter a description for this account
- Account Type – enter an account type for this account
- Beginning Balance – enter a beginning balance for this account
- Current Balance – enter current balance if creating a new account. This field updates when costs are tied to it on the Paid From or Charged To
- Created By – auto populated field showing who created this account
- Date Created – auto populated field showing date account was created
- Modified By – auto populated field showing who made last modification to account
- Date Modified – auto populated field showing date of last modification to account
- Active Account – Check if the account is active

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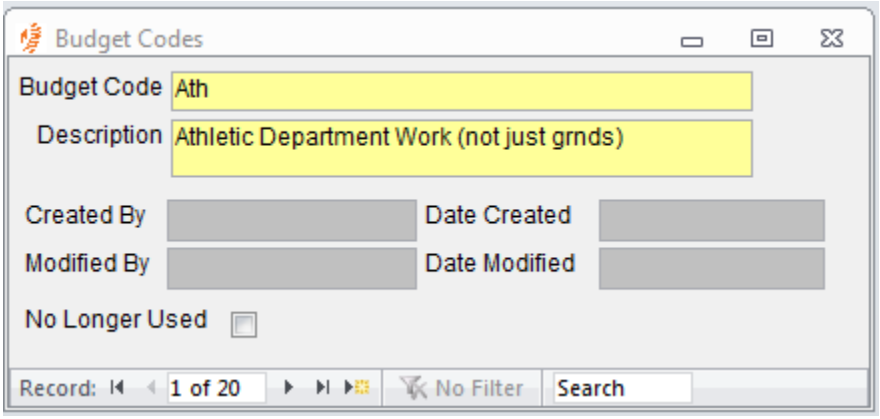
Budget Codes

Add a budget code to keep track of work orders tied to a specific budget. This is not a debit/credit account



- Budget Code – enter a Budget Code for this Budget
- Description – enter a description for this budget code
- Created By – auto populated field showing who created this budget code
- Date Created – auto populated field showing date budget code was created
- Modified By – auto populated field showing who made last modification to budget code
- Date Modified – auto populated field showing date of last modification to budget code
- No Longer Used– Check if the budget code is no longer active

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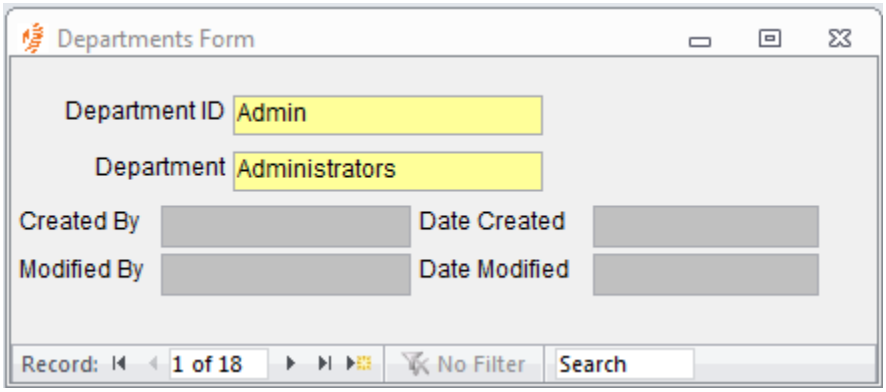
Departments

Add departments so you can separate work orders and assigned assets to a specific department



- Department ID – enter a Department Code for this department
- Department – enter a description for this department
- Created By – auto populated field showing who created this Department Code
- Date Created – auto populated field showing date Department Code was created
- Modified By – auto populated field showing who made last modification to Department Code
- Date Modified – auto populated field showing date of last modification to Department Code

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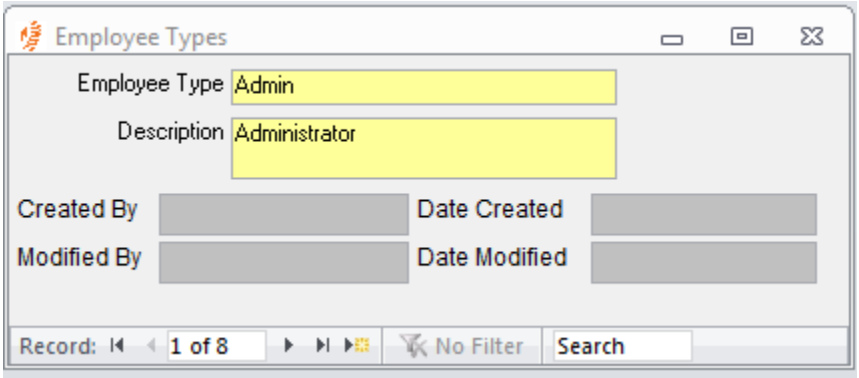
Employee Types

Enter Employee Types for tracking certain types of employees (i.e. Full Time, Part time, summer help, etc.)



- Employee Type – enter an Employee Type Code for this Employee Type (i.e. FT, PT)
- Description – enter a description for the Employee Type (i.e. Full Time, Part Time, etc.)
- Created By – auto populated field showing who created this Employee Type
- Date Created – auto populated field showing date Employee Type was created
- Modified By – auto populated field showing who made last modification to Employee Type
- Date Modified – auto populated field showing date of last modification to Employee Type

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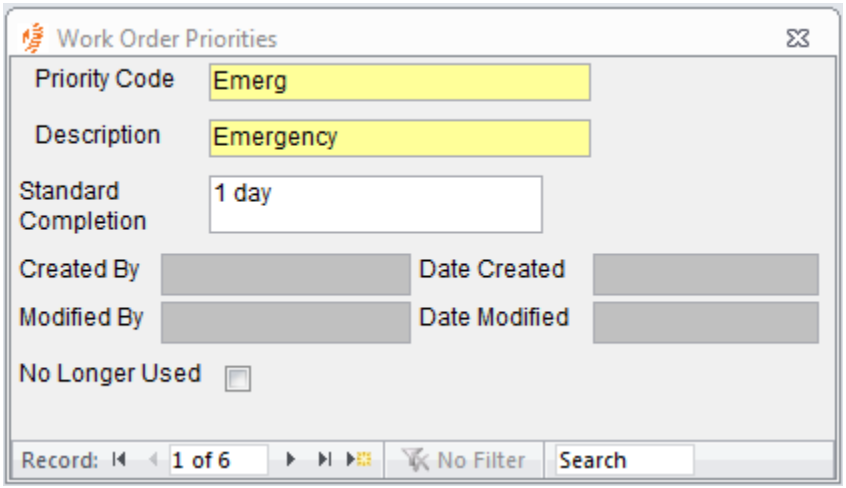
Priority Codes

This is used for establishing the priority of work to be complete.



- Priority Code – enter a Priority Code for this Priority Code
- Description – enter a description for this Priority Code
- Standard Completion – enter completion time for this Priority Code
- Created By – auto populated field showing who created this account
- Date Created – auto populated field showing date Priority Code was created
- Modified By – auto populated field showing who made last modification to Priority Code
- Date Modified – auto populated field showing date of last modification to Priority Code
- No Longer Used – check if the Priority Code is no longer used

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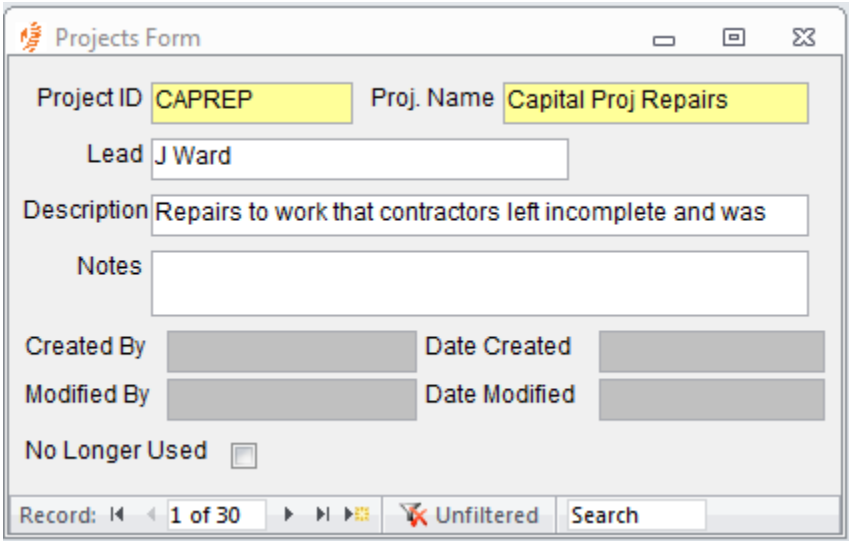
Projects Codes

You may want to create projects if you are going to track work tied to things like renovations, building additions, or event schedules.



- Project ID – enter a Project ID for this Project
- Project Name – enter a name for this project.
- Lead – enter the name of the person taking the lead on this project (i.e. Project Manager)
- Description – enter a description for this project
- Notes – enter generic notes regarding this project
- Created By – auto populated field showing who created this project
- Date Created – auto populated field showing date project was created
- Modified By – auto populated field showing who made last modification to project
- Date Modified – auto populated field showing date of last modification to project
- No Longer Used – check if the Project Code is no longer used

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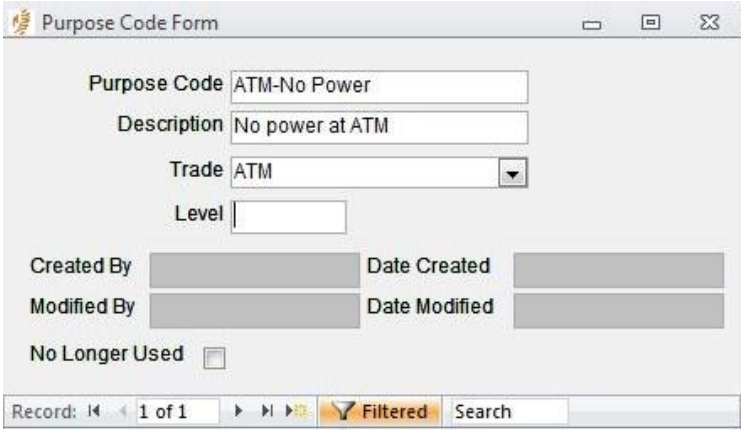
Purpose Codes

Enter a Purpose code to track certain types of work orders. (I.e. Vandalism, ADA, Food Service, etc.)



- Purpose Code – enter a Purpose Code for this Purpose
- Description – enter a description for this purpose code
- Trade – This associates the purpose code for this selected trade
- Level – This is only used for Dispatch. This will associate this purpose code with the desired level
- Created By – auto populated field showing who created this purpose code
- Date Created – auto populated field showing date purpose code was created
- Modified By – auto populated field showing who made last modification to purpose code
- Date Modified – auto populated field showing date of last modification to purpose code
- No Longer Used – check if the purpose code is no longer used

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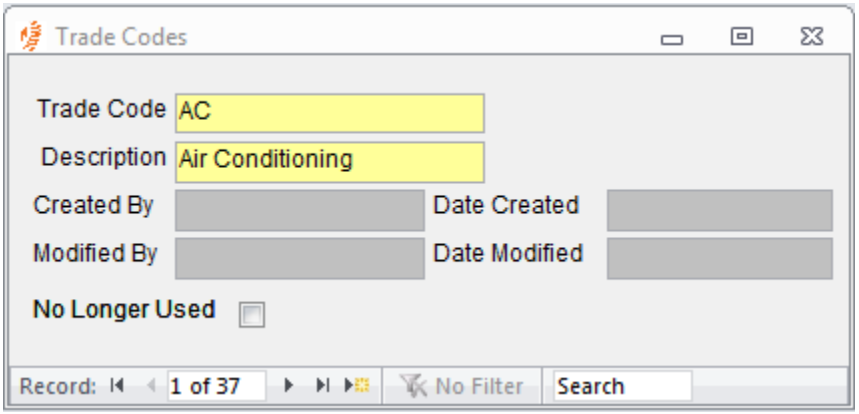
Trade Codes

Trade codes can separate work orders into various trades.



- Trade Code – enter a Trade Code for this Trade
- Description – enter a description for this trade code
- Created By – auto populated field showing who created this purpose code
- Date Created – auto populated field showing date purpose code was created
- Modified By – auto populated field showing who made last modification to purpose code
- Date Modified – auto populated field showing date of last modification to purpose code
- No Longer Used – check if the purpose code is no longer used

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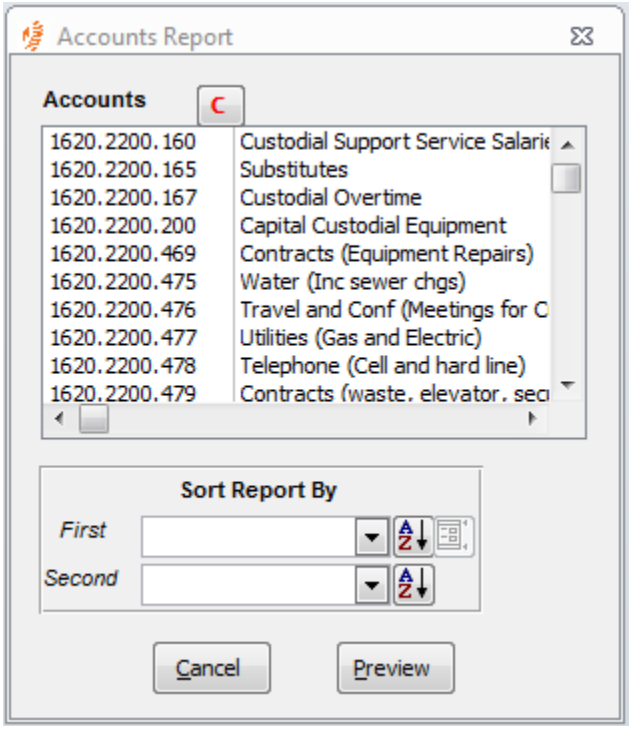
REPORTS

ACCOUNT REPORT

This report will show all Account Codes, a description, a beginning balance and a current balance of each code.



Account Codes Report

TeamWORKS Solutions, Inc
Facility Management Software

Account ID	Description	Beginning Balance	Current Balance
1	General Fund Account	$0.00	
100-1-2600-410.0-01	Water & Sewer Big Creek ES	$9,692.31	$9,692.31
100-1-2600-410.0-02	Water & Sewer Chestatee ES	$9,692.31	$9,692.31
100-1-2600-410.0-03	Water & Sewer Coal Mountain ES	$9,692.31	$9,692.31

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BUDGET CODES REPORT

This report will show all Budget Codes and a description

Budget Codes Report

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Budget Code	Description
CAPRW	Capital project related work
Dist Off	District Office Maintenance Work
EEW NB	Early Education routine work
NA	Not Used

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DEPARTMENTS REPORT

This report will show all Department ID's and Names.

Departments Report

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Facility Management Software

Department ID	Department Name
A-1 Hood Cleaning and Pressure Washing	A-1 Hood Cleaning and Pressure Washing
A-1 Phillips Painting	A-1 Phillips Painting
AAA Commercial Floors Inc.	AAA Commercial Floors Inc.
Absolute Contractors, Inc.	Absolute Contractors, Inc.

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PROJECT CODES REPORT

This report will show all Project Codes, Project ID, Project Name and Lead, Project Description and Notes.

Project Codes Report

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Facility Management Software

Project ID	Project Name Project Lead	Project Description	Project Notes
CW	CONTRACTED WORK	CONTRACTED WORK	All contracted work will be under this project ID. Emergency -Lump Sum- Unit Price work
GM	GENERAL MAINTENANCE	GENERAL MAINTENANCE	

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PURPOSE CODES REPORT

This report will show all Purpose Codes and a description.

Purpose Code Report

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Code	Description
ADA	American Disability Act
C & A	CHECK AND ADVISE - PROVIDE COST ESTIMATE
CA	CAPITAL OUTLAY
CM	CORRECTIVE MAINTENANCE
CONST	CONSTRUCTION

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TRADE CODES REPORT

This report will show all Trade Codes and a description

Trade Codes Report

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Trade Code	Trade Description
C	Carpentry
E	Electrical
H	HVAC
P	Plumbing
WSC	Warranty/School Construction

Customer Support

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