aptean

STATEMENT OF WORK
CHANGE REQUEST ESTIMATE

Client	RMS	Project	DEV	Site	
Client Reference		Aptean Reference	354634	Estimate Version	0.1
Prepared By	A N Walker			Estimate Date	11/12/18
Invoice Reference				Priority	3
Customer				System Version	4.X

Client Request

We have a requirement to create identical jobs in bulk. The requirement is for paired jobs i.e collect and deliver and toggle to create either multiple single deliveries or multiple collections.

To avoid repeated entry of free text of loose product desc and associated qty, the client asked if they can pre-populate standing data table in *CALIDUS* ePOD with their products and standard quantity. This will enable a drop down/search rather than repetitive entry.

This is a clean series of required fields for the user to fill out whilst on the phone to a client. Below are indicated which fields should be toggle to be hidden and made non applicable:

- Paired - tick box. Should be made to be optional/ hidden/toggle
- Collection address - Should be made to be optional/ hidden/toggle unless paired is ticked. Search on name or any part of the address would be great here.
- Collection Job Driver instructions - optional field. Should be made to be optional/ hidden/toggle
- Delivery address - Should be made to be optional/ hidden/toggle unless paired is ticked. Search on name or any part of the address would be great here.
- Delivery Job Driver instructions - optional field. Should be made to be optional/ hidden/toggle
- Product - Should populate Loose product line and qty on job. See above regarding standing data requirement. Should be made to be optional/ hidden/toggle
- Qty of Product - Free text or drop down. See above regarding standing data requirement
- Date - Should be free text or calendar pop up
- Time Window - Either free text or small all day tick box which should allow defaulted configurable standing data of say 9.00am to 5.00pm
- Number of jobs - Numeric
- Cust Ref - Free Text

Aptean Solution

The *CALIDUS* ePOD Admin system will be modified to allow the user to enter jobs in bulk, when configured to do so.

The Jobs screen will be modified to have a new **Bulk Jobs** button on the button bar of the header. When clicked, this will display a Bulk Job entry form.

The contents of the form will be subject to configuration, that will allow sections and elements to be hidden, shown or configured as required or optional.

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The configuration allowed against the Site will be:

- *Job Type Default* - Collection, Delivery, Both (Linked).
- *Instructions* - Optional, Required or Disabled (hidden).
- *Window or Service Level* - a selector of whether to enter an access window directly, or just a Service Level text item.
- *Window Entry* - Required, Optional, Disabled (hidden).
- *Product Entry* - Required, Optional, Disabled (hidden).
- *Product Selection* - Pre-set or Free-text.
- *Default Bulk Job Group* - a selection of a Job Group for the site.

The new Bulk Jobs Entry pop-up screen will prompt for the following:

- *Your Reference* - this will be generated by the system and will be a unique reference for the site.
- *Number of Jobs* - required entry, defaulting to 1.
- *Customer Ref* - Free Text, always required.
- *Date* - free text or calendar pop up. Required. Must be today or in the future. Default to today, or last date selected in this session.
- *Job Type* - a drop-down list of "Collection"/"Delivery"/"Both (Linked)". If "Collection" or "Both (Linked)" is chosen, the "Collection" address fields are enabled and must be entered. If "Delivery" or "Both (Linked)" is chosen, the "Delivery" address fields are enabled and must be entered. This will default to the configured choice.
- *Job Group* (for collection or delivery) - a drop-down list of all configured job groups for the site. This will default to the job group selected as part of the configuration.
- *Customer* (for collection or delivery) - a drop-down searchable list of all customers in the system. This is required for every job and address. When the customer is selected, the Address, Post Code, Contact, Tel and Email address will be set from this address and may not be changed.
- *Job Address* (for collection or delivery) - a check-box, defaulting to unchecked. If checked, the Address, Post Code, Contact, Tel and Email address may be changed.
- *(Driver) Instructions* (for collection or delivery job) - may be required, allowed to be blank (optional) or hidden.
- *Window* (for collection or delivery) - Through configuration this can either be:
    - *Service level* (for collection or delivery) - free text entry, for information only. Can be required or optional or hidden.
    - *Windows* - if entered, must be two times in time format. Can be required, optional or hidden.
    - *Hidden*.
- *Product* - If configured, will be a drop-down list of pre-configured products. This may also be configured for free-text entry. This can be required, optional or hidden.
- *Quantity* - If product has been selected, this will default to standard product quantity (if set against a pre-configured product). If not, then this must be entered and may not be zero. If no product has been entered, this value will not be required. This can be required, optional or hidden.

If more than one job is being created, the Job Code of the jobs created will be generated from the "Your Reference" generated, plus a counter to keep them unique.

On saving the bulk job entry (through the provided **Save** button, the system will generate the required number of jobs based on the information entered.

The generated jobs will then be displayed in the Jobs screen results table.

🛑 **Warning**: Unknown costs for client/year (RMS/2018)

Cost Details			
Activity	**Hours**	**Rate per hour (£)**	**Cost (£ Exc. VAT)**
Requirements	0.00	0.00	£0.00
Change Request Evaluation	0.25	0.00	£0.00
Functional Specification	1.75	0.00	£0.00
Technical Specification	0.00	0.00	£0.00
Development	4.75	0.00	£0.00
Testing and Release	1.00	0.00	£0.00
Implementation	0.00	0.00	£0.00

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Project Management	0.25	0.00	£0.00
TOTAL	8.00		£0.00

Estimate excludes training, release to live and go live support.

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