



Alloc8 User Guide

Paperwork Regeneration

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Paperwork Regeneration

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Overview

Attachments and forms can be included or excluded at Branch, Company, or Job level.

Mobile workers can also submit forms and attachments on mobile.

There will be times where a form or attachment needs to be included or excluded, and paperwork has already been created.

Example scenarios

1. An invoice was sent with Paperwork but was missing a required form. This form needs to be included and re-sent as part of the Paperwork.
2. An internal client contact list was uploaded to all branches and accidentally included in all paperwork. This document needs to be excluded, and paperwork to be regenerated for any jobs that included this.

Including or Excluding from Paperwork

A column called 'Included in Paperwork' has been introduced for forms and attachments at Branch, Company and Job levels.

Simply check what you wish to include in Paperwork on jobs.

Jobs will inherit what is checked at a Branch or Company level. You can also override this directly on individual jobs on the Forms and Attachments tab.

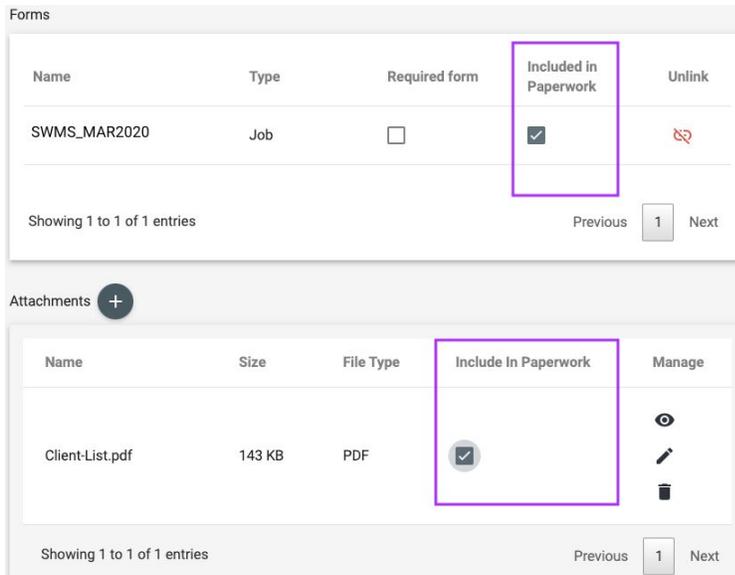
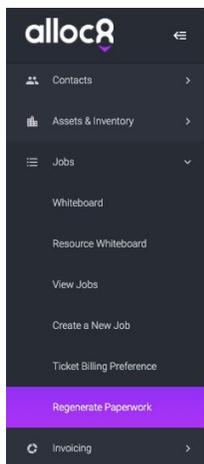


Fig 1. Paperwork inclusion checkbox for Forms and Attachments

Regenerating Paperwork



If you have changed the Paperwork settings for a Branch or Company or job after a Timesheet has been submitted, you will need to manually Regenerate Paperwork.

Under the 'Jobs' menu in the sidebar, you will see a new page called 'Regenerate Paperwork'

Fig 2. Regenerate Paperwork Page under 'Jobs' menu



Fig 3. Paperwork Regeneration filters

Using the Filters

You can filter jobs to regenerate paperwork by selecting:

1. Branch(es)*
2. Client(s)
3. Date Range*
4. Project
5. Tag(s)
6. Include invoiced jobs

Branches and Date Range are mandatory.

Alternatively, you can enter a specific job number directly into the 'Ticket Number' field. This will enable you to skip all of the filters below.

Search Results

Once you have entered the details into the search filter, click 'Show Results'. The results page will only show jobs that already have Paperwork generated. If you do not see the job you are looking for here (and filters are correct), it means that job does not yet have Paperwork generated for it. This means when the Timesheet is submitted for the job, the Paperwork will generate using the latest Branch, Company or Job settings.

The results will show the following columns:

1. Ticket Number
2. Branch
3. Company
4. Project
5. Job Date
6. Tags
7. Purchase Order number
8. Whether the job has been invoiced
9. Date Paperwork was last generated

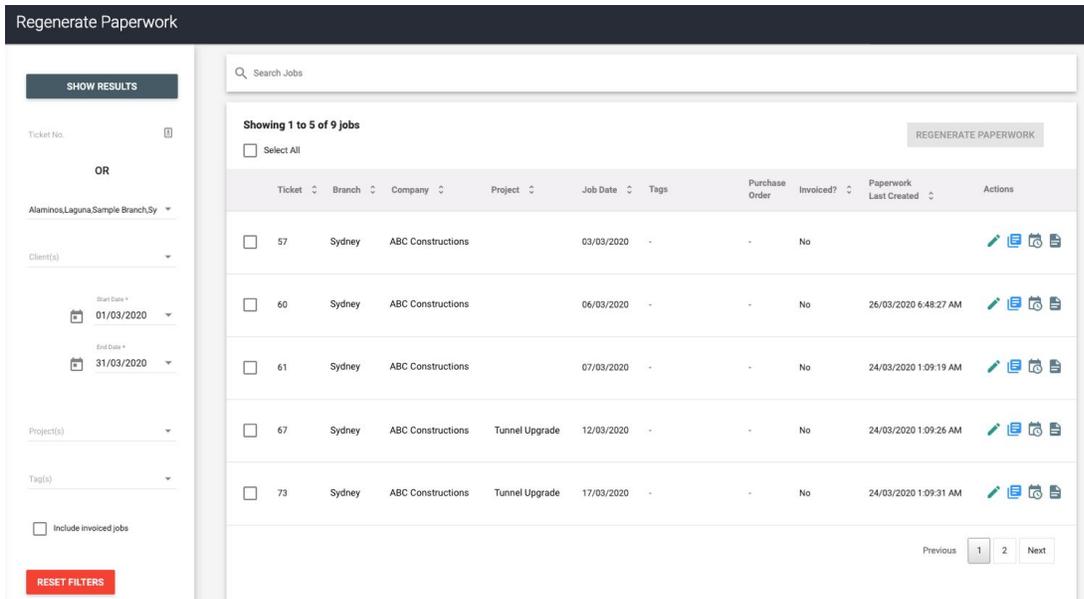


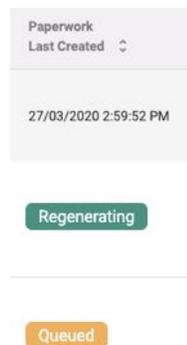
Fig 4. Paperwork Regeneration Search Results

The last column will display a list of actions:

-  Edit Ticket
-  View Forms and Attachments
-  View Timesheet
-  Download Paperwork

Regenerating Paperwork

Select the jobs you want to regenerate paperwork for and click the REGENERATE PAPERWORK button:



If you have selected many jobs, you will see either a green **Regenerating** or yellow **Queued** status.

When Paperwork has finished regenerating, the date and time will appear in this column.

Fig 5. Regeneration Status

Regenerating Paperwork for Invoiced Jobs

You won't be able to edit a ticket for an invoiced job. You can, however, click the Forms and Attachments icon. Upon loading the page the below dialog will show:

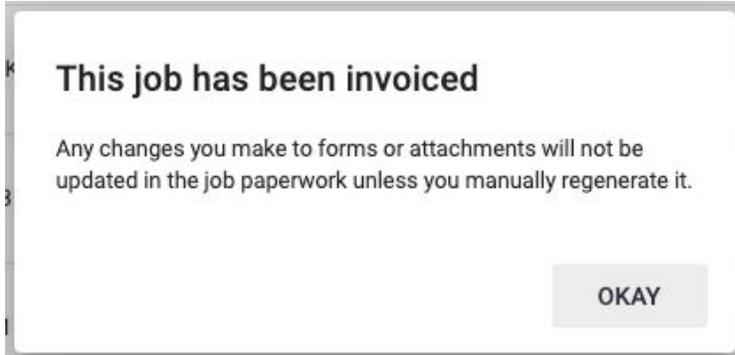


Fig 6. Dialog for invoiced jobs

Once you have made changes to Paperwork inclusions/exclusions, click SAVE.

Then return to the Paperwork Regeneration page and ensure 'Include Invoiced Jobs' is ticked on the filter:

Include invoiced jobs

Regenerating Paperwork for an invoiced job will keep the original invoice. It will NOT generate a new invoice number.

Invoices with more than one job

For invoices that contain multiple jobs, each job must be selected on the Paperwork Regeneration page if they each require paperwork to be regenerated. You can do this by sorting by Purchase Order number and selecting all jobs for that Purchase Order. Alternatively, if you only need to regenerate one of the jobs on that invoice, just select this job to regenerate. The remaining invoice Paperwork will not be changed.

Note: You can only regenerate paperwork for jobs that have been invoiced from 1 April 2020, or later.

Downloading Paperwork

After you have regenerated paperwork, you can download the PDF from the following areas:

- Paperwork Regeneration page
- View Jobs page
- View Invoices page (Invoiced jobs)

The hyperlink that is sent to the site contact will also be updated with the latest version of Paperwork.