

Client Processes Playbook



Electrical Installation Services →



CONTENTS.

02 About the Playbook

03 Sales

- 04 Managing Open Electrical Installation Project Bids in Acumatica (or other similar platforms)
- 05 Preparing RFP's and Electrical Service Bids Breakdown
- 06 Generating Leads for Upcoming Electrical Contracts
- 07 Sending Follow-up Emails to Contractors after Submitting Estimates
- 08 Creating Weekly Sales Reports on Installation Opportunities and Awarded Contracts

09 Marketing

- 10 Building Targeted Lead Lists of Contractors and Developers
- 11 Posting Completed Electrical Installations on Social Media
- 12 Designing Email Campaigns about Projects and Services
- 13 Monitoring and Responding to Client Reviews on Angi
- 14 Updating the Website with new Project Portfolios

15 Operations

- 16 Handling Customer Job Integrations using Divvy (or other similar platforms)
- 17 Validating Job Contracts, Electrical Permits, and Compliance Paperwork
- 18 Organizing Active Installation Project Files
- 19 Populating Client and Project Data in Acumatica
- 20 Communicating with Electrical Equipment Vendors

21 Finance

- 22 Processing Accounts Payable for Installation Materials and Invoices
- 23 Entering Expense Receipts for Electrical Components and Field Purchases
- 24 Tracking Upcoming Payments to Electrical Suppliers and Vendors
- 25 Performing Financial Reconciliation
- 26 Matching and Entering Payments in QuickBooks from Bank Statements

27 HR & Recruitment

- 28 Posting Job Listings for Licensed Electricians
- 29 Tracking Hours Worked by Electricians and Crews on Projects

About Us:

Outsource Access is a comprehensive “business process outsourcing” and virtual assistant firm with over 500 employees in the Philippines serving businesses in 70 industries. But what are we really? Our Clients tell us we are their “Growth Partner” helping them redefine how they scale. We are proud to have won 6 national and global awards for our commitment to quality and impacting the lives of our staff including recent ranking of #326 on the Inc 5000 for 2023.

We do a customized discovery session with each Client and offer support in every business function including operations, marketing, bookkeeping, sales, HR, admin and executive support. Our staff are all full time and managed employees who are committed to your success with our signature talent and matching, onboarding and detailed OA Playbook process to capture and document every task we execute. We will be your full turn-key, affordable answer to scale and growth.

Want to Take Next Steps? Scan the QR code and see a short video tour of our company and process with links to book a complimentary discovery call at:
OutsourceAccess.com/process



SALES



Task | Managing Open Electrical Installation Project Bids in Acumatica

Description of the Task: Tracking and managing open project bids using the Acumatica system. Ensuring all bid details, including scope, pricing, and timelines, are up-to-date and accessible is key to staying competitive. It's essential to monitor bid statuses and deadlines, helping the team stay organized and responsive to potential clients in the fast-paced electrical installation industry.

1. Access your Outlook email to retrieve project bid files and communications from the sales team or project managers related to new electrical installation opportunities.
2. Locate the relevant email from the salesperson, download attached bid documents, specifications, and any other necessary files that detail the scope of the electrical project.
3. Access your Acumatica system, the platform where you manage project bids and track opportunities. Ensure you're in the correct account for project bids and client tracking.
4. In Acumatica, go to the "Opportunities" section, where you manage and organize all incoming project bids and proposals related to electrical installation services.
5. Use the Opportunity ID, Account Name, or Subject provided in the email to locate the specific project bid within the Acumatica system.
6. Click on the opportunity to view all the details associated with the bid, including potential project timelines, pricing, and client communications.
7. Based on the salesperson's assessment in the email, adjust the probability percentage to reflect the likelihood of winning the electrical installation contract. This helps track bid statuses and prioritize high-probability leads.
8. From the salesperson's email, update the estimated close date for when the client is expected to make a decision on the project bid. Accuracy here ensures your team stays ahead of deadlines.
9. In the Attributes Tab, update the projected start date for the electrical installation, according to the information provided in the email. This ensures project timelines are accurate and resources can be allocated appropriately.
10. In the Opportunity Value Tab, input the latest financials:
 - a. Quoted Amount: Update the proposed project bid total.
 - b. Cost Estimate: Enter the estimated cost breakdown for labor, materials, and equipment needed for the electrical work.
11. Once all updates have been made, click "Save" to ensure the system reflects the most current bid information.
12. Use the "Attachments" icon (paperclip symbol) to upload all relevant bid documents, project scopes, or blueprints provided by the salesperson into the opportunity file.
13. Send a follow-up email to the salesperson to confirm that the bid details have been updated in Acumatica and that all relevant documents have been attached. This step ensures clear communication and keeps the sales team informed.

Task | Preparing RFP's and Electrical Service Bids Breakdown

Description of the Task: Compiling Requests for Proposals (RFPs) and breaking down the costs, materials, and labor for electrical services. Accurate preparation ensures that potential clients receive clear, comprehensive proposals that demonstrate professionalism and attention to detail, which are critical for winning contracts in the electrical installation field.

1. Monitor the designated channel or communication platform (Slack, email, etc.) where new RFPs (Requests for Proposals) or bid opportunities for electrical services are dropped. Make note of the bid deadlines and prioritize them accordingly.
2. Add the RFP or bid to your project management tool (e.g., Monday.com, Asana, etc.), creating a new item for the project and assigning yourself as the owner. This allows for organized tracking of deadlines and responsibilities.
3. Carefully read through the entire RFP or bid document, focusing on key details such as the scope of work, timeline, deliverables, qualifications required, and any specific submission guidelines. This ensures you understand the full requirements of the project.
4. Take detailed notes on important aspects of the RFP or bid, including:
 - a. Scope of Work: What specific electrical services are being requested?
 - b. Timeline: When does the project need to start and be completed?
 - c. Proposal Requirements: What should be included in the bid submission (pricing, technical approach, etc.)?
 - d. Qualifications: What certifications, experience, or past work examples are required?
 - e. Submission Guidelines: What format should the proposal take, and what's the submission process?
- f. Evaluation Criteria: How will the proposal be judged?
- g. Additional Information: Any other relevant notes, such as insurance requirements or specific regulations.
5. Go to the RFP/Bid project board and fill in all the relevant details gathered from the document into the designated fields. This will help keep all stakeholders informed and ensure nothing is missed during the bid preparation.
6. Break down the proposal preparation into specific tasks. Assign parts like drafting the technical approach, calculating costs, gathering compliance documents, and securing any required certifications to the relevant team members.
7. Once you've documented all the necessary details and assigned tasks, update the owner of the RFP/Bid in the project management system to the designated lead responsible for proposal submission. This ensures the project moves forward smoothly.
8. Start a thread in the communication platform (e.g., Slack) under the designated channel, summarizing the RFP or bid and tagging the responsible team members. Highlight key aspects such as deadlines and important requirements that need attention. Ensure everyone is aligned and has access to the necessary documentation.
9. Regularly check the project board and communication threads to ensure tasks are being completed on time. Make sure all elements of the RFP/bid are submitted before the deadline, and coordinate any last-minute adjustments if needed.

Task | Generating Leads for Upcoming Electrical Contracts

Description of the Task: Identifying potential clients or projects in need of electrical installation services. By researching and sourcing new construction projects or refurbishments, you help ensure a steady pipeline of opportunities. This step is critical for maintaining growth and staying ahead in the competitive electrical contracting market.

1. Log in to Outlook and review emails from lead sources, such as Cognito Forms. Identify key information, including customer name, contact details, location, and project scope.
2. Search the company name in the Job File Cabinet or Active Service Agreements folder to determine if the customer is already in the system. Look for any existing contracts or service agreements.
3. Access Acumatica to further verify if the customer has previous job opportunities or service orders. Cross-check past interactions or existing accounts.
4. If a work order number is provided, go to Service Management in Acumatica and search for the corresponding work order. Check for related jobs or follow-up tasks.
5. Use the Job Rolodex or Outlook Folder View to verify the project's location based on the customer address. Ensure all location details align with the service region (e.g., Knoxville, Chattanooga).
6. If the lead qualifies, create a new opportunity by selecting "Quoted Service" as the class ID. Input customer details, such as contact person, business account, and location.
7. Fill in relevant opportunity fields, including the sales stage (e.g., Qualify), solution type (e.g., Fire Alarm, Access Control), industry vertical (e.g., Commercial, Government), and performing branch.
8. Based on past jobs or new customer interactions, assign the correct salesperson to the opportunity. This ensures continuity in communication and follow-up.
9. Set the estimated close date, start date, and the probability percentage (e.g., 20% Qualified) for the project. This helps in tracking the progress of the bid.
10. Upload supporting documents such as the Sales Lead Information Form or PDF attachments to the opportunity in Acumatica. Use the attachments tab for easy document access.
11. Add notes to the opportunity that summarize customer interactions or specific project details. For example, mention email follow-ups or sales team coordination.
12. Forward the original email, including all lead details, to the assigned salesperson, copying any relevant team members. Ensure prompt communication.
13. In Outlook, mark the Cognito Form email as completed, then move it to the designated Sales Lead folder to keep your inbox organized.
14. Record the new opportunity in the Sales Lead Log Sheet or your institution's tracking system, ensuring proper documentation for future reference.
15. Regularly review the opportunity's status in Acumatica. Follow up with the assigned salesperson to ensure timely updates and any necessary adjustments in the bidding process.

Task | Sending Follow-up Emails to Contractors after Submitting Estimates

Description of the Task: After submitting estimates for electrical projects, sending follow-up emails ensures that contractors are aware of your interest and availability to discuss further. This communication keeps your bid top of mind, encourages prompt feedback, and can enhance relationships with contractors, increasing the likelihood of securing projects.

1. Log in to your company's project management system or email (e.g., Acumatica or Outlook) and retrieve the estimates that have been submitted to contractors. Confirm the submission date and details of the estimate.
2. Review the contractors associated with each submitted estimate. Ensure you have their contact information (email addresses, phone numbers) and the specific projects they are bidding on.
3. Draft a professional follow-up email template. Ensure the template includes key elements such as the contractor's name, project name, estimate reference, and a polite reminder for feedback or further communication regarding the bid.
4. Personalize each follow-up email by including the contractor's specific project, estimated amount, and any key points from the estimate submission. Mention the urgency of the project and how their response will aid in scheduling and procurement timelines.
5. In each email, reiterate essential details such as the scope of work, timelines, and any terms or conditions previously agreed upon in the estimate. This reinforces clarity and encourages a prompt reply.
6. Kindly request feedback or confirmation within a specified time frame, typically 3-5 business days, to keep the project on track. Mention that this helps your team prepare for the next steps in the installation process, including ordering materials and scheduling work.
7. If the contractor needs another copy of the estimate, attach the estimate PDF to the email. Ensure all related documents such as material breakdowns, labor costs, and project timelines are included for reference.
8. After sending the follow-up email, log the communication in the company's CRM (e.g., Acumatica or Salesforce). This allows the team to track all interactions related to the estimate and monitor responses.
9. Use your email or project management system to set reminders for when responses are due. If you don't receive a reply by the given deadline, prepare to send a polite reminder or escalate as needed.
10. Depending on your internal process, copy (CC) or blind copy (BCC) relevant team members, such as the sales team or project manager, to ensure they are aware of the follow-up communications.
11. Once all details are correct and the email is personalized, send the follow-up to the contractor. Ensure the tone remains professional and customer-focused.
12. Keep an eye on incoming emails for any responses. As contractors reply, ensure their feedback is forwarded to the appropriate internal team members for review.
13. If a contractor does not respond within the set timeframe, prepare a secondary follow-up email or a phone call to prompt a reply. Reiterate the importance of their feedback to the project schedule.
14. After receiving a contractor's confirmation or response, update the project status in the relevant system (Acumatica, CRM) to reflect the next steps (e.g., scheduling, purchase order issuance, or contract signing).

Task | Creating Weekly Sales Reports on Installation Opportunities and Awarded Contracts

Description of the Task: Compiling a detailed report on potential installation opportunities, bids submitted, and contracts awarded. Regular reporting helps the team assess progress, track success rates, and adjust strategies for business development. In the electrical installation industry, data-driven insights are crucial for optimizing future bidding efforts and growing the business.

1. Access your company's CRM or project management system (e.g., Acumatica or Salesforce) to collect data on installation opportunities and awarded contracts from the past week. Filter the data by date to ensure you're only including relevant entries.
2. Compile a list of active installation opportunities, including essential details such as:
 - a. Opportunity Name
 - b. Client Name
 - c. Estimated Value
 - d. Stage of Sales Process (e.g., Proposal, Negotiation, Closed Won/Lost)
 - e. Expected Close Date
3. Separate awarded contracts from the list of opportunities. Record details including:
 - a. Contract Name
 - b. Client Name
 - c. Award Amount
 - d. Start Date
 - e. Completion Date
 - f. Contract Scope of Work
4. Open a spreadsheet application (e.g., Microsoft Excel or Google Sheets) and set up a template for your weekly sales report. Include sections for:
 - a. Introduction
 - b. Summary of Opportunities
 - c. Summary of Awarded Contracts
 - d. Insights/Trends
 - e. Action Items
5. Input the gathered opportunity data into the designated section of the report. Use clear headings and bullet points to ensure readability. Highlight key opportunities that may require management attention.
6. Fill in the details of awarded contracts in the appropriate section. Highlight significant contracts and any notable terms or conditions that may impact project execution.
7. Review the data for trends, such as:
 - a. Changes in the number of awarded contracts compared to previous weeks
 - b. Variations in contract values
 - c. Patterns in specific sectors (e.g., commercial, residential, industrial)
 - d. Note any significant observations that could inform future sales strategies.
8. Write a brief summary of insights gained from the data analysis. Include any recommended action items for the sales team or management to enhance future performance.
9. Ensure the report is visually appealing and easy to read. Use charts or graphs to illustrate key points, such as total awarded contracts per week or opportunity values by stage.
10. Conclude the report with a summary section that highlights overall performance, including total installation opportunities, total awarded contracts, and the overall impact on the business.
11. Save the report with an appropriate filename (e.g., "Weekly Sales Report – [Date]"). Share the report with relevant stakeholders via email or your company's project management tool, ensuring all key team members are informed.
12. If necessary, coordinate a follow-up meeting to discuss the report's findings with the sales team or management. Prepare to present key insights and answer any questions.
13. After the report has been reviewed, log any feedback received from stakeholders regarding the report's content or format. Use this feedback to improve future reports.
14. Store the completed report in an organized manner, either in a designated folder on the company's server or within your project management system, ensuring it's easily accessible for future reference.
15. Begin preparing for the next weekly report by setting reminders to collect data and update records throughout the week, ensuring you have all necessary information ready for the upcoming report.



MARKETING

Task | Building Targeted Lead Lists of Contractors and Developers

Description of the Task: Identifying and compiling a list of contractors, developers, and project managers who are actively seeking electrical installation services. Using industry databases, online directories, and project bidding platforms, the list is tailored to target key decision-makers in sectors such as commercial, residential, and industrial projects.

1. Access platforms such as ConstructConnect, Dodge Data & Analytics, or Buildertrend to source potential contractors and developers. These platforms provide access to current construction projects, contact details, and bid opportunities relevant to electrical installation services.
2. Use filters to search for ongoing or upcoming construction projects that require electrical services. Focus on sectors like commercial, residential, industrial, and infrastructure developments that align with the company's service offerings.
3. Look for key contacts such as general contractors, project managers, developers, and procurement officers. Prioritize roles that have authority over selecting electrical service providers or subcontractors.
4. Collect important details like company names, contact persons, email addresses, phone numbers, and project details (location, scope, timeline). Ensure accuracy by cross-referencing with LinkedIn or company websites when necessary.
5. Input the gathered data into a CRM system like HubSpot or a spreadsheet. Create categories for project types (e.g., commercial or residential), project sizes, and estimated timelines to allow for easy follow-up and prioritization.
6. Narrow down leads by focusing on contractors and developers actively working in areas relevant to the company's specialties, such as electrical wiring, lighting installations, or energy management systems. Also, consider project location to target regions where your company operates.
7. For each identified lead, verify the bidding timelines or deadlines for their projects. Make sure that the timing aligns with your company's ability to respond and submit competitive bids for electrical services.
8. Organize the leads based on project size or specific needs, such as full electrical installation, retrofits, or maintenance services. This allows for tailored outreach and targeted sales pitches that address the exact needs of each potential client.
9. Rank leads according to factors such as project value, timeline urgency, and the potential for long-term partnerships. Larger-scale projects or developers with multiple ongoing projects should be marked as high-priority.
10. Collaborate with the marketing team to create an email template specifically addressing contractors' and developers' electrical needs. This outreach should highlight your company's track record, certifications, and value-added services such as energy-efficient solutions or quick turnaround times.
11. Set reminders to follow up on unresponsive leads within a week of initial outreach. Use personalized messaging to reinforce the company's expertise in electrical installation services, addressing any specific project details that were gathered.
12. Regularly update the spreadsheet or CRM with notes on responses, interest levels, and potential next steps. Track which leads have been contacted, who responded, and what their interest level is in moving forward.
13. Conduct regular checks to remove outdated or irrelevant contacts, add new leads, and update existing entries based on new projects or changes in decision-makers within the companies.
14. Compile the list of targeted contractors and developers into a weekly report for the sales or business development team. Include insights such as project opportunities, contact status, and next steps for outreach.
15. Collaborate with the sales team to ensure the leads are being approached with the right messaging and that any potential clients from the list are pursued effectively. Align outreach efforts based on the company's project availability and bid submission schedule.

Task | Posting Completed Electrical Installations on Social Media

Description of the Task: In this task, detailed posts showcasing recently completed electrical installations are created and shared across social media platforms. Highlighting projects, such as commercial wiring, lighting installations, and energy-efficient systems, helps build brand awareness and credibility. It also reinforces the company's position as a trusted service provider in the electrical industry.

1. Coordinate with the project manager or installation team to gather relevant details about the completed electrical installation project. This includes the project location, client type (e.g., commercial, industrial, residential), scope of work (e.g., wiring, lighting systems, control panels), and any special features (e.g., energy efficiency, cutting-edge technology).
2. Request high-resolution images or videos showcasing the electrical installation. Ensure the media includes shots of key components such as electrical panels, cable management, and installed systems (e.g., lighting, HVAC controls, security systems). Visuals of before and after or progress shots can help highlight the transformation.
3. Verify with the client that they approve the use of images or videos of the project on social media. Ensure that any confidential information or sensitive locations are not displayed in the content.
4. Write a caption that highlights the completed project, using industry-specific terminology. For example, mention how your team successfully installed high-voltage wiring, upgraded lighting systems, or completed an energy-efficient electrical solution. Include details like project timelines, the type of client (e.g., healthcare, retail, government), and any challenges your team overcame during the installation.
 - a. Example: "Proud to announce the completion of a major electrical installation for [Client Name]! Our team delivered a full-scale upgrade to their [commercial/industrial/residential] facility, installing energy-efficient lighting systems and modernized control panels. Excited to see how this project will enhance their operations for years to come!"
5. Add relevant hashtags to reach a broader audience within the electrical services industry. Consider hashtags like:
 - a. #ElectricalInstallation, #ElectricalContractor, #CommercialElectrical, #EnergyEfficientSolutions, #IndustrialWiring, #SmartBuildings, #SustainableEnergy, #Electricians, and location-specific tags such as #KnoxvilleElectricians or #NashvilleContractors.
6. Adapt the content to suit the specific platform. For LinkedIn, focus on a professional tone and include key project metrics (e.g., completion time, energy savings). For Instagram, highlight the visual aspects of the project with an eye-catching image and a concise caption. For Facebook, encourage engagement by asking followers to comment or ask questions about the project.
7. Use social media scheduling tools like Hootsuite, Buffer, or the platform's native scheduling features (e.g., Facebook Creator Studio) to schedule the post at a time when your target audience is most active. For the Electrical Installation industry, posts during weekday mornings or around lunchtime often receive higher engagement.
8. Monitor the post after it goes live. Respond to any comments, questions, or inquiries about the installation, using professional and informative language. If people ask about the scope of services or similar projects, direct them to the company's website or contact page.
9. Use social media analytics tools to track engagement metrics such as likes, shares, comments, and click-throughs. Provide this data in a weekly report to the marketing or sales team, noting which types of projects and content receive the most interest.
10. If the project was particularly successful or involved an innovative solution, plan to create a case study or follow-up post. This can be shared later as a more in-depth look into the technical aspects of the electrical installation or the client's feedback after using the system for several months.
11. Sync with the marketing team to ensure that the post aligns with the company's overall social media strategy and branding guidelines. Make sure the language and tone are consistent with the company's voice across platforms.

Task | Designing Email Campaigns about Projects and Services

Description of the Task: Creating targeted email campaigns to promote recent projects, new services, or upcoming industry trends. The campaigns are tailored to key stakeholders such as general contractors, property developers, and facilities managers, emphasizing solutions like electrical maintenance, safety upgrades, and new installations.

1. Begin by reviewing the overall goal of the email campaign. Clarify whether the objective is to generate new leads, inform current clients, or promote upcoming services or solutions.
2. Analyze previous email campaigns to determine which subject lines, design elements, and content were most effective. Focus on metrics like open rates, click-through rates, and conversion rates. Use this data to tailor the new campaign and avoid past pitfalls.
3. Collect information about the specific electrical services or projects to be highlighted in the email. This may include details about recent installations, project success stories, before and after photos, and customer testimonials.
4. Open your email marketing platform (e.g., Mailchimp, Constant Contact, HubSpot), and select or design a template that matches the company's branding. Use industry-specific language that resonates with the electrical services industry, incorporating terms like load balancing, circuit breaker upgrades, and compliance with electrical codes. Ensure the template features:
 - a. A professional header (company logo, tagline).
 - b. A compelling headline that captures attention (e.g., "Powering Your Next Project with Precision Electrical Installations").
 - c. Clean, visually appealing sections for images and text.
 - d. Call-to-action buttons (e.g., "Contact Us for a Free Quote," "View Recent Projects").
5. Write the email content with a focus on the specific project or service being promoted. Use clear, concise language, and explain how your team provided electrical solutions that enhanced efficiency, safety, or energy savings for a recent project.
7. Incorporate professional images of recent electrical installations or services in action (e.g., electricians working on-site, completed wiring systems, control panel installations). Visuals can help demonstrate the scale and complexity of the work.
8. Ensure each section of the email includes clear CTAs that direct recipients to take action. Use industry-specific CTAs. Segment the email list based on the recipient's industry and needs. Use the platform's audience segmentation feature to send targeted emails about services or projects relevant to each group, ensuring the content feels personalized.
9. Before sending, proofread the email for any errors in the text, images, or links. Make sure all information is accurate, such as project descriptions, services offered, and CTAs.
10. Determine the best time to send the email based on your target audience's schedule. For the electrical installation industry, early in the week and mid-morning may work well for project managers, facility engineers, or contractors.
11. Track key metrics such as open rates, click-through rates, and conversion rates after the email is sent. Monitor whether recipients are engaging with specific sections.
12. After monitoring the results, identify any engaged leads who clicked on specific services or showed interest in a project. Send personalized follow-up emails or direct the information to the sales team for further action.

Task | Monitoring and Responding to Client Reviews on Angi

Description of the Task: Monitoring of client reviews on platforms like Angi, where feedback on electrical installation services is left by clients. Responding professionally to both positive and negative reviews not only improves customer satisfaction but also helps maintain a strong reputation in the marketplace. Effective review management can influence future project bids and client retention.

1. Begin by logging into the company's Angi for Business account. Navigate to the reviews section where feedback from clients who have used the company's electrical installation services is displayed.
2. Set up email notifications or alerts for any new reviews related to the company's electrical projects, such as commercial wiring, lighting system installations, or energy management solutions. This ensures that reviews are addressed promptly.
3. Carefully read each review, whether positive or negative, to fully understand the client's experience. Take note of the specific services mentioned, such as electrical panel upgrades, fire alarm system installations, or emergency generator setups. Look for feedback on project timelines, quality of service, and communication during the job.
4. Categorize reviews by sentiment—positive, neutral, or negative. This helps prioritize responses and tailor the messaging based on the tone of the feedback. For example, a review praising the company's industrial electrical installations might be handled differently than one highlighting delays in a residential wiring project.
5. For positive reviews, express gratitude for the client's feedback and reinforce the company's commitment to delivering high-quality electrical services.
6. For negative reviews, acknowledge the client's concerns, apologize for any shortcomings, and offer a solution or next steps. Be specific and polite, and avoid defensiveness:
7. When responding to reviews, use terminology specific to the electrical installation industry. Mention services like breaker panel upgrades, energy-efficient retrofits, or low-voltage wiring to remind potential clients of the company's range of expertise. For example:
8. Include the client's name or reference their specific project to personalize each response. This shows that the company values its clients and takes the time to address their individual experiences with the electrical services provided.
9. For any serious complaints that require further investigation, escalate the issue internally. Forward the details of the review to the project manager or customer service team responsible for the client's project. Ensure they follow up with the client to resolve the issue and improve future outcomes.
10. Track recurring themes in client feedback, such as praise for project efficiency or complaints about communication during installation projects. This helps the team identify areas of improvement or highlight strengths that can be emphasized in future marketing efforts.
11. At the end of each week, prepare a summary report of the reviews received on Angi, including positive feedback, complaints, and common themes.

Task | Updating the Website with New Project Portfolios

Description of the Task: Regularly adding completed projects to the company's website, particularly within the portfolio section. Showcasing a variety of electrical installations—ranging from large-scale commercial builds to smaller residential services—enhances the company's online presence. A well-maintained portfolio helps attract potential clients by demonstrating experience and successful project execution.

1. Access the company's website using the provided login credentials for the CMS (e.g., WordPress, Wix, or custom CMS platform).
2. Locate the section of the website where completed electrical installation projects are showcased. This might be under "Projects," "Portfolio," or "Case Studies."
3. Collect all relevant details for the new project. This includes project name, client name (if permitted), location, type of installation (e.g., commercial wiring, residential electrical upgrades, industrial system installation), and project completion date.
4. Add professional photos of the completed project, such as before-and-after shots, images of electrical panels, lighting setups, or control systems. Ensure the images are properly labeled and optimized for web loading speed.
5. Create a brief but engaging summary of the project, highlighting the scope of work, technical specifications, and any unique challenges faced during installation. Use industry-specific terms (e.g., "installed energy-efficient lighting systems," "upgraded service panels," or "completed a full commercial rewiring").
6. Where applicable, include important figures like the project's size (e.g., square footage), the number of electrical fixtures installed, or the timeline for completion. This helps potential clients understand the scale and expertise involved.
7. If the project required any specific electrical certifications (e.g., NEC compliance, LEED certification for energy efficiency), mention these in the description to emphasize the company's credibility.
8. If the client has provided a testimonial or review, include it within the portfolio entry. Testimonials enhance trust and provide social proof of your company's electrical installation quality.
9. Ensure that each project entry is optimized for search engines by including relevant keywords (e.g., "commercial electrical contractor," "industrial electrical installation") in the title, description, and metadata. This increases the likelihood of attracting new clients searching for similar services.
10. At the bottom of the portfolio entry, include a call to action that encourages potential clients to get in touch. This might be a link to a contact form or a button to request a quote for similar electrical services.
11. Before publishing, preview the new portfolio entry to ensure that all images, text, and links display correctly on both desktop and mobile versions of the site.
12. Once satisfied with the presentation, hit "Publish" or "Update" to make the new project portfolio live on the website.
13. After the portfolio is live, inform the marketing team so they can promote the new project on other platforms, such as social media or email newsletters.
14. Store all project-related files (photos, descriptions, testimonials) in the company's shared drive or project management system for easy access in future updates or marketing campaigns.
15. Periodically review the project portfolio to ensure all links work, images load properly, and information remains up to date. Remove or refresh outdated projects as needed.



OPERATIONS

Task | Handling Customer Job Integrations using Divvy

Description of the Task: Managing the seamless integration of customer job details into the Divvy platform, ensuring that all electrical project expenses, material orders, and payments are accurately tracked. Effective handling of job integrations helps streamline financial operations, maintain transparency, and provide up-to-date cost reporting for each project, ultimately improving resource allocation and profitability.

1. Access your Divvy account to manage financial details, customer job expenses, and invoices associated with active electrical installation projects.
2. Navigate to the designated folder where job-related expenses and invoices for specific electrical installation projects are stored. Ensure you are working within the correct folder tied to the specific customer or job.
3. Check the status of ongoing or pending customer job integrations, ensuring all related expense categories, including material procurement and labor costs, are properly tracked for each electrical contract.
4. Ensure that each invoice is correctly coded and categorized according to your company's policies and procedures, specifically for electrical services. Categories may include equipment costs, labor, transportation, or subcontractor fees.
5. Retrieve invoices that need to be filed, ensuring all customer project-related expenses are accurately reflected for review and compliance purposes.
6. Confirm that each invoice is linked to the correct job and expense category, such as electrical wiring, installation labor, or equipment rentals. This ensures accurate cost tracking and reporting for the project.
7. Rename the downloaded invoice files according to your company's naming conventions (e.g., "ProjectName_InvoiceDate") and organize them according to the project's filing structure.
8. Upload the organized files into the appropriate folder in Dropbox or your company's designated file storage system. Ensure they are correctly categorized by customer and job number for easy future access.
9. Record key details about the job integration process, including any specific expense entries or notes about the electrical installation job. Ensure that all actions, such as invoice uploads, are documented.
10. Notify the project manager, finance team, or any other stakeholders that invoices have been successfully integrated and are accessible for the ongoing job.
11. In Divvy, mark the invoices as completed or archived to avoid confusion or duplication in future steps, ensuring all job-related expenses are properly documented.
12. Conduct a final review to confirm that all invoices have been properly categorized, uploaded, and filed. Address any discrepancies and ensure completeness of the customer job integration.
13. Once everything is verified, mark the task as complete in your project management system to keep the workflow updated and maintain an organized record of completed customer integrations.

Task | Validating Job Contracts, Electrical Permits, and Compliance Paperwork

Description of the Task: Reviewing and verifying job contracts, ensuring electrical permits are obtained, and checking compliance with local, state, and industry regulations. Proper validation is critical to avoid legal issues, ensure safety standards, and maintain the company's reputation as a compliant and reliable service provider in the electrical installation industry.

1. Access your Acumatica account to manage job contracts and documentation.
2. Go to Sales Admin > Project Queue and click on the relevant Opportunity ID.
3. In the Opportunity Value Tab, click the paperclip icon to view attachments related to the project.
4. Go to Data FS2 > Job File Cabinet and find the folder for the individual salesperson. Look for the job folder within the "sold" section.
5. Cut the job folder and paste it into the Active Job Files under the appropriate region (Knoxville/Chattanooga/Nashville). Rename the job folder using the format: Site (location)
6. Customer Billed - Solution Type (e.g., ACC, FA) - Job Number.
7. Ensure all necessary documents are included:
 - a. Sales Report
 - b. Proposal
 - c. Workup
8. If documents are from Quotewerks, verify that the following are complete:
 - a. GAI Project Sold SREL
 - b. GAI Worksheet Cost & Price
 - c. GAI Primary Proposal
 - d. Approval method (Contract, PO, signed proposal, or email) — No verbal approvals accepted.
9. Ensure the SREL document includes:
 - a. Job number, date, and salesperson name
 - b. Job name and billing customer, including the job site address
 - c. Approval method verification
 - d. Start and completion dates
 - e. Billing method (e.g., bill on completion)
 - f. Verify cost numbers against the worksheet
 - g. If a subcontractor is involved, confirm the written quote and Certificate of Insurance (COI) are obtained.
10. Check that the worksheet includes:
 - a. Margin percentages (35-40% for projects, 50% for change orders)
 - b. Labor hours allocated to engineering and project management (minimum requirements)
 - c. Matching totals across the proposal, worksheet, and opportunity.
11. For the proposal, verify:
 - a. Accurate date, customer name, and site address
 - b. Clear dollar amount, signed by the salesperson
 - c. Compliance with COVID-19 language and monitoring requirements.
12. Note that rejection will occur if any required documents are missing. For new customers, ensure the credit application and W9 are sent to accounting. High-value jobs (> \$50k) require review by management. Any RUSH jobs must also be noted.
13. Search for the site address in the Job Rolodex to determine the job number and update information in Acumatica (double-check availability).
14. Add the job number in the subject line and the Project WO# field under the Financial Tab. Include notes indicating processed dates and assigned personnel.
15. Hit SAVE. Combine all relevant documents into one PDF using Adobe (in order: sales report, proposal, worksheet). Ensure the filename reflects the job particulars.
16. Send the compiled SREL PDF to the appropriate stakeholders as per the project management protocol.
17. Move the PDF to the Project Documents Folder > Sales Documents for proper record-keeping.
18. Record the job in the Job Log Excel file located in Data FS2 > Sales Department.
19. Mark the job as closed won in Acumatica, noting the reason as "Relationship."

Task | Organizing Active Installation Project Files

Description of the Task: Organizing and maintaining detailed records of active electrical installation projects, including blueprints, schedules, permits, and progress reports. Efficient organization of these files ensures easy access to crucial documents, facilitates project tracking, and supports compliance audits, helping the company stay on track with timelines and client expectations.

1. Log in to your document management system and navigate to the Job File Cabinet where all project-related files are stored.
2. Click on the Active Job Files directory specific to your region: Knoxville, Chattanooga, or Nashville. This will direct you to the folders containing current installation projects.
3. Choose a specific project folder to organize. Ensure it corresponds to an active installation job for accurate documentation management.
4. Inside the selected project folder, go to the Project Documents section, then access Sales Documents. This area contains essential sales-related documentation for the project.
5. Open the sales report for the job/project. This document provides critical insights into the scope of work, pricing, and customer details.
6. Check and note the following details from the sales report:
 - a. Job Name: Ensure it reflects the project's specific title.
 - b. Customer Name: Confirm it matches the client's official name.
 - c. Solution Type: Identify the solution type (e.g., Fire Alarm, Access Control).
 - d. Job Number: Verify that the job number is accurate and corresponds to the project.
7. Rename the job file folder to align with standardized naming conventions. Use the format:
 - a. [Job Name] - [Customer Name] - [Solution Type] - [Job Number]. This ensures clarity and consistency in file organization.
8. Continue this process for all folders within the Active Job Files directory. Systematically update each project's file name and ensure all documentation is correctly labeled.
9. After updating the file names, double-check that all documents are present and properly categorized. This includes proposals, contracts, compliance paperwork, and any relevant communication.
10. If you make significant updates or encounter discrepancies, document these changes in a project log or report. This record will assist future project management and audits.
11. If necessary, inform relevant team members about the updates made to project files. Clear communication ensures everyone has access to the latest documentation.
12. Conduct a final review of the entire Active Job Files directory to ensure that all folders are organized and correctly named. Address any outstanding issues before concluding the task.

Task | Populating Client and Project Data in Acumatica

Description of the Task: Entering and updating client information, project details, and job statuses in the Acumatica system, which serves as the central hub for managing electrical installation contracts. Accurate data entry is vital for tracking project progress, ensuring proper billing, and providing real-time insights for project managers and sales teams.

1. Log in to Outlook and review the email from the salesperson. Extract all relevant project details, including the client's needs, project scope, and any critical deadlines.
2. Access your Acumatica account and navigate to the Opportunities section to start a new entry.
3. Click on New Record and fill in the following fields to establish the project context:
 - a. Class ID to categorize the project type.
 - b. Probability to indicate the likelihood of closing the deal.
 - c. Estimated Close Date for when you anticipate finalizing the contract.
 - d. Subject to provide a brief description of the opportunity.
 - e. Owner to assign the project to the responsible salesperson.
4. Switch to the Attributes Tab and complete these critical fields to provide additional context:
 - a. Project Sales Type to identify the nature of the sale.
Customer Type to classify the client (e.g., residential, commercial).
 - b. Solution Type to specify the service offered (e.g., electrical installation, maintenance).
 - c. Industry Vertical to denote the sector the project pertains to.
 - d. Sales Stage to reflect the current phase of the sales process.
5. Click SAVE to ensure all entered data is securely recorded in the system.
6. Navigate to the Job File Cabinet and locate the Pre-job Folder. Within this section, create a New Folder for the specific project, adhering to your organization's naming conventions to facilitate easy retrieval.
7. Copy and paste all relevant documents from the salesperson's email into the newly created project folder, ensuring all necessary information is included for easy access.
8. Return to the opportunity in Acumatica and click on the Activities Tab.
9. Select Create Task and input the following details based on the information gathered from the salesperson:
 - a. Summary to provide a brief description of the task.
 - b. Due Date to establish a timeline for task completion.
 - c. Workgroup to identify the team responsible for the task.
 - d. Owner to designate the individual accountable for completing the task.
 - e. Category to classify the type of task being created.
 - f. Click SAVE to finalize the task entry.
10. Send a reply to the salesperson's email confirming that the opportunity has been created in the system, the project folder has been established, and the task has been assigned to the engineering team.
- f. [Estimated Start Date to outline when project work is expected to commence.
- g. Proposal Due Date to set a timeline for when the proposal should be submitted.
- h. Performing Branch to specify which location will manage the project.

Task | Communicating with Electrical Equipment Vendors

Description of the Task: Engaging with vendors to source electrical components, negotiate pricing, confirm delivery schedules, and resolve any supply chain issues. Effective communication with vendors ensures the timely procurement of high-quality materials, minimizing project delays and ensuring installations are completed to specification.

1. Review project specifications and requirements to determine the type of electrical equipment needed. Note any particular brands or models preferred for the job.
2. Gather a list of reputable electrical equipment vendors, including their contact information (phone numbers, email addresses, and websites). Ensure the list is updated and includes vendors that specialize in the required equipment.
3. Prepare a clear and concise email or phone script to reach out to vendors. Include:
 - a. A brief introduction of yourself and your organization.
 - b. Specific details about the project, including timelines and quantities of equipment needed.
 - c. Any particular questions regarding product availability, pricing, or delivery schedules.
4. Send the email or make the phone calls to each vendor on your list. Be sure to personalize your communication to build rapport and foster a professional relationship.
5. During phone calls, take detailed notes on the vendor's responses, including pricing, lead times, and any additional information provided about the products. Ask follow-up questions for clarification if needed.
6. Ask vendors for formal quotes or proposals for the equipment discussed. Ensure they include all relevant details such as pricing, shipping costs, and estimated delivery dates.
7. Once quotes are received, review each proposal for completeness and competitiveness. Compare pricing, terms, and the vendor's reputation for reliability and quality.
8. If you haven't received responses within the expected timeframe, follow up with the vendors to check on the status of your inquiries. This can be done via email or phone.
9. Keep a record of all communications with vendors in a centralized document or project management system. Include dates, contact details, and key points discussed for future reference.
10. Share vendor information and quotes with the relevant internal teams (e.g., project managers, purchasing department) to facilitate informed decision-making.
11. Based on the collected information, assist in making decisions regarding which vendors to engage for the project. Ensure selections align with project budget and requirements.
12. Once vendors are selected, confirm orders via email or phone. Ensure that all details (product specifications, quantities, pricing, and delivery dates) are accurate.
13. Keep lines of communication open with vendors for future projects. Regularly check in to build relationships and stay informed about new products or offerings.



FINNANCE

Task | Processing Accounts Payable for Installation Materials and Invoices

Description of the Task: Reviewing and processing invoices for installation materials received from suppliers. Accurate accounts payable management is crucial for maintaining good relationships with vendors, ensuring timely payments, and managing cash flow effectively. Proper processing helps to prevent project delays caused by unpaid invoices.

1. Launch the secure connection application and enter the necessary credentials to access the company network.
2. Navigate to the accounting folder and open the daily cash update report to assess available cash flow. Review the weekly aged accounts payable report to identify outstanding invoices. Modify the view to select the most recent accounts payable that are coming due.
3. Open the web browser and access the accounting software. Enter your login credentials to access the system, then select the payables module and click on prepare payments.
4. Process Payments for Vendors:
 - a. For each vendor, set the branch to the appropriate designation and select the payment method as "credit card." Choose the relevant cash account based on the vendor type and input today's date as the payment date.
 - b. Reference the approved vendor list and check all boxes next to the invoices that have been approved for payment. Verify that the total amount matches the records and, once confirmed, click the process button.
 - c. Repeat the steps for any additional vendors under the same payment method until all invoices have been processed.
5. Note that payments processed via check and ACH will be handled by designated personnel. Ensure that all necessary information is provided to facilitate these transactions.
6. Navigate back to the accounting folder and locate the payroll section related to accounts payable. Access the relevant credit card form and for each vendor due for payment, create or modify an existing folder to reflect the current date and vendor name.
 - a. Edit the spreadsheet by removing old invoices and amounts, replacing them with the latest due invoices and their corresponding total amounts. Confirm that the total matches the records and update the date accordingly. Copy the vendor's email address to prepare for further communication.
7. Create a new email addressed to the vendor, attaching the updated spreadsheet with the payment details. Ensure that all relevant parties are included in the email communication and send the message.
8. Access the secure login folder for online vendor payments. Retrieve the necessary credentials to enter the vendor's payment portal. Follow the provided instructions to complete the payment process, ensuring that the transaction is successful before logging out.
9. Open the communication application and log into the accounting system. Navigate to the vendor section and review any relevant notes for payment processing. Dial the vendor's contact number and provide the required details, including job numbers and invoice specifics, to facilitate the payment.

Task | Entering Expense Receipts for Electrical Components and Field Purchases

Description of the Task: Capturing and entering receipts for electrical components and materials purchased in the field. By accurately documenting these expenses, it ensures compliance with budgeting guidelines and provides a clear record of costs incurred during installation projects. This practice aids in financial tracking and reporting.

1. Launch the secure connection application and log in to establish a VPN connection to access the accounting system.
2. Open the File Explorer and navigate to the shared accounting directory. Access the "credit card" folder, then select the folder with the latest date related to recent transactions.
3. Open the BBT Excel file, format it as a table, and sort the entries alphabetically by cardholder name to streamline data entry.
4. Access the accounting software using your credentials to enter the system.
5. Go to the "Time and Expenses" section and open "Expense Claims" to start entering expense receipts.
6. Use the search icon to enter the first item listed in the BBT file and retrieve relevant expense claims.
7. Compare the amounts and post dates from the BBT file to the corresponding expense claims in the system.
8. Click on the reference number (highlighted in blue) to review all details of the submitted receipt and ensure accuracy.
9. Check the attached receipt by clicking the paperclip icon. Ensure the following are included:
 - a. Cardholder's name
 - b. Project number (if applicable)
 - c. Vehicle number (if relevant)
 - d. Names of employees present (for meals treated by managers)
 - e. If anything appears suspicious or fraudulent, report it to the appropriate personnel.
10. Confirm that the description and amount on the receipt match the details in the BBT file.
11. If the receipt is valid and the amounts match, highlight the corresponding cell in the BBT file in green to indicate it has been verified.
12. In the Expense Claims section, review the "Expense Account" and "Expense Item" fields to ensure the correct codes are used:
 - a. For the Expense Account, refer to the Chart of Accounts to confirm codes:
 - i. Codes starting with 7 are for internal/admin personnel.
 - ii. Codes starting with 6 are for field personnel.
 - b. For the Expense Item, confirm:
 - i. "OPS" is for field personnel.
 - ii. "G&A" is for internal/admin personnel.
13. To verify the Expense Sub and Branch, look up the employee in the employee directory:
 - a. Click on the employee ID to access their profile.
 - b. Review the branch information under General Info, and note the employee's manager for any follow-ups on missing receipts.
 - c. Check the Expense Sub in the Financial Settings section.
14. If the receipt pertains to a project, open the Service Orders section in a new tab and verify that the project is entered. If not, reach out to the cardholder for the correct project number.
15. Under the Tax Category, classify the receipt accordingly:
 - a. Non-taxable for hotels and rentals.
 - b. Taxable if the receipt includes tax.
 - c. Materials for material purchases.
 - d. Labor for labor costs.
 - e. Others for any expenses that do not fit the above categories.
16. If the receipt has a tax component, enter the appropriate tax amount in the designated field.
17. Once validated, hit "Submit" and then "Release" to finalize the expense claim. If any edits were made, ensure to save those changes.
18. Be mindful of the status:
 - a. If the status is "On Hold," you can edit the details.
 - b. If the status is "Approved," edits cannot be made; in this case, delete the expense claim and re-enter it under Expense Receipts if changes are necessary.
 - c. If the status is "Released," notify the relevant personnel for any needed reclassifications and provide necessary details to IT for further processing.

Task | Tracking Upcoming Payments to Electrical Suppliers and Vendors

Description of the Task: Monitoring payment schedules for electrical suppliers and vendors to ensure timely payments. Proactive tracking is vital for maintaining supplier relationships and avoiding late fees or disruptions in material supply, which can impact project timelines and overall operational efficiency.

1. Launch the FortiClient application and establish a VPN connection to access the necessary accounting systems securely.
2. Navigate to the Accounting folder and open the relevant subfolders:
 - a. Daily Cash: Review the daily cash flow to understand current liquidity.
 - b. Weekly Aged Accounts: Check the aging reports to track outstanding payments.
 - c. Modified Folders: Locate and select the latest saved accounts payable (AP) report that indicates payments coming due.
3. Enter your credentials to log in to Acumatica. Once logged in:
 - a. Navigate to the Payables section.
 - b. Select AP Coming Due to view upcoming payment obligations.
 - c. Change the company branch for accurate reporting.
 - d. Set the date filter to the Thursday of the following week to capture all upcoming payments within the relevant timeframe.
 - e. Run the report to compile the necessary data for analysis.
 - f. Export the report to an Excel spreadsheet for further processing.
4. Open the exported Excel file and make the following adjustments:
 - a. Highlight the first four rows to emphasize header information and increase the font size for better visibility.
 - b. In cell G1, enter the word "Check", and highlight cells G1 and H1 in green.
 - c. In cell G2, enter "ACH", and highlight cells G2 and H2 in green.
 - d. In cell G3, enter "Pinnacle", and highlight cells G3 and H3 in yellow.
 - e. In cell G4, enter "AMEX", and highlight cells G4 and H4 in blue.
5. Carefully review the dates under each vendor to confirm which payments are due this week and next week, up until the following Thursday:
 - a. For any vendor that has no upcoming payments, delete all corresponding details from the report.
 - b. For vendors with upcoming payments, check if the payment method is designated as Check, ACH, Pinnacle, or AMEX. Highlight the vendor name and the total payment amount according to the previously assigned color codes.
6. After organizing the payment information by color codes, sum the totals for each payment method:
 - a. The totals should be placed in cells H1 to H4 corresponding to Check, ACH, Pinnacle, and AMEX.
7. Ensure that the total amounts for each credit card payment method align with the grand total for upcoming payments. This helps in maintaining financial accuracy.
8. Save the updated Excel file and navigate back to the Accounting folder. Go to the Daily Cash and Weekly Aged subfolders, then save the file with the naming convention using the current date in the format YYYYMMDD.
9. Send the finalized Excel report to the designated approval contact for review. Ensure that the document is marked as ready for payment to facilitate timely processing, aiming for payments to be executed by tomorrow or Friday.

Task | Performing Financial Reconciliation

Description of the Task: Comparing and verifying financial records to ensure accuracy between accounts payable and received invoices. Regular reconciliation is essential for identifying discrepancies, maintaining accurate financial reporting, and ensuring that all transactions are correctly recorded, which supports overall financial health.

1. Launch the VPN application to establish a secure connection to the remote desktop necessary for financial tasks.
2. Click on the remote desktop icon and log in using your credentials.
3. In the remote desktop environment, locate and open the financial management software.
4. Enter your credentials to access the features and data related to service contracts.
5. Click on the Service Dispatch section within the software interface to begin the reconciliation process.
6. From the Service Dispatch menu, select Contract Processing to manage and review existing contracts.
7. Within Contract Processing, choose Contract Maintenance to view and edit specific service contracts as needed.
8. Open your email client and search for the Service Contract Billing document for the prior month, along with the associated billing schedule from the previous period. These documents will provide essential details for reconciliation.
9. Upon opening the Service Contract Billing document, verify the following key details:
 - a. Notes regarding any special terms or conditions.
 - b. Service Contract ID for tracking.
 - c. Billed Amount for accuracy.
 - d. Customer Contract Number for identification.
 - e. Billing Customer to ensure proper invoicing.
 - f. Billing Location where services are rendered.
 - g. Billing Period indicating the timeframe for the billing cycle.
10. Upon reviewing the billing schedule, check for the following essential information:
 - a. Notes that might highlight any issues or adjustments.
 - b. Customer Number associated with the billing.
 - c. Contract Number for reference.
 - d. Schedule Date when billing is expected.
 - e. Schedule Amount to confirm against billed amounts.
 - f. Contract Division to classify the type of service provided.
11. Open a web browser and navigate to the internal management software to verify contract details.
12. Enter your credentials to access the internal management system. Once logged in:
 - a. Go to the designated section for Service Contracts.
 - b. Search for the relevant service contracts listed in the spreadsheet.
 - c. Select the appropriate contract based on the type (e.g., Monitoring, Maintenance, Inspection, Security).
 - d. Review the Services per Period to verify billed amounts match the agreed terms.
13. While still in the internal management software, verify:
 - a. General details such as the contract date.
 - b. Billing amounts to confirm correctness.
 - c. Scheduled billing dates.
 - d. Additional notes and instructions related to the contract.
14. If encountering difficulty locating specific data, return to the Service Dispatch section for additional resources or information.
15. Access the designated folder in the remote desktop and click on Active Service Agreement. Open the corresponding document to check:
 - a. Type of service provided.
 - b. Date of the service agreement.
 - c. Location where services are performed.
16. After verifying all relevant details, return to the internal management software and input any missing information, particularly the contract amount, notes, and relevant codes to ensure all records are complete and accurate.
17. After completing your updates in the internal management system, return to the spreadsheet:
 - a. Highlight rows in green if all information is accurate and reconciled.
 - b. If there are discrepancies or errors in billing, add notes highlighting the issues and mark those entries in red for correction. Communicate with the designated contact for verification of contracts.

Task | Matching and Entering Payments in QuickBooks from Bank Statements

Description of the Task: Reconciling payments made to electrical suppliers against bank statements in QuickBooks. Accurate matching ensures that all payments are accounted for and recorded properly, contributing to clean financial statements and providing insights into cash flow management for ongoing and future projects.

1. Begin by opening the QuickBooks Desktop application on your computer to access financial records.
2. Enter your username and password to gain access to the system.
3. Navigate to the Customers menu. If the bank statement reflects a credit transaction, select Receive Payments. This action is typically taken when payments are received from clients for completed electrical installation services.
4. In the transaction details, locate the relevant customer payment. Match the amount received, the customer's name, and the date of the transaction as listed in the bank statement to ensure accuracy.
5. Once the payment has been successfully matched, proceed to record the deposit. Click on the Banking menu and select Make Deposits.
6. A window will appear displaying the payments you recorded earlier. Select the appropriate transactions and confirm the deposit to accurately reflect the received amounts in your financial records.
7. For transactions where payments are debited from the bank, navigate to the Vendors section, as this pertains to payments made to suppliers for electrical components and materials.
8. Click on Pay Bills to begin processing these payments. Match the vendor's name, the amount being paid, and the transaction date from the bank statement to the corresponding entries in QuickBooks.
9. Ensure that each payment detail, including the date, amount, and any other relevant information, aligns perfectly with the data in the bank statement. This step is crucial for maintaining accurate records and will facilitate a smoother bank reconciliation process.
10. After verifying all details, click the Pay button to finalize the payment to the vendor. This step confirms that the payment has been processed in QuickBooks and reflects the outflow of cash for your electrical services operations.
11. Regularly review your QuickBooks entries against bank statements to identify any discrepancies. Consistent matching and entering of payments will enhance the accuracy of your financial reports and aid in managing cash flow effectively.



HR & RECRUITMENT

Task | Posting Job Listings for Licensed Electricians

Description of the Task: Creating and disseminating job listings aimed at attracting qualified licensed electricians to join the team. It's essential for filling critical positions that ensure projects are completed efficiently and safely. By effectively promoting job openings, the organization can build a skilled workforce, enhance service delivery, and maintain high standards in electrical installations.

1. Review the job description to identify essential qualifications, skills, and experience required for the licensed electrician position. Ensure it includes details about necessary licenses, certifications, and any specific expertise in electrical installations.
2. Identify and select relevant online job boards and platforms where the listings will be posted. Consider industry-specific sites such as electrical trade associations, local job boards, and general platforms like Indeed, LinkedIn, or Glassdoor.
3. Write a compelling job listing that includes:
 - a. Job title (e.g., Licensed Electrician)
 - b. Company overview and values
 - c. Key responsibilities (e.g., installing electrical systems, troubleshooting, adhering to safety codes)
 - d. Required qualifications (e.g., state license, years of experience)
 - e. Benefits offered (e.g., competitive salary, health benefits, continuing education opportunities)
 - f. Application instructions (e.g., how to apply, deadline for applications)
4. Share the drafted job listing with the hiring manager or relevant stakeholders for review. Incorporate any feedback or revisions to ensure accuracy and appeal.
5. Log into the selected job platforms and post the approved job listing. Ensure that the formatting is clear and visually appealing, and all relevant information is included.
6. Share the job posting on social media platforms and within relevant online communities to reach a broader audience. Encourage current employees to share the listing with their networks.
7. Regularly check the job posting for incoming applications. Organize and track applicant submissions in a designated folder or spreadsheet for easy reference.
8. Manage any inquiries regarding the job listing from potential candidates. Provide timely and informative responses to help attract qualified applicants.
9. Communicate with the HR and recruitment teams about the status of the job posting, including the number of applications received and any notable candidates.
10. After a predetermined period, review the effectiveness of the job posting. Assess the number and quality of applications received and make necessary adjustments to the job description or posting strategy for future listings.

Task | Tracking Hours Worked by Electricians and Crews on Projects

Description of the Task: Monitoring and recording the hours worked by electricians and their crews on various installation projects. This process is vital for managing labor costs, ensuring compliance with labor regulations, and optimizing resource allocation. By tracking hours diligently, the company can enhance project budgeting, improve productivity analysis, and ensure timely billing for services rendered.

1. Log in to the company's time tracking software or system where electricians and crews submit their hours. Ensure you have the necessary credentials and access rights.
2. Familiarize yourself with the current projects being handled by electricians and crews. Check the project management tool or documentation to understand which teams are assigned to which projects.
3. Collect Daily Time Entries:
 - a. Communicate with team leads or supervisors to remind them to submit daily time entries for their crews.
 - b. Ensure that entries include the number of hours worked, project codes, and any specific tasks completed (e.g., wiring, installations, inspections).
4. Review submitted time entries for accuracy. Cross-reference with project schedules and work orders to confirm that reported hours align with the actual work completed.
5. Update Time Tracking System:
 - a. Enter or update the verified hours into the time tracking system, ensuring each entry reflects the correct project and crew member.
 - b. Maintain consistent formatting for clarity, such as using standardized codes for projects and tasks.
6. Use the tracking system to generate reports on total hours worked by each electrician and crew per project. This may involve exporting data to a spreadsheet for easier manipulation and review.
7. Assess the hours worked against project budgets to ensure labor costs are within expected limits. Highlight any discrepancies or concerns for management review.
8. Share the compiled hours and labor cost analysis with project managers or supervisors. Provide insights into workforce productivity and any issues that may affect project timelines or budgets.
9. If there are missing or incomplete time entries, reach out to the respective electricians or crew leads to gather the necessary information. Ensure that all hours are accounted for in a timely manner.
10. Organize and maintain accurate records of hours worked for each project. Ensure that documentation is stored in a systematic manner for future reference and compliance purposes.
11. Generate weekly or monthly reports summarizing hours worked, project progress, and any labor-related insights. Distribute these reports to relevant stakeholders for review.
12. After a period of tracking, evaluate the effectiveness of the time tracking process. Gather feedback from electricians and crew leads to identify any areas for improvement and make necessary adjustments to streamline future tracking efforts.