

QUICK REFERENCE GUIDE TO THE FACILITIES MANAGEMENT BILLING DETAIL LOOKUP

<https://www.fm.wmich.edu/go/bo>

Step 1. Use description on GLOW line billing to determine which section to use on FM Billing Site

A. Sales Orders:

- Items from Maintenance Stores (typically fuel purchases) that hit a fund and cost center directly. These will charge against the 4490 object code.
- Charges will look like this in GLOW

12/31/2013	FM3DEC	SALES ORDER: 148667	.	54.76
12/31/2013	FM3DEC	SALES ORDER: 149061	.	62.29
12/31/2013	FM3DEC	SALES ORDER: 149206	.	60.87

B. Work Orders:

- Used to bill and/or track charges for specific work
 - Prefix can give indication of type of work
- | | |
|---------------------------------------|--------------------------------|
| S_ = Maintenance Shops (S1, S3...) | XL = Lockshop / Public Safety |
| S0 = Outside contractor, Misc charges | L_ = Landscape (LS, LM, LC) |
| R1 = Recharge/Remodel Shop | C_ = Custodial (CA, CI, CC...) |
| R2 = Sign Shop | TS = Transportation |
- No established budget
 - Hits object code 4390 (most work orders) or 4988 (transportation work orders)
 - Charges will look like this in GLOW

01/31/2014	FM4JAN	WORKORDER:TS-139550 VEH:0196	.	711.59
01/31/2014	FM4JAN	WORKORDER:TS-139556 VEH:1011	.	30.51
01/31/2014	FM4JAN	WORKORDER:TS-139564 VEH:1044	.	44.44

C. Projects:

- Projects are usually a larger scope of work that may include numerous work orders
- Projects require signed project approval and established budget
- All charges bill through project work orders. In most cases, this will hit object code 4390
- R projects were created and closed prior to July 29, 2013. LR projects were created before WebTMA conversion and were open on July 29, 2013. P projects are projects created after July 29, 2013. The two digits after P indicate year project opened (P130005 was opened in 2013).
- Charges will look like this in GLOW

12/31/2013	FM3DEC	PROJECT:LR10325 (WO:S0-108973)	.	5,655.31
12/31/2013	FM3DEC	PROJECT:LR10325 (WO:XL-104521)	.	3,829.27

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Step 2. Go to FM Billing Site to retrieve information

Enter sales order number, work order number, or project number into appropriate box and hit “Search for Sales Order” button, “Search for Work Order” button, or “Search for Project” button

- A. Sales Orders: Searching for a sales order will take you directly to detailed information about the purchase. Includes transaction date, requestor, product description, and cost break down. These are typically fuel purchases.
- B. Work Orders: Searching for a work order will take you to a summary page showing work order description information (request, requestor, date requested, location, summary of GLOW dates, and cost summary).
 1. For detailed information on monthly charges, click on the “+” to the left of summary of GLOW dates. This opens up the monthly billing (or pending billing, if current month) and shows you what charges make up your billing for that month.
 2. Hovering on detail lines can provide additional information (contract numbers, invoice numbers, names of people who purchased if on pro card).
 3. Hovering over lines in the billed column can give you additional details. This may be especially useful if it is a line item pending billing.
- C. Projects: Searching for a project will take you to a summary page showing project description information (request, requestor, date requested, location, budget amounts, amounts billed to date, pending amounts, and a summary of all work orders attached to a project).
 1. For detailed information on monthly charges, you will need to look at the work orders (see section above).
 2. When you click on a work order, the work order opens in a new tab.

Step 3. Contact us if you have additional questions

- A. Questions regarding sales orders.
 - Contact 7-8523 or 7-8527 or maint-stores@wmich.edu
- B. Questions regarding work orders, project billing information, or general website concerns.
 - Contact 7-8524 or 7-8532 or fm_ops@wmich.edu
- C. Questions regarding project work scope
 - Contact your project manager