

## "Operations" module

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Since the information on housing is very broad, three separate modules deal with this subject:

- The [Residence] module for the building(s)
- The [Equipment] module for their contents
- **The [Operations] module for current household expenses and the costs related to the maintenance of facilities.**

The [Operations] module allows to follow the costs and interventions related to each place of residence.

Invoices can either be entered directly in the [Operations] module or entered and paid from the [Invoices] module. Once the payment has been validated in the [Invoices] module, they will be automatically added to the relevant tab of the [Operations] module.

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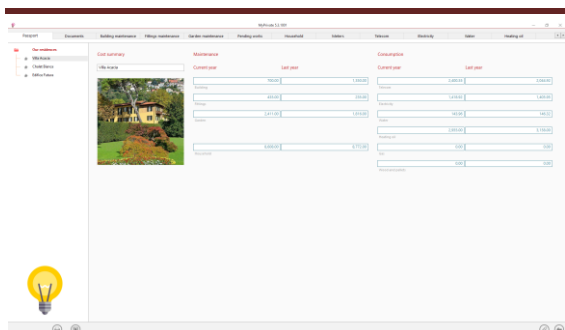
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## Summary of module tabs

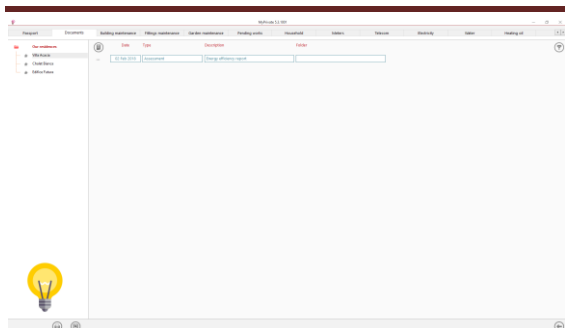
[Passport]	Overview of maintenance and consumption costs for the current year and comparison with the previous year
[Documents]	Non-financial documents
[Building Maintenance]	Building maintenance costs
[Facility Maintenance]	Facility maintenance costs
[Garden Maintenance]	Garden maintenance costs
[Pending works]	List and amount of work to be done
[Household]	Costs related to current household
[Meters]	List of services and products related to consumption
[Telecom]	Telecommunication charges
[Electricity]	Electricity costs
[Water]	Water consumption costs
[Heating oil]	Heating oil consumption costs
[Gas]	Gas Consumption Costs
[Wood/Pellets]	Wood/pellet consumption costs
[Contracts]	List of various contracts in progress
[Notepad]	This is the area for various notes about the current module
[Reports]	Selection of information to print

## [Passport]



The [Operations] module passport provides an overview of maintenance and consumption costs for the current year as well as for the previous year.

## [Documents] - Summary



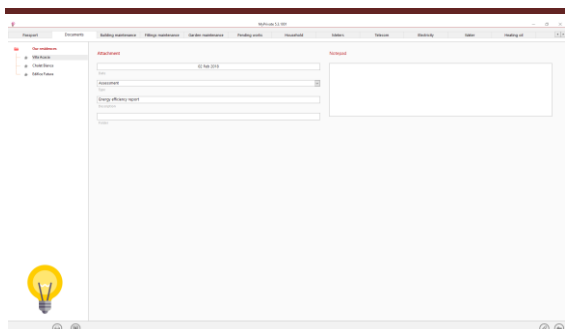
This tab allows you to scan and preserve all types of documents by assigning them a date, a type and a title. A summary of documents related to the place of residence is displayed and allows a quick view of the documents available.

To add a new document, click on the icon



. The screen below opens:

## [Documents] - Detail



Enter the date of the document, a type (select an existing type from the drop-down menu or enter a new one) and a description. These three items will appear in the [Documents] - Summary. The [Notepad] field is for adding additional information.

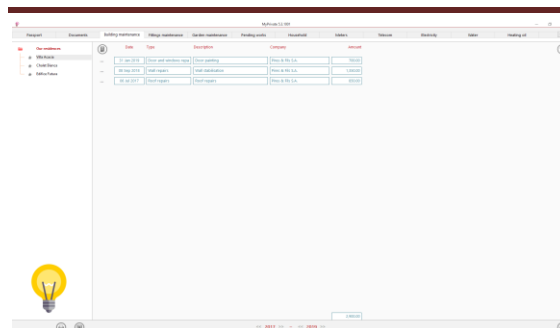
Once these fields are filled, click on the icon



to start scanning documents.

For scanning and document integration, refer to the "Document Management" user manual.

## [Building maintenance] - Summary

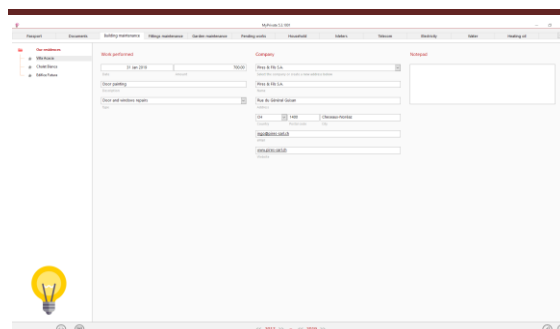


Displays a complete list of maintenance costs related to the building envelope.

The costs entered in this tab only concern the maintenance of the building (investments increasing the value of the building will be inserted in the [Transformations] tab of the [Residence] module.

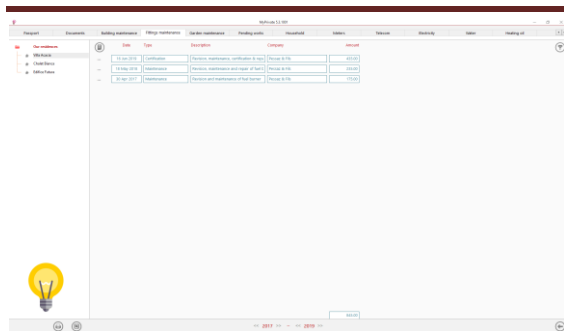
To view and/or edit the details of a record, click on the [...] field on its left.

## [Building maintenance] - Detail



Detailed information on the work carried out and the mandated company.

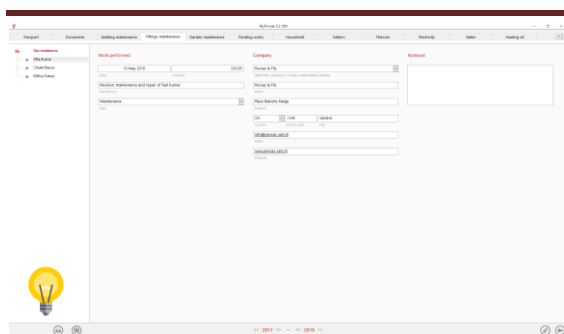
### [Fittings maintenance] - Summary



Displays a complete list of facility maintenance costs.

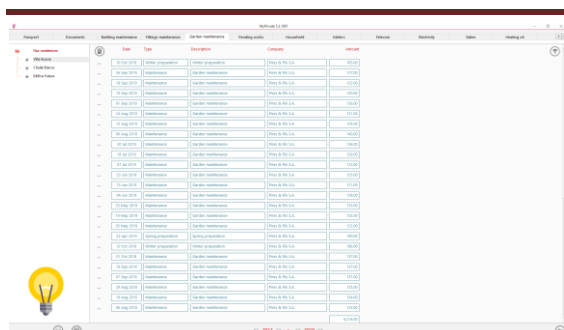
To view and/or edit the details of a record, click on the [...] field on its left.

### [Fittings maintenance] - Detail



Detailed information on the work carried out and the mandated company.

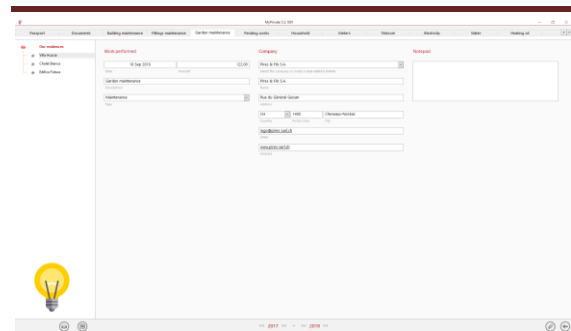
### [Garden maintenance] - Summary



Displays a complete list of garden maintenance fees.

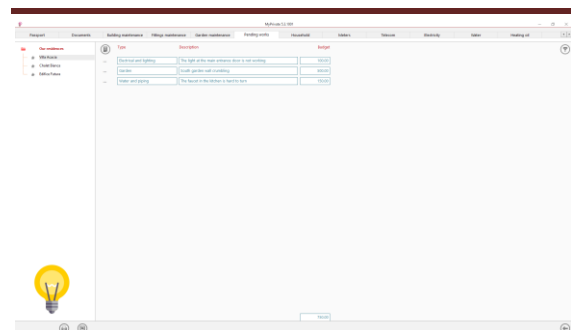
To view and/or edit the details of a record, click on the [...] field on its left.

### [Garden maintenance] - Detail



Detailed information on the work carried out and the mandated company.

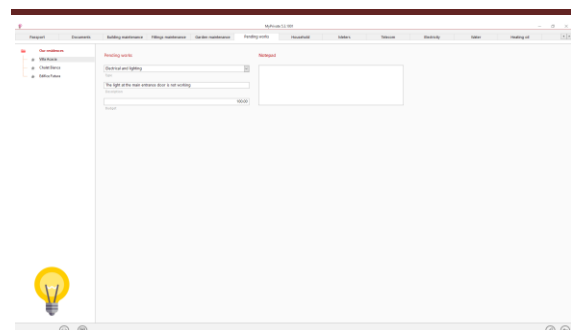
### [Pending works] - Summary



Displays a complete list of planned works and repairs, as well as their estimated price.

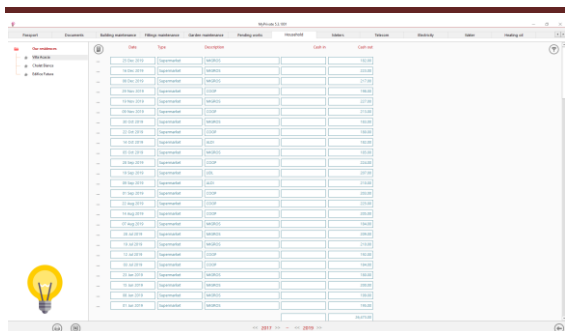
To view and/or edit the details of a record, click on the [...] field on its left.

### [Pending works] - Detail



Detailed information on planned works and repairs and their cost.

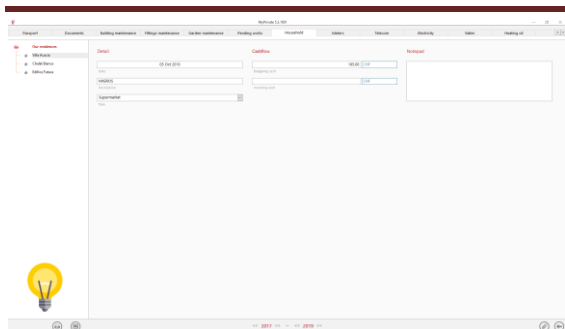
## [Household] - Summary



Displays the complete list of current household costs, e.g. supermarket, cleaning products, etc.

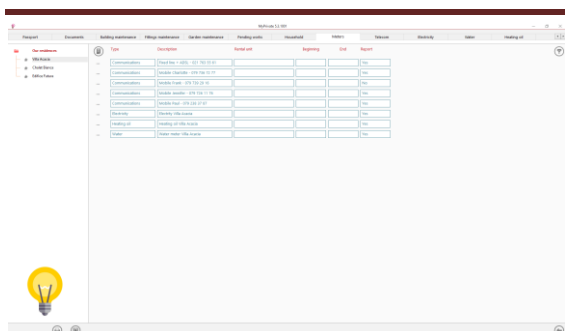
To view and/or edit the details of a record, click on the [...] field on its left.

## [Household] - Detail



Detailed information on the expenditure, and comments.

## [Meters] - Summary



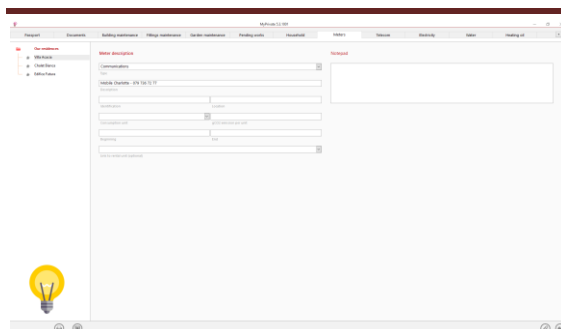
In the [Meters] tab, the services and products for which periodic invoices linked to measurable consumption will be issued are created.

These invoices will then be saved in their respective tabs:

[Telecom], [Electricity], [Water], [Heating oil], [Gas] and [Wood / Granulate].

To view and/or edit the details of a record, click on the [...] field on its left.

## [Meters] - Detail



Detailed information by counter.

### Special fields:

#### [Type]:

The type is mandatory and determines in which tab the consumption will be saved.

#### [Identification]:

Counter number used by the service provider when invoicing.

#### [Location]:

Physical location of the meter.

#### [Unit of consumption]:

Choose the unit used for billing from the drop-down menu or leave the field blank.

#### [CO<sub>2</sub> emissions]:

MyPrivate provides default values for emissions. These can be accepted or modified.

These values will automatically be included in the [Ecology] module for the estimation of the family's CO<sub>2</sub> footprint.

#### [Start]:

Date of commissioning.

[End]:

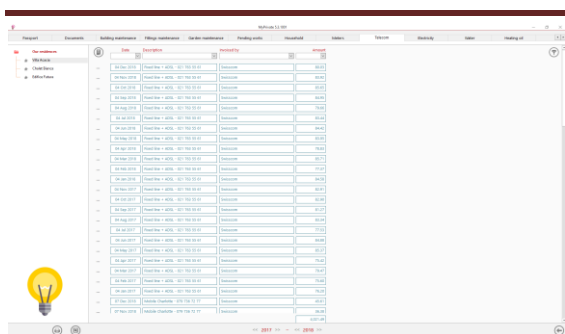
Stop Date

It is possible to ensure meters are not displayed after the end date, by disabling them in the [Control panel]. The latter will nevertheless be stored in the database and can be consulted if necessary by re-displaying them.

[Link to location]:

Select a location to which the meter is linked. This must have been previously created in the [Local] tab of the [Residence] module.

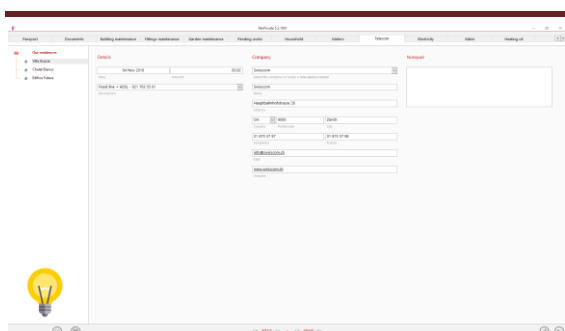
## [Telecom] - Summary



Displays the complete list of telecommunication charges/invoices for the selected period.

To view and/or edit the details of a record, click on the [...] field on its left.

## [Telecom] - Detail



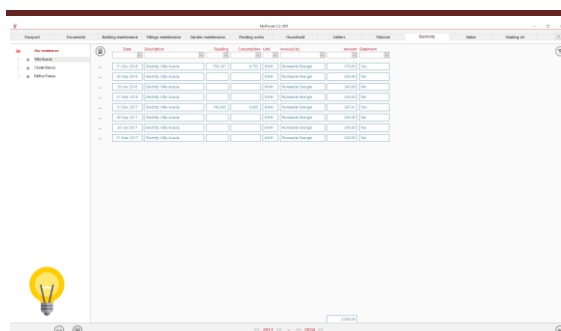
Detailed information on telecommunication fees.

## Special features of the tab:

The different numbers/positions are created in the [Meters] tab.

The desired number/position is displayed in the drop-down menu at the bottom of the screen.

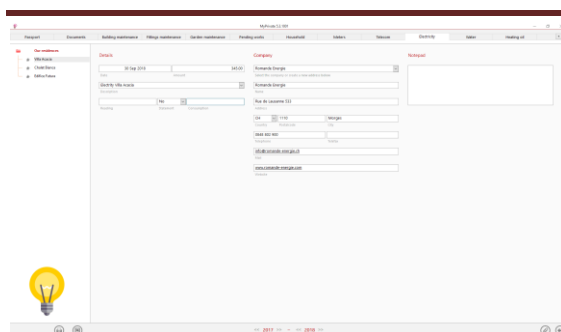
## [Electricity] - Summary



Displays a complete list of electricity charges/bills for the selected period.

To view and/or edit the details of a record, click on the [...] field on its left.

## [Electricity] - Detail



## Special features of the tab:

Electricity meters are created beforehand in the [Meters] tab.

The desired number/position is displayed in the drop-down menu at the bottom of the screen.

This tab allows you to track consumption and electricity costs.

- 1) Registration of an invoice with indication of cost, meter reading and consumption.
- 2) Intermediate reading of the counter value.  
In this case no cost is entered.

Special fields:

[Reading]:

Value on the counter or on the invoice.

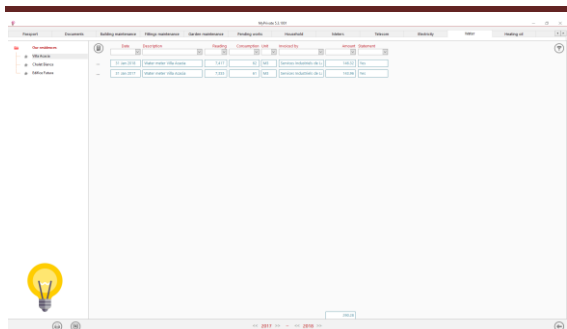
[Count]:

Indicate "Yes" or "No". After each countdown, the cumulative consumption restarts at 0. For an annual view, it is advisable to insert only one count per year, e.g. 1<sup>st</sup> January.

[Consumption]:

This field is automatically calculated and shows the accumulated consumption since the last count.

## [Water] - Summary

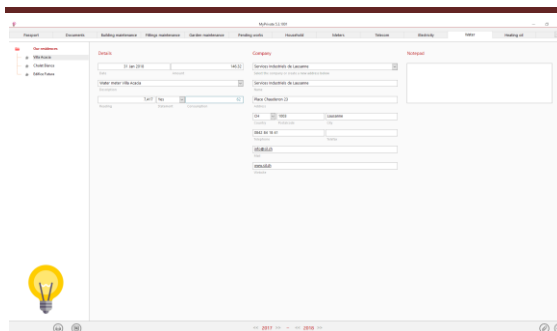


Date	Description	Reading	Consumption	Cost	Unit
15/01/2018	Water meter 100000	100000	100000	100000	100000
15/01/2018	Water meter 100000	100000	100000	100000	100000

Displays a complete list of water charges/bills for the selected period.

To view and/or edit the details of a record, click on the [...] field on its left.

## [Water] - Detail



Form fields include: Date, Description, Reading, Consumption, Cost, Unit, and various checkboxes for status and location.

Special features of the tab:

Water meters are created beforehand in the [Meters] tab.

The desired number/position is displayed in the drop-down menu at the bottom of the screen.

This tab allows you to track water consumption and costs.

- 1) Registration of an invoice with indication of cost, meter reading and consumption.
- 2) Intermediate reading of the counter value.  
In this case no cost is entered.

Special fields:

[Report]:

Value on the counter or on the invoice.

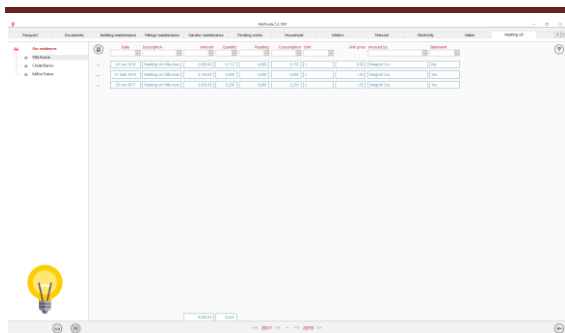
[Count]:

Indicate "Yes" or "No". After each countdown, the cumulative consumption restarts at 0. For an annual view, it is advisable to insert only one count per year, e.g. 1<sup>st</sup> January.

[Consumption]:

This field is automatically calculated and shows the accumulated consumption since the last count.

## [Heating oil] - Summary

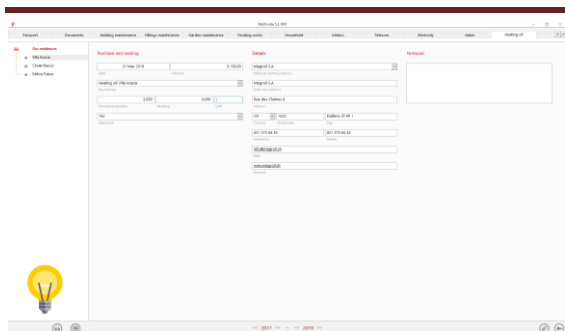


Date	Description	Amount	Consumption
1 Jan 2018	Heating oil (1000)	1000.00	1000.00
1 Feb 2018	Heating oil (1000)	1000.00	2000.00
1 Mar 2018	Heating oil (1000)	1000.00	3000.00
1 Apr 2018	Heating oil (1000)	1000.00	4000.00
1 May 2018	Heating oil (1000)	1000.00	5000.00
1 Jun 2018	Heating oil (1000)	1000.00	6000.00
1 Jul 2018	Heating oil (1000)	1000.00	7000.00
1 Aug 2018	Heating oil (1000)	1000.00	8000.00
1 Sep 2018	Heating oil (1000)	1000.00	9000.00
1 Oct 2018	Heating oil (1000)	1000.00	10000.00
1 Nov 2018	Heating oil (1000)	1000.00	11000.00
1 Dec 2018	Heating oil (1000)	1000.00	12000.00

Displays a complete list of heating oil charges/bills for the selected period.

To view and/or edit the details of a record, click on the [...] field on its left.

## [Heating oil] - Detail



### Special features of the tab:

The meters for the heating oil are created in the [Meters] tab.

The desired number/position is displayed in the drop-down menu at the bottom of the screen.

This tab allows you to track water consumption and costs.

- 1) Registration of an invoice with indication of cost, meter reading and consumption. The survey is made once the tank has been filled.
- 2) Intermediate reading of the contents of the tank. In this case no cost is entered.

### Special fields:

#### [Report]:

Contents of the tank.

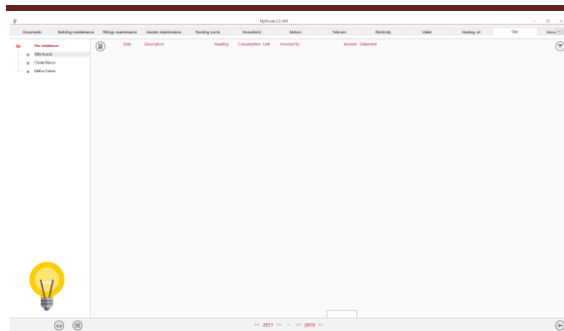
#### [Count]:

Indicate "Yes" or "No". After each countdown, the cumulative consumption restarts at 0. For an annual view, it is advisable to insert only one count per year, e.g. 1<sup>st</sup> January.

#### [Consumption]:

This field is automatically calculated and shows the accumulated consumption since the last count.

## [Gas] - Summary

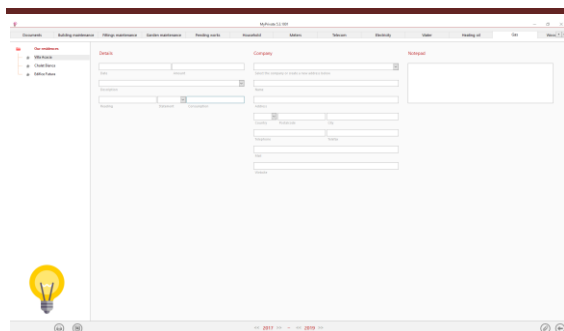


Date	Description	Amount	Consumption
1 Jan 2018	Gas (1000)	1000.00	1000.00
1 Feb 2018	Gas (1000)	1000.00	2000.00
1 Mar 2018	Gas (1000)	1000.00	3000.00
1 Apr 2018	Gas (1000)	1000.00	4000.00
1 May 2018	Gas (1000)	1000.00	5000.00
1 Jun 2018	Gas (1000)	1000.00	6000.00
1 Jul 2018	Gas (1000)	1000.00	7000.00
1 Aug 2018	Gas (1000)	1000.00	8000.00
1 Sep 2018	Gas (1000)	1000.00	9000.00
1 Oct 2018	Gas (1000)	1000.00	10000.00
1 Nov 2018	Gas (1000)	1000.00	11000.00
1 Dec 2018	Gas (1000)	1000.00	12000.00

Displays the complete list of gas charges/invoices for the selected period.

To view and/or edit the details of a record, click on the [...] field on its left.

## [Gas] - Details



### Special features of the tab:

Gas meters are created beforehand in the [Meters] tab. The consumption can be indicated in KWH or M<sup>3</sup>.



The desired number/position is displayed in the drop-down menu at the bottom of the screen.

This tab allows you to track consumption and gas costs.

- 1) Registration of an invoice with indication of cost, meter reading and consumption.
- 2) Intermediate reading of the counter value.  
In this case no cost is entered.

Special fields:

[Report]:

Value on the counter or on the invoice.

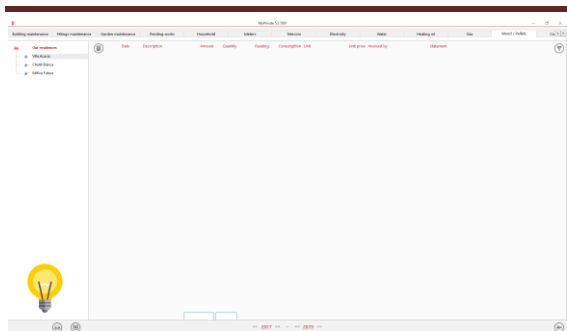
[Count]:

Indicate "Yes" or "No". After each countdown, the cumulative consumption restarts at 0. For an annual view, it is advisable to insert only one count per year, e.g. 1<sup>st</sup> January.

[Consumption]:

This field is automatically calculated and shows the accumulated consumption since the last count.

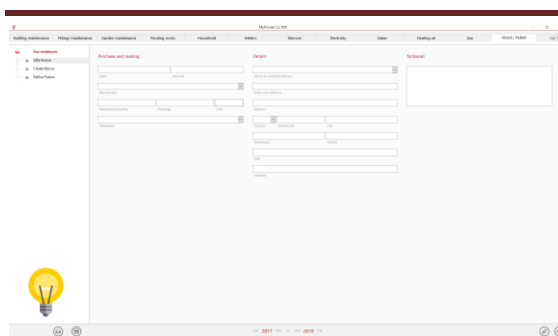
### [Wood/Pellets] - Summary



Displays the complete list of pellet charges/invoices for the selected period.

To view and/or edit the details of a record, click on the [...] field on its left.

### [Wood/Pellets] - Details



Special features of the tab:

The meters for pellets are created in the [Meters] tab.

The desired number/position is displayed in the drop-down menu at the bottom of the screen.

This tab allows you to track pellet consumption and costs.

- 1) Registration of an invoice with indication of cost, meter reading and consumption.  
The survey is made once the tank has been filled.
- 2) Intermediate record of silo contents. In this case no cost is entered.

Special fields:

[Report]:

Content of the silo.

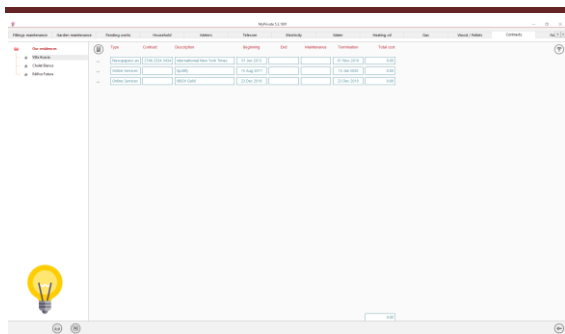
[Count]:

Indicate "Yes" or "No". After each countdown, the cumulative consumption restarts at 0. For an annual view, it is advisable to insert only one count per year, e.g. 1<sup>st</sup> January.

[Consumption]:

This field is automatically calculated and shows the accumulated consumption since the last count.

## [Contracts] - Summary



Type	Contract	Description	Beginning	End	Maintenance	Termination	Total cost
Subscription	123456789	Subscription for 12 months	12/12/2017	11/12/2018	12000	12000	24000
Subscription	987654321	Subscription for 24 months	12/12/2017	11/12/2019	24000	24000	48000
Subscription	111111111	Subscription for 36 months	12/12/2017	11/12/2020	36000	36000	72000

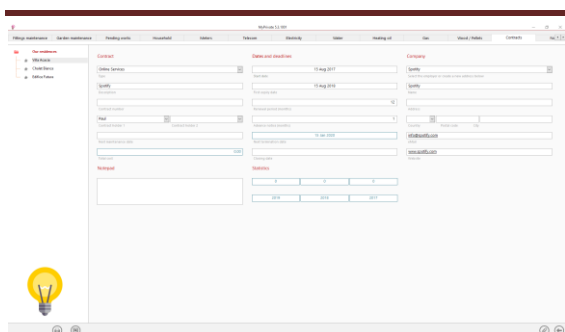
Displays the complete list of various contracts and commitments signed.

This tab allows you to have a complete view of the various commitments made with their cumulative amounts, duration and possibility of termination.

When the invoices are broken down in the [Payments] module, it is possible to allocate the costs to a specific contract.

To view and/or edit the details of a record, click on the [...] field on its left.

## [Contracts] - Detail



### Special fields:

#### [Type]:

Allows grouping of contracts by nature, such as "Maintenance and Certification", "Subscriptions", "Online Services" and "Telecommunications".

#### [Date of next service]:

This date will automatically appear in the calendar of events

#### [Total cost]:

This field automatically displays the accumulated total value of the values broken down on the contract, over the total period of use.

#### [Next termination date]:

This is the next due date of the contract, minus the termination period. This date is calculated automatically, it also appears in the calendar of events.

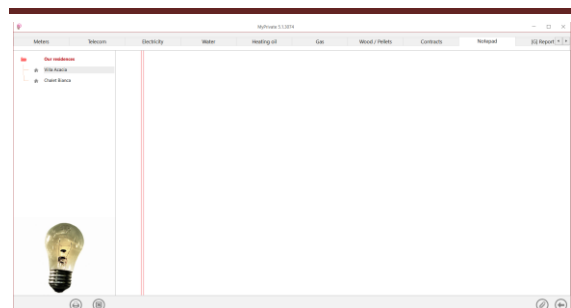
#### [Statistics]:

These 6 fields contain values displayed automatically for the current year, as well as the two previous years.

These are the values broken down on the various contracts.

The financial values on this tab do not appear in the [Finance] module and are stored for informational purposes only.

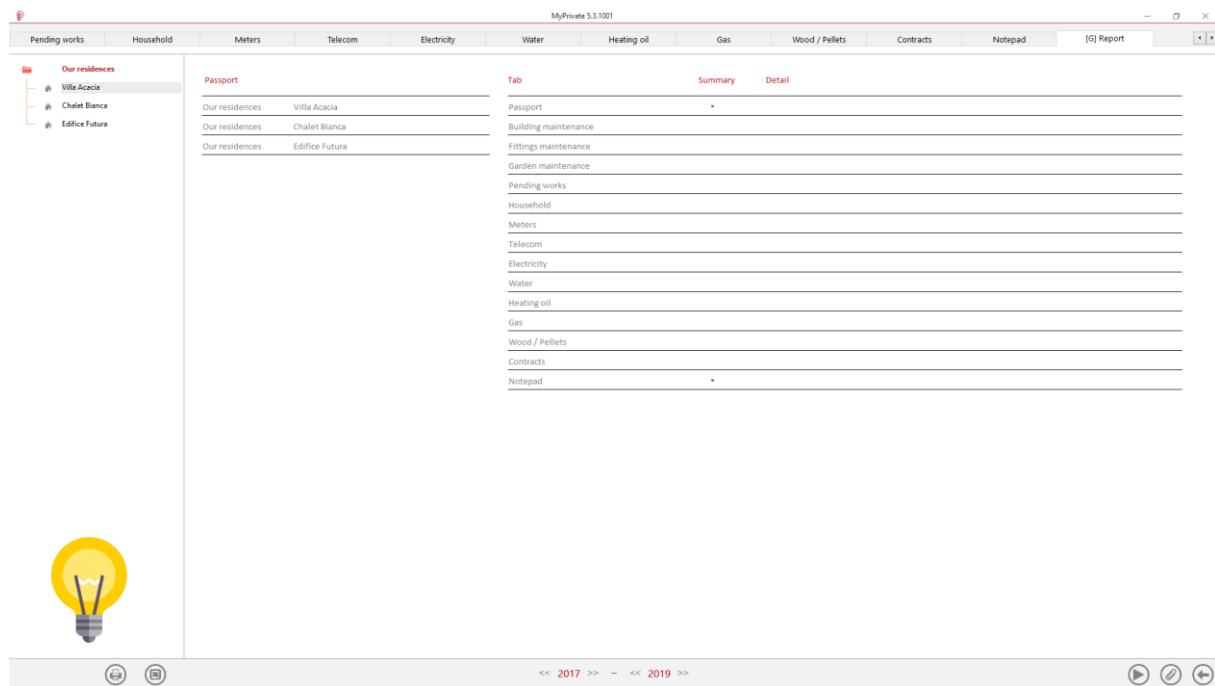
## [Notepad]



This tab allows you to enter various notes related to the equipment.

## [Reports]

This tab allows you to choose which passports and tabs to print



Select/deselect the data to be printed by clicking on the corresponding line(s) and column(s).


The choices are

- Passports
- Tabs - Summary and details

The selected passports and tabs are marked with the character [✓].

For some tabs it is possible to print the summary and/or the details.

When a print option is not available, it is indicated by the character [▪].

Once the information to be printed has been chosen, click on the button  then choose the [Generate Report] option.

MyPrivate prepares a PDF file that will be ready for printing.