Job Management User Guide

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Job Management User Guide

Protean Software General Introduction

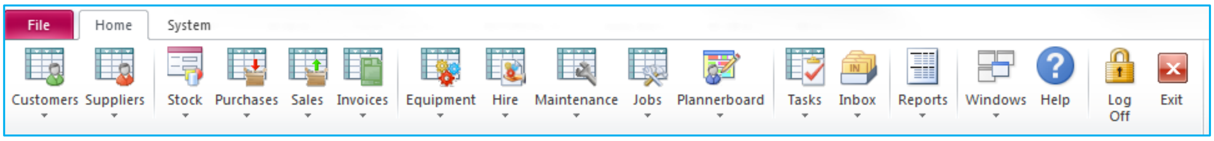
Once you have logged into Protean there are 3 Tabs – File / Home / System.

File: contains information about the version of Protean you are running and contact details for Protean Support.

Home: is the tab that you will go to when logged into Protean, this contains all the items you will use on a day to day basis within Protean.

System: is where the settings and setup of Protean is done, so any configuration details will be done through this tab.

Home Tab: this is what we call the Protean Ribbon:

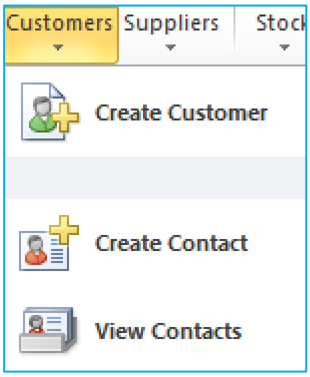


This is broken up into sections for each module that you have access to.

There is a global enquiry button, 

and a drop down for each section. 

If you hit the dropdown it gives you the other functionality to do with this section of Protean.

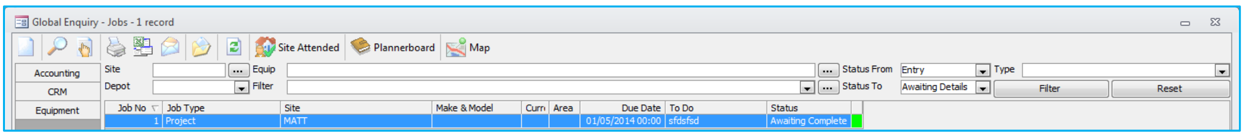


Depending on which section you click on you will get different options.

The example here is the customers section.

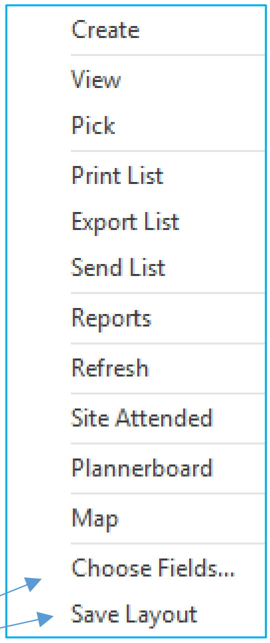
(Again these options can be controlled by access rights).

If you hit the Global Enquiry button, this brings up a list of all the current items within this section of Protean.



These Lists (Global Enquiries) are how each individual user can quickly get the information they need about that particular module of protean.

Every global enquiry has common buttons at the top left, which are also available by right clicking on within the middle of the global enquiry:



Create, creates a new record.

View drills into the record selected.

Pick is used when a global enquiry is bought up within another record.

Print / Export / Send will send your list to Printer / Excel / Email.

Reports will shortut to the reports for this module of Protean

Refresh just refrehses your list (can be set to happen automatically).

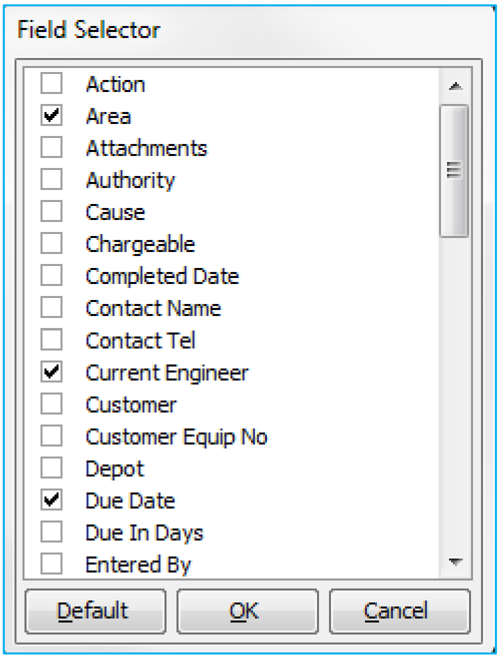
The final 2 options are for customising the Global Enquiry view per user.

Choose Fields brings up a lit of fields you can see, tick any you want, untick any you don't want.

This then dispays these fields this one time you are in the global enquiry.

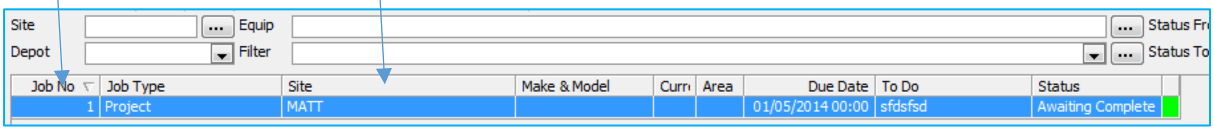
If you wish (per user) to always see these fields, then right click on the global enquiry and click "Save Layout".

Save Layout can also be used to save a users preferrnce for a sort order, or column order within each global enquiry screen, which can be achieved by clicking on or dragging a column as below.



Click to sort.

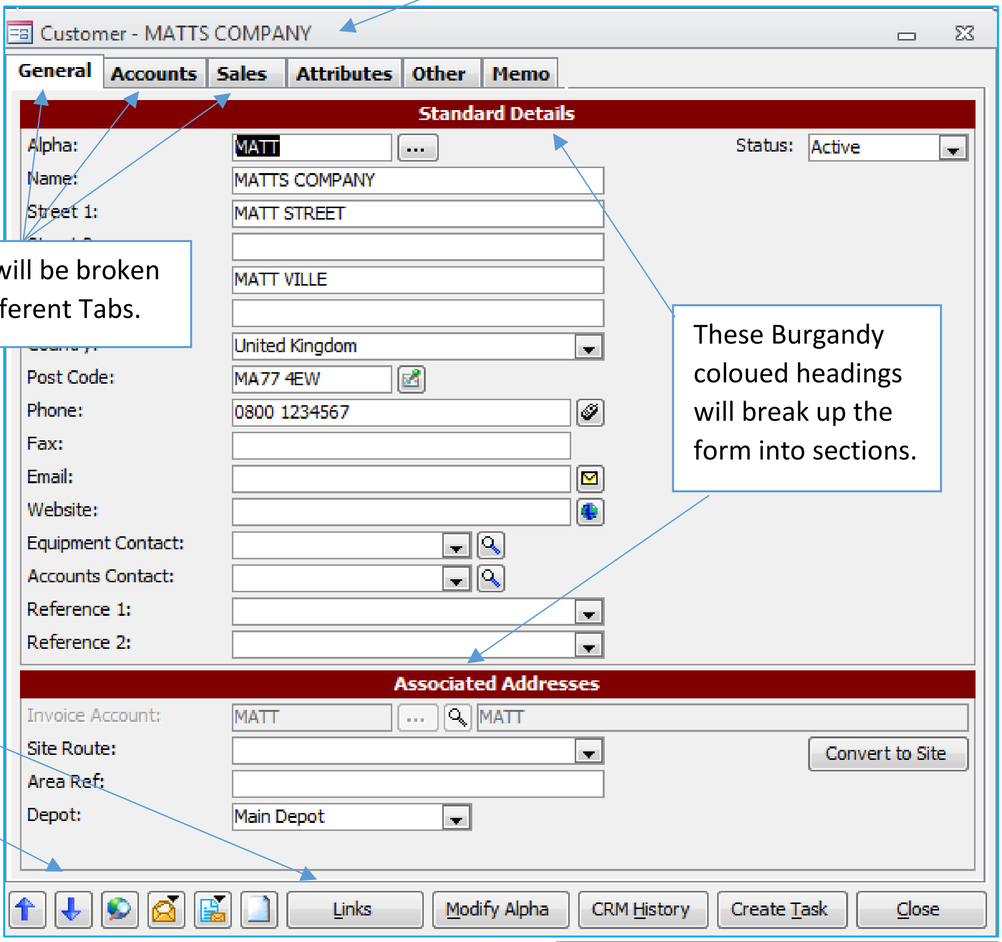
Click and hold to drag



Common Layouts & Features:

When you are in a record within Protean it will follow a common layout:

The Top left will show you where you are / what you are looking at.



The form will be broken up into different Tabs.

These Burgandy coloued headings will break up the form into sections.

And the bottom of the form will have buttons.

The first 6 are consistant in every module.

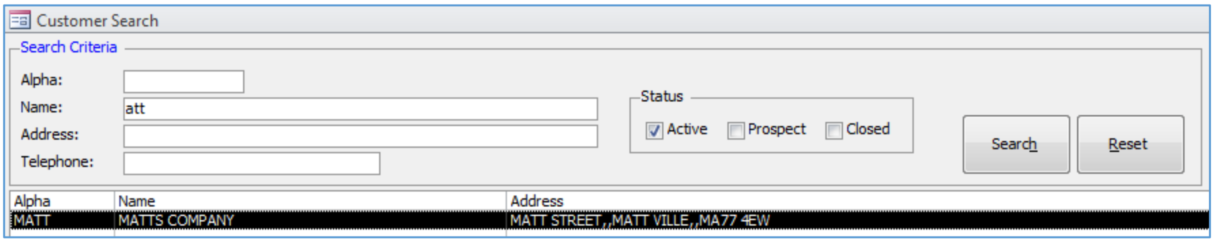
The other ones depend on what type of record you are viewing.

Other Common Features:

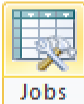
These (...) buttons will open up a Search screen.

A Magnifying Glass will Drill into a record and move you to that record in Protean.

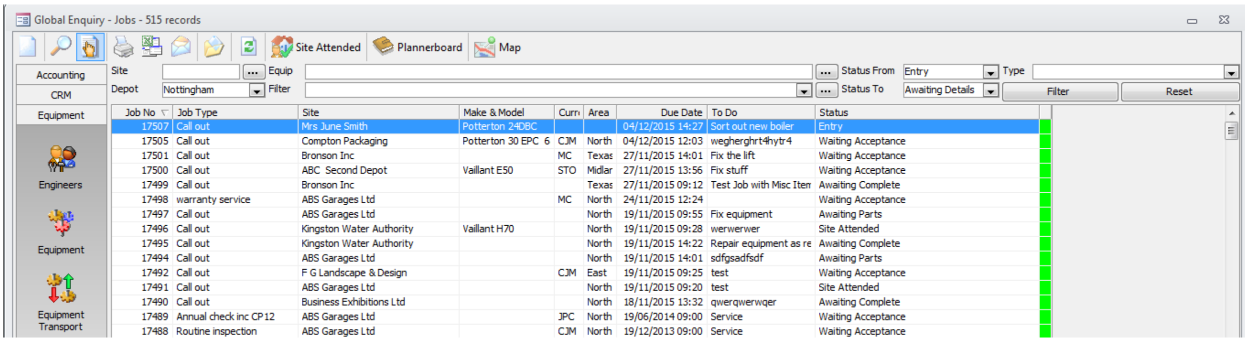
If you open up a search screen in Protean, its an automatic smart search, so it will wildcard before and after what you type, and you can fill out any, or a combination of search boxes.



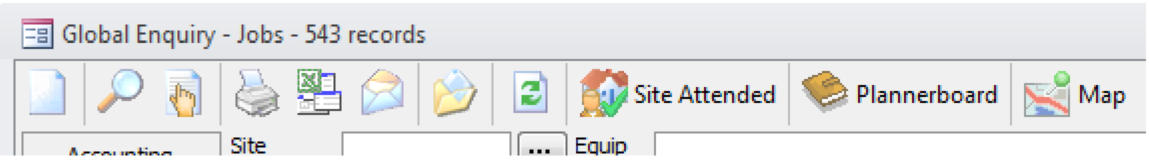
Searching for a current Job

To view a list of Jobs, click on the Jobs Global Enquiry icon:  .

The system will then display a screen similar to the one shown below:



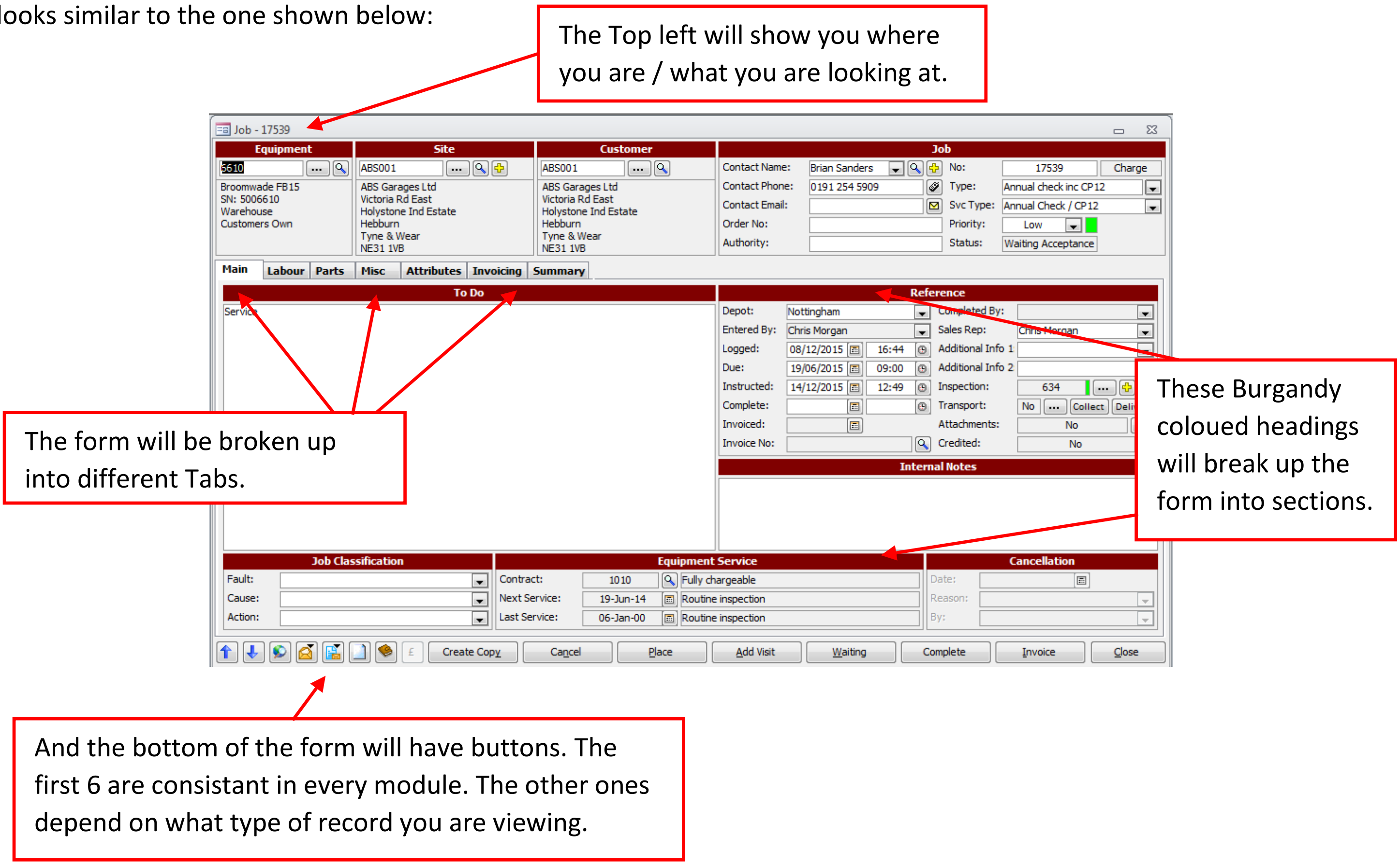
Every global enquiry has common buttons at the top left, which are also available by right clicking on within the middle of the global enquiry.



- **Create:** Used to create a new Job.
- **View:** Drills into the record selected.
- **Pick:** Used when a global enquiry is bought up within another record.
- **Print / Export / Send:** Used to send the list to Printer / Excel / Email.
- **Reports:** Provides a shortcut to the reports for this module of Protean.
- **Refresh**: Refrehses the list displayed (Can be set to happen automatically).
- **Site Attended:** This allows a user to quickly update all of the visits on a Job, without the need to access each one individually. Once a job is selected, any visits on it that have a status of "Allocated", will be updated to a status of "Visited". This process will also update the overall status of the Job "Site Attended".
- **Plannerboard:** Provides a shortcut to the Plannerboard screen.
- **Map:** If a site is using MicroSoft MapPoint, this will then display a screen showing the location of each Job displayed in the Global Enquiry screen and their current status.

Accessing a Job:

To access a Job already created, simply double click on the Job required and the system will then display a screen which looks similar to the one shown below:



Show Previous Record: Allows access to the Job record that is above the record selected, in the Global screen.

Show Next Record: Allows access to the Job record that is below the record selected in the Global screen.

Show Jobs List: Returns the user to the Global screen.

Create a Message: Allows a user to create either an Internal Protean message that can be sent to another user on the system, an external email or a Task within the CRM area of the system.

Output a Job Report: Allows a user to print, view, email, export or fax either an Estimate, Quotation, Work Sheet or Invoice based on the information entered on the Job (An invoice can only be produced if the Job has been invoiced).

Create a New Job: Allows a user to create a new Job.

Engineer Plannerboard: A quick shortcut to the Engineers Plannerboard, particulary useful when creating new Jobs.

<u>Other Common Features</u>:

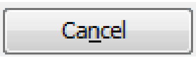
These (…) buttons will open up a Search screen.

A Magnifying Glass will Drill into a record and move you to that record in Protean.

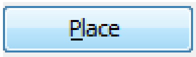
<u>Other Buttons</u>:

Along the bottom of the screen are a number of buttons, which are as follows:

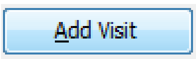
Allows a user to create a copy of the job they're currently accessing. This is particulary useful when dealing with credit notes.



Depending upon the status of the Job, this allows a user to cancel it. A canellation date and reason must be selected.



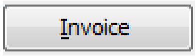
Allows a user to alter the status of a Job from Entry to Unallocated.



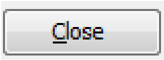
Allows a user to add further Visits in the Labour Tab.

Allows a user to alter the Status of the Job to Awaiting Parts. This happens automatically if a Purchase Order is creating from within the Job itself.

Once all entries have been made on the Job, a user must then click on this button before being able to invoice it. The system will then validate the Job to check everything is in order.



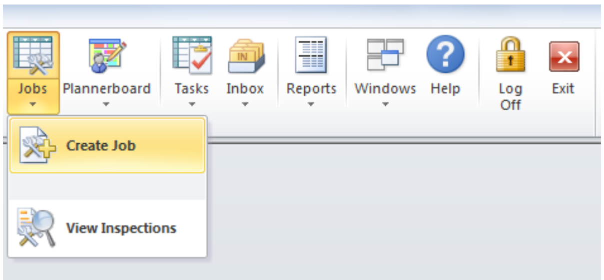
After the Complete button has been clicked and possibly Authorised (Depending on the System Settings), this is used to then either view a Preview Invoice or generate the Full Invoice with a Tax Point date as required.



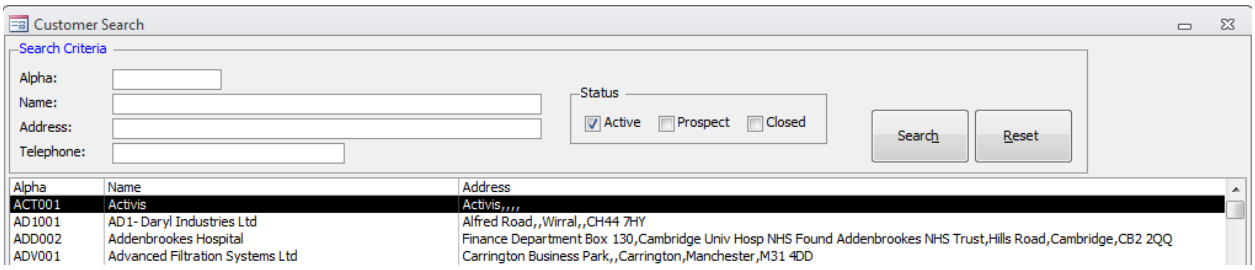
This button is used to close the Job screen down and will save any additions or changes made.

Creating Jobs

- To create a New Job, click **Jobs** and then **Create Job**:

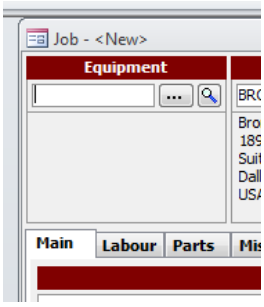


- Depending on how Protean is configured, you will be presented with a Customer Search form, an Equipment Search form or the Job form.
- In the Customer Search form, enter the required search criteria and click the Search button. Then double-click on the relevant item in the results list, to add the customer to the job.



Note: *It is possible to create and complete a Job without an equipment record being entered. However, if the Job is an invoicing Job, then a customer is required before completion.*

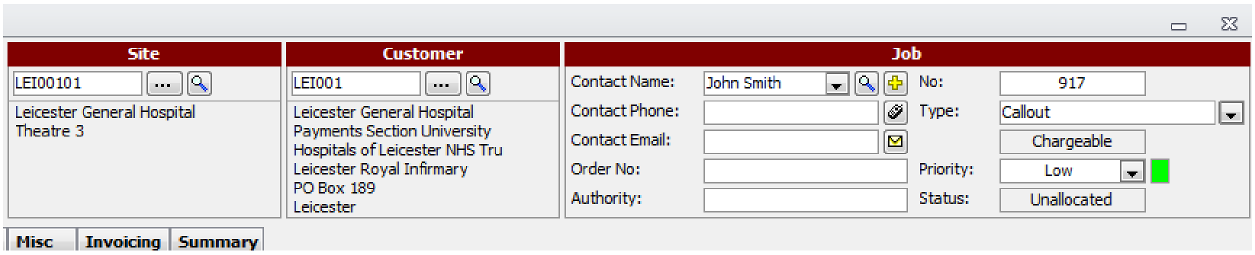
- If you wish to select a piece of Equipment, click the … button to the right of the Equipment field in the top left hand corner of the screen, to access the Equipment Search form:



- In the Equipment Search form, enter the required search criteria and click the Search button, double-click on the relevant item in the results list to add the equipment to the job.

Note: *If the piece of equipment isn't displayed, then you can click on the* ***Full Create*** *button to create the equipment record if required. Once you have selected a Site and Customer and optionally an Equipment record, a Job No will then be allocated.*

Job Section



- **Contact Name:** Defaults from the Equipment record. User can enter a Contact Name or select an existing Contact from the drop-down list. If you enter a contact you will be prompted with the option to add the contact.

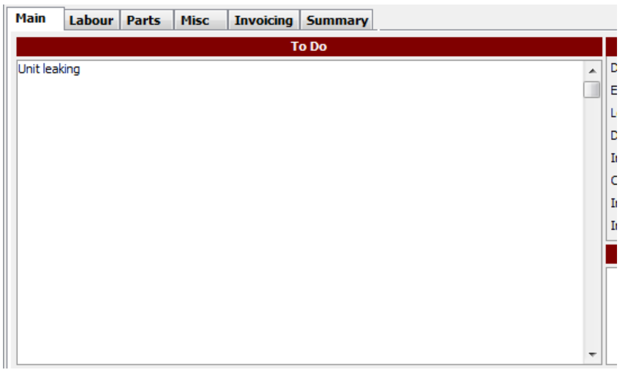
Note: *If you select "No" on this prompt, the job record will hold the contact details but the contact will not be linked to the Site record. If you select "Yes" on this prompt you will then be presented with the Contact form. On this form you can add additional information such as Job Title, telephone number and email address etc).*

- **Contact Phone:** Defaults from Equipment record, can be amended if required.
- **Contact Email:** Defaults from Equipment record, can be amended if required.
- **Order No:** Enter an Order Number if required. Depending on the settings on the Customer Record, the system may remind you that an order number is required.
- **Authority:** Enter the name of an additional contact in the Authority field, if applicable.
- **Type:** The system will automatically put your default Job Type in for you. If it is different, select an alternative Job Type from the drop down list.
- **Chargeable / Non Chargeable:** Pre-determined by the Job Type selected in the previous field.

- **Priority:** Amend the priority of the Job if required (Low – Green, Medium – Amber, High – Red). This can be seen in the Jobs Global Enquiry screen.
- **Status:** Displays the current status of the Job, defaults to "Unallocated".

Main Tab

- Enter the details reported by the customer into the "To Do" field.



- Any details you type here will print on the Job Sheet/Work Sheet for the engineer.

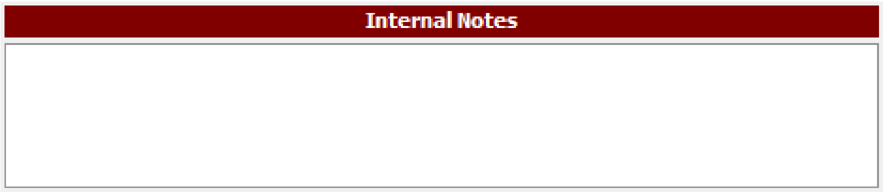
Reference Section

- **Depot:** Defaults to the Depot attached to the user who is raising the Job. Can be amended if required.
- **Entered by:** Defaults to the name of the user who raised the Job. Can't be amended.
- **Logged:** Displays the date and time the job was first created/logged.
- **Due:** Displays the date and time the job should be attended, job type category needs to be 'call-out' (An exception would be when the 'Update Service Jobs' process is run). Default response time can be set in System > General-Settings > Default response time or in a maintenance contract. Can also be entered manually if required.
- **Instructed:** Displays the Date and time the job is allocated to an engineer.
- **Complete:** Displays the date and time the job is completed.
- **Invoiced:** Displays the date on which the Job was invoiced.
- **Invoice No:** Displays the invoice number, click on the magnifying glass icon to view the invoice itself.
- **Completed By:** Displays the name of the user who completed the Job.
- **Sales Rep:** Defaults in, can't be amended here.
- **Reference 1:** Additional user defined field for the recording of additional information as required.
- **Reference 2:** Additional user defined field for the recording of additional information as required.
- **Inspection:** An inspection sheet can be 'attached' to a job, shows the inspection no. in the first field, '•••' goes to sheet details.

- **Transport:** If ‘yes’, ‘•••’ displays the global enquiry screen for Equipment Transport, for that customer.
- **Collect:** This raises a request for transport from the customer site to the workshop.
- **Deliver:** This raises a request for transport to the workshop to the customer site.
- **Attachments:** Allows a user to attach any documents for the Job, which can be viewed on the Engineers PDA’s.
- **Credited:** If a credit note has been raised against the Invoiced Job, then this field will say “Yes” and the credit note can be viewed by clicking on the magnifying glass icon.

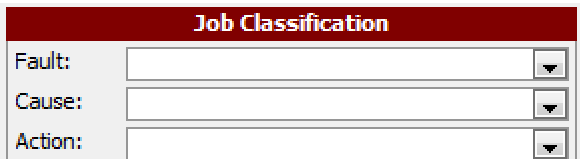
Internal Notes Section

Notes can be entered into this section, which just display on screen and don’t print off on any documentation.



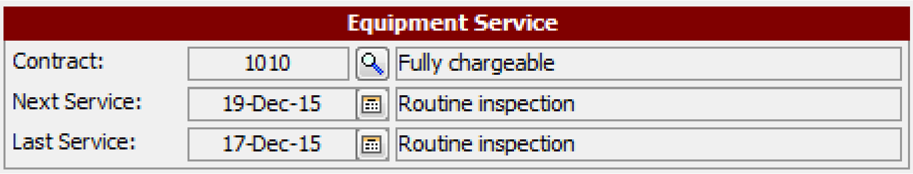
Job Classification Section

Faults, Causes and Actions, are user definable and are useful when reporting on reason for call-outs/breakdowns as they help keep the information entered consistent (They are setup in System > Job > Faults, Causes & Actions).



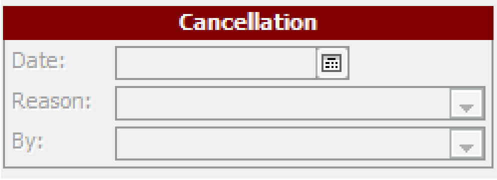
- **Faults:** Use the drop down icon to select if required. Text will appear in the ‘To Do’ field, if blank and text details have been set up against a fault.
- **Cause:** Use the drop down icon to select if required.
- **Actions:** Use the drop down icon to select if required.

Equipment Service Section



- **Contract:** If the equipment is on a maintenance contract, the number of the contract will show here, the magnifying glass icon will display that contract details.
- **Next service:** Date per service schedule on equipment.
- **Last service:** Date the last service was completed.

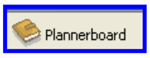
Cancellation Section

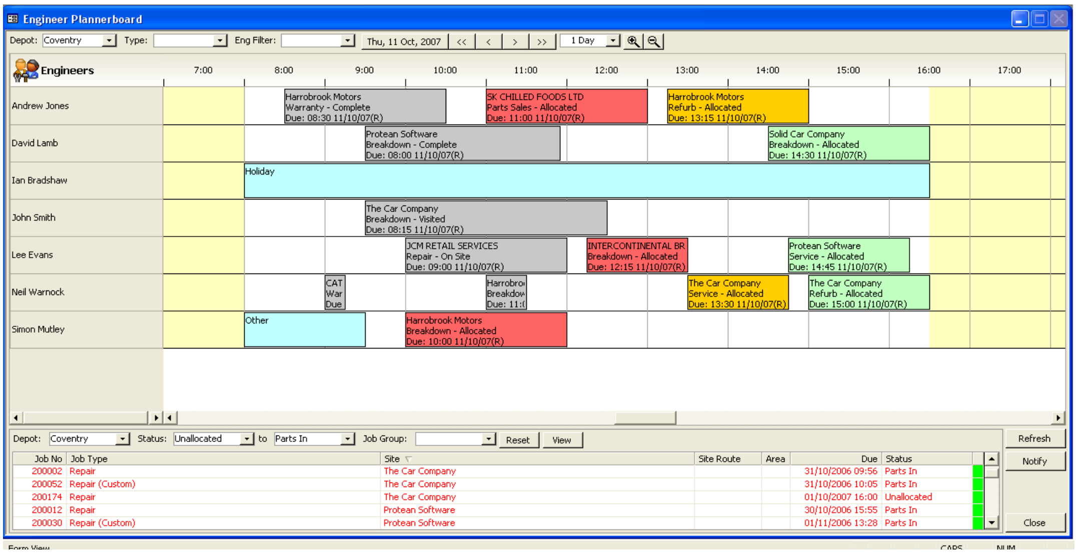


If the Job has been cancelled, this section will display the following details:

- **Date:** The date on which the Job was cancelled.
- **Reason:** The reason selected when the Job was cancelled.
- **By:** Will display the name of the User who cancelled the Job.

Allocating an Engineer using the Planner Board

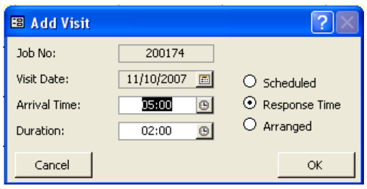
- The Planner Board form allows you to plan Engineer visits, move allocations and add unavailable time and is accessible from where ever you see the Plannerboard icon: 



- The top half of the Plannerboard will display a list of Engineers together with details of Jobs Completed, Due, and Overdue. For Each Job the Plannerboard will display The Customer, Job Type, Status and Time Due. The board will display other time for Engineers such as Holidays & Sicknesses.
- The bottom section of the Plannerboard will display a list of outstanding jobs, similar to the main Jobs Global Enquiry screen.

Allocating an Engineer

1. Locate the Job from the list of outstanding jobs in the bottom half of the Plannerboard.
2. **Drag and Drop** the Job against the engineer. You will then be prompted to "Add Visit" where you can enter the proposed arrival time, then click ok. If the Arrival Time not known, simply accept the defaults and click ok. The time can be amended later on the job record.



Note:** To go to the Job Record, **Right Click** on the Job in the Plannerboard & select **View Job.

Job Colour Codes:

Red: Job Is Overdue.

Grey: Job has been completed.

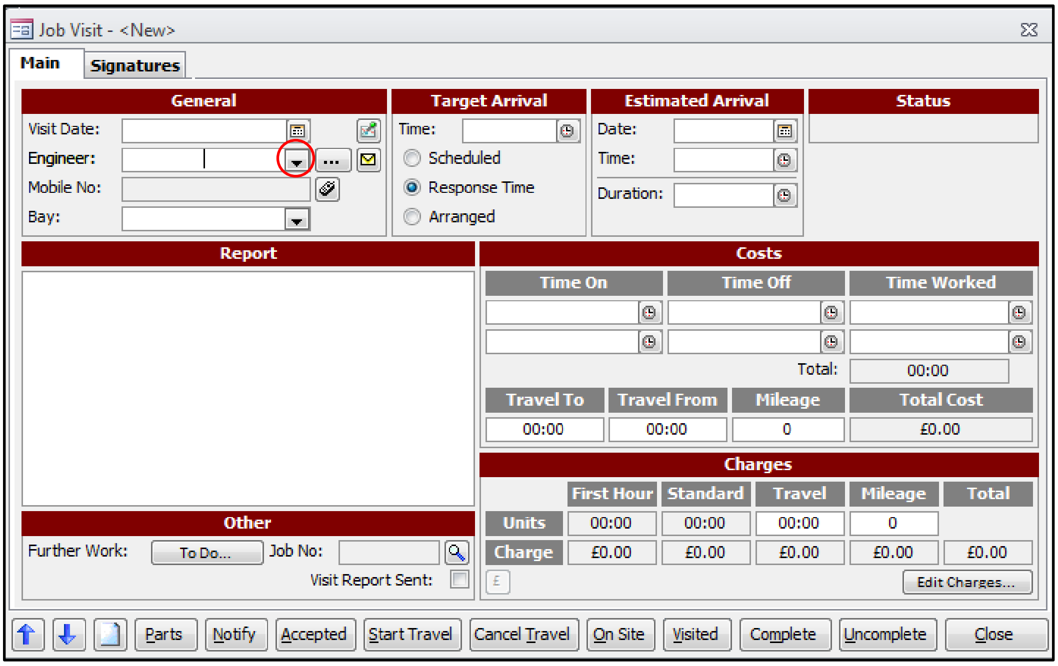
Yellow: Job Due in less than 1 Hour (This time Due Setting can be amended in Settings).

Green: Future Jobs whereby "due Time" can still be met.

Blue: Engineer Unavailable (You can choose from 4 set reasons, Holiday, illness, Training & Other).

Adding a New Labour Visit

- Go to the Job in question and click the **Add Visit** button. If you choose not to select an Engineer at this time then the Job will remain as *Unallocated*.
- Then select an Engineer (if appropriate) from the list which opens automatically:

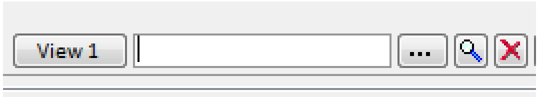


- Click the Engineer from the list. Once an engineer has been selected, the Van or Bay (if workshop) that they are assigned to will be automatically filled in.
- Once the Engineer has been allocated to the job, the status of the Visit will be set to: *Allocated*

Creating a Purchase Order for Parts on a Job

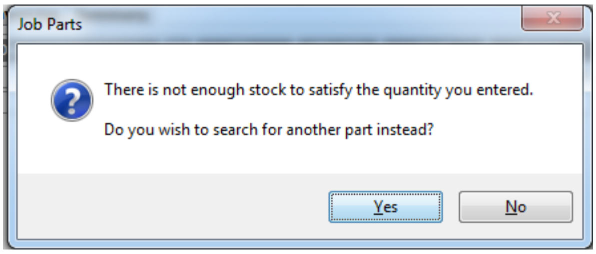
If you wish to buy a part in specifically for this Job you can use the **Purchase Orders for Jobs** facility as an alternative to ordering via the Purchase Order module.

1. Go to the **Parts Tab**.
2. In the box in the bottom left hand corner of the screen, enter the part number if know and press Return:



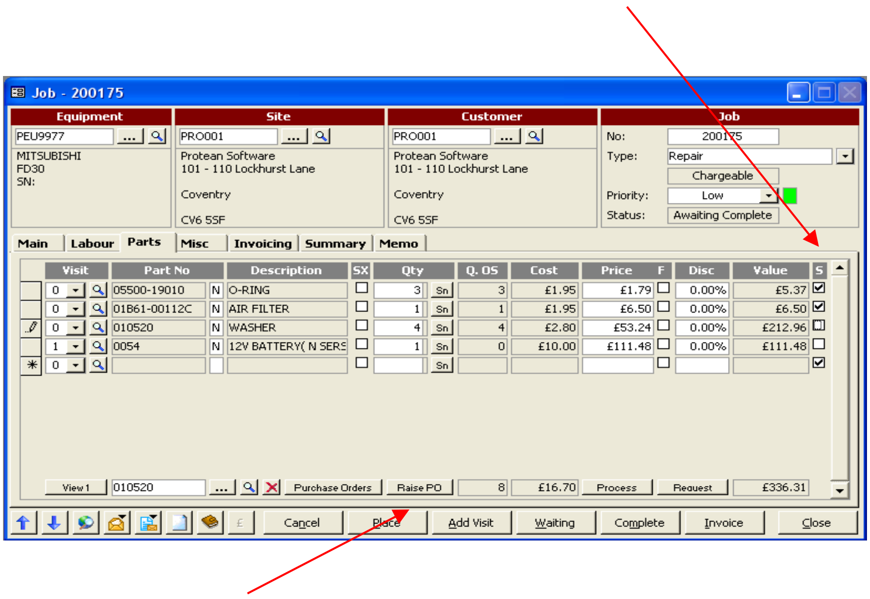
3. If the part number isn't known, click on the … button, & use the Find Part screen to search for the part required.
4. Double click on the Part required.
5. Enter quantity required for the job in the **Qty** box.

Note: *The system may display a warning message advising that there isn't enough stock of the part selected and to search for another part instead.*



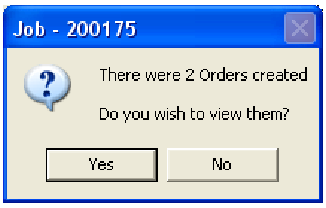
Note: *Click on the No button to continue with the part number entered earlier.*

6. Repeat step 3 to 5, for as many parts as are required from **Stores**. **Ensure that the Visit No is set to 0 (zero)**, the system will default to this Visit No.
7. If you do not wish to order all the outstanding parts on the Parts Tab simply un-tick the selection box on the right-hand end of each Part line.



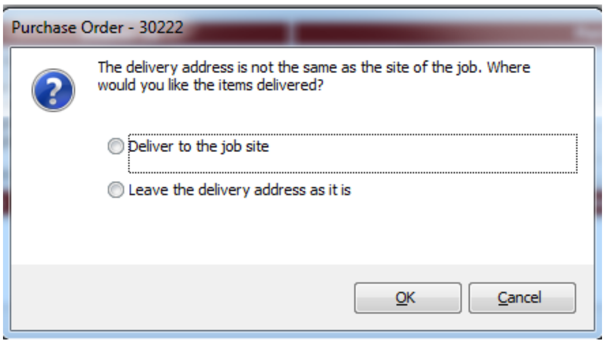
8. Click the **Raise PO** button at the bottom of the screen.

9. The system will then display a Parts Order List screen, which summarizes the P/O's that will be created. Click on the Create P/O's button at the bottom of the screen to continue.
10. A new Purchase Order is created for each Supplier for the Parts listed.
11. The system will tell you what orders it has raised and offer to show them to you so they can be placed. The orders are created at 'Entry' status so that the spending limit authority levels can still be applied. You would then Book In the Purchase Orders as normal on Receipt of Parts.



For each Purchase Order now displayed, Internal Notes and Instructions can be added as required.

12. If you amend the cost price here the small box to its right will be 'ticked'. This means that it will update the Cost Price on the Stock Enquiry screen with the new price. If you do not want this to happen then untick the box.
13. Then check the Due Date for each line. This will default to today + the Suppliers lead time, but can be over written here if required.
14. If you wish to save the order without processing it (which will lock the fields down) then simply click the Close button.
15. Clicking the Process button will take the order to the status of "*To be Placed*", and means that the order cannot be amended.
16. The system will then ask you to confirm where the parts should be delivered to:



17. Select the option as required and then click on Ok.

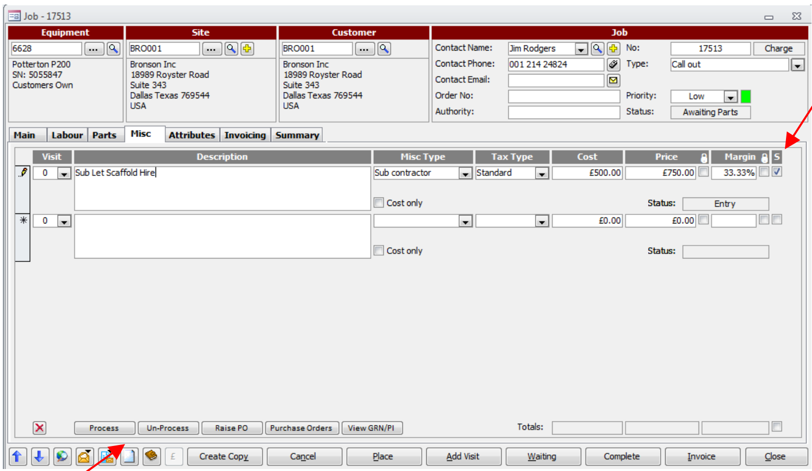
***Note:** Depending upon system settings, you may have to get the Purchase Order authorised by another user.*

18. Clicking Print, Fax or Email will advance the status to *Placed* and print a copy of the order (or e-mail if so configured).
19. Click on the Close button, in the bottom right hand corner of the screen, to return back to the Job screen seen earlier.

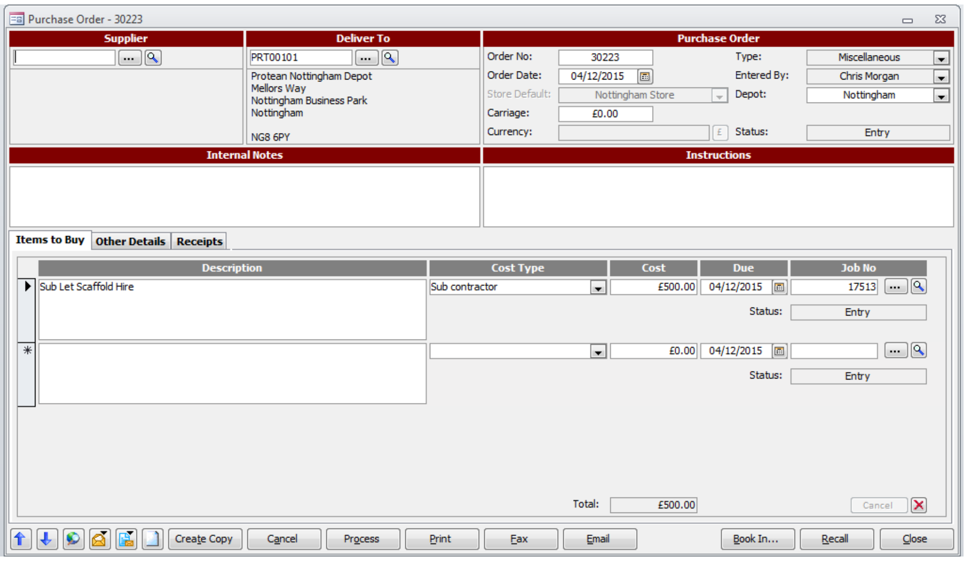
Creating a Purchase Order for Misc Items on a Job

If you wish to purchase any miscellaneous items specifically for this Job you can use the **Purchase Orders for Jobs** facility as an alternative to ordering via the Purchase Order module.

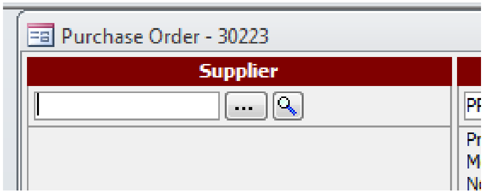
1. Go to the **Misc Tab**.
2. In the Description box, enter the Sub Let item required.
3. Using the drop down arrow icon, select the appropriate Misc Type required.
4. Enter the Cost Price and Charge Price as required.
5. Repeat step 2 to 4, for as many Misc Items as are required.
6. If you do not wish to order all the outstanding Misc Items on the Misc Tab, simply un-tick the selection box on the right-hand end of each Misc line.

i. 

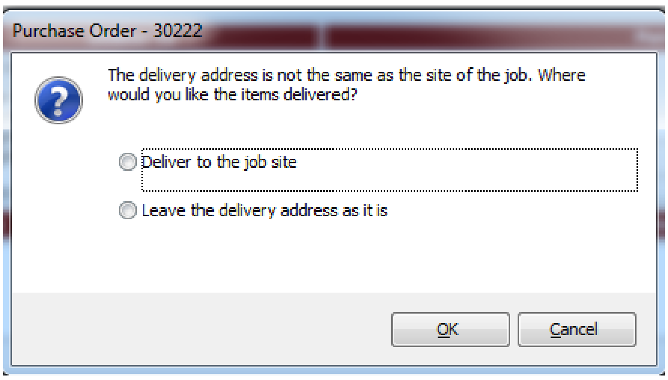
7. Click the **Raise PO** button at the bottom of the screen.
8. The system will tell you what orders it has raised and offer to show them to you so they can be placed. Click on the Yes button and the system will then display the Purchase Order screen:



9. Select the Supplier who is supplying the Misc Item (s), buy using the … search button shown in the top left hand corner of the screen.



10. Internal Notes and Instructions can be added as required.
11. If you wish to save the order without processing it (which will lock the fields down) then simply click the **Close** button.
12. Clicking the **Process button** will take the order to the status of "*To be Placed",* and means that the order **cannot be amended**.
13. The system will then ask you to confirm where the parts should be delivered to:



14. Select the option as required and then click on Ok.

Note: *Depending upon system settings, you may have to get the Purchase Order authorised by another user.*

15. Clicking **Print, Fax or Email** will advance the status to *Placed* and print a copy of the order (or e-mail if so configured).
16. Click on the Close button, in the bottom right hand corner of the screen, to return back to the Job screen seen earlier.

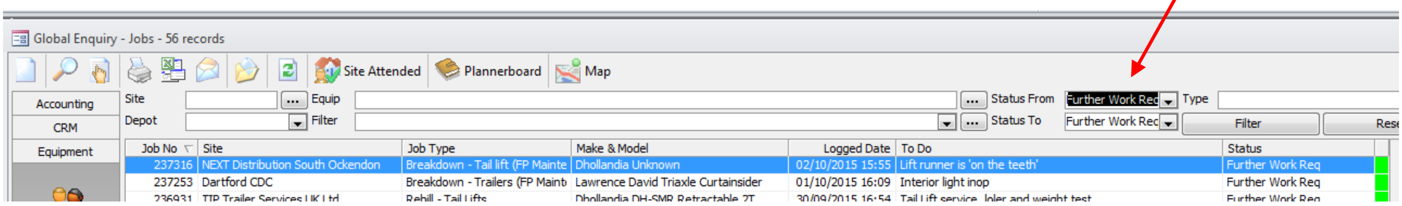
Further Work Required Process

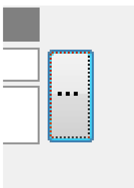
Step 1: Engineer highlights the job as requiring further work required:

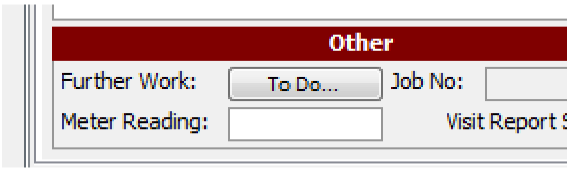
- Whilst completing the Job on the PDA, an engineer can use the “Further Work Required” button, to enter details of the work required, parts to be ordered etc.
- (Details of how to do this are shown on page 19 of the attached PDA Guide).

Step 2: Office staff view the further work required requests:

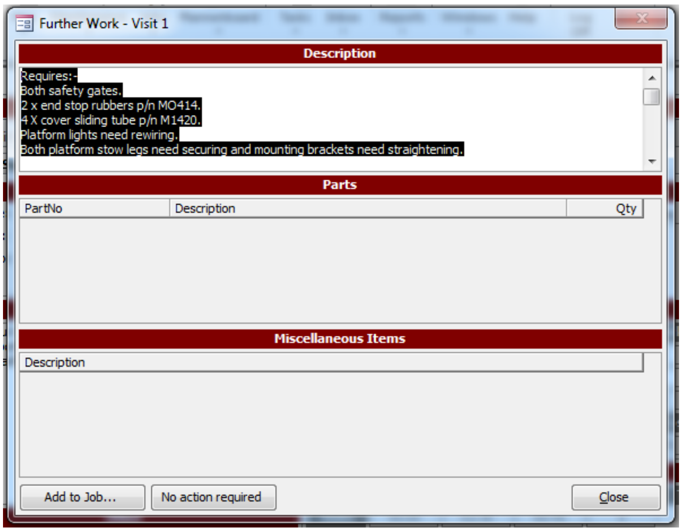
- Office staff can then use the Jobs Global Enquiry screen and change the status to “Further Work Required”, to then view the jobs highlighted earlier by the engineer as requiring additional work.



- Double click on the Job required and then on the Labour Tab, click on the  button shown on the far right hand side of the screen.

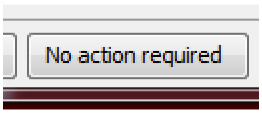
- Whilst in the visit, click on the Further Work 

“To Do” button, shown in the bottom left hand corner of the screen.
- The system will then display the details of the further work required, entered by the engineer on the PDA:



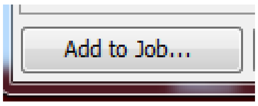
Step 3: Office staff then process the request as required:

- If there doesn’t need anything to be done, then click on the “No Action Required” button:

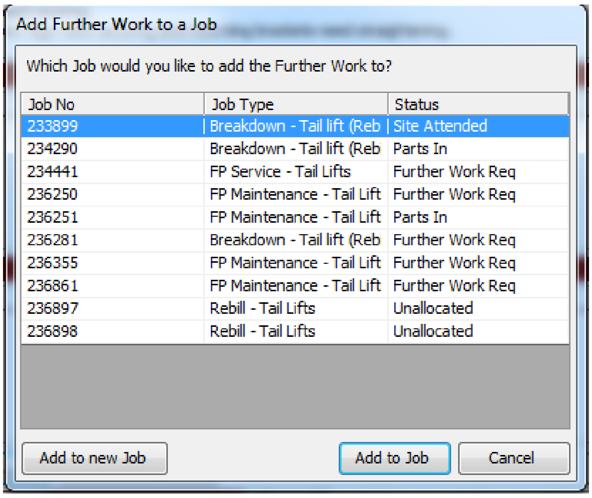


- The system then changes the status of the job accordingly.

- If the user wishes to process the request, then click on the “Add to Job” button:



- The system will then display a list of Jobs that are currently open for the same customer:



- If you wish to attach the work required as an additional visit to a current job, select the Job required and then click on the “Add to New Job” button. The system will then add the work required to the job selected as a new visit, with a status of “Un-Allocated”. This can then be allocated to an engineer, inspection sheets added, parts ordered etc.
- If you wish to add the work required to a new job, then click on the “Add to New Job” button. The system will then create a new job with the text automatically entered in the Main tab and also creates a Labour Visit, again with the text automatically entered. This visit can then be allocated to an engineer, inspection sheets added, parts ordered etc.

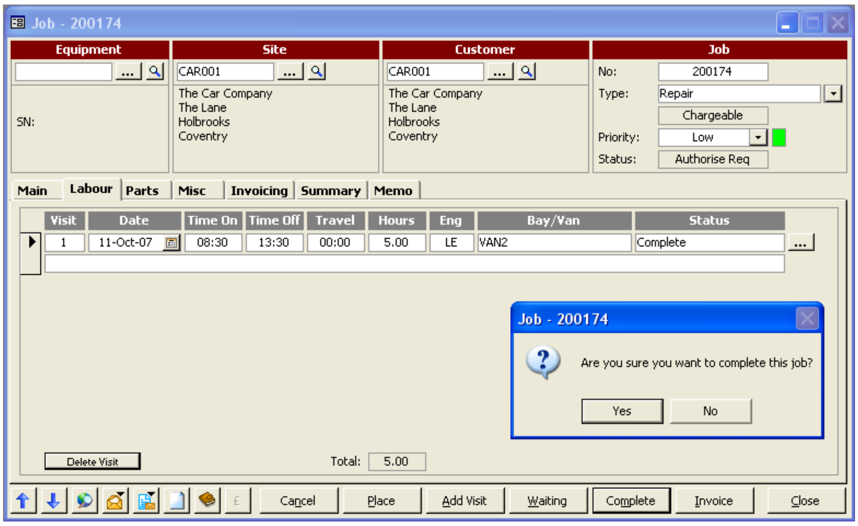
Completing a Job

Before you can complete a Job, check the following:

- Check that there are no Outstanding Parts or Miscellaneous Items.
- In the Labour Tab, Ensure that you have entered the Time On & Off for each Labour Visit, with any details of Travel time & mileage.
- In the Labour Tab, ensure each **visit** has been individually completed and is at a status of Completed.
- Check your Job Costs & Charges using the Summary Tab for the Job as a whole, and check the final invoice value (net) if you require.
- Go to the Invoicing Tab and ensure the selections there are correct (they are defaulted from the Job Type to save repetition).
- Click the Complete button. If the Job Status changes to “Completed” or “Authorisation Required”, then you have been successful.

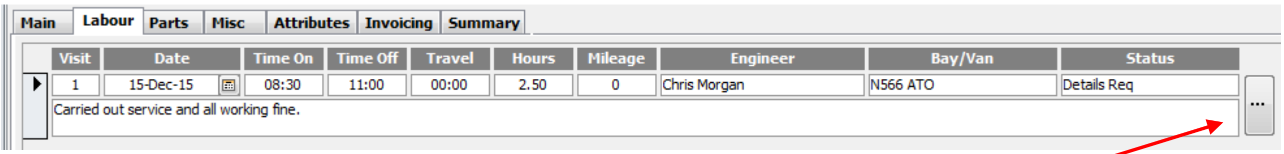
If the status changes to **Awaiting Details** then Protean could not complete the Job as there was information missing. The system will display a message informing you what the missing data is. Review the Job, make the changes and the Job will automatically 'complete' as soon as it can.

Note: *The most usual cause of non-completion of a Job is because there is a Labour Session still 'open'. These are closed using the Labour Only button.*

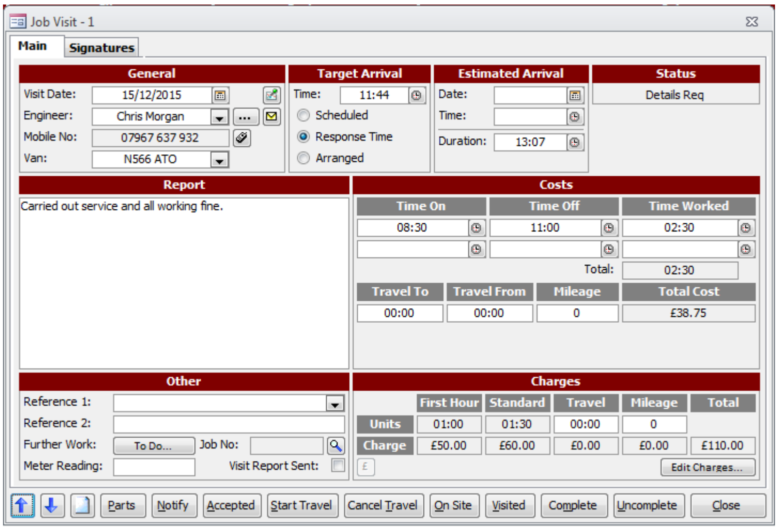


Labour:

Check that all of the visits made are entered and the correct details shown.

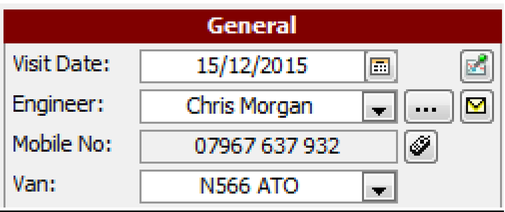


- Click on this button to view / amend the details of the visit as required.
- The system will then display a screen similar to the one shown below:



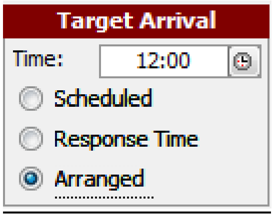
General Section

This displays the Visit Date, the Engineer who carried out the visit, their phone number and Van information.



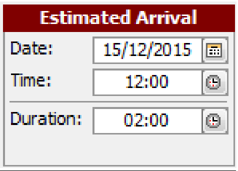
Target Arrival Section

This displays the time that the visit should take place, dependent upon the Job Type attached to the Job.



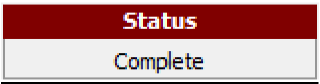
Estimated Arrival Section

This displays the Estimated Arrival Date, Time and the Default Duration of the visit.



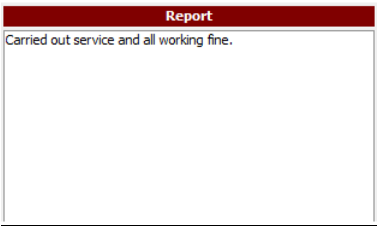
Status Section

This displays the current status of the Visit.



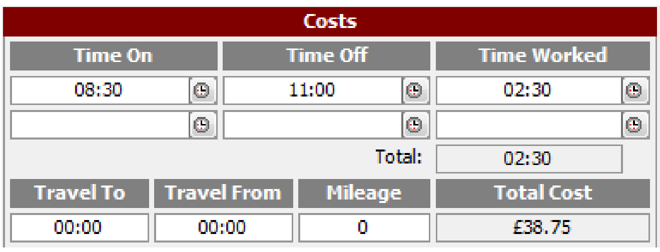
Report Section

Check the text entered by the Engineer on their PDA, and amend if required.



Costs Section

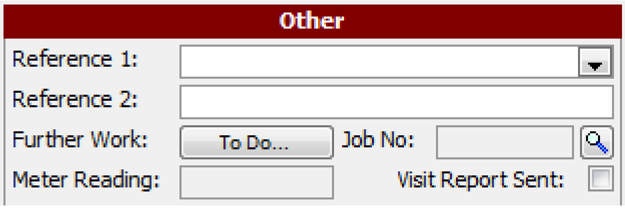
This displays the Labour Costs associated with this visit. Check the times on and off the Job entered via the engineers PDA, and amend if required.



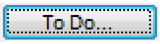
- **Time On:** Will display the actual time of day the engineer started working on the Job.
- **Time Off:** Will display the actual time of day the engineer finished working on the Job.
- **Travel To:** Will display the amount of time spent travelled to the site by the engineer (Can be amended if required).
- **Travel From:** Will display the amount of time spent travelling from the site by the engineer (Can be amended if required).
- **Mileage:** Will display the actual distance travelled by the engineer (Can be amended if required).

Other Section

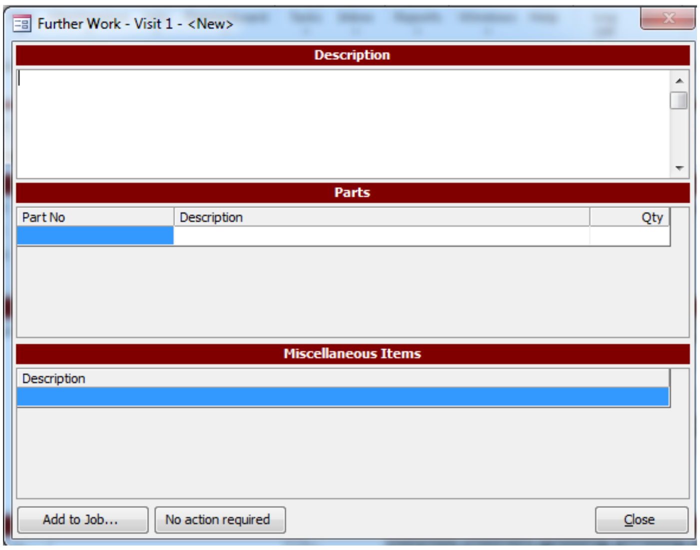
This allows a user to add additional information for the Visit and view / add further work required.



- **Reference 1:** Add additional information regarding the Visit as required (The name of this field is user defined).
- **Reference 2:** Add additional information regarding the Visit as required (The name of this field is user defined).
- **Further Work:** If the engineer discovers other work needs to be carried out, this can be recorded under Further Work. This can also be entered by the engineer via their PDA.

Click on the 

button to view / enter the Further Work required.



- **Description:** Displays the free text details of the work that is needed.
- **Parts:** Displays a list if the parts that will be used.
- **Miscellaneous:** Displays details of misc. items used / charged for.
- Click the relevant button to either **add this work to the current Job** (**as a new visit**) or to **add it to a new Job**.

If you select to **add it to a new Job** the system will automatically create a new Job, add the Site, Customer and Equipment details from the originating Job and put the work required into the **To Do** box.

- **Meter Reading:** Displays the meter reading entered by the engineer via their PDA. Can be entered here also if required.
- **Visit Report Sent:** Displays a tick, if the Visit report has been sent to the customer.

Charges Section

Displays the Charges associated with the visit.

Charges

	First Hour	Standard	Travel	Mileage	Total
Units	01:00	01:30	00:00	0	
Charge	£50.00	£60.00	£0.00	£0.00	£110.00
£					Edit Charges...

- These charges can be amended if required, by clicking on the Edit Charges button. Access to this option can be restricted by user / role.

Buttons Available:

The buttons shown along the bottom of the screen are primarily for use with the PDA system. Some may also be used manually.

Parts Provides a user with a shortcut to the Parts screen.

Notify If a visit is entered manually, this allows a user to send the Job information to the required engineers PDA without going via the Engineer Plannerboard (Changes the status of the Visit from “Notification Required” to “Notification Sent”.

Accepted This changes the status of the Visit from “Notification Sent” to “Allocated”.

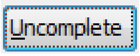
Start Travel This changes the status of the Visit to “En Route”.

Cancel Travel This returns the status of the Visit to “Allocated”.

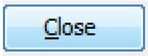
On Site This changes the status of the Visit to “On Site”.

Visited This changes the status of the Visit to “Visited”.

Complete This changed the status of the Visit to “Completed”.

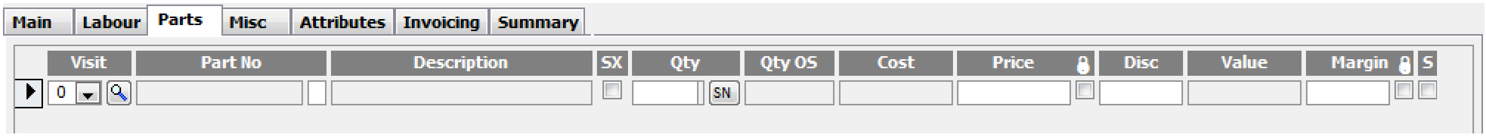


If a Visit has already been completed, this button must be used to then allow a user to amend any details in the Job Visit screen.



This returns the user back to the main Job screen and saves any information entered or amended.

Viewing Parts Added to Jobs:



- **Visit**: Indicates the visit number; 1 upwards = engineers stock, may also be workshop in some instances. ‘0’ issued from the main store. Clicking on the magnifying glass icon, displays the Job Visit screen.
- **Part No.:** The box to the right indicates the state/condition: **N**ew, **U**sed, **R**efurbished or **Q**uarantined
- **Description:** Displays the description of the Part Number.
- **SX:** Tick if the part is a service exchange item, ensures the part removed will be returned to the supplier.
- **Qty: The quantity of parts required.**
- **SN:** If the part(s) are serial numbered, the field will be Blue, indicating that a serial number for the part used needs to be confirmed.
- **Qty OS**: Default state of quantity to be issued (See ‘view 2’; other states are Q. Order, Q. Issue, Q. Desp and Q. Returned)
- **Cost:** Displays the cost value of the part (Stk Avg value x Qty), which will be replaced with the actual value once the PO invoice is matched.
- **Price:** Will display the standard selling price of the part, which is held on the Stock record or calculated using a special price on a Price Lists.
- **Padlock Icon:** Tick this box to fix the selling price, prevents overwriting by Price List entries etc…
- **Disc:** Displays any discounts to be applied to this part, defined by the customer’s Stock Discount Group, Parts Discount Category or special settings in a price list.
- **Value:** shows the extended value less any discounts.
- **Margin:** Displays the margin as a percentage.

- **S:** This is ticked by default, and indicates that the line is 'selected', and therefore will be included in any future processes. Un-ticking a line will exclude it from any processing, such as Requests or the raising of a Purchase Order.

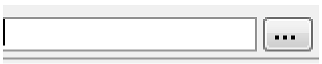
Adding Parts from Stock to a Job:

Parts can be booked out to a Job from 'Stores' using the Stock Issue screen. A Stock Issue can either be raised from the Stock Module – **Stock > Issue Stock to Jobs**, or via the **Parts Tab** on the Job itself.

Adding a Part from Stock:

1. Click on the Parts Tab in the Job required.

2. The Visit Number will default to '0' (i.e. not linked to a visit/van).
3. In the bottom left hand corner of the screen, enter the Part Number if known or click on the 'Stock Search' button



and search for the part required.

4. When you have entered the part number, then enter the quantity in the "Qty" field.
5. Repeat the above steps for as many parts as are required from your main "Stores".
6. Click the 'Request Parts' button in the bottom right section of the Part Tab. A message will appear that confirms the creation of a Stock Issue and gives you the Issue Number.
7. You can then either notify the stores man of the issue number, or carry out the booking out yourself.
8. The message will offer to open the Stock Issue so you can simply click 'Yes' to continue.
9. If you close the message by mistake you can still get to the Stock Issue form the Job screen by clicking the 'View' button twice and then using the button to jump to the Stock Issue in question.
10. On the Stock Issue screen you will see the line(s) showing the part number, quantities and Job number it is for. Click the 'Allocate' button. The system will ensure that enough stock is available for your request. If not, a message will inform you of the shortfall. The system will allocate what stock it can.
11. Click the 'Book Out' button. This transfers the stock from the stock location to the Job itself.
12. Close the Stock Issue screen and the Qty OS box on the Parts Tab will show zero(s) (if there was enough stock to satisfy the request).

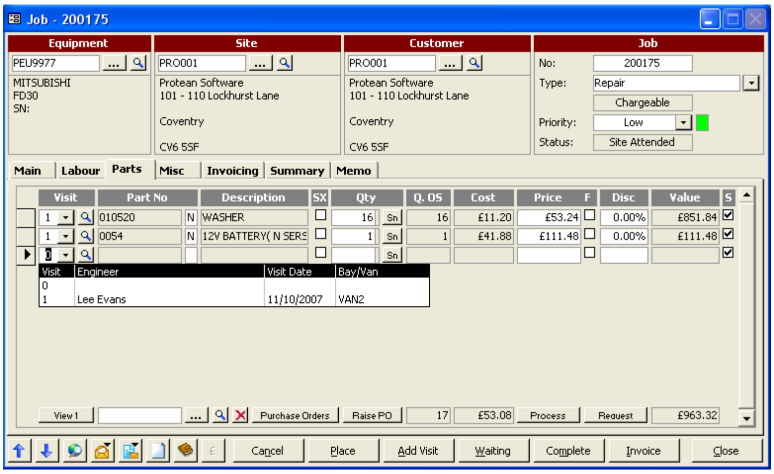
Adding Parts from an Engineers Van:

Engineers do have the ability to add the parts that they've used from their Van stock via their PDA. However, a user can also add the parts used if required.

1. Go to the **Parts Tab** for the relevant Job Number.
2. Select the correct **Visit no** from the drop-down list on the left hand side (see below)

Note: *Remember Visit/Session zero (0) designates that the Part is not tied to an Engineer's visit but is coming from stores*.

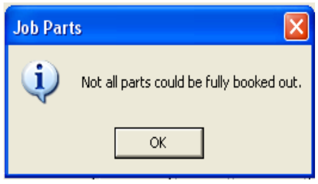
3. **Add the Parts** that the Engineer has used by either entering the Part No (if known) in the white entry box at the bottom left-hand side of the screen and press "Enter", or use the **[…]** button to Search.
4. Enter a required quantity. Check the selling price and discount fields. Make any necessary amendments.
5. Repeat steps 3 and 4 for all the parts you want to add that are to be drawn from the engineer's stock location / van.



6. When you have added the visit numbers, click the '**Process**" button shown at the bottom of the screen.

7. The system will attempt to 'move' the stock from the stock location (van) to the Job.
8. If there is enough stock, the **Qty OS box** (es) will change to show zeros.

   If there was **insufficient stock** on one or more lines, the system will book out what it can and display a message informing you that ***"Not all parts could be fully booked"*** out and ***"There are outstanding Parts for this Visit".***

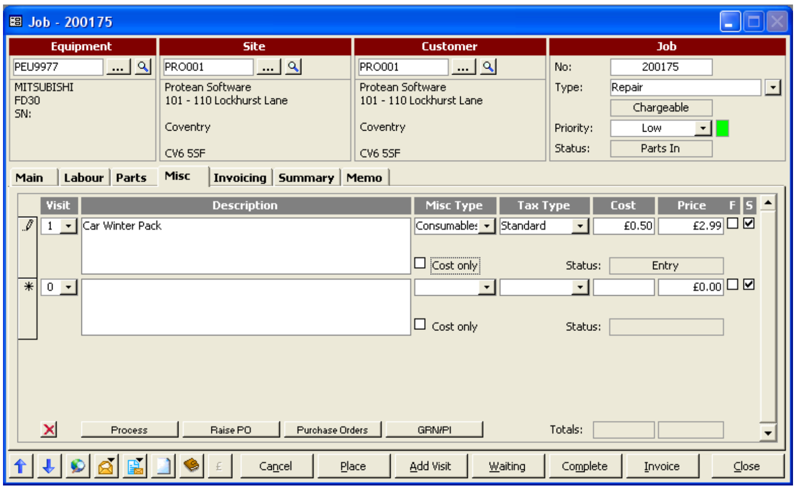


9. The **"Q.OS"** column will show what is still required for the Job. You will need to do one of the following to bring the part in

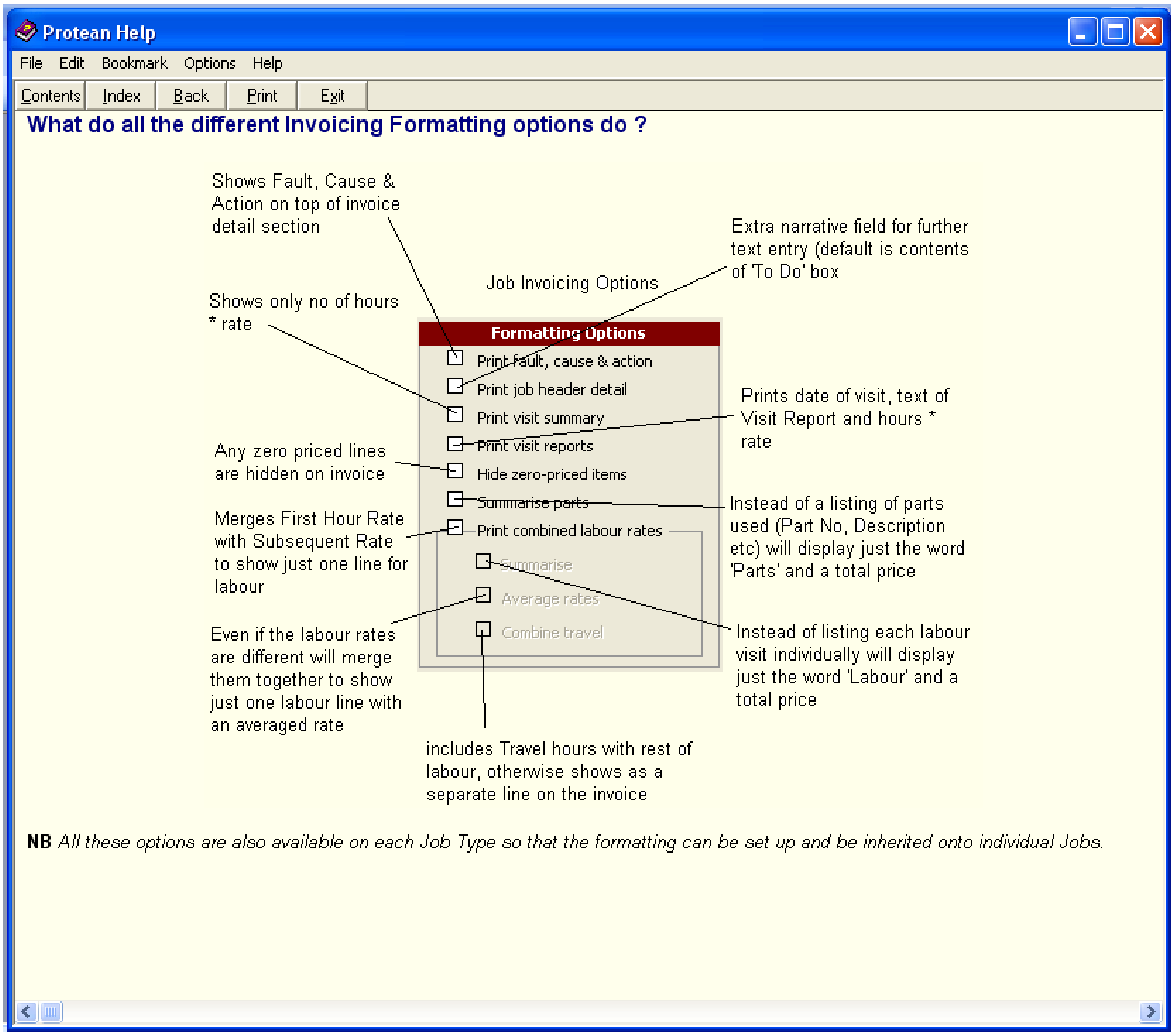
   - Transfer the required amount from **Stores** to the Engineers Van via "**Stock Adjustments"** then run through the Process procedure again.
   - Raise a **Manual** Purchase Order using the "Raise PO" button from within Jobs, ensuring that you edit the **Store** to the Engineers Van.
   - Raise a Purchase Order from within the Purchase Order module for the part.

Adding a Miscellaneous Item to a Job:

1. Go to the **Misc Tab.**
2. Click into the large **Description** box on the left and type in the text you would like to appear on the invoice (if this is a chargeable Job). NB you can use the <enter> key to go to a new line within the box.
3. Select the appropriate **Misc Type** from the drop-down list.
4. Then, if filled in on the Misc Type record, the VAT rate, Cost and Selling Prices will automatically be copied down to the screen. If these values have not been entered they must be entered now.
5. Select which **Visit No** you wish to add these Misc Items to, Visit No 0 (zero) represents Main Store. **Amend the Cost and Price** fields as appropriate.
6. Add any other **Misc** items for the Job.
7. To tell the system that these items are in relation to the Job, click the **Process** button.

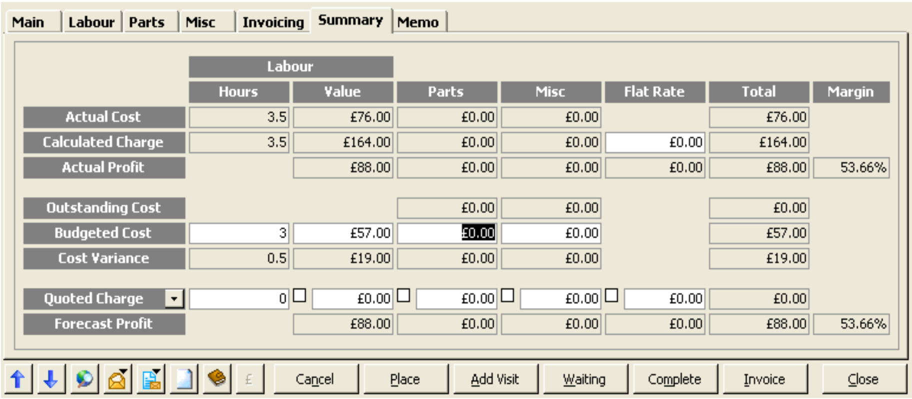


Invoice Formatting Options:



Costs associated with the Job:

- At any point in the life of a Job you can view the current cost and revenue figures on the **Summary Tab:**



- The **Actual Cost** row contains the summary information of costs on this Job.
- On the **Calculated Charge** row you can see what you will be charging the customer, with an Actual Profit calculated at the bottom including the margin.
- Lower down is an area where you can enter **Budgeted Costs** with a variance calculation and therefore keep an eye on the mounting costs of a Job against budget.

Note: *The figure that appears in the* ***Calculated Charge*** *Total box on the right will be the invoice total excluding VAT.*

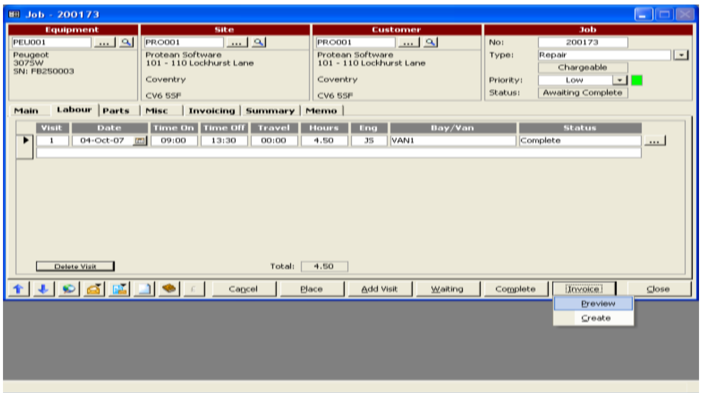
- Other tools for viewing costs on completed Jobs are the **Job Visit Reports** on the Job Menu and **Profit Analysis** on the Analysis Menu.

Invoicing a Job

There are two ways of invoicing a Job:

<u>A</u> **Raise an Immediate Invoice from the Job Screen**

1. On the **Invoicing Tab** of the Job in question ensure that the selections are consistent with the type of invoice you want to produce.
2. Ensure the Job is of the status *Completed.*
3. Click the **Invoice** button. Then select whether to view a **preview** of the invoice or to go ahead and **generate** it now.

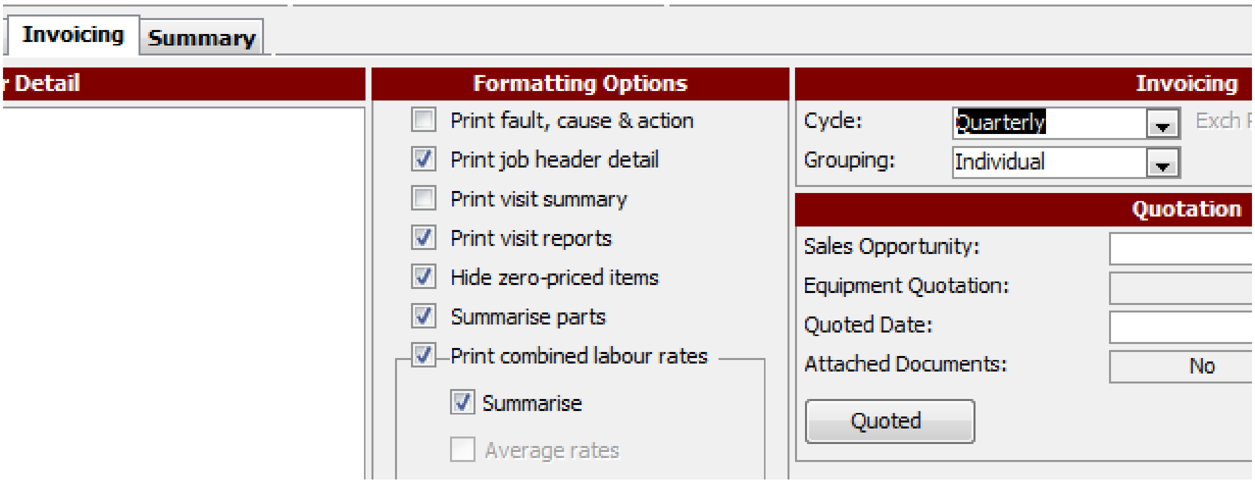


If you want to **reprint the invoice**, you can do so on the far right of the **Invoicing Tab**. Simply click the button next to the invoice number.

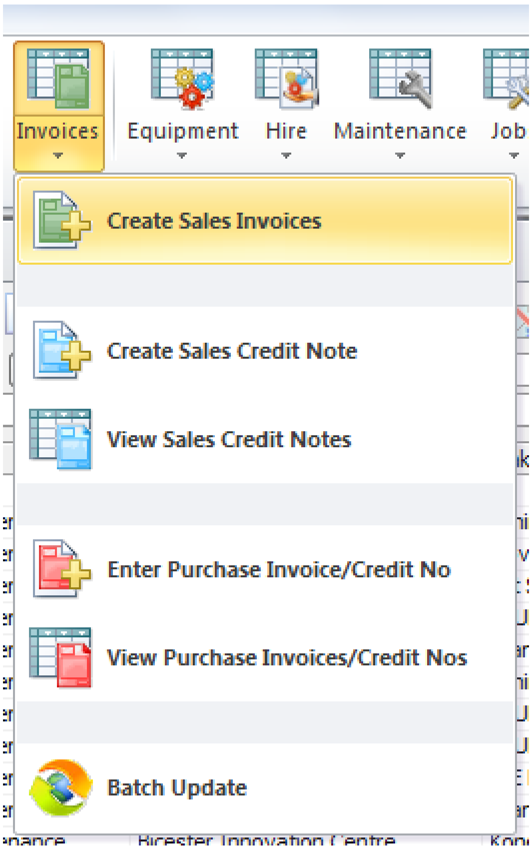
Alternatively, you can go to **Invoicing ¦ Create Sales Invoices**. Go to the **Reprint Tab**. Either select the invoice from the list or use the Invoice reprint facility, key in the invoice number and choose to print or preview on screen.

Consolidated Jobs

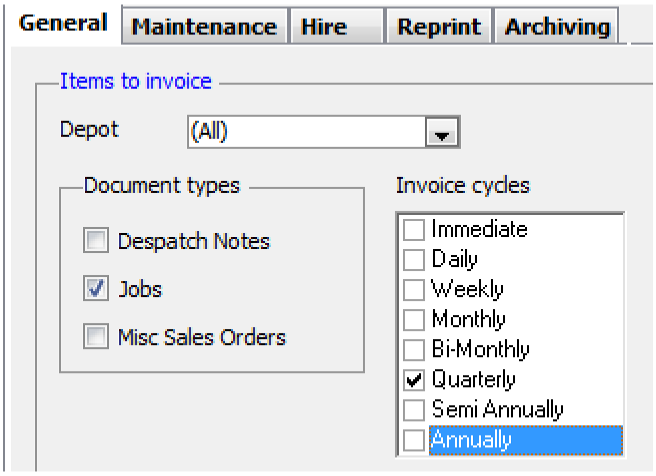
In the Invoicing tab on a job record modify the Cycle field within the Invoicing section. Repeat this step for all jobs that you wish to generate consecutive invoices for:



Click **Invoices** > **Create Sales Invoices**:

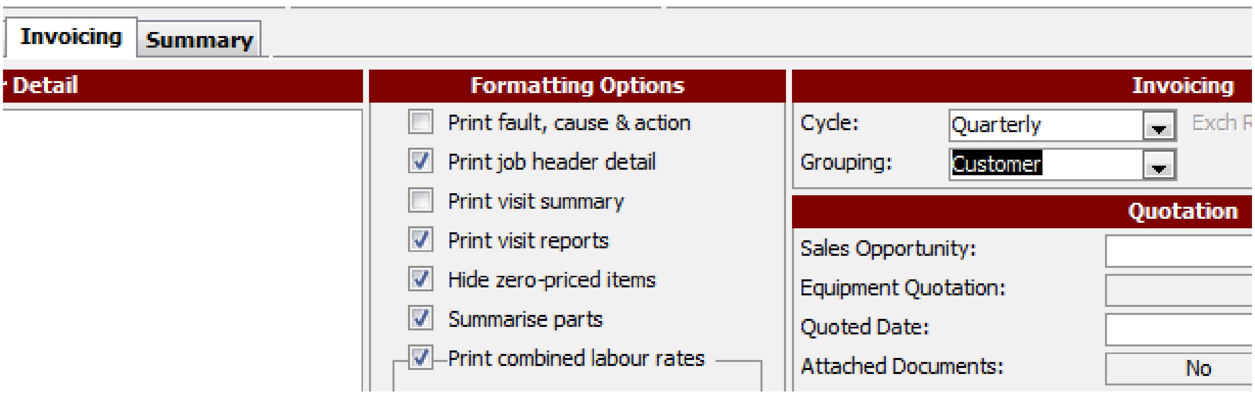


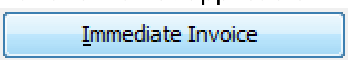
Tick Jobs and clear the ticks from the Invoice cycles that are not applicable:



You can now generate the invoices so each job in the batch has a consecutive invoice number.

If you require all jobs to go on one invoice an additional modification has to be made on the job record. Change the Grouping field within the Invoicing section to Customer:



NOTE – the consolidated invoice option is only applicable when raising invoices through Invoices > Create Sales Invoices. This function is not applicable if raising an invoice directly from a job or maintenance contract record, i.e. when clicking the 

button.

Cancelling a Job

NB You may only cancel a Job prior to invoicing.

1. If you want to cancel a Job click the **Cancel** button at the bottom of the screen.

2. You will be asked for confirmation of this to ensure you haven't pressed this button by accident.

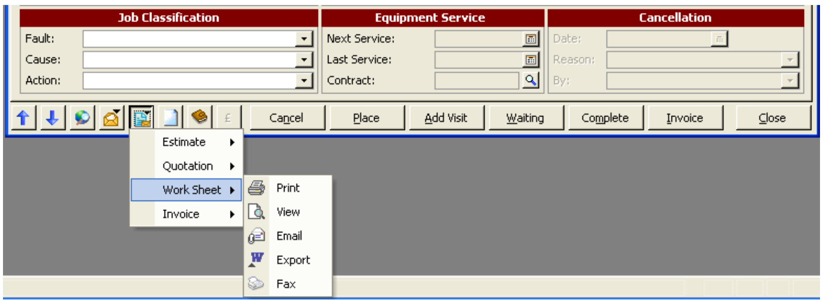
3. Another message will appear asking you to select a reason for the cancellation. Click **OK** to this message to say you have read it. Select a reason for the cancellation of the Job and then click the **Close** button. The date of the cancellation will be stored automatically.

Note: *If you do not have any cancellation reasons in the list they can be created at System ¦ General ¦ Cancellation Reasons.*

Printing a Job Sheet

1. After you have created a Job you may wish to print the Job/Work Sheet. To do this ensure that you have saved the Job by pressing the **Place** button at the bottom of the screen.

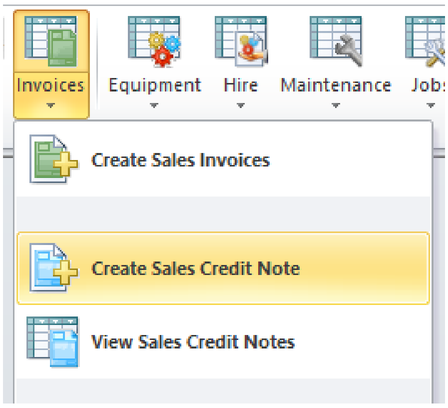
2. Then click the button in the panel of icons on the right-hand side of the Job screen. A list will appear (see screenshot below), select **Work Sheet** and then **Print**. A Job Sheet will automatically be printed containing the site, equipment and job requirement details as well as having space for an engineer to fill in labour and part information and a place for the customer to sign it.



Producing a Credit Note

This process enables you to raise Credit Notes against any invoice raised on the system.

1. Go to **Invoices ¦ Create Sales Credit Note** on the menu:



Ensure that the Type box in the top right-hand corner of the Credit Note screen is set to Job (this is the default position).

2. In the field below the Type box either enter the Job number you wish to credit and press Return, or use the button to open the Global Enquiry screen to search for it.

4. Once selected the Credit Note screen is automatically filled in with the details from the Job (the Customers name and address and all the Labour, Parts and Miscellaneous information).

5. Now, **amend the details that have come through from the Job to suit the Credit you need to raise**. For example: you may only be crediting the Parts charges, or refunding some of the Labour charge. Using the record selectors and the Delete key remove the items you do not wish to credit. ***NB Whatever items remain on the screen when you press the Credit button will appear on the Credit Note.***

6. You can amend all of the cost/charge fields on all Tabs and can even add extra items to the Credit Note at this stage.

7. Next, for each line that remains on the Credit Note you need to select a Reason. This reason will determine what happens to this line on the Credit depending under which Stock Adjustment Category it was created under.

Stock Adjustment Categories - An Explanation

In order to perform a stock adjustment, which may be anything from an opening stock take to a write off, you need to use Stock Adjustment Reasons. These consist of a description (name) and an account codes (if applicable). Each Reason belongs to a Stock Adjustment Category (non-user definable) and the Category dictates how that Reason operates. See table below:

Adjust	Normal adjustments to stock e.g Spot Check, Returns to Supplier etc
Credit Charge Only	Used by the Credit Note system - only updates charge values
Quar In	Used for booking in quarantine stock items
Quar Out	Used for booking out quarantine stock items
Credit Return	Used by the Credit Note system - actually puts parts back into stock
Stock Take	For Opening or Cyclical stock taking
Xfer	For transferring stock from one location (store) to another

It is important to select the correct category when creating the reasons otherwise the stock adjustments you carry out will not perform as wish.

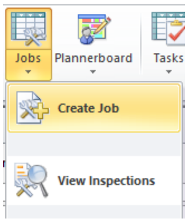
For example if you are raising a credit note for some parts that have been returned you should select a reason under the Return category which will move the values in the nominal and put the parts back into stock on Protean. Selecting a reason under the Credit Charge Only category instead, for example, would have moved the charge values but not put the parts back into stock.

***NB** You can create as many different reasons (with their attendant nominal codes) under each category as you wish.*

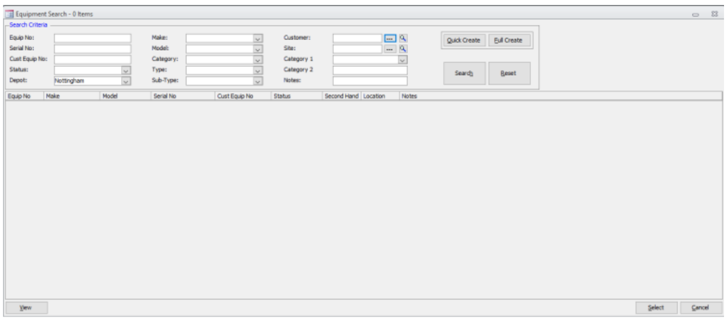
8. Check the Credit Total box just above the Close button. This is the Net Credit Note value. If it is satisfactory click the Credit Button. This will raise the Credit Note based on the details left on-screen. If you have not allocated Reasons to all the remaining lines the system will remind you.

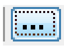
Creating a Quote (Using Protean Layout):

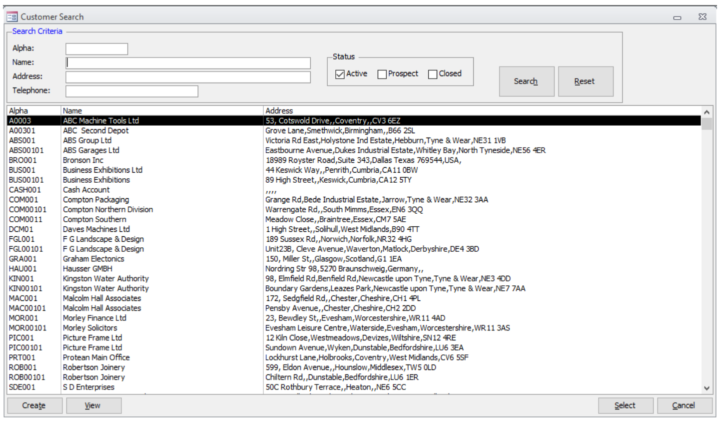
1. Click on the arrow shown below the Jobs icon and then on the “**Create Job**” option:



2. The system will then display the following screen:

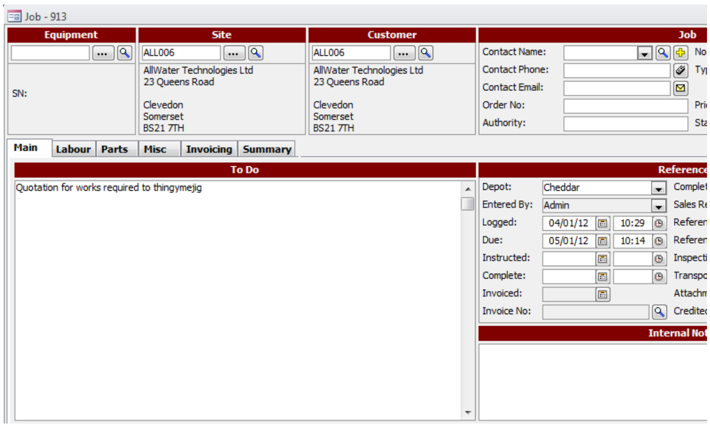


3. Then search for the customer required, by clicking on the  button next to the **Customer** Field. The system will then display the following screen:

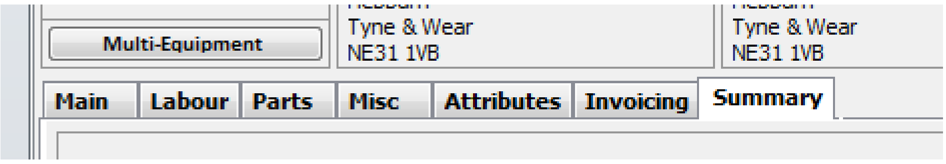


4. Search for the customer required and then select their record as required (Click on the “Create” button shown in the bottom left hand corner of the screen, to create a new customer record if required).
5. The system should then display a screen similar to the one shown below:

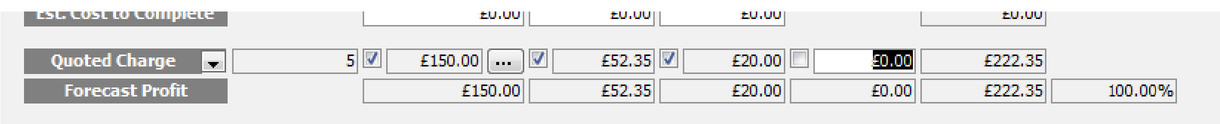
In the "**To Do**" section, enter the details of the work, materials etc. required.



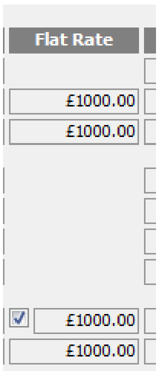
6. Then click on the Summary tab:



7. Then populate the Quoted Charge row near the bottom of this form with the required values for Labour, Parts and Misc. items as required:

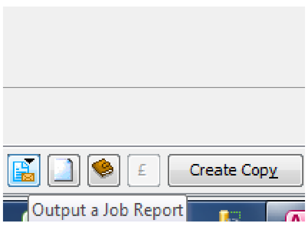


8. If you wish to just show one total value, then enter this value in the Flat Rate field:

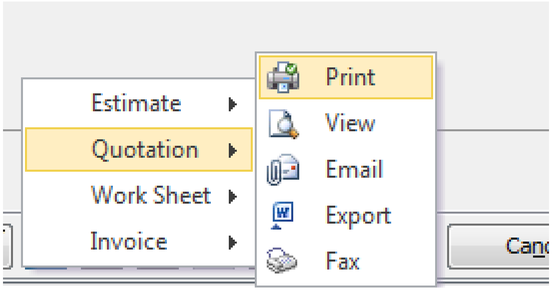


9. To "hold" this total value for invoicing, you must make sure there's a tick in the Labour, Parts and Misc. Columns:

10. Click the Output a Job Report button (the button to the left of the blank paper button).



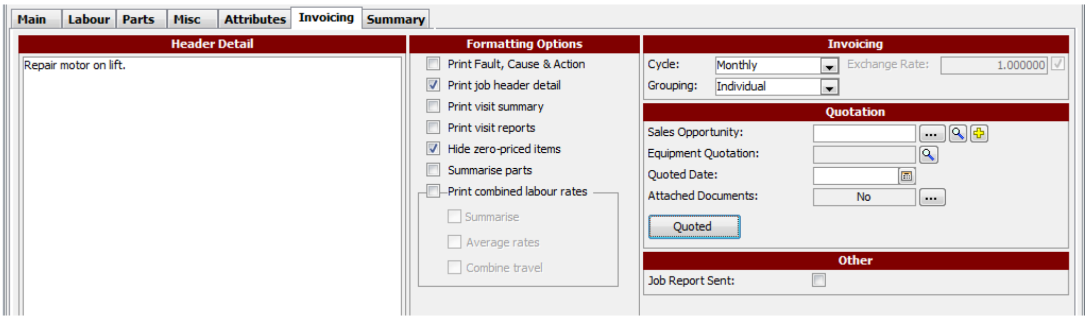
11. Select Quotation and the relevant option to Print, View, Email etc…



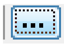
Creating a Quote (Using your own Quote already produced):

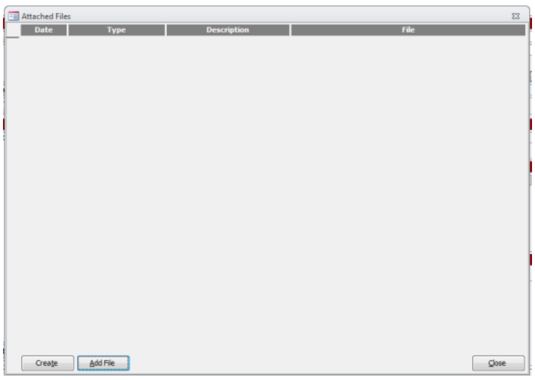
1. Create the Quote as shown earlier, following steps 1 to 5

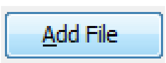
2. Click on the Invoicing tab:



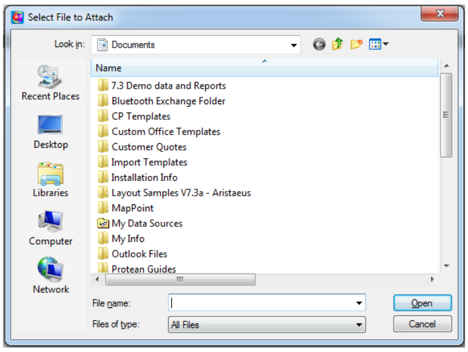
3. Quoted Date: Enter the date that the Quote was produced.

4. Attached Documents: Click on the  button and the system will display the following screen:

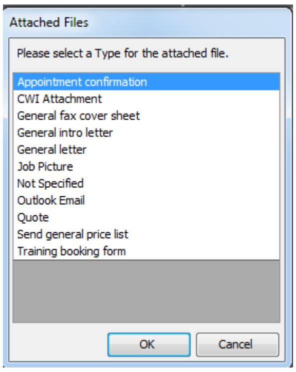


5. Then click on the  button.

6. Locate the Quote already produced:

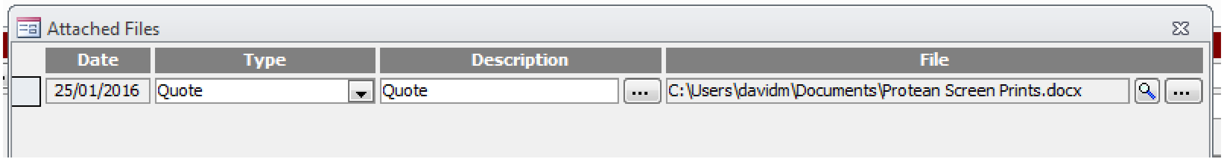


7. Select the File Type of “Quote”:

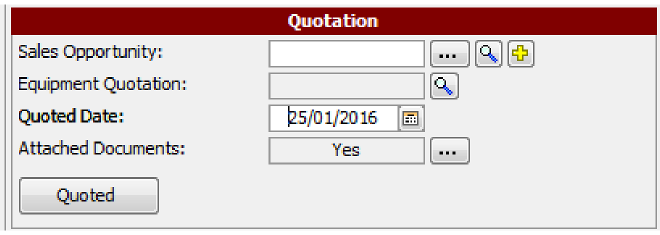


8. Click on the “OK” button.

9. The system will then display a screen similar to the one shown below:



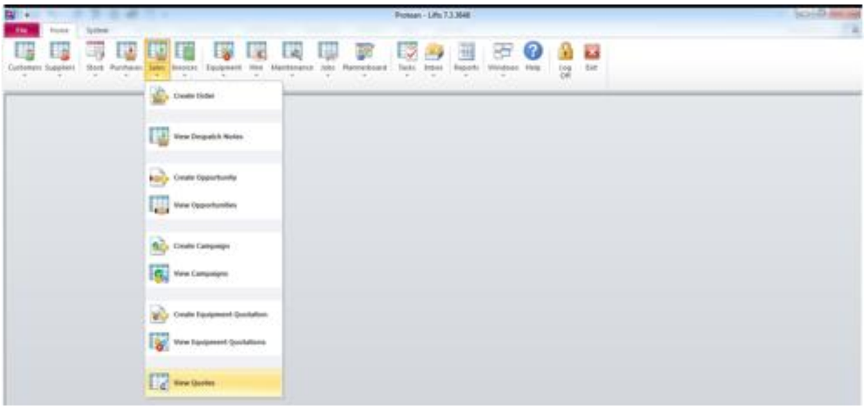
10. Click on the Close button, shown in the bottom right hand corner of the screen. The system will then display the following:



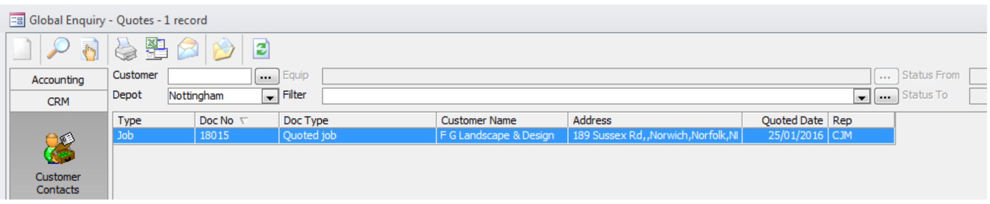
Searching for a Quote

All of the Job Quotes created in either way, are then available in their own search screen which is accessible by clicking on the small down arrow shown below the Sales Icon: 

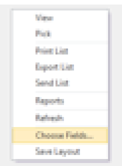
and then selecting “View Quotes”:



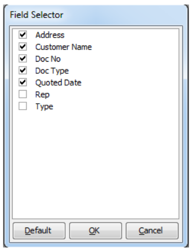
The system will then display a list of Quotes that have been created:



Don’t forget you can change the columns displayed, by right hand clicking your mouse button and selecting “Choose Fields”:



You might only require the following information:



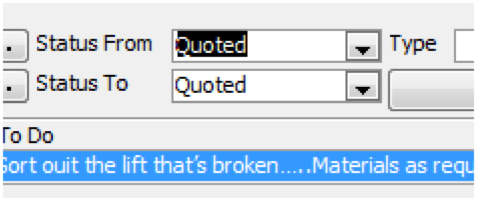
Then click on the OK button, then right hand click the mouse button for a second time and select "Save Layout" to save the column changes made.

Simply double click on the Quote required to check/amend or cancel the quote if required.

Converting a Quote into a Job

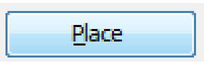
If the customer is then happy to proceed with the quote, these can then be found using the standard Jobs Global Enquiry screen, by clicking on the Jobs icon:

1. Then change the "Status From" and "Status To" fields to "Quoted":



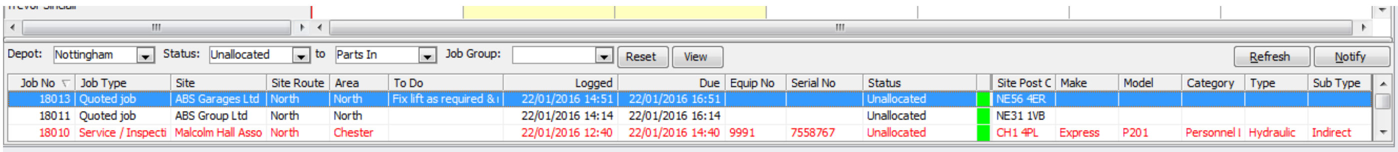
2. Then double click on the quote required.

3. To then allocate this job to an engineer, click on the "Place" button shown at the bottom of the screen:



4. Then click on the "Engineer Planner Board" button shown at the bottom of the screen:

5. The job will be shown at the planner board screen, so simply "drag & drop" it on the Engineer and Date required:

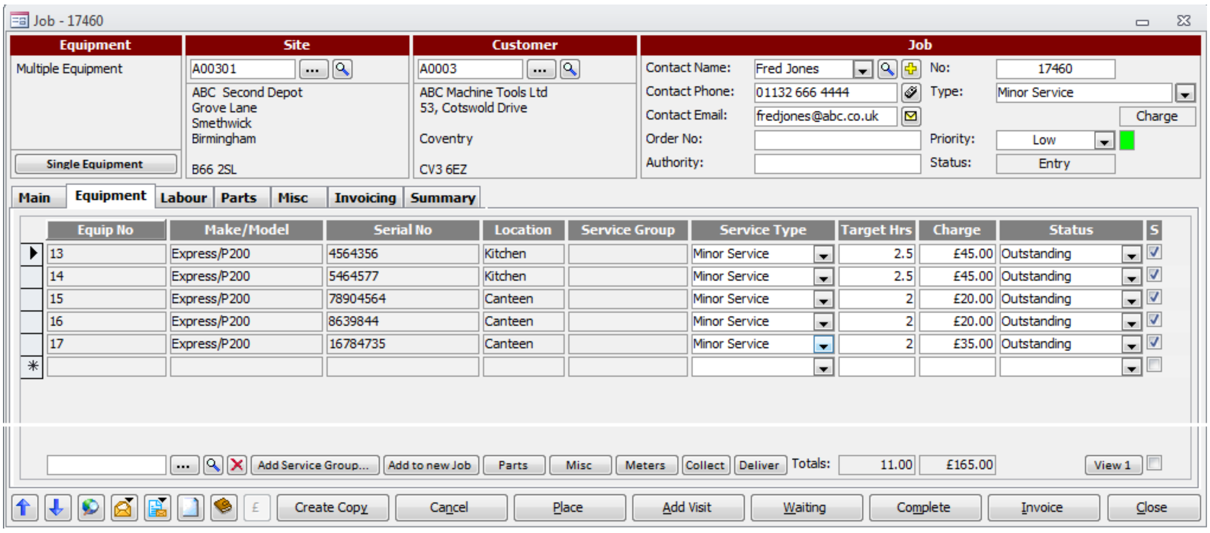


6. Then click on the Notify button shown on the right hand side of the screen, to send the Job to the engineers PDA.

Multi Equipment Jobs

Create the Job as normal (if not an auto-created service), pick Site etc. If the Setting is turned on then a button will be at the bottom of the Equipment box on the Job labelled 'Multi Equipment'. Click this button and use the **[…]** to open the search screen for Equipment. A list of Equipment appears for that Site, as normal. You can pick the items for the Job from the list, or use the Select All option at the bottom of its quicker. All selected Equipment will be returned to the Job and shown on a new Equipment Tab.

NB You can select one item from the list, go to the Equipment Tab and use the 'Service Group' button to drag on all the other items in the selected items Service Group to save time.



On a Multi-Equipment Job the button at the bottom of the Equipment field changes to 'Single

Equipment' if you wish to switch back to the 'normal' style.

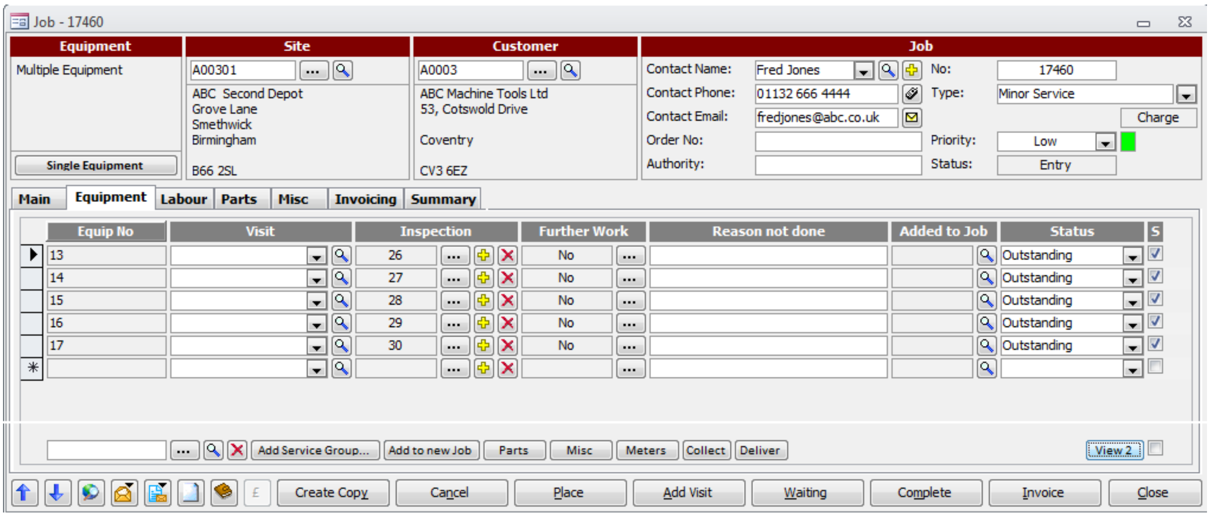
On the Equipment Tab there 3 'Views' available to get all the new fields in! In View 1 you can see the Equipment No, Make, Model & Serial No. Also available is the Location (from the Equipment Record) and Service Group/Service Type.

Note you don't have to use Service Groups if you don't want to. Also note you would be able to select a different Service Type on different lines of Equipment. It is also possible to add the same item of Equipment more than once as long as they are linked to different Service Types. Also on View 1 you can see and enter the Target Hrs & Charge. The target Hrs defaults from the Make & Model per Service Type. The Charge also defaults from here.

The status could be one of the following:

- **Outstanding:** *Not yet visited*
- **Done:** *Visited*
- **Not Done:** *Site visited but this item not serviced/worked on*
- **Item Retired:** *Reason for 'Not Done' – Equipment item no longer in use*
- **Skipped:** *Reason for 'Not Done' – Couldn't carry out works*
- **Added to New Job:** *Reason for 'Not Done' – Moved to another Job*

The Engineer on the PDA sets the Status to 'Done' or 'Not Done' as applicable. If they select 'Not Done' they must then enter a reason. This reason is shown to the office users (on View 2), who will then interpret that into one of the three Status listed above.

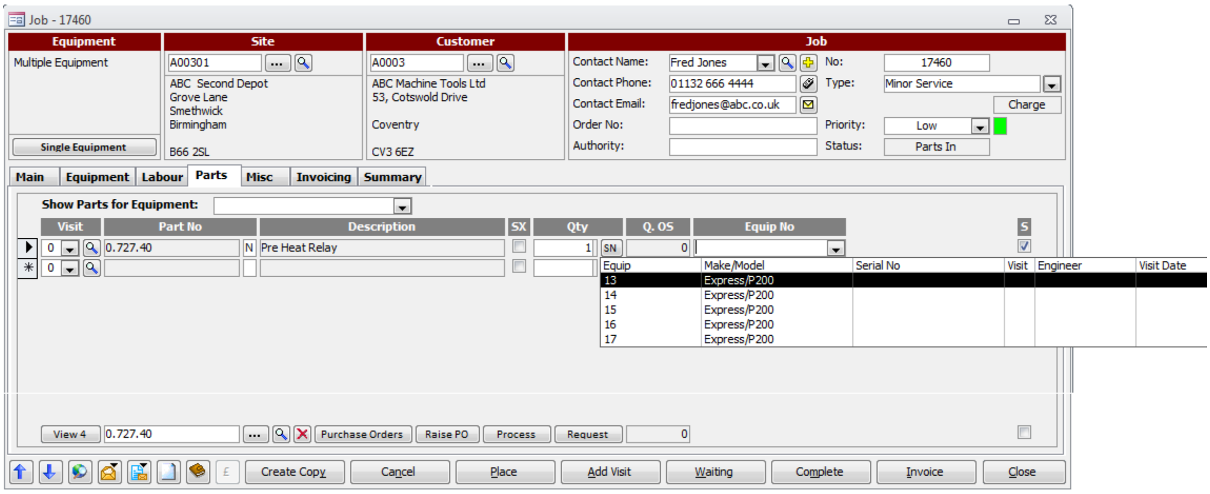


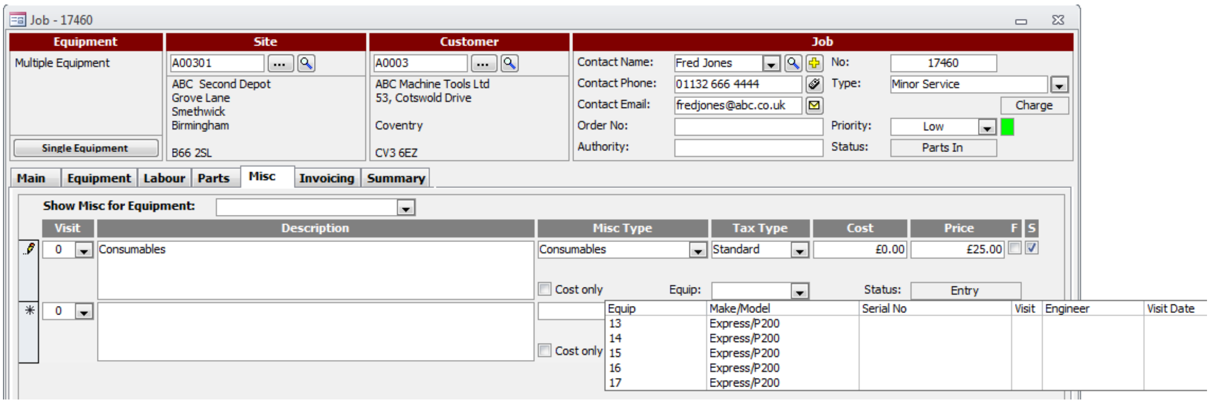
Also on **View 2** you can see the Visit (i.e. which Engineer worked on this line), Inspection information (see more on this later), whether there is any Further Work Required and the Job No (if added to another Job).

View 3 on the Equipment Tab will expose the Fault, Cause & Action fields which are now per line also.

The Meters button is now at the bottom of the Equipment Tab also (from the Labour Tab) as this needs to be entered per line also.

On the Parts & Misc. Tabs you can now filter the lists by the Equipment line as any materials used will need to be allocated to the appropriate item they were fitted to (if using PDAs this will happen automatically). There is now a **View 4** on Parts to accommodate an Equipment selection box.





On the **Invoicing Tab** there are three new options.

1. **Equipment List**
2. **Equipment Category Summary**
3. **Equipment with Parts & Misc.**

If you don't select any of the options the invoice looks traditional and doesn't mention Equipment at all.

Equipment List: Adds a list of the Equipment on the Job at the top of the body of the invoice showing No, Make, Model & Serial No

Equipment Category Summary: Shows a quantity for each combination of Category & Type e.g. *Fire Systems/Smoke Detectors x 25*

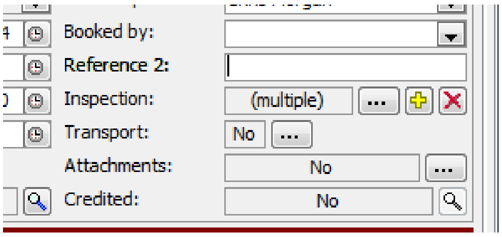
Equipment with Parts & Misc.: Will group the Equipment with its associated materials (not dissimilar to a consolidated job in look)

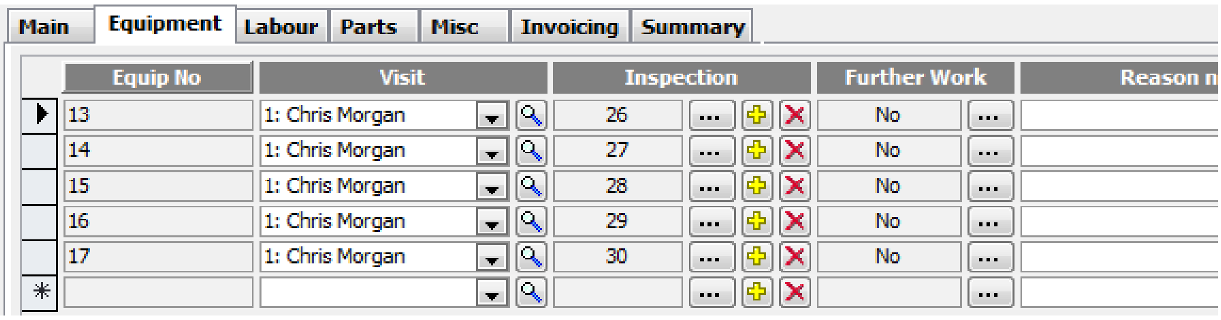
Inspections:

You can now have multiple inspections per Equipment line on the Job AND multiple Inspections on a Job itself independent of the Equipment Inspections. For example you could have a Risk Assessment form attached to the Job and the actual Inspections attached to the Equipment.

Inspections can be specified on the Make & Model screen for each Service Type. You can also select an Inspection to a Job Type as well, including Service Category Job Types (as the relationship is now broken).

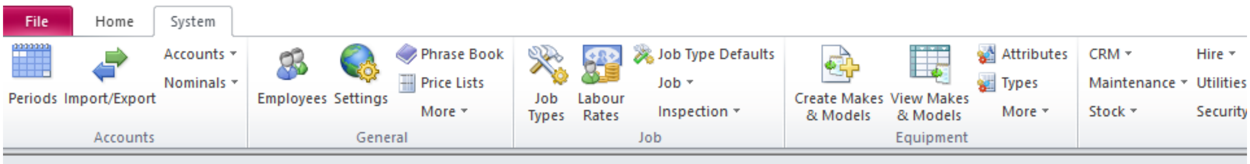
Use the **[…]** button on the Main Tab to add an Inspection and then the **[+]** button to add further Inspections if required.





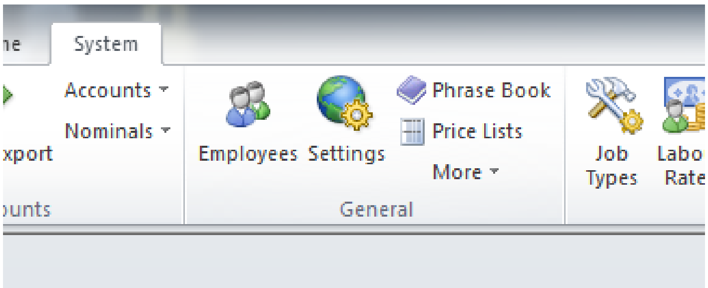
Jobs Module Setup

In order to use the Protean Job Management system, a number of pre - determined settings and lists must be setup. This is done, by clicking on the **System tab** and then selecting the various options as shown:

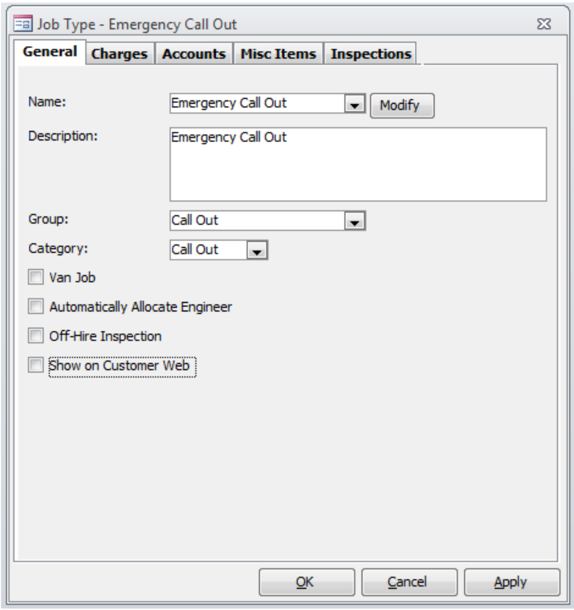


Job Types:

1. Click on the **System Tab** and then on the **Job Types** Icon:



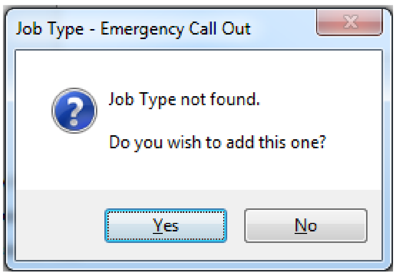
2. The system will then display a screen, similar to the one shown below:



General Tab:

To amend an existing Job Type, simply use the drop-down menu to select the appropriate one and then the data can be amended.

1. To create a new one, either highlight the Job Type Name or delete the name showing and type in a new one. Press Return / Enter.
2. If entering a new Job Type, the system will then display the following message:



3. Click on the "**Yes**" button to continue.
4. **Description:** Add a description if required. This is **not** a required field.
5. **Group:** Select which Group you wish this new Job Type to belong to. If you wish it to belong to a new group then simply type the text into the Group box and press Return. If you wish to add it, click '**Yes**'.

__NB:__ Each Job Type is placed in to a Job Group. In this way you can report and filter on the data at two different levels. The Job Group facility allows you to filter the Job list on the Global Enquiry screen and in various reports by the text you enter here.

6. **Category:** Select the appropriate Category:

    - **Abuse**: When a Job is changed to having a Job Type belonging to this category the system checks to make sure that the Customer (invoice address) on the Job is the selected invoice address for that Site.
    - **Call Out**: When a Job is created using a Job Type in this category, then it will automatically calculate a Due Date based on the Logged Date and the Response Times set up in the System Settings elsewhere in the system.
    - **Repair**: A normal Job. No extra functionality.
    - **Service**: When selected a new box appears to its right allowing you to link this Job Type to a Service Type

***NB** You cannot add to or amend this list and, like Group, it is required.*

7. **Van Job:** This tick-box controls where the service parts (if any are allocated to the equipment service records) will come from to the Job. If this field is 'ticked' then any service parts will come from the Engineer's van and be added to the current Labour Session. If it is not ticked then the parts will be added from 'Main Stores' to Session 0.
8. **Automatically Allocate Engineer:** If ticked, will use Site Routes to assign engineer. If you have previously set up Site Routes then you can determine what types of Jobs require an automatic allocation of engineer to the Job.

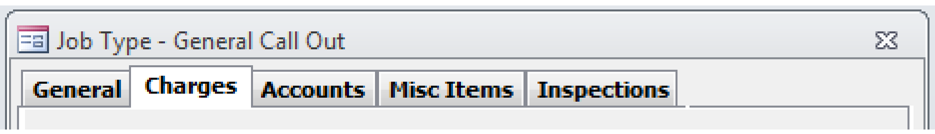
__For example:__ You may wish to allocate an engineer for service work, but for breakdowns you just want whoever is available at the time.

__NB:__ In order for this to work correctly the Site Route must have already been created with an Engineer's name and have been selected on the appropriate Customers' Records screen.

9. **Off-Hire Inspection:** If ticked this Job Type is to be used to inspect Hire equipment on its return from a customer's site.
10. **Show on Customer Web:** If selected, all jobs created using this Job Type, will then display on the Customer Web facility within the Protean system.

<u>Charges Tab:</u>

A user can use this screen to decide what items to charge for when invoicing a Job using this particular Job Type.

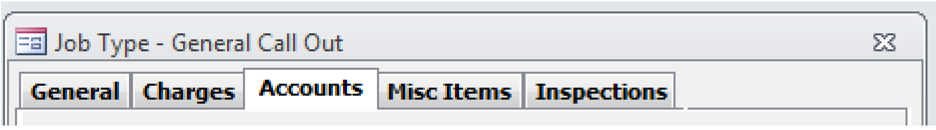


- **Charge for Labour/Mileage/Travel:** Defines whether labour/mileage/travel are chargeable.

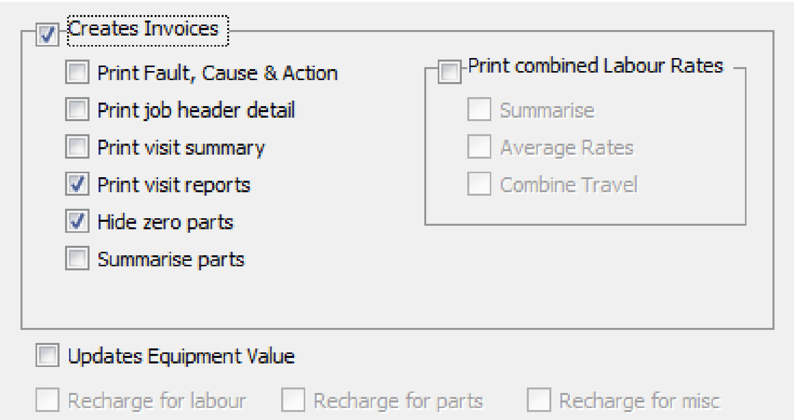
- **Labour Profile:** Assigns a labour profile for the job type. This must have been setup first in System > Job > Labour Profiles.
- **Override Labour Rate Basic Charge:** To specify a default callout/set charge.
- **Charge for Parts/Misc:** Defines whether parts and misc items are chargeable.
- **Charge at cost:** Used to charge parts/misc items at cost price.
- **Exceptions:** Used to define certain parts/misc items that should not be chargeable.

<u>Accounts Tab:</u>

Using the 'tick' boxes in the top of the screen, a user can tell the Job Type how the invoices will look for Jobs of this type.



- **Creates Invoices:** Used to define whether invoices should be created for this job type (i.e. if the job type is chargeable).



You can select to show the following:

- **Print Fault, Cause and Action:** Shows any Fault, Cause & Action on top of invoice detail section.
- **Print Job Header Detail:** Extra Narrative field for further text entry (Default is contents of “To Do” box.
- **Print Visit Summary:** Shows only No of Hours, multiplied by the rate.
- **Print Visit Reports:** Prints Date of visit and text.
- **Hide Zero Parts:** Any zero priced lines are hidden on the invoice.
- **Summarise Parts:** Instead of listing all of the parts used (Part Number, Description etc), the invoice will just display the word “Parts” and a total price.
- **Print Combined Labour Rates:** Merges the First Hour Rate with subsequent Rates to show just one line for Labour.
- **Summarise:** Instead of listing each labour visit individually, the invoice will display just the word “Labour” and a total price.
- **Average Rates:** Even if the labour rates are different, the invoice will merge them together to show just one labour line with an average labour rate.

- **Combine Travel:** Will include Travel Hours with the rest of the labour, otherwise shows as a separate line on the invoice.
- **Updates Equipment Value:** Defines whether the cost of the work contributes to the stock value of the equipment.
- **Recharge for Labour/Parts/Misc:** Opens up the charge fields for non-chargeable work to allow nominal accounts to be entered for cross-charging.

Nominal Codes:

In the bottom part of the screen, depending on the choices selected earlier, anywhere from 2 (4) to 4 (8) boxes will be white in the Nominal Codes' section at the bottom of the Nominals Tab. This enables the system to post the correct costs and revenues associated with Jobs, into your accounts system.

Nominal Codes	Debit		Credit	
	Account	Dept	Account	Dept
Labour Cost			0000	
Labour Charge	0000			
Parts Cost			0000	
Parts Charge	0000			
Misc Cost				
Misc Charge	0000			

Fill in the appropriate boxes by clicking into the box and then using the drop-down list to select the correct Nominal Code.

There are four possible variations in the number and type of codes that require setting up. These depend upon other choices on the Nominals Tab of the Job Type. They are as follows:

1. A Chargeable Job Type: Creates Invoice
2. A Non-Chargeable Job Type: No invoice
3. An Internal Recharge Job Type: No Invoice
4. An Update Equipment Value Job Type: No invoice

A Chargeable Job Type:

This Job Type would create an invoice. Four accounts boxes at the bottom of the screen become white, with four remaining grey (If you include the dept boxes it would be eight and eight).

- **Labour Cost Debit:** Select from the drop-down list the appropriate Cost of Sales account. Protean will post the cost of the labour on Jobs of this type as a debit (increase) to this account when the Job is invoiced (Add a Dept code if this account is departmentalised).

- **Labour Charge Credit:** Select from the drop-down list the appropriate Sales account. Protean will post the sales value of the labour on Jobs of this type as a credit (increase) to this account when the Job is invoiced (Add a Dept code if this account is departmentalised).

- **Material (Parts & Misc) Cost Debit:** Select from the drop-down list the appropriate Cost of Sales account. Protean will post the cost value of the material on Jobs of this type as a debit (increase) to this account when the Job is invoiced (Add a Dept code if this account is departmentalised).

- **Material (Parts & Misc) Charge Credit:** Select from the drop-down list the appropriate Sales account. Protean will post the sales value of the materials on Jobs of this type as a credit (increase) to this account when the Job is invoiced (Add a Dept code if this account is departmentalised).

NB: *The four grey boxes should show a valid Nominal Code that Protean supplies from the Nominal Code screen in System / Accounts / Nominal Codes. On a chargeable Job Type these should be:*

> *Labour Cost Credit - Work In Progress*
> *Labour Charge Debit - Trade Debtors / Sales Control*
> *Material (Parts & Misc) Cost Credit - Work In Progress*
> *Material (Parts & Misc) Charge Debit - Trade Debtors / Sales Control*

<u>A Non Chargeable Job Type:</u>

This Job Type would **not** create an invoice. The two accounts boxes at the bottom of the screen become white, with six remaining grey (If you include the dept. boxes it would be four and twelve).

- **Labour Cost Debit:** Select from the drop-down list the appropriate Cost of Sales account. Protean will post the cost of the labour on Jobs of this type as a debit (increase) to this account when the Job is completed (Add a Dept code if this account is departmentalised).

- **Material Cost (Parts & Misc) Debit:** Select from the drop-down list the appropriate account. This would be a Cost of Sales account. Protean will post the cost value of the material on Jobs of this type as a debit (increase) to this account when the Job is completed (Add a Dept code if this account is departmentalised).

NB: *The two grey boxes alongside those above should show a valid Nominal Code that Protean supplies from the Nominal Code screen in System / Accounts / Nominal Codes. On a non-chargeable Job Type these should be:*

> *Labour Cost Credit - Work In Progress*
> *Material (Parts & Misc) Cost Credit - Work In Progress*

<u>An Internal Recharge Job Type:</u>

This Job Type would **not** create an invoice. A possible six accounts boxes at the bottom of the screen become white, with two remaining grey (If you include the dept. boxes it would be twelve and four).

The number will depend on whether you wish to recharge both labour and parts. For the sake of this example, we will assume both will be recharged.

- **Labour Cost Debit:** Select from the drop-down list the appropriate Cost of Sales account. Protean will post the cost of the labour on Jobs of this type as a debit (increase) to this account when the Job is completed (Add a Dept code if this account is departmentalised).

- **Labour Charge Debit:** Select from the drop-down list the appropriate 'recharge' Balance Sheet account. Protean will post the sales value of the labour on Jobs of this type as a debit (increase) to this account when the Job is completed (Add a Dept code if this account is departmentalised).

- **Labour Charge Credit:** Select from the drop-down list the appropriate 'recharge' P&L account. Protean will post the sales value of the labour on Jobs of this type as a credit (increase) to this account when the Job is completed (Add a Dept code if this account is departmentalised).

- **Material Cost (Parts & Misc) Debit:** Select from the drop-down list the appropriate Cost of Sales account. Protean will post the cost value of the material on Jobs of this type as a debit (increase) to this account when the Job is completed (Add a Dept code if this account is departmentalised).

- **Material Charge (Parts & Misc) Debit:** Select from the drop-down list the appropriate 'recharge' Balance Sheet account. Protean will post the sales value of the labour on Jobs of this type as a debit (increase) to this account when the Job is completed (Add a Dept code if this account is departmentalised).

- **Material Charge (Parts & Misc) Credit:** Select from the drop-down list the appropriate 'recharge' P&L account. Protean will post the sales value of the materials on Jobs of this type as a credit (increase) to this account when the Job is completed (Add a Dept code if this account is departmentalised).

NB: *The two grey boxes should show a valid Nominal Code that Protean supplies from the Nominal Code screen in System / Accounts / Nominal Codes. On a non-chargeable Job Type these should be:*

Labour Cost Credit - Work In Progress
Material (Parts & Misc) Cost Credit - Work In Progress

<u>An Update Equipment Job Type:</u>

This Job Type would **not** create an invoice. All accounts boxes at the bottom of the screen become grey.

When a Job of this type is completed the system will use the nominal codes set up in Nominal Codes in *System / Accounts / Nominal Codes*.

The cost of the Job are transferred from Work-In-Progress to the nominated Equipment Stock Account (i.e. it increases the value of equipment stock by the cost of the Job).

<u>Setting up Fixed Price Job Types:</u>

If you want to be able to have Jobs that don't charge for Labour or Parts but instead charges a fixed price (e.g. a service) then you can easily create a Job Type to achieve this.

1. Create a new Job Type and fill in the boxes on the General Tab as required. Go to the Charges Tab.
2. Untick the charge for Labour, Mileage and Travel and the tick the Do Not Charge for Parts & Do Not Charge for Misc boxes.
3. Then go to the Nominals Tab and make the appropriate selections.
4. When you have created the Job Type to your satisfaction click OK.

***NB** Obviously you can also do combinations of charges. For example you may want to set up a fixed price job that also charges for parts. In that scenario you would leave the Charge for Parts box ticked instead of switching to Do Not Charge for Parts. Then on the Job it will invoice the customer for the fixed price plus the sales value of any parts as and when they are booked onto the Job.*

Setting up Non Invoicing Job Types:

If you want to be able to have Jobs that don't charge for Labour or Parts and don't raise an invoice (e.g. a service or warranty job) then you can easily create a Job Type to achieve this.

1. Create a new Job Type and fill in the boxes on the General Tab as required.
2. Go to the Nominals Tab.
3. Untick the box labelled 'Creates Invoice'.

***NB:** The system automatically greys-out the options on the Charges Tab.*

4. When you have created the Job Type to your satisfaction click OK.

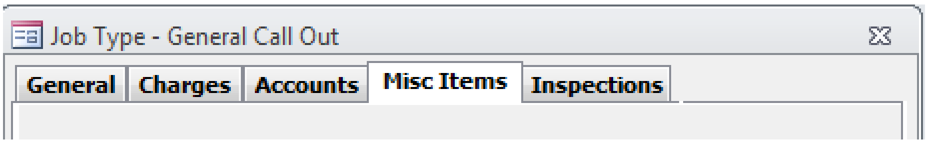
Setting up Internal Recharge Job Types:

If you want to be able to have Jobs that don't raise an invoice but instead recharge the sales value to another department (e.g. A prepare for sale job), then you can easily create a Job Type to achieve this.

1. Create a new Job Type and fill in the boxes on the General Tab as required.
2. Go to the Nominals Tab.
3. Untick the box labelled 'Creates Invoice'.
4. The system automatically greys-out the options on the Charges Tab.
5. The three boxes below however, become active. These are 'Recharge Labour', 'Recharge Parts' and 'Recharge Misc'.
6. Tick the appropriate box (es) and fill in the relevant nominal codes below.
7. When the Job is completed, the value of the Job will be posted to the codes entered instead of raising an invoice.
8. When you have finished creating the Job Type, click OK.

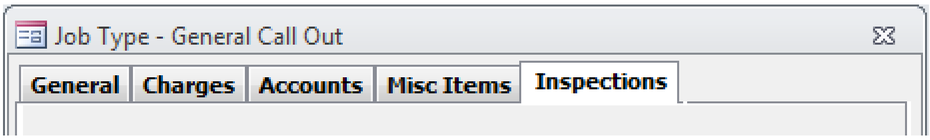
Misc Items Tab:

Used to define whether any of the auto-add Misc Types, should **not** be auto-added for this Job Type.



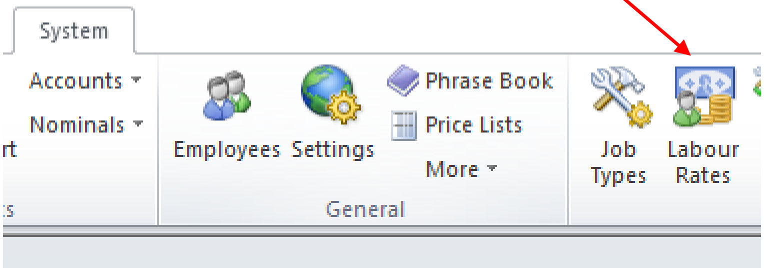
Inspections Tab:

Used to define which inspections should be automatically added to this Job Type.

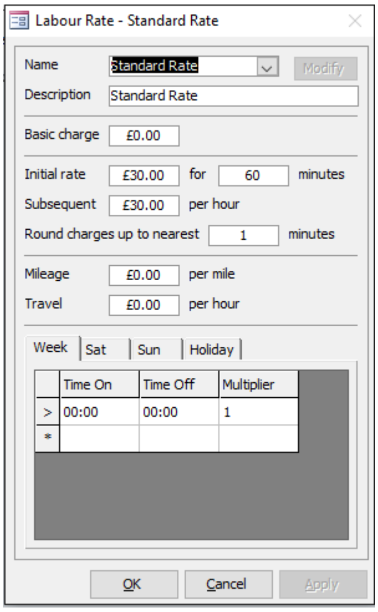


Labour Rates:

1. Click on the **System Tab** and then on the **Labour Rates** Icon:



2. The system will then display a screen, similar to the one shown below:



3. To create a new Labour Rate, highlight the text in the **Name** field and type in the name of the new rate you wish to create and press return. The system will ask if you wish to create a new Labour Rate. Click 'Yes'.
4. The other fields on the screen will blank out ready for you to enter the details of the new rate. Enter the **Description** of the new rate. Although this can be left blank we advise that some text is entered here as it will ensure ease of use later when the reason for creating the new rate may have been forgotten.
5. If you wish to add a fixed call out fee to this Labour Rate enter it in the **Basic Charge**.
6. Then enter the **Initial Rate**, and how many minutes this covers, the **Subsequent hours** rate, and the number of minutes you would like to round up to. Then enter the **Travel** and **Mileage** values if applicable.

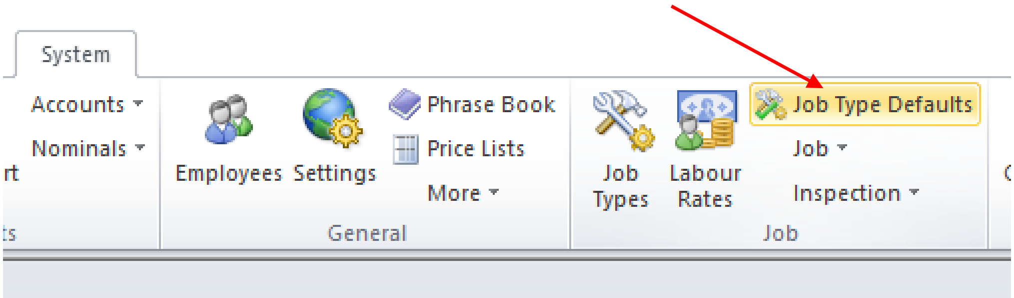
NB: If you do not have a different First Hour rate simply type the same value here as you have in the Standard box. Do not leave it blank.

7. Enter any Overtime parameters that you wish.

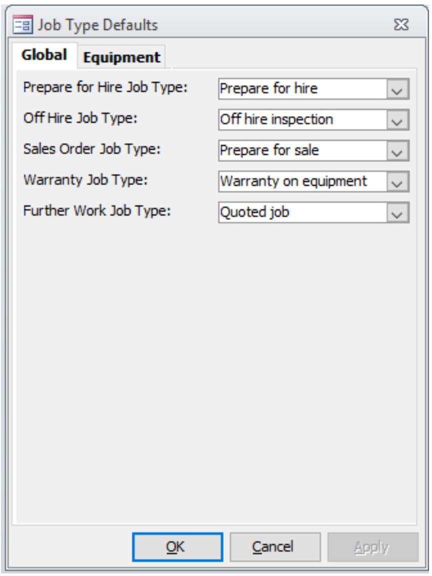
If you want to save what you have done and stay on the screen to enter/amend another Labour Rate, click **Apply**.
If you want to save what you have done and exit the screen click **OK**.
If you want to cancel what you have done choose **Cancel**.

Job Type Defaults:

1. Click on the **System Tab** and then on the **Job Types Defaults** Icon:



2. The system will then display a screen, similar to the one shown below:



<u>Global Tab:</u>

This screen allows a user to allocate the default Job Types used in certain specific processes within the Protean system:

Prepare for Hire Job Type: On the Hire Contracts Despatch screen, there is a button called 'Prepare for Hire'. This button will create a Job for the selected equipment on the contract of whatever Job Type is selected here.

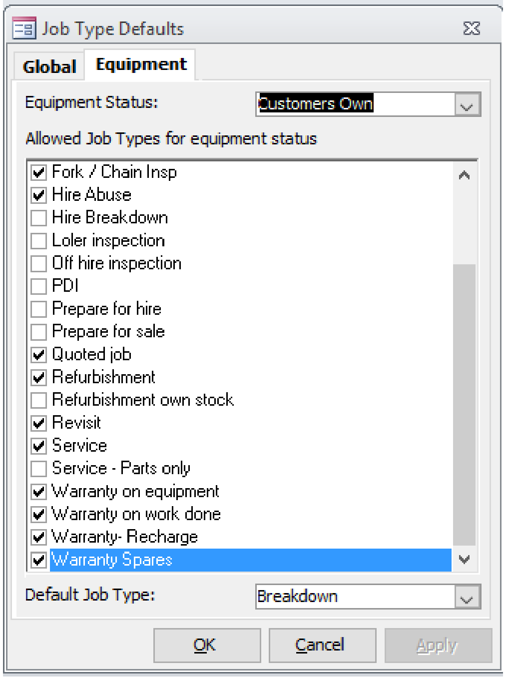
Off Hire Job Type: On the Hire Contract Collect screen there is an 'Inspect' button. This button will create a Job for the selected equipment of the type specified here.

Sales Order Job Type: When you raise a Sales Order for an item of equipment you have the opportunity of raising a 'Prepare for Sale' Job. This Job will be raised with this Job Type.

Equipment Warranty Job Type: If an item of equipment is under warranty then when you raise a Job the system warns you it is under warranty and asks if you would like to change the Job Type to the warranty one. If the user answers yes to this question then the Job Type will change to whatever is selected here.

Equipment Tab:

This screen allows you to link Job Types to Equipment Status', to limit mistakes when allocating Job Types on Jobs.

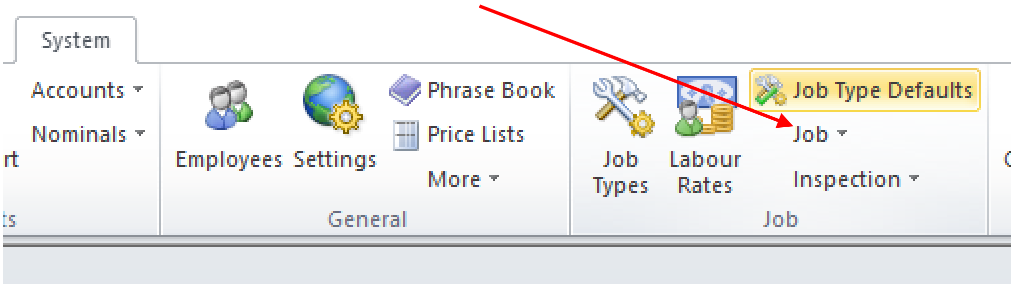


For each status of equipment that you utilise on the system, select the appropriate Job Types that appear in the list below.

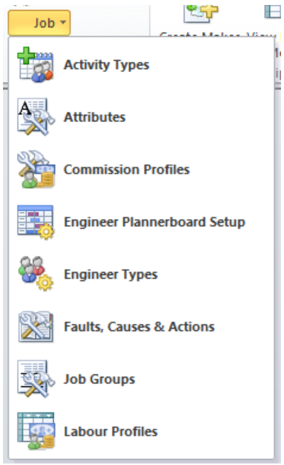
This is done by selecting the status from the 'drop-down' list, e.g. Customers' Own and then 'ticking' the boxes next to the Job Types that are allowed for equipment of that status.

Job:

Click on the **System Tab**, and then on the **Job** Icon:



Then select the required option:



Activity Types:

These allow you to record Engineers time that cannot be allocated to a Job. You can create different types of Activity and choose how they are represented on the planner board. You can also stipulate whether it is a paid Activity for Timesheet purposes.

Attributes:

Attributes allow you to store information about a Job. They are completely user-defined, allowing you to hold as much or as little information as you wish about anything in connection with a Job on Protean.

There are various 'Types' of Attribute that essentially govern in what form the information is held. These Types are Numeric, Text, Yes/No, List & Date.

Each Attribute can also be Categorised (again using user-defined Categories), to enable you to control long lists of information.

They then can be used in Global Enquiries, using the Advanced Query option.

Engineer Planner board Setup:

Here you can customise the look and feel of the Engineer Planner board. You can determine what information about the Jobs and Visits you wish to see on the Planner board and what colour schemes to use.

Engineer Types:

You can set up different groups for your Engineers to belong to assist in filtering the Engineers on the Planner board, to make it easier to find the right Engineer for the Job.

Faults, Causes & Activities:

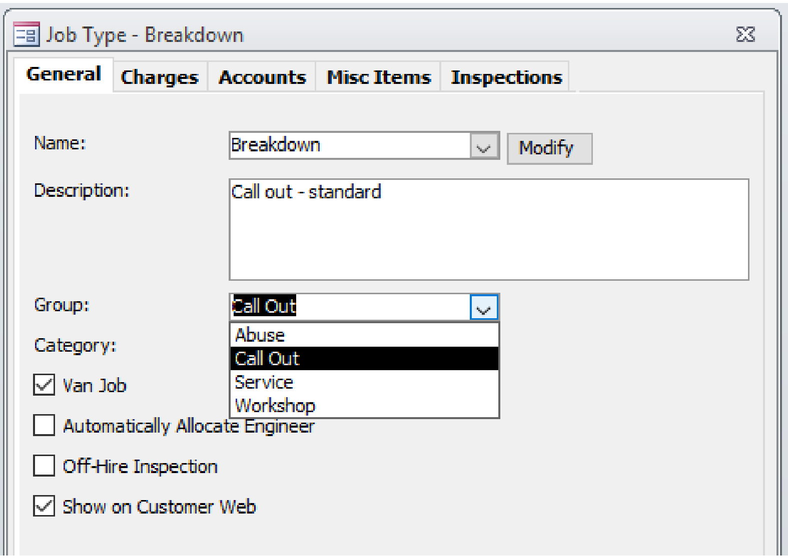
This screen allows you to create and maintain the Job Classification system. By setting up the list of Faults, Causes and Actions here and then allocating them to Jobs you will be able to analyse the Job data for common trends. For example, at the end of the year you can run reports that might show you that 75% of all Jobs done were on a certain Make and Model and of those 50% were the same fault (bad starters for example). This may lead you to decide not to buy any more of that particular model.

Job Groups:

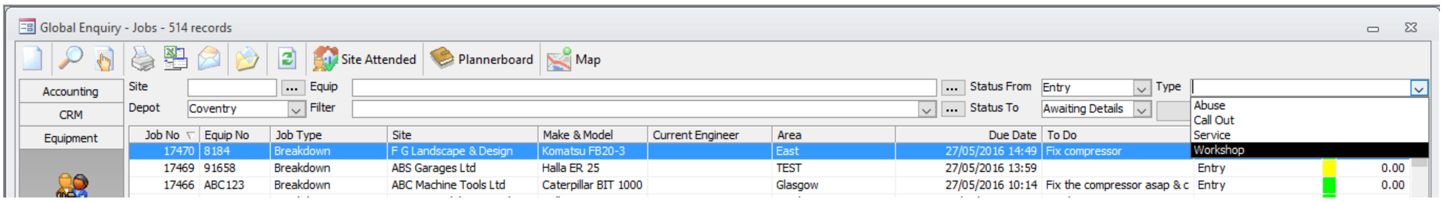
Job Groups are used to group Job Types together for reports and enquiries around the system.

For example you may have Job Types of: Customer Breakdown, Hire Breakdown, Contract Rental Breakdown etc. in a Job Group of 'Breakdowns'. In this way you can enquire or report on say just Customer Breakdowns, or all Breakdowns by using the Job Group. Similarly you can in this way have a Service Group despite the fact that you may have 4 or 5 different Service Job Types.

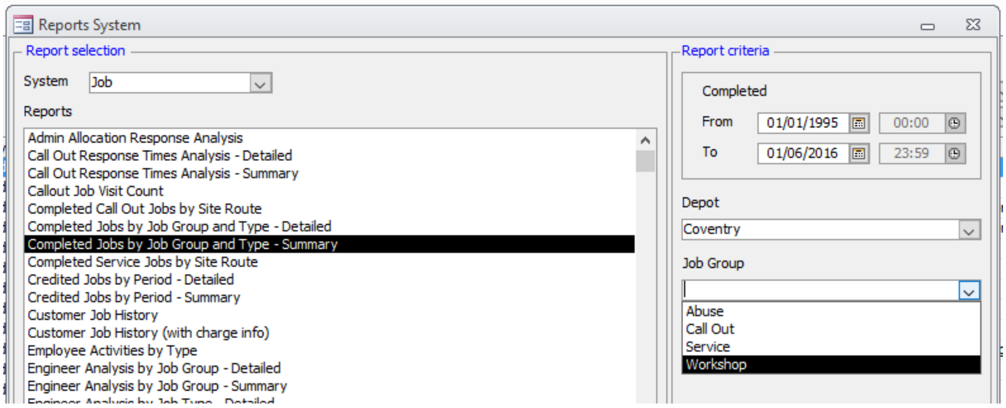
On the Job Type screen you can select which Job Group you want this Type to belong to. This can be changed at any point so that you can re-allocate Job Types if requirements change later:



You can filter the Jobs Global Enquiry screen by this Job Group:

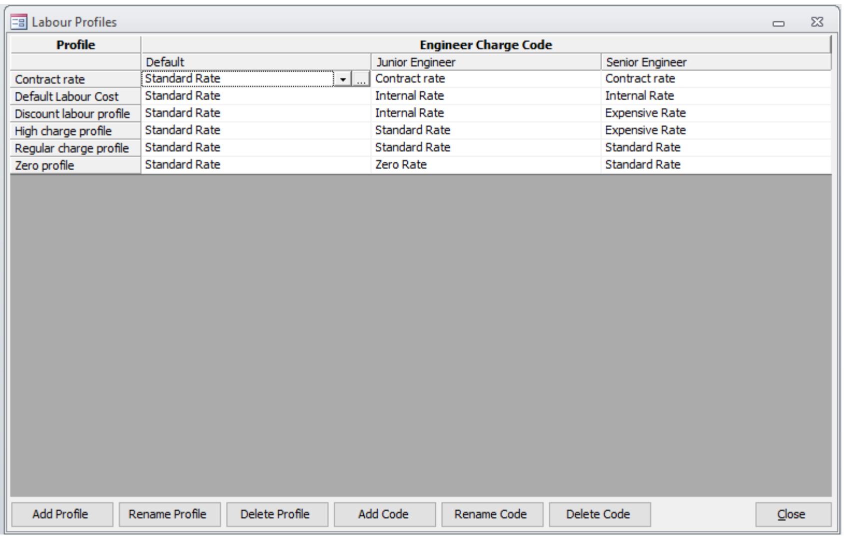


You can also run several reports using Job Group as a filter:

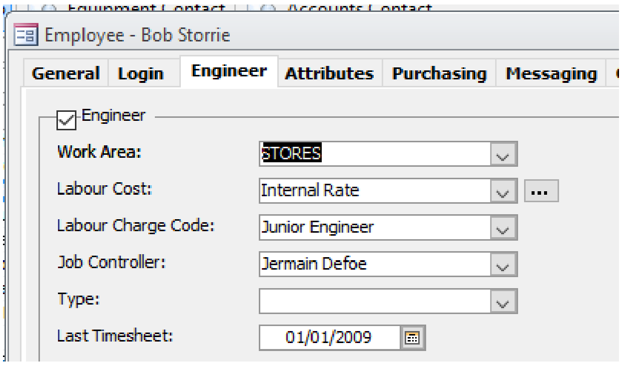


Labour Profiles:

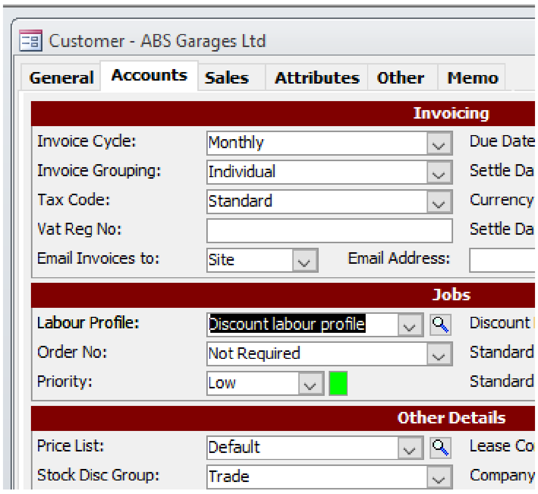
Labour Profiles allows you to set up a Labour Rate matrix, so that different charge out rates can be applied depending which Engineer is selected for a Job.



On the right is the **Profile** name. Each Profile has a **Labour Rate** set against it for each **Engineer Charge Code**. These Codes are then applied to an **Engineer's employee record**:



A Customer has a Profile attached to it:



In this way, Jobs can determine which charge out rate to apply.

Inspections:

Protean allows you to create an unlimited number of templates for inspection/service report sheets. These sheets that can be automatically added to Jobs (when linked to Job Types, Service Types or Makes & Models) and can either be printed or sent to engineers mobile devices for use during service checks or inspections.

The data compiled can be keyed into an on-screen version of the sheet (if printed) or viewed if completed by engineers on mobile devices and is permanently tied to the Job including any notes or recommendations.

The setting up of these templates is divided into 4 areas. These are:

Codes: These are the possible results of inspecting an item e.g. Serviceable, Requires Attention

Types: Allows you to group together these Codes under different names

Attributes: The actual list of items to inspect or check. Each has a Category and a Type (so you can control what Codes are not appropriate and which aren't.

Templates: Here you can put together all the elements above to create an inspection 'sheet'

Reasons not done: A list of reason why an engineer might not be able to complete an inspection sheet

How do I create new Inspection Codes?

Inspection Codes are the results or evaluation an engineer might record when he/she inspects an item of equipment. For example, some popular Codes are:

Serviceable; Requires Attention; Needs Replacing; Not Applicable; Worn But Serviceable

Or

Pass; Fail

Protean allows you to create as many Codes as you wish for use in your *Inspection Templates*. They can be grouped together into *Inspection Types* so that each item to be inspected (Inspection Attributes) can have a unique set of Codes that relate to it.

1. Go to **System ¦ Job ¦ Inspection ¦ Codes** on the menu
2. Click into the **Description** box and type the name for this Code (i.e. the result of the inspection).
3. Then enter an appropriate **Code** against this Description. For example if you had a description of *Not Applicable* you could have a Code of *NA*.
4. If selection of the Code will result in the item being satisfactory (e.g. Serviceable, Pass, Yes) tick the **Pass** box.
5. If you wish the engineer carrying out the inspection to record any notes about the inspected item when this Codes is used (e.g. Requires Attention) then tick the **Notes Required** box and select the appropriate **Note Type**.
6. Repeat steps 2 to 4 for as many different Codes as you require.
7. When you are satisfied with your entries click the Close button.

How do I create new Inspection Types?

Inspection Types allow you to group *Inspection Codes* together. These *Inspection Types* can then be applied per *Inspection Attribute* (these are the items to inspect).

For example: Most of the items you inspect on a given piece of equipment may have the following possible results - Serviceable; Requires Attention; Worn but Serviceable.

However, some items on the same equipment may be simply - Pass or Fail.

Using the *Inspection Types* screen you can create two *Inspection Types*, e.g. Pass/Fail and Standard (containing the other Inspection Codes mentioned above). Then, when creating the individual items to inspect (*Inspection Attributes*), apply the Pass/Fail *Inspection Type* to those that require it and Standard to the rest.

You can also nominate a **Default Code**. This allows you to automatically fill in the Inspection report with this **Code** at the touch of a button to save having to fill in 30 boxes with the same code. The default code should be the most commonly used.

1. Go to **System ¦ Job ¦ Inspection ¦ Types** on the menu

2. In the **Type** box at the top of the form type in the name of the new Type you are creating (you may overtype an existing one of you are adding to the list).

3. The system will then ask whether you wish to add this as a new Type (click **Yes**); modify the Type you overtyped (click **No**) or abandon the change (click **Cancel**).

4. On the right is a list of all available *Inspection Codes* that have been created so far. Click to highlight the *Inspection Codes* you require in this *Inspection Type* and then click the < button to send them over to the left-hand box. Repeat this for as many Codes as you need.

   - If the *Inspection Codes* you require are not in the list use the **Create Inspection Codes** button to add more.

5. Click **Close** when you have added as many as you require.

How do I create Inspection Attributes?

Inspection Attributes are the individual items that require inspection/servicing. Each Attribute belongs to a Category and is linked to an *Inspection Type* (so that only the appropriate results can be selected).

For example: *Inspection Attributes* may be Cabling, Connectors, Engine Housing, Pipe Work, Switches. Switches can either be Pass or Fail, whereas Housing could be Serviceable, Requires Attention etc.

1. Go to **System ¦ Job ¦ Inspection ¦ Attributes** on the menu.

2. Enter the **Category** name that this *Inspection Attribute* belongs to. This will act as a heading on the inspection sheet.

3. Enter the *Inspection Attribute* name. This is the actual item to inspect.

4. Select from the drop-down list the appropriate **Inspection Type**.

5. Repeat steps 2 to 4 for each *Inspection Attribute*. Note that once you have entered a Category you can then select it from the drop-down list for further *Inspection Attributes* in that Category.

6. When you are satisfied with your entries click the **Close** button.

How do I create an Inspection Template?

Creating an *Inspection Templates* is the final step in the process. This screen allows you to bring together all of the other areas of the Inspection system (Codes, Types & Attributes) to create an inspection/service sheet.

Completed *Inspection Templates* can be attached to Service Types, Job Types or Makes & Models for use around the system.

1. Go to **System ¦ Job ¦ Inspection ¦ Templates** on the menu.

2. In the right-hand pane right-click with the mouse and select **New** from the pop-out menu that appears.

3. An entry labelled **New Template** will appear highlighted in the right-hand pane. Right-click it and select **Rename** from the menu. Enter the name of this *Inspection Template*.

4. Then left-click on the new template (that you have just renamed) in the left-hand pane. All the available *Inspection Categories* currently set up on the system will appear in the right-hand pane.

5. Click on the first *Inspection Category* you wish to add and you will be taken to a list of the *Inspection Attributes* under it. Click these to add them to your *Inspection Template* (a large tick will appear so you can see what you have added).
6. Repeat steps 4 & 5 for as many *Inspection Attributes* as you need on your new template.

   - If you need to add *Inspection Attributes* at this stage use the **Create Attributes** button at the bottom of the screen.

- You can use the 'explorer' style interface in the left-hand pane to view and move around the templates.

- You can specify the order the *Inspection Attributes* appear in by clicking on the item in the left-hand pane and clicking the up and down arrows in the bottom left of the form till the item appears in the required place.

How do I create a Reason Not Done?

Reasons not Done are used to specify why an Inspection that has been attached to a job has not been carried out.

1. Go to **System ¦ Job ¦ Inspection ¦ Reasons not Done** on the menu.

2. Click the **Add** button, and then type in the description of the Reason.

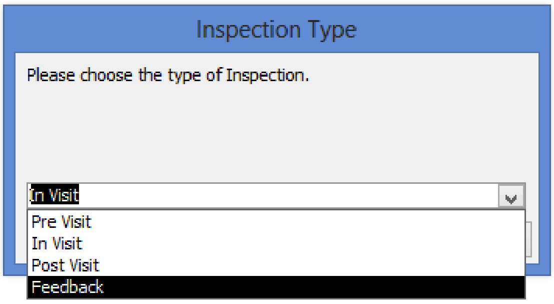
3. Repeat for as many *Reasons* as are required, and then click **Close**.
   - You can edit existing reasons by clicking on the item you wish to change and clicking **Edit**
   - You can delete reasons that have not already been used by clicking on the item you wish to remove and clicking **Delete**

End Of Visit Inspections & Customer Feedback Surveys

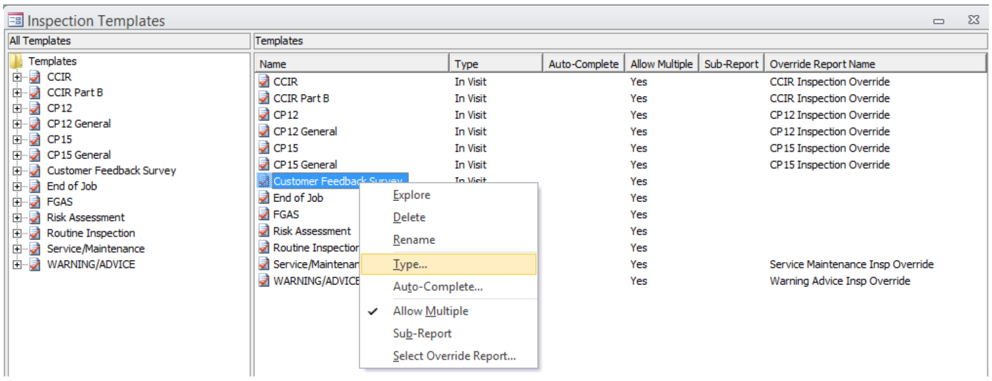
Builds from 7.3.3743 onwards have incorporated two new types of Inspection for use with the Job system.

‘End of Visit’ Inspections:

Following on from the ability to have Inspections being required to be completed prior to work commencing (risk or health and safety assessments) Protean now has the ability to flag an Inspection to take place ‘Post Visit’.

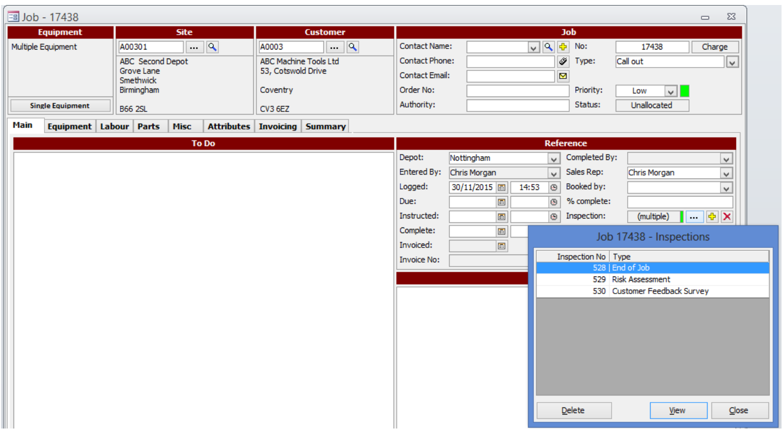


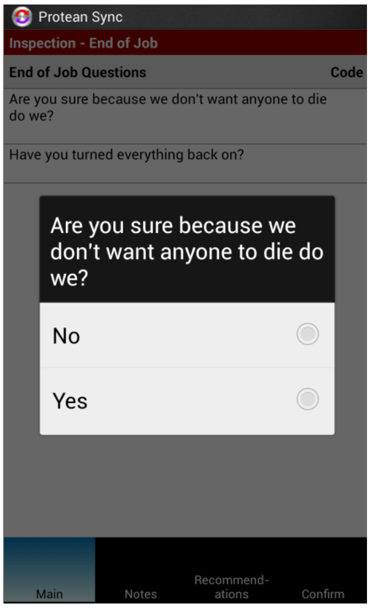
On the Inspection Template screen right-click the Inspection Name and select 'Type' from the list:



Then choose 'Post Visit' from the list. Add to Job as normal.

On the mobile app when the Engineer hits the 'Sign Off' option to signify that he has finished his visit the flagged Inspection will open for completion automatically:

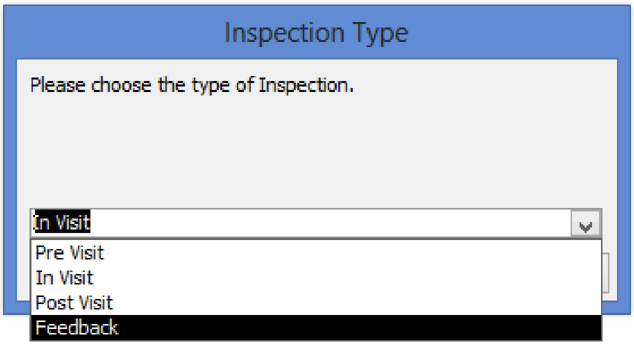




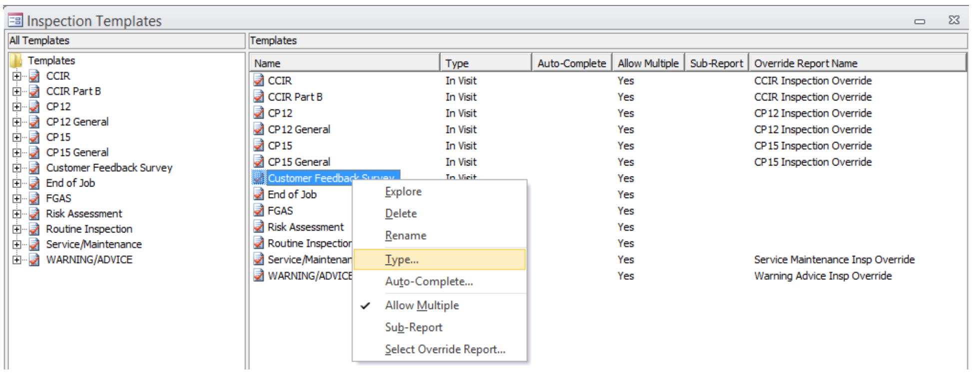
The Engineer completes the Inspection as normal and after confirmation the app will go to the 'Job Sheet' view for the Customer to review as normal.

Customer Feedback Surveys

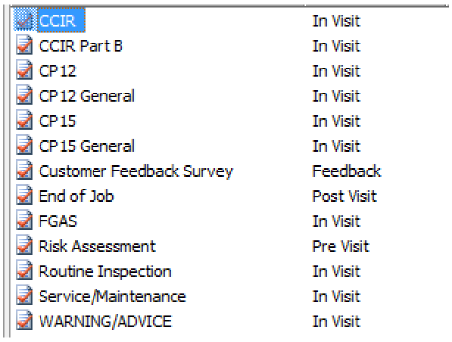
Following on from the ability to have Inspections being required to be completed prior to work commencing (risk or health and safety assessments) Protean now has the ability to flag an Inspection as a 'Feedback' inspection to capture Customer satisfaction on the device.

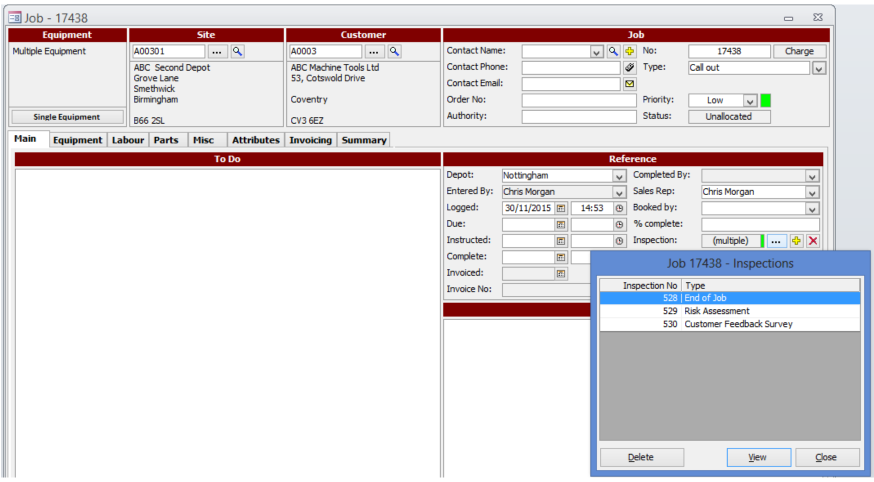


On the Inspection Template screen right-click the Inspection Name and select 'Type' from the list:

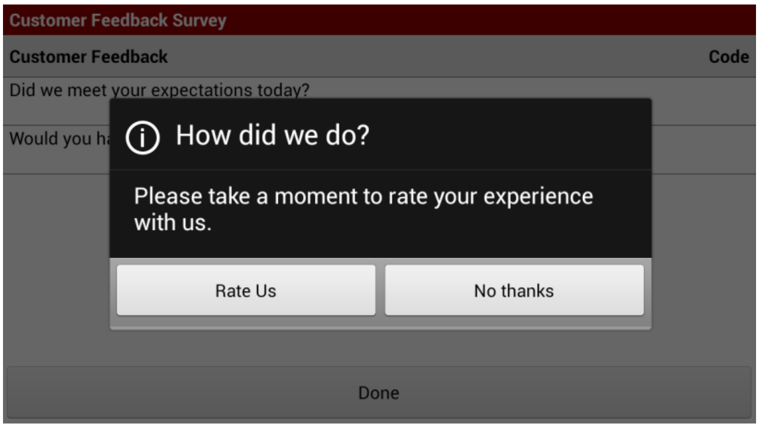


Then choose 'Feedback' from the list. Add to Job as normal.



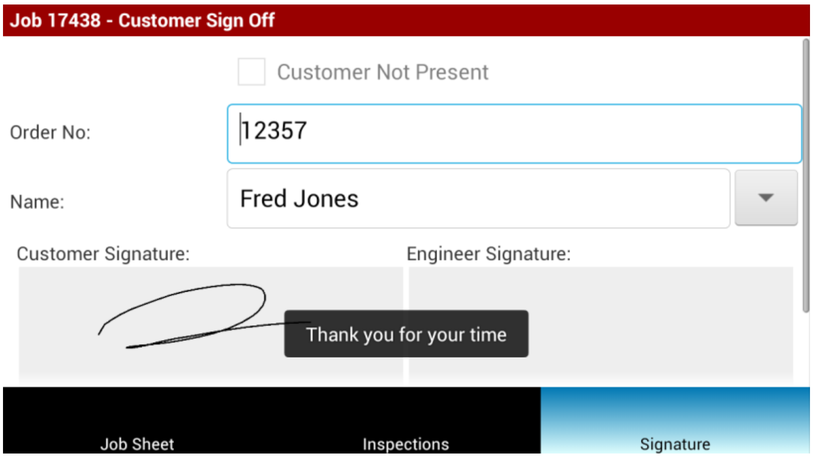


On the device, when the Customer Signature is captured and the customer hits 'I Accept' the Feedback Survey will open and the Customer will be asked if they are willing to take part in the survey.



Hitting 'No Thanks' will return the app to the signature screen for the Engineer to sign. If the Customer taps 'Rate Us' the Inspection is made available to complete as normal. Obviously these surveys are created as Inspection Templates & so users can have whatever questions they wish to have on their survey.

Once completed the Customer taps the 'Done' button & the app returns to the signature page and pops up a 'Thank you for your time' message. The Engineer can then sign the screen and complete the job as normal.

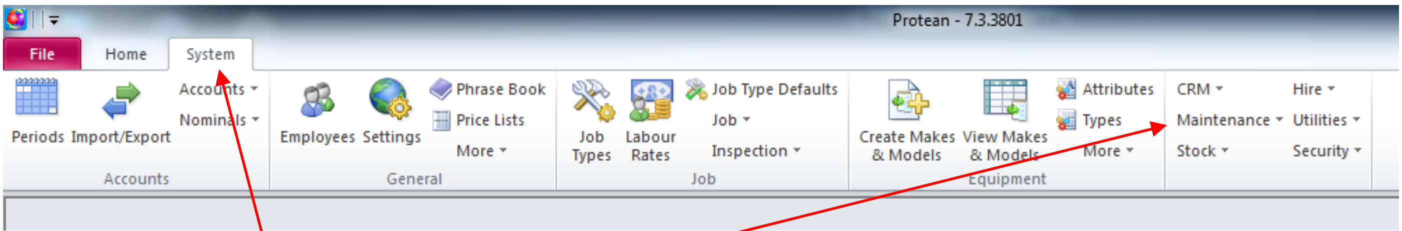


Feedback Survey results are fed back into the office system at refresh as a normal Inspection.

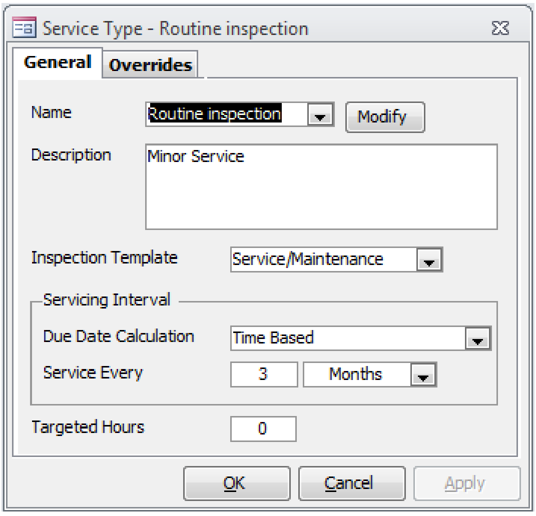
Attaching Inspection Templates:

Completed Inspection Templates can then be attached to Service Types, Job Types or Makes & Models, for use around the system:

Service Types:



1. Click on the System Tab and then the Maintenance icon.
2. Select Service Types. You should then get a screen that looks similar to the one shown below:

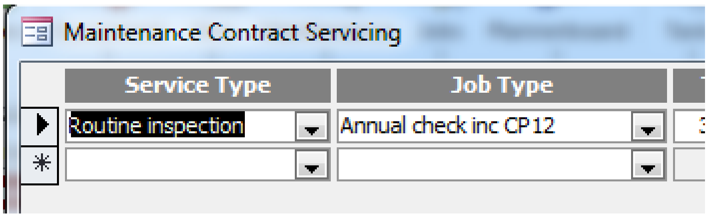


3. In the Inspection Template field, use the drop down arrow to then attach the Inspection required to the Service Type.

As you may or may not know, Service Types are then used on Maintenance Contracts as shown below:

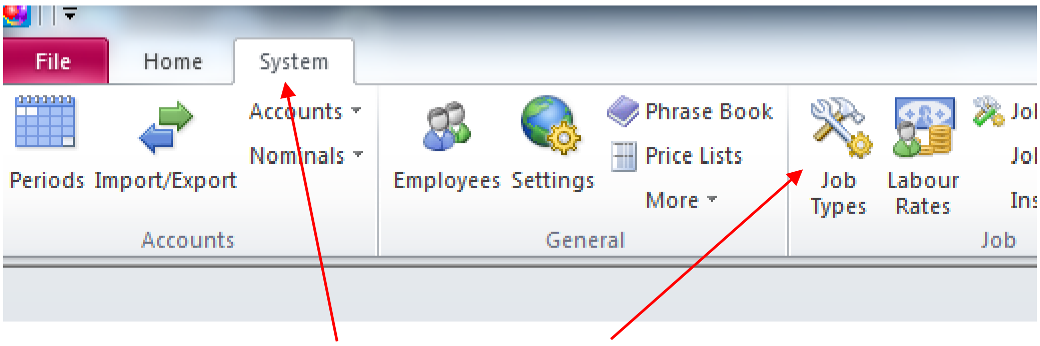
1. Whilst in the Maintenance Contract required, click on the Servicing Button shown at the bottom of the screen:

2. Then attach the Service Type setup earlier:

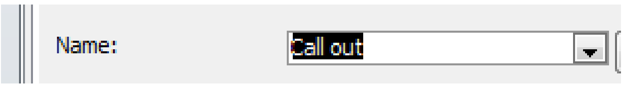


Now whenever a user or the Update Service Jobs creates a Service Job of this Service Type, the Job will automatically have an inspection sheet attached to it.

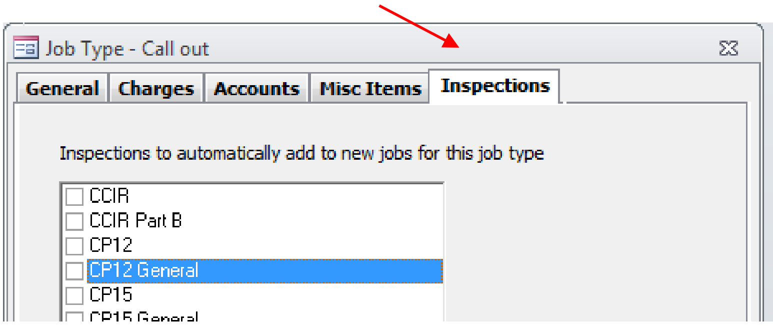
Job Types:



1. Click on the System Tab and then the Job Types icon.
2. In the Name field, use the drop down arrow icon to select the Job Type required:



3. Then click on the Inspections Tab:

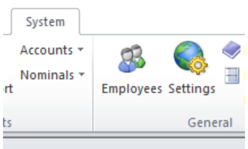


4. Then select the Inspection which you would like to link to the Job Type.

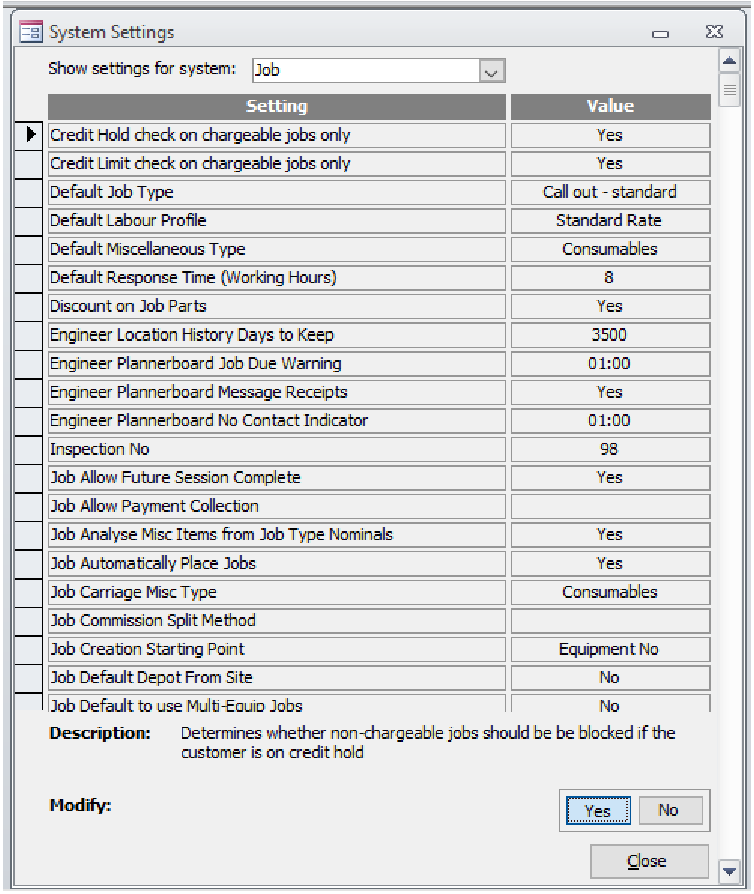
Now whenever a user creates a Job using this Job Type, the Job will automatically have an inspection sheet attached to it.

Jobs Module Settings

Please find below a summary of the various System settings, some of which have already been mentioned in this guide. These are accessed by clicking on **System ¦ Settings:**



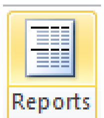
In the **Show Settings For System** field, use the drop down arrow icon and select Job. The system will then display the various settings used in the Job Management area of the system:



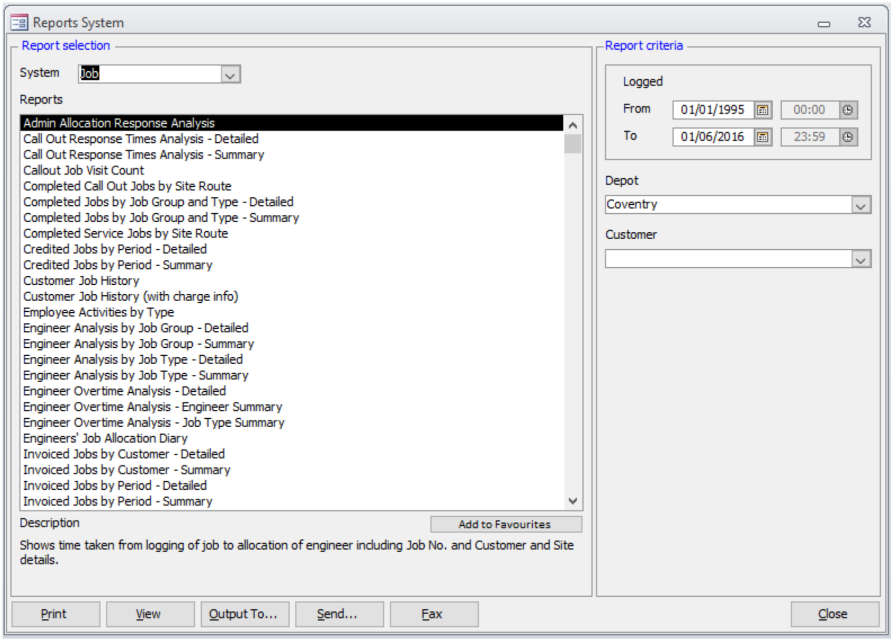
An explanation of each setting is given at the bottom of the screen. Please contact our support team for any additional help with these settings.

Job Module Reports

Protean has a number of Job Reports available and these can be accessed by clicking on the Reports Icon, shown at the top to Home screen:



In the **System field**, use the drop down arrow icon to select **Job**. The system will then display a list of the standard stock reports available:



An explanation of each report is shown at the bottom of the screen.

What are the different Job Status?

Status Name	Meaning
Entry:	The Job is being created but not yet saved.
Credit Hold:	The Customer is 'on-stop' and so the Job cannot be processed. The 'on-stop' facility is controlled by the Accounts Dept.
Order No Req:	This Customer has been flagged as requiring an order number for a Job but as yet this has not been entered on the Job.
Estimated:	An estimate has been printed for this Job.

Quoted: A quote has been printed for this Job.

Unallocated: The Job record has been saved but no engineer is yet allocated.

Allocated: An engineer has been allocated to the Job.

Awaiting Parts: There is a Stock Issue or Purchase Order (Parts or Misc) outstanding against the Job, or the 'Waiting' button has been pressed.

Parts In: The parts that were ordered/requested have been booked in/issued.

Waiting Acceptance: Primarily a PDA function. The Job details have been sent to an Engineer and we are awaiting a response to say he is attending.

En-Route: Primarily a PDA function. The Engineer is currently travelling to site.

On Site: Primarily a PDA function. The Engineer has arrived on site.

Site Attended: The engineer has visited the site and the Job is now awaiting completion.

Further Work Req: A PDA function. Further work has been identified by the Engineer on site and details have been entered via the PDA.

Awaiting Complete: A PDA function. The Engineer has flagged his Job as complete on the PDA and it is now only awaiting confirmation by the Job Controller(s) at the office.

Awaiting Details: The Job needs some further information before it can be completed.

Authorise Req: The **Complete** button has been pressed once and you have chosen the option to have an authorisation stage in the completion process. It is awaiting another press of the 'complete' button by an authorised user.

Completed: The Job is completed. If it is chargeable it can now be invoiced.

Invoiced: The Job has been completed and invoiced

Batch Updated: This Job has been updated to the accounts software.

Cancelled: This Job has been cancelled.