

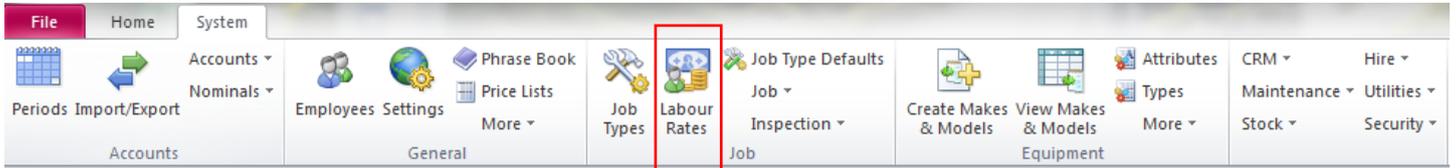
Labour Rates & Profiles

User Guide

Labour Rates

Labour Rates are used to set up default labour charges and costs to save you amending prices every time and keep figures accurate. You will still get the flexibility to change labour charges during a job even if you use labour rates.

You can find labour rates in the job section of the system tab.



Setting up Labour Sell Rates

To edit an existing labour rate simply use the 'NAME' dropdown box to select the relevant rate. To create a new labour rate, type over the name field with the name of your new rate, press enter and click yes. No fields are required when setting up a labour rate so you can enter as much or as little as you need. If you don't need any of the charge fields, leave them at £0.00.

Labour Rate - New rate 1

Name:

Description:

Basic charge:

Initial rate: for minutes

Subsequent: per hour

Round charges up to nearest: minutes

Mileage: per mile

Travel: per hour

Week: Sat Sun Holiday

	Time On	Time Off	Multiplier
	00:00	07:00	1.5
	07:00	20:00	1
>	20:00	00:00	1.5
*			

DESCRIPTION: Used to explain your rate if the name is not clear, this does not show anywhere other than this screen.

BASIC CHARGE: Any figure entered in here will be a flat rate charged once on a job regardless of how long you spent on the job or how many visits you made. This is most commonly used to apply a set call out fee.

INITIAL RATE: You can set a rate for the first X minutes. This is used generally if you don't have a set call out charge but want to try and recoup the money it has cost you to get there by charging more for an initial period of time.

SUBSEQUENT: Once the initial rate period is over enter how much you charge per hour.

ROUND CHARGES UP TO NEAREST ___ MINUTES: Rounds labour charge up to nearest X minutes.

MILEAGE: Charge per miles travelled on a job.

TRAVEL: Charge per each hour spent travelling on this job.

OUT OF HOURS RATES: In the bottom section of the labour rate setup, you can enter different multipliers for different time periods. For example in the labour rate pictured I have set any work between 8pm and 7am on weekdays to be at time and a half (1.5). You have to start the first 'Time On' at midnight and end the last 'Time Off' at midnight. Saturdays, Sundays and Holidays can be set with differing multipliers.

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Examples of what you can do with Labour 'Sell' rates:

A one off flat rate: E.g. £200 flat rate. Set the basic charge to be £200.00 and the initial rate and subsequent rate to £0.

A set rate per hour: E.g. £50 per hour no more no less. Set the basic charge and initial rate to £0 and subsequent per hour to £50 with your desired rounding.

Setting up Labour Cost Rates

Labour Rate - Senior Engineer Cost

Name: Senior Engineer Cost [Modify]

Description: Senior Engineer Cost

Basic charge: €0.00

Initial rate: €0.00 for 0 minutes

Subsequent: €15.00 per hour

Round charges up to nearest: 1 minutes

Mileage: €0.15 per mile

Travel: €15.00 per hour

Week: Sat Sun Holiday

	Time On	Time Off	Multiplier
>	00:00	00:00	1
*			

OK Cancel Apply

To record your labour costs to you on a job you can create 'Cost' Labour rates. The benefit of this is to give you an indication of profit/loss on a job and give you the ability to account for labour costs through Protean if you so desire.

Cost rates are setup in the exact same way as sell rates, but you just need to enter how much labour costs you an hour. In the example shown I am setting up a cost of £15 an hour by typing in £15.00 in the subsequent hour's field and leaving basic charge and initial rate as £0. You can also record your travel/mileage costs if you so wish.

We would typically recommend rounding your costs to the nearest minute to keep these as accurate as possible.

Similar to labour 'sell' rates you can increase your costs if the job is out of hours.

It is worth considering whether you wish to include all job related costs in this rate to give you a more accurate picture or whether to keep it to just the engineer's actual pay rate.

Any cost rates that you set up need to then be assigned to the relevant engineer's employee record. Then the cost you have setup will be applied to that engineer's time on jobs. This can be done in the engineering tab of the employee record.

Employee - Senior engineer

General Login **Engineer** Attributes Purchasing Messaging Other

Engineer

Work Area: Main Store

Labour Cost: Senior Engineer Cost [...]

Labour Charge Code: Senior Engineer

Job Controller: Admin

Type: Catering

Last Timesheet: 13/12/2015

Use Timesheet Controls: Use Flexi-time:

	Skill	Start Date	End Date
▶			

OK Cancel Apply

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Labour Profiles

Labour profiles allow you to setup different sell rates depending on which engineer is working on the job. For example you may charge more for a senior engineer as the cost of his time/expertise is higher or you may charge less for an apprentice. Labour profiles allow you this flexibility.

To setup labour profiles go to **SYSTEM > JOB > LABOUR PROFILES**.

This setup screen works as a matrix where for each combination of 'engineer charge code' and 'labour profile' you need to assign which labour rate to use.

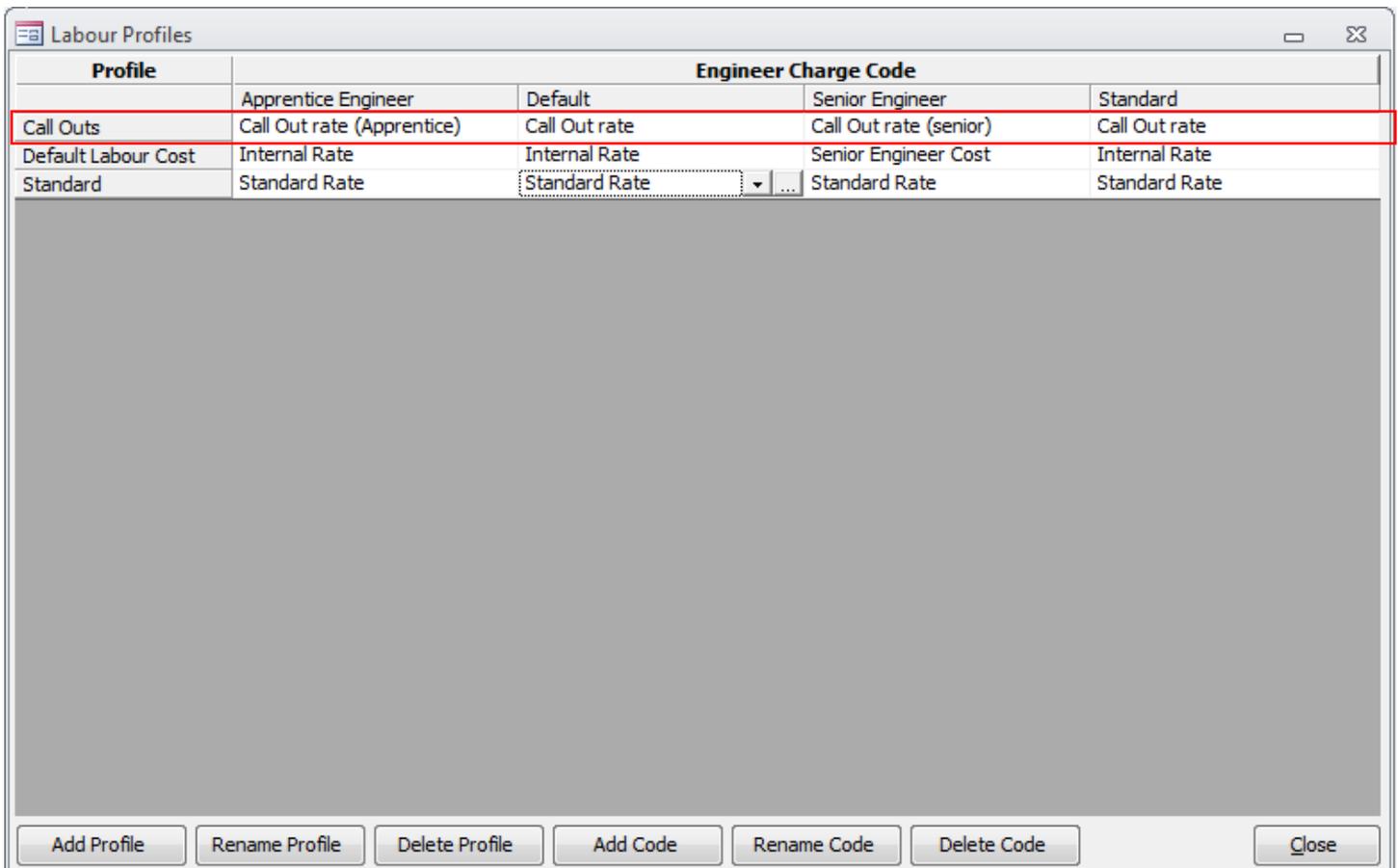
ENGINEER CODE: When setting up an engineer's employee record you will need to assign them an 'engineer charge code'. These charge codes are created by pressing the 'Add code' button in the labour profiles setup screen.

For example I may charge differently for senior, apprentice and standard engineers. So I will add a code called 'Senior Engineer' and one called 'Apprentice Engineer', I can use default or standard for my normal engineers. New engineer codes will create new columns in this setup screen.

LABOUR PROFILE: A labour profile will be needed to apply the labour rates you want to use for certain engineers, job types, contract types or customers.

So for example say I want to setup the different labour rates to be used for my call out jobs. I would add a labour profile named Call Out. This would create a new row in this screen.

On the call out labour profile row I now need to assign which labour rate to use for each of my different engineer charge codes. I have a labour sell rate for senior and apprentice engineers so I have applied these to the relevant columns.



The screenshot shows a software window titled "Labour Profiles". It contains a table with the following structure:

Profile	Engineer Charge Code			
	Apprentice Engineer	Default	Senior Engineer	Standard
Call Outs	Call Out rate (Apprentice)	Call Out rate	Call Out rate (senior)	Call Out rate
Default Labour Cost	Internal Rate	Internal Rate	Senior Engineer Cost	Internal Rate
Standard	Standard Rate	Standard Rate	Standard Rate	Standard Rate

At the bottom of the window, there are several buttons: "Add Profile", "Rename Profile", "Delete Profile", "Add Code", "Rename Code", "Delete Code", and "Close".

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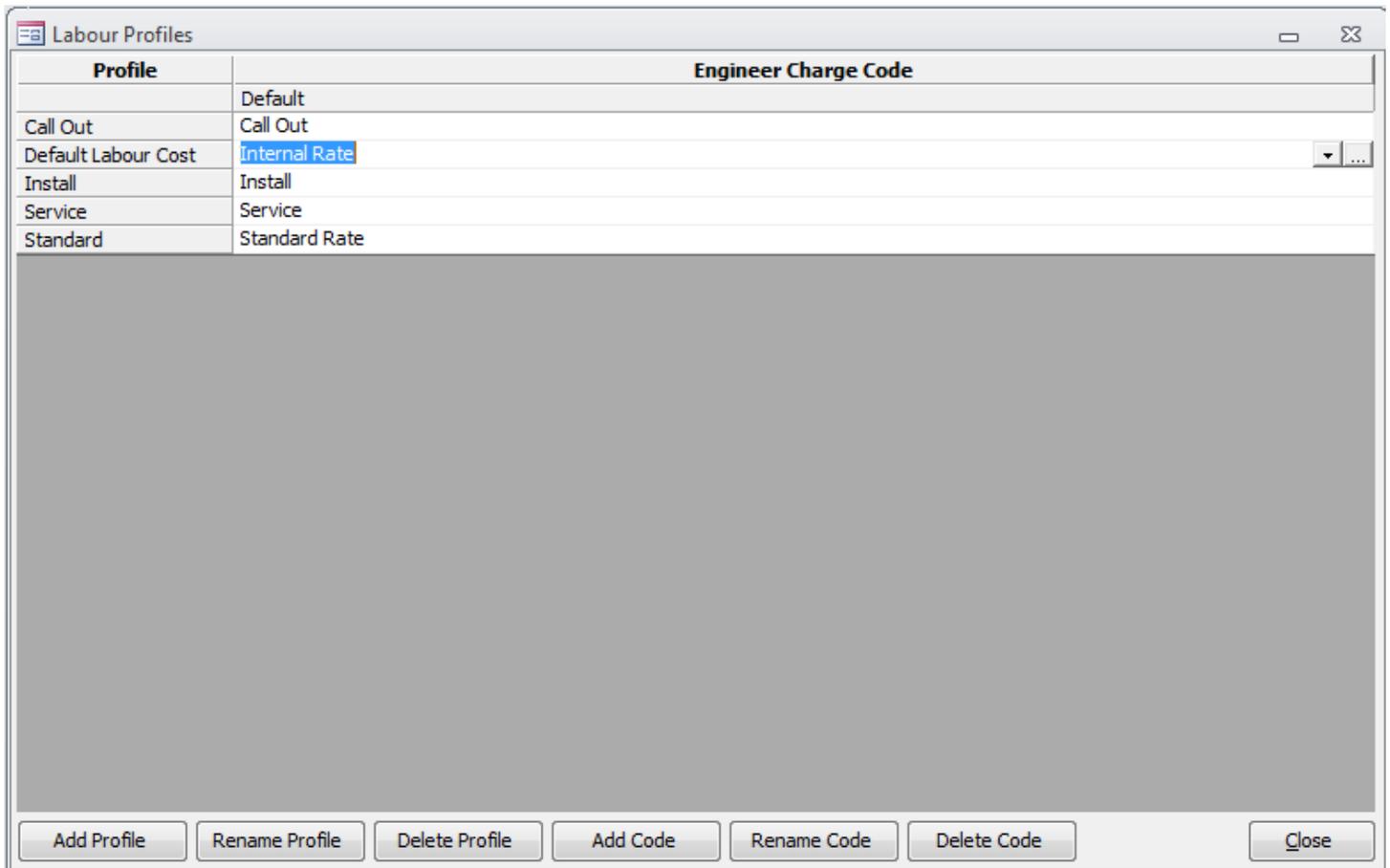
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If your Engineers are charged at the same rate

If you don't have differing sell rates per engineer then you do still need to setup labour profiles to apply any custom labour rates you have created to be used based on engineer/job/contract/customer. The simplest way to set this up and manage them is to firstly delete the 'Standard' engineer code so you only have one column. You will then set up a labour profile for each different labour rate you have created. Once setup apply the relevant labour rates to each profile.

NOTE: IT IS IMPORTANT THAT YOU DO NOT DELETE THE 'DEFAULT' ENGINEER CODE. DELETING IT MAY CAUSE ISSUES WITH QUOTE CALCULATIONS.

For example if I only have different labour rates for call outs, installs and services then my labour profile setup screen would look like this:



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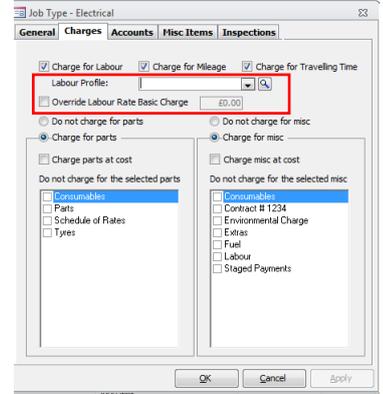
Where to apply Labour Profiles

Once you have setup your labour profiles as desired, it is now important to set in what circumstances you want these labour profiles applied. You can set a labour profile to be used against a job type, a customer and/or a maintenance contract. They override each other in the following order:

1	Job Type
2	Maintenance Contract
3	Customer

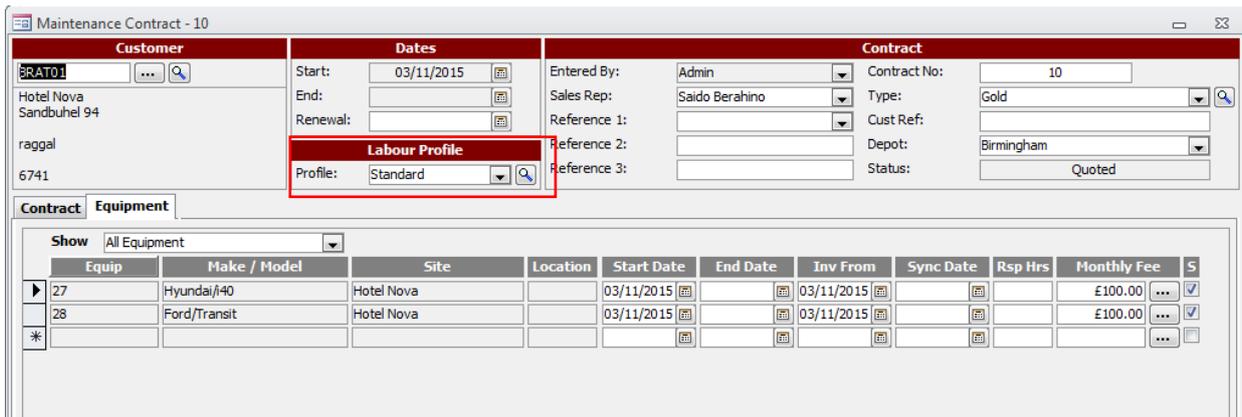
1. Setup in **SYSTEM > JOB TYPES** (not required)

Any labour profile assigned to a job type will override all other settings. You can also override any basic charges setup on the labour rates.



2. Setup in each maintenance contract record (not required)

This labour profile will override a customer's default labour profile if a job is linked to that contract.



3. Setup in each customer record (required) – Accounts Tab

This labour profile will default to standard but needs to be amended if any customers are on any differing agreed rates.

