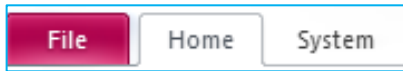# Protean Software

Maintenance User Guide

Maintenance User Guide

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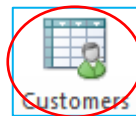
System: is where the settings and setup of Protean is done, so any configuration details will be done through this tab.

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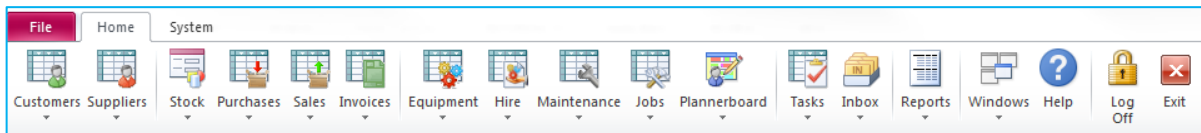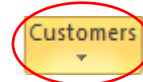

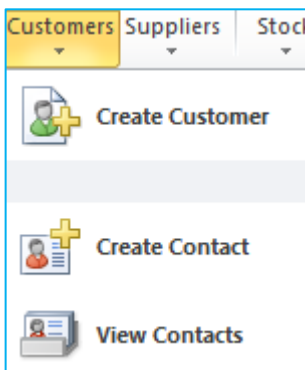This is broken up into sections for each module that you have access to.

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.
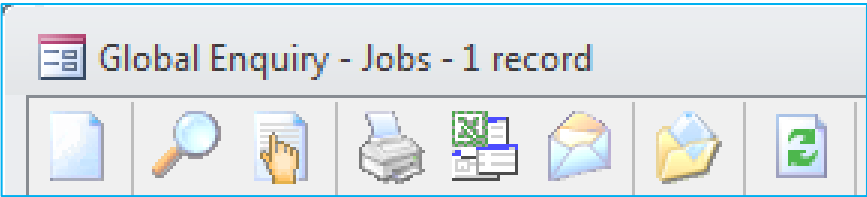
The example here is the customers section.

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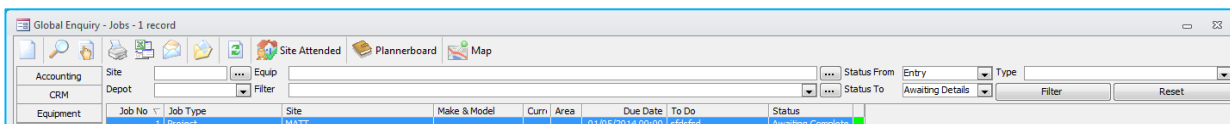
These Lists (Global Enquiries) are how each individual user can quickly get the information they need about that particular module of protean.

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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 prefernce 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

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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.

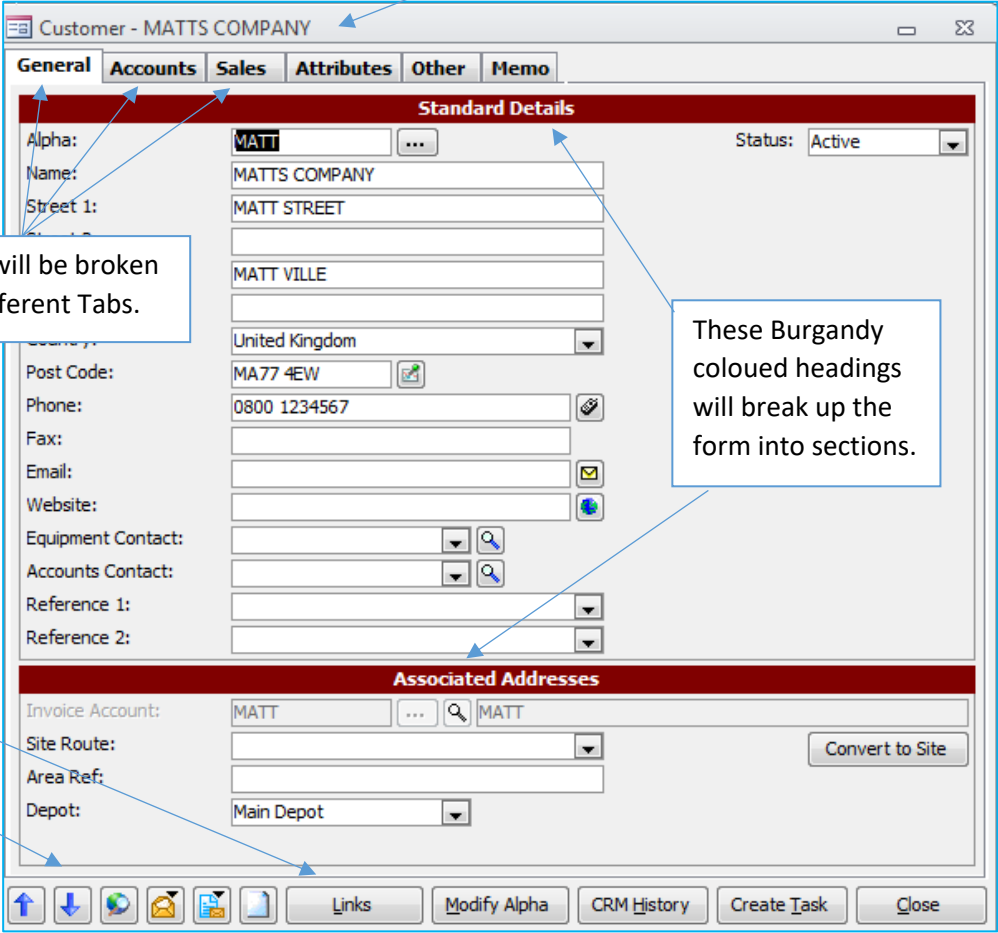The form will be broken up into different Tabs.

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.

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Creating Maintenance Contracts

To create a new Maintenance Contract, click on the drop down arrow below the **Maintenance Icon** and select **Create Contract**:
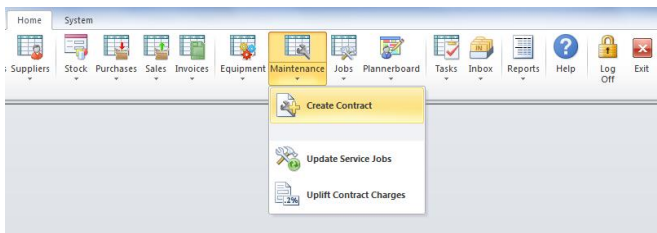
The system will then display the New Maintenance Contract screen:

1. In the top left hand corner of the screen, enter the **Customer Alpha code** or use the ⋯ button to search for the Customer record required:

2. Enter the required text into the search fields (using a combination of fields if required) and click Search.

3. Double-click on the required Customer record:

4. After selecting the customer, use the drop down arrow icon in the top right hand corner of the screen, to select the **Contract Type** required:

NB: The Contract Type is very important in determining how this contract will operate and to which nominal codes it will report to, in your accounts.

5. The **Start Date** & **Labour Rate** fields are filled in by default. The Start Date being 'today' and the Labour Rate coming from the Maintenance Contract Type. The Start Date cannot be altered here, but by entering new Start Dates against the Equipment items later. The Labour Profile can be selected from the list, if you wish to change it.
6. Select a **Sales Rep** (if required) and populate Reference fields too if applicable (Reference 1 or 2 may not be the labels for these fields as these are user-definable). Select the appropriate contract type from the Type dropdown.
7. Enter additional information in the **Reference fields** as required. The names of these fields, can be setup in the System Settings area of the system.
8. Enter the customer's order no in the **Cust Ref:** field if required.

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Contract Tab:

Click the Contract tab to access options for linking the contract to a Sales Opportunity, generating quotation documents and modifying the invoicing terms:

- **Cycle:** This will default in from the settings displayed on the Accounts Tab shown on the Invoice Customer record selected. It controls how often this customer is invoiced.
- **Grouping:** This will default in from the settings displayed on the Accounts Tab shown on the Invoice Customer record selected. It ddetermines if invoices are to be consolidated or not, and if so how:

Individual: Invoice raised for this order only.

Site: Groups invoices of same type by site address.

Site Mixed: Groups invoices of all types by site (excl. equipment sales orders)

Customer: Groups invoices of same type by Invoice Customer.

Customer mixed: Groups all types by Invoice Customer.

Order reference: Groups all documents with same Customer Order Ref.

- **In Arrears:** Enter a tick in this field to invoice the customer in arrears. If not selected, the customer will be invoiced in advance.
- **Self Billing:** If ticked, this allows a contract to be included in the standard invoicing process, but the invoice date won't be moved onto the next invoicng period. In order for this to work, a zero value <u>must</u> also be entered in the Fee value field (This facility is mainly used when invoicing Leasing Companies and their customer has missed a payment for example).
- **Service Groups:** Will default in, if set in the system settings screen (Explained on page 29 of this guide).
- **Job Consolidation:** Will default in, if set in the system settings screen (Explained on page 29 of this guide).
- **Invoice Notes:** In this box, free type notes for invoicing purposes.
- **Notes:** In this box, free type notes for internal use only.

Adding Equipment to a Contract

Equipment Tab:

1. In the white box above the Cancel button (bottom left corner) type in the Equipment number and press
    <return>, or use the [...] button to open the Equipment Search screen:
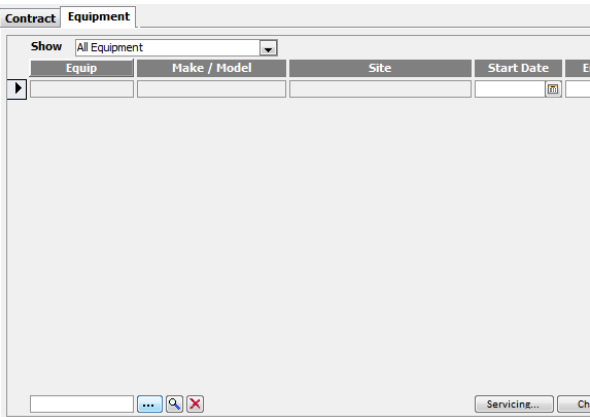
2. Depending on the amount of equipment at the Customer's site/s you may wish to enter search criteria to filter
    the results – double-click on the required item to add it to the contract.
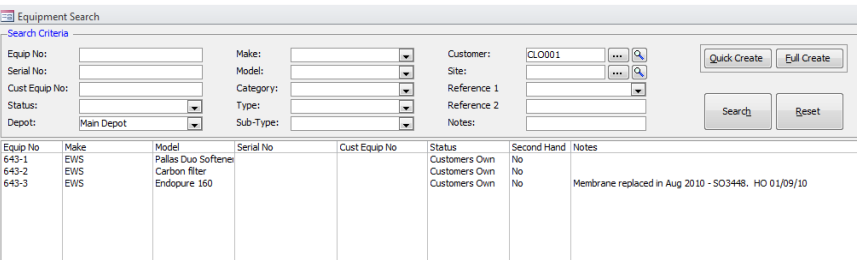
NB: You can also select more than one piece of equipment, by simply selecting each record by clicking on them using
your mouse. If all of the equipment records are required, click on the **Select All** button shown in the bottom left hand
corner of the screen:
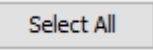
3. This will copy the Equipment Record (s) you have selected into the contract list above and add the Make &
    Model information for you.
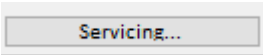
4. Enter the **Start Date** for this item of Equipment. This would be when you wish the cover the contract provides to come into effect (This can be a future date).
5. Enter the **End Date** if known, although this can be left blank if not known.
6. The **Inv From** date will automatically default to the value you just entered in Start Date, but can be changed if necessary. This would be more likely if you are putting on existing contracts that have already been invoiced and therefore this would be the date up to which they have been invoiced already.

7. If you are creating a new contract you would leave **Sync Date** blank. This allows you to run an invoice **up to** this date, so that all the Equipment lines have been invoiced up to the same point, and will produce neat invoices from then on. **This is done by entering the same Sync Date on all of the Equipment lines**. When you then invoice the contract the Sync Date will blank and all of the Equipment lines will be invoiced up to the same point.
8. If you have negotiated a special **Response Time** for this contract (different to the default Response Time in Settings), then enter it here in the format hh:mm (e.g. 04:00 for 4 hours).
9. The final box on the right will be labelled, according to the **Invoice Cycle** chosen on the **Contract Tab:**

For example: If you have chosen to invoice this contract quarterly, then this box will be called Quarterly Fee, into which you simply type the charge per quarter:

10. To enter future rates, for example if you wish to employ stepped maintenance charges on this equipment, click the button to open this screen. Here you can enter the new rate (or a % uplift) and date by which this should be in force:

11. Repeat steps 1 to 9, for a many items of Equipment as you need to add to this contract.

Setting up Equipment Service Schedules

To enter servicing information relating to the equipment record, click on the [Servicing...] button shown at the bottom of the screen.

1. The system will then display the **Maintenance Contract Servicing** screen:
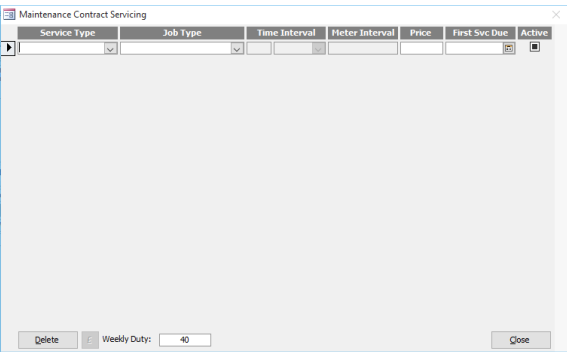
2. From the drop-down list select the appropriate **Service Type (s)** you wish carried out on the selected item of Equipment. These are the types of Service Jobs that will be created automatically by the system, when they are due.

NB: If the list is blank, this is because the Equipment Servicing screen (on the Equipment Record) has not yet been completed. To do this, follow these steps:

Completing the Equipment Servicing screen:

From the **Maintenance Contract setup** screen, single click the column on the left hand side of the screen, next to the Equipment record required (This will put an arrow into the field):
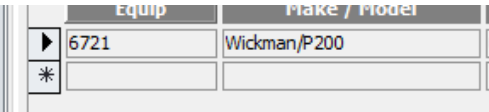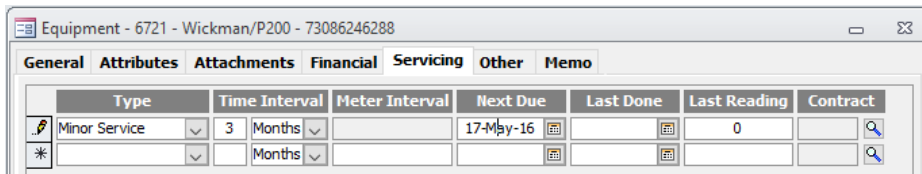
1. Then click on the magnifying glass icon, shown in the bottom left hand corner of the screen, next to the equipment record selected above:

2. Then click on the **Servicing Tab**:

3. Then select the **Service Type** required, check the **Time Interval** between the services, the **Meter Interval** (If using Usage Based Service Type), **Next Due** and **Last Reading** value (If using a Usage Based Service Type).

(See Page 28 of this guide for more information on Meter based Servicing if required).

NB: The **Last Done** date is not mandatory at this stage, as it will be updated by the system when a Service Job is completed.

4. Repeat these steps until all Service Types have been linked to the piece of equipment selected.

Setting up Equipment Service Schedules (without Service Groups – Continued):

Once the Service Types have been attached to the piece of equipment, return back to the Maintenance Contract Servicing screen seen earlier:

1. From the drop-down list select the appropriate **Service Type (s)** you wish carried out on the selected item of Equipment. These are the types of Service Jobs that will be created automatically by the system, when they are due.

NB: The **Job Types** displayed here are those that are linked to Service Types that are allowed on this item of Equipment.

2. The Interval and the interval units will default to the Service Type's (that is linked to this Job Type) interval, but can be changed as required here on an individual Equipment item basis. This is the number of months or weeks between services (if based on time) *or* the number of units between services (if usage based).

For example: If you wish to set up this item with quarterly services, you would enter 3 in the Interval box (12/3 = 4 services a year).

3. Next go to the **Price box**. If you wish to charge a Flat Rate figure for the service Job, rather than invoice the contract then enter the value here. This will be added to whatever the Job Type has been configured to.

For example: If you had an agreement with a customer to service his machine 4 times a year and charge him £100 a service, when done, then set the Contract Fee to zero (on the Equipment Tab), and instead enter £100 in the price box after first ensuring that the Job Type I chose raised an invoice but didn't charge for Parts or Labour. Then Protean would create the service Jobs when required and after completion raise an invoice for £100 + VAT.

4. In the **FirstSvcDate** box enter the date you wish Protean to generate the first service for, under this contract. If this is an existing contract you are entering then this would be the next service da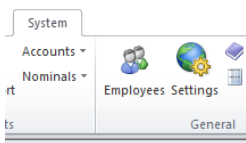te, rather than the actual date of the first service. When you "Agree" this contract, this date is copied to the Servicing screen on the Equipment Register and is not referred to again. Further amendment of this field, after activation of the contract, will not affect the running of the service system.

NB: Within the System Settings area of the system, there is a setting that determines whether the **First Service Date** should default from the **Next Due Date** on the equipment, or from the **Contract Start Date** plus the Service Interval.

This is accessed by clicking on **System ¦ Settings:**

Then select the **Maintenance Contract First Svc from Next Due** setting:

5. Then, enter the **Weekly Duty** agreed with the customer that this item of Equipment will perform at these maintenance charges. This will print on the Maintenance Contract should you raise it.
6. Repeat the above steps as is necessary to complete your servicing requirements.

For example: You may wish to carry out two sorts of servicing on this Equipment line, Major and Minor. Here you would select two Job Types (one linked to 'Major' Service Type and one linked to 'Minor' Service Type) and fill in the other fields accordingly.

Once you have entered all the Equipment lines, you can print a hard-copy of the contract using the **Print Contract** button:

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This will advance the status of the contract to Quoted.

Clicking the **Agree button** will then activate the contract (status = Active) and Protean will be ready to begin invoicing (either in batches or using the Immediate Invoice button) and/or creating service jobs for the Equipment listed:

Service Groups

Service Groups allow you to have finer control in that you can group the Equipment on the Contract for servicing and specify the schedule and price by the group (rather than individually).

In order to use Service Groups by default on the system, this facility must be activated by selecting the appropriate setting. This is done by accessing the System Settings area of the system by clicking on **System ¦ Settings:.**

Then select the **Maintenance Contracts – Use Service Groups** setting:

If the Service Group flag is turned on, then an extra field is available when the equipment is added called 'Service Group'. When the lines are added, the system will create a Group (Group 1) and assign as many items from the contract as possible to that group

If you are adding equipment to an existing contract, then you will be given a choice of which Group to add it to (from a list of Groups already in existence on that Contract).

Checks are made to ensure that the group items are allocated too are allowed (i.e. the Service Type is available on the Equipment record) for all items in the group.

When you open the Service Schedule screen the Group defaults to the selected group, but can be changed as necessary.

NB: You can't use Meter based servicing intervals on contracts using Service Groups. The whole idea of a Service Group is to keep the items together in terms of NDD so Meter based would throw it all out straight away.

Using Service Groups on a Maintenance Contract:

1. On a new Maintenance contract go to the Contract tab, here tick the **Service Groups** option, if not already set as mentioned above:
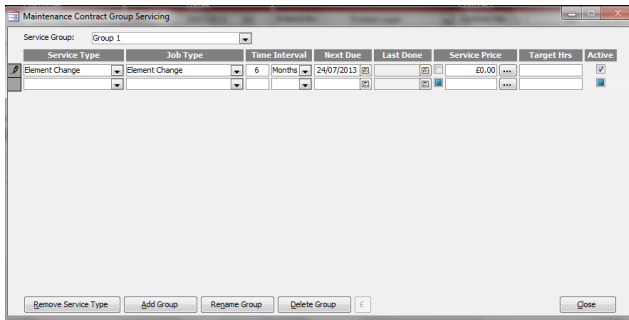
2. On the Equipment Tab, add the equipment as required.

NB: It is possible to have a mixture of equipment located at different sites, within the same group.

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3. To then create a service group, click on the [Service Groups...] button shown at the bottom of the screen.
4. The system will then display the **Maintenance Contract Group Servicing** screen:

5. In this screen, you can specify the service schedule as normal.
6. You can also add Groups (They will be auto-named e.g. Group 2, Group 3 etc, but can be renamed as you wish.
7. You can then amend the Groups on the individual lines so that items that can you want to appear on the same jobs are grouped together.

NB: As long as the equipment have the same service type set up, you can then select it for the group and select a **Next Due** date etc. This will then pull all of the equipment through to one job, when the Update Service Jobs process is run.

8. **Service Price:** You can enter a price for the whole group OR, using the […] button you can enter individual prices per item which will be added up to get a group price. The tick box here indicated that "a per" item price has been entered. This can be unticked of you want to override it with a group price.
9. **Target Hrs:** This is the amount of labour hours this group should take to be completed.
10. The **Active** tick box on the right, is used to suspend any of the service lines you have created as you can't delete from this form.

Consolidated Service Jobs
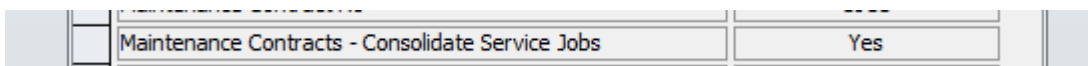
Consolidate Service Jobs will create one service job when the sites are the same, on the equipment. They use the same Job Type and the NDD are either the same or fall within the allowances on the Service Types.

> **For example:** If you have a contract with 3 trucks on at the same site and you'd like to create 1 Job instead of 3 and all the info is the same then simply turning this option on the Contract will do it. No further set up would be required.

In order to use the Consolidated Service Jobs process, the facility must be activated by selecting the appropriate setting. This is done by accessing the System Settings area of the system by clicking on **System ¦ Settings:**
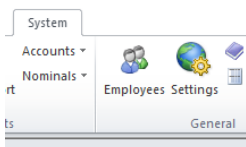
Then select the **Maintenance Contracts – Consolidate Service Jobs** setting:

These act as defaults for Maintenance Contracts. You can actually set this PER Maintenance Contract, by clicking on the Contract Tab:

Amending Existing Maintenance Contracts

Adding Equipment:

1. Open the Maintenance Contract, using either the Global Enquiry screen or opening a blank contract and typing in the contract number and pressing return.
2. Go to the Equipment Tab. In the white box above the Cancel button (bottom left corner) type in the Equipment number and press return, or use the […] button to open the Equipment Search screen. This will copy the Equipment Record you have selected into the contract list above and add the Make & Model information for you.
3. Then, enter the Start Date for this item of Equipment. This would be the date when you wish the cover the contract provides to come into effect. (This can be a future date). Enter the End Date if known, although this can be left blank if not known.
4. The Inv From date will automatically default to the value you just entered in Start Date, but can be changed if necessary. Enter here the date you wish this new Equipment addition to start invoicing from.
5. If you wish you may then set a **Sync Date**. This allows you to run an invoice up to this date, so that all the Equipment lines have been invoiced up to the same point, and will produce neat invoices from then on. This is done by entering the same Sync Date on all of the Equipment lines. When you then invoice the contract the Sync Date will blank and all of the Equipment lines will be invoiced up to the same point.
6. After entering the Sync Date (if required) then enter a Response Time, if a special one has been negotiated. If left blank the system will use the standard Response Time from Settings.
7. Finally enter the charge for this new item you are adding. If you are invoicing per service job done rather than invoicing 'the contract' then leave this charge at zero. You have successfully added a new Equipment item to this contract.

Removing Equipment:

The are two methods to remove equipment records from an existing maintenance contract, depending upon what has happened to it:

1. If you have not yet invoiced this contract, and you wish to remove an item from it, then you can use the small **_Remove button_** (after selecting the required item, using the record selector).

2. If you have already invoiced the contract, then you must **_enter an End Date_** on that Equipment line. This will effectively terminate that item, which will no longer have jobs or invoices raised against it.

Changing the Customer:

You may begin by invoicing the actual customer for the maintenance but then the contract may be taken over by a managing agent. You can simply select the customer account code from the Address Search screen (Use the ⋯ button to open this), and the invoices will be raised against this new address instead of the old one.

Cancelling a Maintenance Contract:

1. Open the Maintenance Contract in question using either the Global Enquiry screen, or opening a blank contract and typing in the contract number and pressing return.
2. Then click on the **Cancel** button, shown in the bottom left-hand corner of the screen.

NB: You may only cancel a contract before raising invoices.

3. You will be asked for confirmation of the cancellation. Click Yes. You will then be asked to select a reason for the cancellation and the list of reasons will open for you on the Contract Tab.
4. Select your reason and then click the Close button. The reason selected and the date of the cancellation are stored on the Contract.

The status of the contract advances to "Cancelled".

Terminating a Maintenance Contract:

1. Go to the Maintenance Contract in question using either the Global Enquiry screen or opening a blank contract and typing in the contract number and pressing return.
2. If they are not already there, enter **End Dates** against each Equipment line. If you wish to terminate this contract immediately then you will need to enter a date in the past.
3. Then click the **Terminate** button. You will be asked for confirmation. Click **'Yes'**. The status of the contract advances to 'Terminated'.

4. When you next invoice your contracts the system will check to see if there is any remaining time between the End Date and when it last invoiced up to. If there is then a final invoice will be raised, if not then the system will inform you of the fact.

The status will then advance to "Completed'.

Uplifting Contract Charges

This screen allows you to update Maintenance Contract rates automatically.

Click on **Maintenance** and **Uplift Contract Charges**:
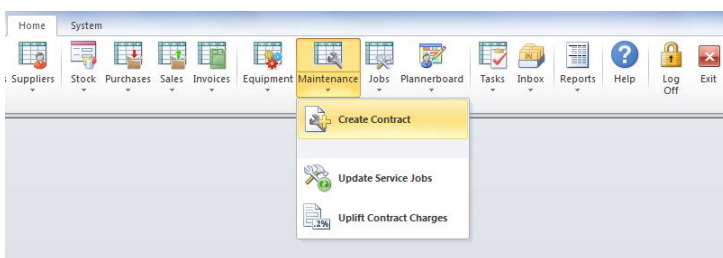
The system will then display the Maintenance Contract Uplift screen:

1. On the Criteria Tab, enter any criteria you wish to use to allow the system to select the contracts you need to uplift. Possible criteria are: Depot, Contract Type, Renewal Dates, Customer, Site & Contract No. This means that you could run the uplift for each contract individually, or all the contracts for a particular customer and so on.
2. Then enter the percentage by which you wish to update the contract rates. Remember to enter this value as a 'decimal'. For example, if you wished to uplift the rates by 5% you would enter 0.05 in the 'Uplift %' box.
3. Then click the Calculate button. The system will flip the screen onto the Contracts Tab and display a list of affected contracts as per your criteria, with the old, existing rate and the new.
4. You should now check the list. You can sort the list by any of the data columns by clicking on the column heading. This will sort the list alphabetically by that column. Clicking the same heading again will sort the list into reverse alphabetical order by that column. You can also remove lines you don't want simply b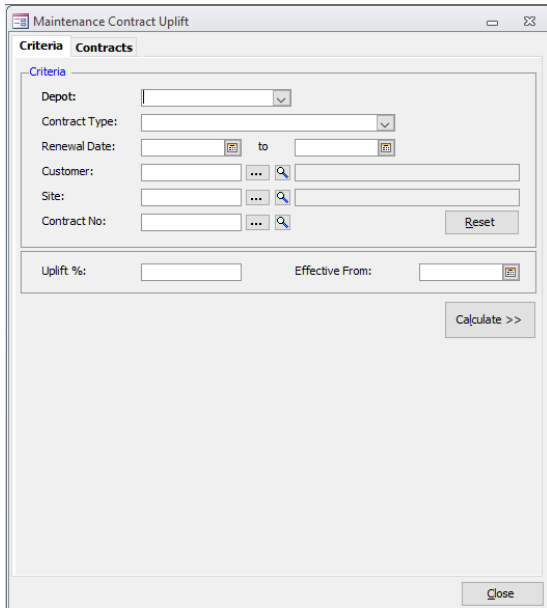y pointing to it using the record selector and then hitting the delete key on your keyboard. You can also manually adjust the 'new' calculated rates if you desire.
5. When you are happy with the results click the 'Update Contracts' button to perform the change.

Invoicing

There are really two main ways in which you can charge customers for Maintenance Contract cover.

1. Invoice the 'contract' itself, on a monthly/quarterly/annual basis and carry out the service works (for example) on free-of-charge basis.
    or
2. Do not invoice the 'contract', but rather, invoice the jobs as and when you do them, like normal breakdown jobs but scheduled automatically by the system.

Protean can cope easily with either method, and if you are lucky enough you could even do both, say charging a percentage up front, but then also charging the Parts element on the jobs as you do them. We shall look at both methods in turn.

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1. Invoicing the Contract:

On the Equipment lines, enter the fee (charge) as required in the Fee box on the far right of the line. The label of this box is dependent on the Invoice Cycle you have chosen (monthly/quarterly etc). You should enter the fee appropriate to the cycle. This figure is then used when raising **Immediate** or **Batch Invoices**.

2. Invoicing the Jobs:

On the Equipment lines, leave the Fee box at zero. This will ensure that the contract will not raise invoices. Then on the Service Schedule use the Price box to enter a Flat Rate for that Job. This value will be added to whatever the Job Type selected already charges for. If you wish the Price you enter here to be the only charge made then ensure that the Job Type you select *does not* charge for Labour or Parts, but *does* raise an invoice.

Then as the Jobs are created and completed, simply invoice them in the normal way.

Invoicing a Maintenance Contract Immediately:

1. Locate the Maintenance Contract concerned, by clicking on the Maintenance Icon:
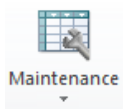
2. Then use the Global Enquiry screen to search for the Maintenance contract that requires invoicing. Double click on the Contract and then on the Immediate Invoice button shown at the bottom of the screen:
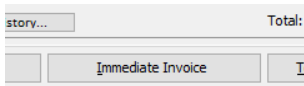
3. Click on the Preview button to view a Pro-Forma version of the invoice to check the information shown etc.:
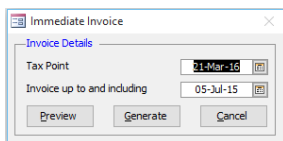
4. Otherwise, enter the date of the invoice in the **Tax Point** field and confirm the date that the system should invoice up to and include.
5. Once entered, click on the **Generate** button to produce the full invoice:

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Invoicing Maintenance Contracts in a Batch process:

1. Click on the drop down arrow icon under the Invoice Icon and select "**Create Sales Invoices**":
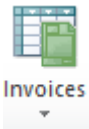
2. The system will then display the Invoicing screen:

3. Click onto the Maintenance Tab:

4. If you operate a multi-depot operation then first select from the **Depot** drop-down list which Depot's contract invoices you wish to raise now. If you do not have more than one Depot or you wish to raise all the invoices now, simply leave the Depot field on its default value of (All).

5. Using the **Invoice Cycle** and **Advance/Arrears** drop-down lists, create the different combinations of invoicing you need. Against each combination enter an **Inv Up To** date (inclusive). Once you have done this check the **Tax Point** (this is the date that will be printed on the invoices).

6. If you wish you can then generate a preview of the invoices that would be created if you clicked 'Generate'.

7. When you are happy with the preview information then click Generate. The system will select the contracts to invoice based on the template created above and notify you of the number of contracts selected, and ask you if you wish to proceed with creation.

8. Once created you have the option of printing straight away or later.

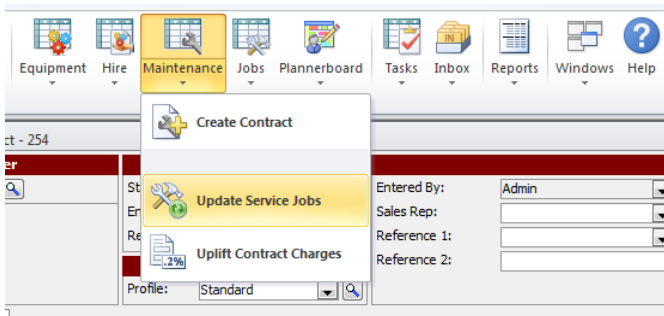**NB**: Once the system has selected the contracts to invoice you can exit the invoicing screen and use the Global Enquiry screen, to see which contracts it has selected. If you are not happy with the selection, use the Deselect All button on the Maintenance Tab, to undo this and start again.

Update Service Jobs Process

This process is used to create the automatic service jobs from the Maintenance Contracts setup earlier.

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To run the Update Service Jobs process, click on the drop down arrow below the **Maintenance Icon** and select **Update Service Jobs**:

The system will then display the Update Service Jobs screen:

1. If you operate a multi-depot operation then first select from the Depot drop-down list which Depot's Job you wish to raise now. If you do not have more than one Depot or you wish to create all the service Jobs now simply leave the Depot field on its default value of (All).
2. Similarly you can run the routine just for a particular Site Route or Area Reference as well. In this way you can produce a separate Job list for each Site Route to make distribution to Engineers easier.
3. Enter the date you wish to create the service Jobs up to (but not including). For example, if today was 12th December 2015 and I wished to create next month's service Jobs so that I could start scheduling them in with the Customers I would enter 1st February 2016 in the date box here.
4. Then click the '***Create Service Jobs'*** button. A progress meter appears in the bottom left-hand corner of the screen. This time taken by this process is entirely dependent on the number of contracts, equipment and service schedules on the system and the speed of the PC and network in general.

NB: Once started the process cannot be interrupted.

5. When the system has finished creating the Jobs a message will be displayed informing you of the number of Jobs raised and asking if you would like to print these now. If you say 'Yes' then Protean will print out Job Sheets and Inspection Sheets as required by the Jobs created. If you say 'No' you can still print them later using the Print Run button.
6. Click **Close** to close the form.
7. If you now go to **Jobs ¦ Display Jobs,** you should find the service Jobs you created awaiting you.

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Maintenance Setup

In order to use the Protean Maintenance 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 in the **Maintenance** section:
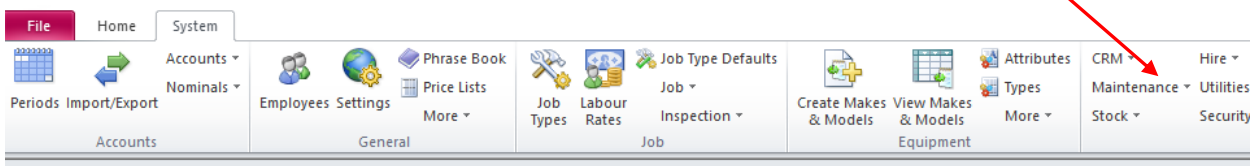
Maintenance Contract Types:

Go to **System ¦ Maintenance ¦ Maintenance Contract Types:**

General Tab

- **Name:** Click into this field and type in the name of the new Contract Type you wish to create. If there are already Contract Types on the system, simply overtype whatever is in the Name box. The system will acknowledge that this Contract Type does not exist and asks you if you wish to add it. Say Yes.
- **Copy From:** Click on this button if you wish to base this Type on an existing Contract Type.
- **Description:** Enter a description of this contract type. This is optional but it can be useful to record some notes about the functionality of this Contract Type for future users.
- **Labour Profile:** Using the drop down arrow icon, select the correct labour rate.

NB: This Rate overrides the standard Labour Rate set up on the Customer Record. When a chargeable Job is raised on an item of equipment on a contract on this Type this Labour Rate will be used instead of the one specified on the Customer screen.

- **Nominal Sales Account:** Select the nominal sales account and dept (if appropriate), that you wish the revenue from invoicing contracts of this Type, to go to on your Nominal Ledger.
- **Length:** This is an optional field where you can enter the default length of time for this type of contract. This is used to calculate End Dates. This can be left blank if not required.

Click either 'Apply' to save your new Contract Type and stay in the screen to add another, or 'OK' to save and close.
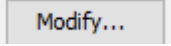
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Job Types Tab

Under certain Types of Maintenance Contract that you offer, the way the Job Types work may differ. A Job Type governs how the Job will operate in terms of chargeable or non-chargeable, do we charge for labour and parts, or just parts etc.

> **For example**: Your regular breakdown Job Type may raise an invoice and charge for everything. However under your Contract Type "Cover Plus", you may only charge for any parts used. This requires a change to the normal Job Type.

Like Labour Rates, instead of creating every combination of Job Type chargeability and cluttering up the list, Protean allows you to customise your existing Job Types for use on individual Contract Types.
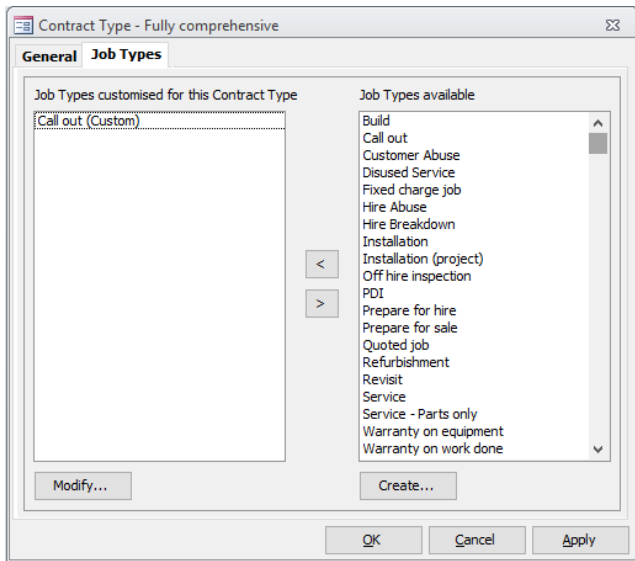
1. Go to the **Contract Type** you wish to customise Job Types for and click the **Job Types Tab**.

2. In the list of all available Job Types on the right hand side of the screen, click to highlight the Job Type you wish to modify.

1. Click the **<** button to copy it across to the left hand box.

4. Click to highlight it again and click the ⬚ Modify… button. The Job Type screen will appear on the Charges Tab. Make the necessary amendments (on any of the three Tabs).

5. Click **OK** to save it and return to the Contract Type screen.

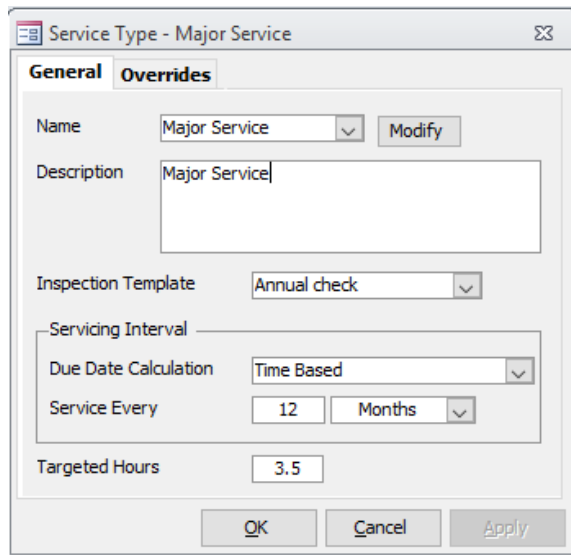**For example**: Let's say we modified our 'breakdown' Job Type as described above. When we now raise a breakdown Job on an item of equipment under a contract of this Type the system will automatically override that Job Type with your modified one and only parts will be charged. For a breakdown on a non-contract item of equipment it will function as before.

NB: You can modify as many Job Types as you like on each Contract Type.

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Service Types:

Go to **System ¦ Maintenance ¦ Service Types:**

General Tab

- **Name:** If you wish to amend an existing Service Type select it from the drop-down list and change the details as explained below. If you are adding a new one, simply highlight the Name box and type in the name of the new Service Type.
- **Description:** Enter a description as required.
- **Inspection Template:** Use the drop down arrow icon to select the appropriate Inspection Template or Specification for this Service Type (optional).

NB: Linking a Service Type to an Inspection Template, means that when you or Protean create a service Job based on this Service Type, then the appropriate Inspection sheet will also be created and linked to the Job.

- **Due Date Calculation:** Using the drop down arrow icon, select the appropriate calculation method. This can either be Usage Based (i.e. the number of hours a machine is in operation) or time based (i.e. every so many months or weeks) or the sooner of meter and time.

  If you have selected Time Based servicing enter the default interval for this type of Service. This can either be expressed in Weeks or Months.

NB: This is the default Interval, or gap between services. This is purely a default value and can be amended on the individual Equipment Records or on Maintenance Contracts.
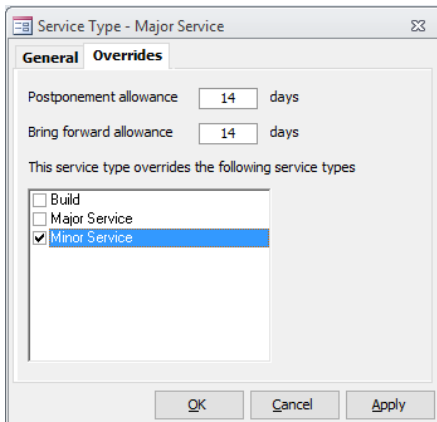
- **Targeted Hours:** Enter the number of hours you estimate this service will take in this field. This can be used to calculate variances between budgeted service labour hours and actual service labour hours. This can be amended at the Make & Model level if required.

NB: If you are going to carry out 'multi-level' servicing (i.e. apply more than one Service Type to an item of equipment - for example minor and major services) then you need to click on the Overrides Tab.

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Overrides Tab:

Having set up a Service Type we now want to set up multi-level servicing i.e. carry out more than one kind of service on the same item of equipment, for example minor and major services. Go to the Overrides Tab:

- **Postponement Allowance:** Enter the number of days as appropriate for this Service Type.
- **Bring Forward Allowances:** Enter the number of days as appropriate for this Service Type.

NB: These values allow Protean to operate the override facility more effectively.

- In the list of all Service Types currently set up, tick the ones that are *overridden* by this Service Type.

Click on the **Apply** button to save and stay in the screen to set up further records, or click on **OK** to save and close.

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Usage Based Servicing - Setting Up:

Firstly, set up a **Service Type** in **System ¦ Maintenance ¦ Service Types.** Then change the option under Servicing Interval to depend on Usage. This Service Type is now set up for usage dependent servicing.

Below is an explanation of how this method works:

- When meter readings are entered into the visits on jobs, they are written to the Equipment Record, along with the date of the visit on which it was read. When a service Job is then completed, Protean records that the service was done and calculates when the next service should be performed.

- To determine when the next service should be done, Protean calculates a *Usage Rate*, i.e. how often the equipment has been used since the last service. The *Usage Rate* is calculated by working out how many units have been used since the last service and dividing this by the length of time from when the meter was read to when the last service was done. The *"Units Between Services"* is then divided by the *Usage Rate* to give the length of time that it will take the equipment to clock up the *Units Between Services.* This is then added to when the service was done to give when it should next be performed. The "*Units Between Services",* comes from the Equipment Servicing screen.

If for some reason, meter readings haven't been entered, then Protean will calculate the time to next service based on the previous time interval between services.

If the equipment is on an active maintenance contract, then Protean will look at the **Weekly Duty** on the contract and calculate an *Expected Usage Rate*. If this rate is higher than the *Usage Rate* then it will base the next service due date on this rate instead. This makes sure that the equipment is serviced when expected or earlier if it is being used more.

NB: If a service Job is cancelled, then the next service due is still calculated.

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Maintenance Settings

Please find below a summary of the various System settings that have already been mentioned in this guide. These are accessed by clicking on **System ¦ Settings:**
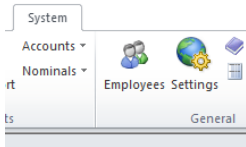
In the **Show Settings For System** field, use the drop down arrow icon and select Maintenance. The system will then display the various settings used in the Maintenance area of the system:

Setting	Value
Default Maintenance Contract Type	Fully comprehensive
Maintenance Contract First Svc from Next Due	
Maintenance Contract No	1012
Maintenance Contracts - Consolidate Service Jobs	Yes
Maintenance Contracts - Use Service Groups	Yes
Maintenance Update Svc Due Dates Last Run	04-Apr-16 09:45
Schedule Services from Due Date	No

- **Default Maintenance Contract Type:** Specifies the default Maintenance Contract Type to use when Maintenance Contracts are created from a Sales Order.
- **Maintenance Contract First Svc from Next Due:** Determines whether first service dates should be defaulted from the next due date on the equipment or from the contract start date plus the service interval.
- **Maintenance Contract No:** Displays the current maintenance contract number.
- **Maintenance Contracts – Consolidate Service Jobs:** Determines whether service jobs created using the Update Service Jobs process, should be consolidated by default when not using Service Groups on Maintenance Contracts.
- **Maintenance Contracts – Use Service Groups:** Determines whether Service Groups should be used on Maintenance Contracts by default.
- **Maintenance Update Svc Due Dates Last Run:** Displays the date and time when the Update Svc Due Dates process was last run.
- **Schedule Services from Due Date:** Determines whether the next service should be scheduled from the last due date or from when the job was actually done.

There is an additional important setting listed within 'All Settings'

- **Maintenance Update Service No Of Job Stock Issues To Create:** Determines how many job stock issues are created when the update service jobs routine is ran. This is when parts are linked to service types on the equipment covered by a contract.
  This has 3 options. **None, One Per Job, One Per Service Run**

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Maintenance Reports:

Protean has the following standard reports available:

Maintenance User Guide

Version Control

Version	Comments	User	Date	Approver
1.3	Logo Updated	RB	09/08/2019	MH

Version Control