

# Management Setup Training

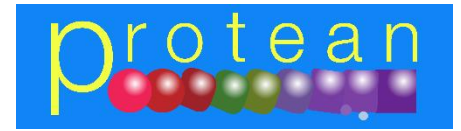
Job Type Setup Guide



## Job Type Setup Guide

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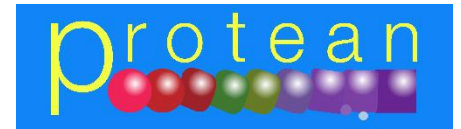


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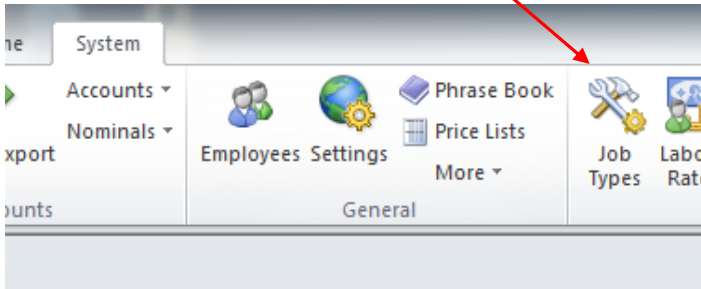
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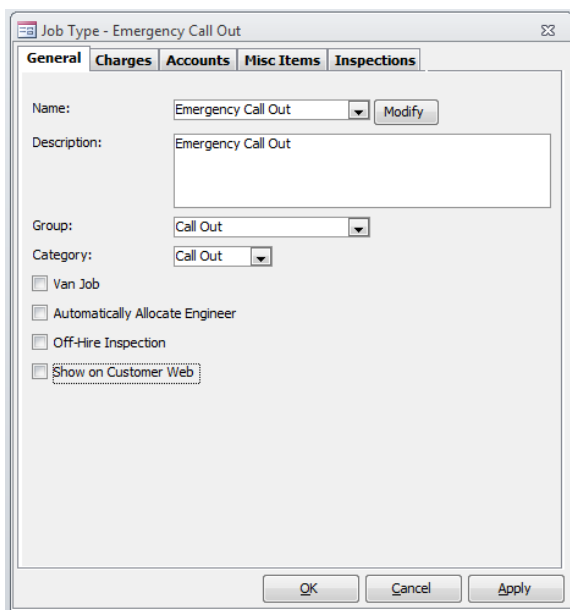


## Accessing the Job Type screen:

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:



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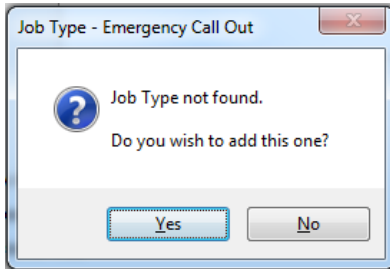
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### General Tab:

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

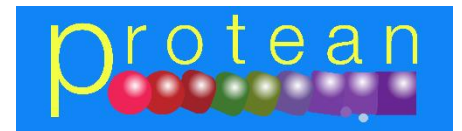
**NB** You cannot add to or amend this list and, like Group, it is required.

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.

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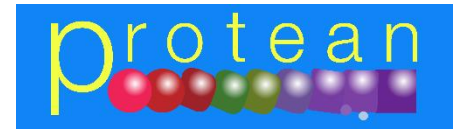


**NB:** *In order for this to work correctly the Site Route must have already been created with an Engineer's name and have been selected on the appropriate Customers' Records screen.*

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.

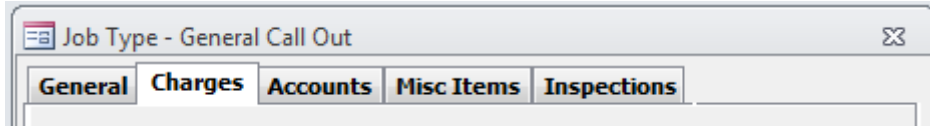
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## Charges Tab:

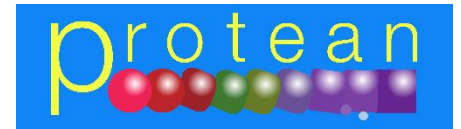
A user can use this screen to decide what items to charge for when invoicing a Job using this particular Job Type.



- **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.

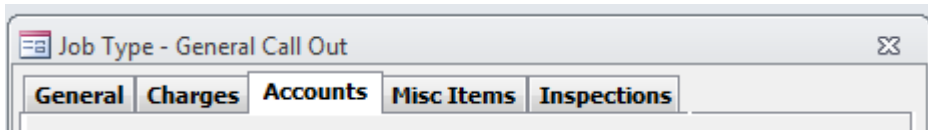
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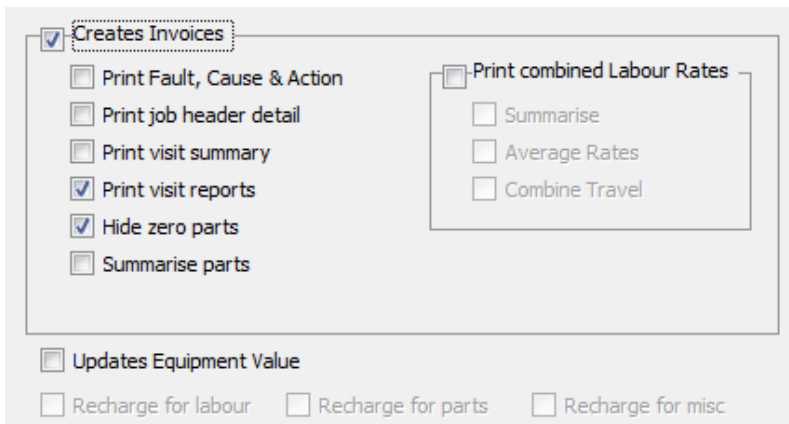


## Accounts Tab:

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.

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### 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      |

### 1. A Chargeable Job Type:

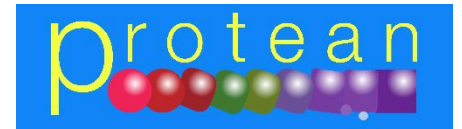
This Job Type would create an invoice. Four accounts boxes at the bottom of the screen become white, with four remaining grey (If you include the dept boxes it would be eight and eight).

- **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).



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**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*

## 2. A Non-Chargeable Job Type:

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*

## 3. An Internal Recharge Job Type:

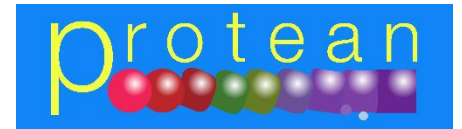
This Job Type would **not** create an invoice. A possible six accounts boxes at the bottom of the screen become white, with two remaining grey (If you include the dept. boxes it would be twelve and four).

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).

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- **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*

#### 4. An Update Equipment Job Type:

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).

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### Setting up Fixed Price Jobs Types:

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.

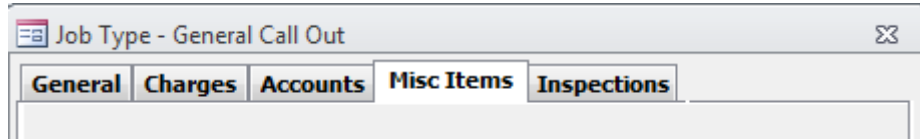
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## Misc Items Tab:

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.

