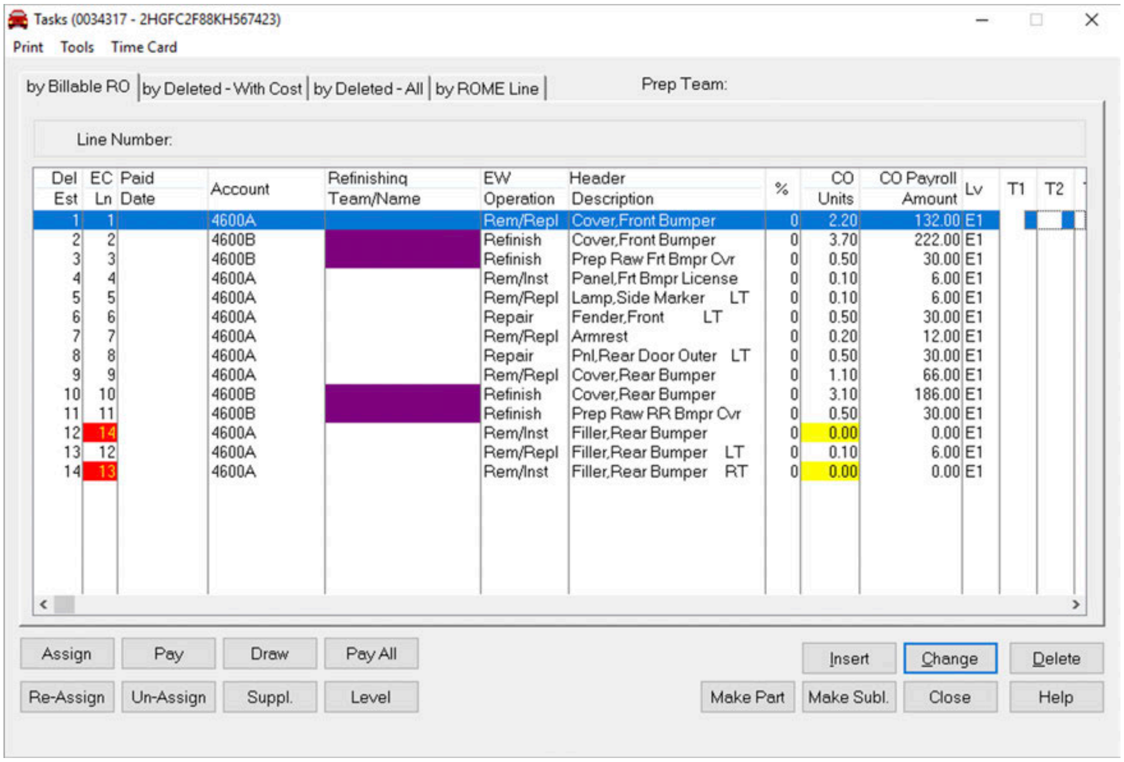
LABOR

ROME MANAGEMENT USER GUIDE

LABOR



Let’s go over the parts of the Labor window to give you an overview. We will start with the menu bar. The Print menu has three options: Labor Worksheet, Labor task list, and Shop RO. This will print the labor worksheet for just this Repair order.

Time card will display the time card entries that have been entered for this RO. This will only be available if you have techs clock in and out of the RO.

Tabs - There are four tabs at the top of the labor screen:

> **Billable RO** - This tab display the lines that are being billed to the customer and that will display on the final invoice.
>
> **Deleted** - **With Cost** - This displays lines that have been deleted due to supplements but still have cost on them.
>
> **Deleted** - **All** - This displays all of the deleted lines regardless of cost.
>
> **ROME Line** - Will sort the list by the Rome Management line number.

DISPLAY COLUMNS:

Del/Est - This column will display the line number the line has in the estimate. If the number in this column is purple it means this line has been deleted by a supplement, and any cost on the line should be removed.

EC/In - This column display the line number in the Repair Order assigned by Rome Management. If this number is red the line is excluded from calculating on the ticket.

Paid/Date - This column will display the date that this line was flagged to be paid on. If the date is yellow, part of but not all of the time has been committed. If the Date is green then the line has been committed.

Account - Displays the account number of the line.

Team/Name - This column display the team or technician that has been assigned to this line.

EW/Operation - This column displays the labor operation that is being performed on this line.

Description - This is the description of the line as entered in the estimating system or Rome Management.

% - This column displays the percentage of the line that is completed according to the production schedule. Note: If you are not updating the production schedule this column will not be correct.

CO/Units - This column will display the unit hours for each of the labor lines. If the number is yellow it means this line is a cost-only transaction.

Amount - This column displays the amount of revenue on each line.

Lv - This column display what level the line has been assigned to. (E1,S1, 52, C1)

T1 - This column displays a check if the line is subject to Sales Tax.

BUTTONS

Assign - This button will allow you to assign technicians to labor transactions.

Pay - This button will allow you to flag a tech to be paid in full for an account code, in the upcoming payroll cycle

Draw - This will allow you to draw a portion of the total hours a tech is assigned to be paid in the next payroll.

Pay All - This will pay all of the remained unpaid hours on the job.

Un-assign - This will remove a tech from assignment to a labor account code.

Suppl. - This button will allow you to create a labor supplement for additional hours on a certain line

Level - This will allow you to filter the labor display to show only which levels you check.

Insert - This will insert a new labor line onto the job.

Change - This will allow you to edit the highlighted labor line.

Delete - If you have permission this will delete the currently highlighted line.

Make Part - This will change the highlighted line from a labor operation to a part. The line will be removed from the labor management screen and added to the parts management screen. On the worksheet the unit hours will be translated into a part price based on the labor rate of the account code on that line. The account code will remain the same so you my need to change the account code to a part account code.

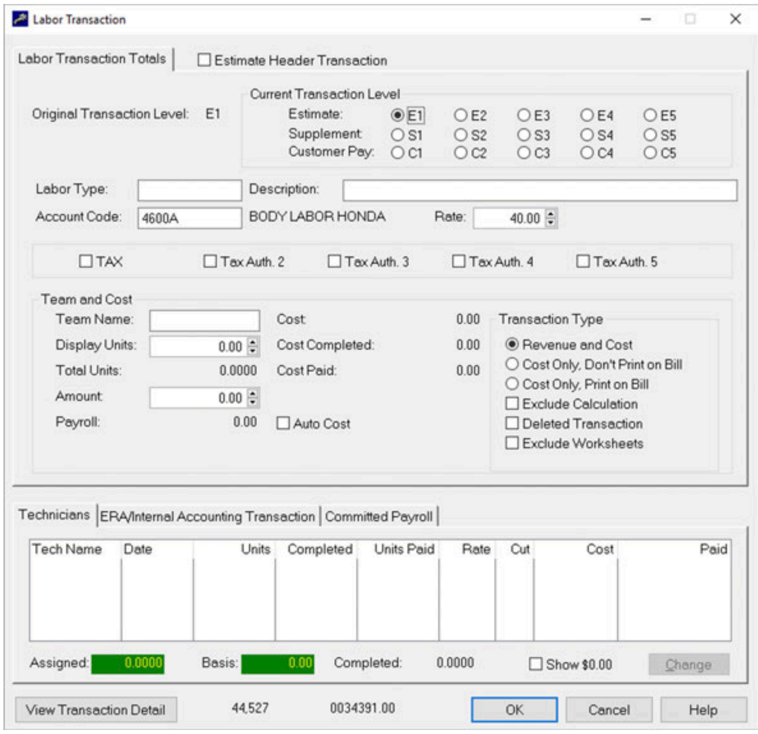
NOTE: Make sure you don't change the account code until after you press the Make Part button. The labor account code rate is used to calculate the part price. The parts account code does not have a rate so the new part would have no price if you change the account code before you hit Make Part.

Make Sublet - This will change the highlighted labor line from a labor operation to a sublet transaction. The line will be moved from the labor management to the Sublet/Misc screen. It works the same as the Make part button above with respect to calculating the amount of the transaction and the account codes.

Close - This will close this screen and save any changes made.

INSERTING A LABOR LINE

If you need to insert a labor line you would press the Insert button. The first thing you will be asked is the level of the line being added.



Fill in the following fields:

Labor Type - The labor operation i.e. Repair, Refinish, Remove & Replace

Description - Description of the labor task to be performed.

Account code - The account code the line will calculate against, i.e. Body, Paint, etc.

Rate - The hourly rate being charged to the customer.

Tax - Check the appropriate Tax box if this transaction is taxed.
Do not fill in the Team Name it will be done when you assign the tech, and entering it now will not correctly assign the tech.

Units - Enter the unit hours of the repair, when you do so the Amount will automatically be calculated.

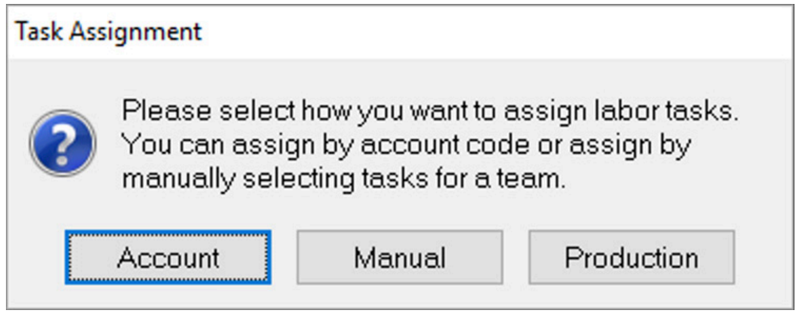
Leave the other fields alone, they should be left as they are when you are adding a new line.
Press OK to create the line.

EDITING A LABOR LINE

To edit a labor line you would highlight the line and press the change. You can then edit the fields that you want. If the information is not correct you should un-assign the line, make any changes to the line then re-assign the tech.

ASSIGNING TECHNICIANS

When you are ready to assign a technician to a task, press the Assign button on the labor management screen. The following window will appear asking if you want assign by Account or Manual. Account, will assign a technician or team to all of the labor lines for a single account. i.e. All the Body labor, all the paint labor, etc. This is the most common way of assigning labor. Manual will bring up all unassigned labor lines on the RO, and you can select each line that you want the tech to work on. This is helpful when a tech is performing some of the lines for an account code and another will also work on the same account code.



ASSIGNING BY ACCOUNT CODE

1. Press the Account button to assign a tech to all of the labor for a specific account code. The team list will pop-up so you can choose the tech or team you will be assigning. If you do not see the tech or team you want to assign go to Section 5 in the setup guide to see how to setup techs and teams.

2. Highlight the tech or team you are going to assign and hit the Select button.

3. The account list for the billing profile on this RO will pop-up. Highlight the account code you wish to assign and hit the select button. It will display your selections so you can confirm them. Hit OK to confirm or Cancel to cancel.

4. It will put the techs name in the Team/Name column on every line that assigned. If there are any lines not assigned it will pop-up a box asking you to assign another. If you are ready to assign the other accounts on the job go ahead and hit yes and it will repeat the process so you can assign another account code.

When a tech is assigned to a line Rome Management calculates the cost of that line based on the unit hours and the technician's rate for that account code.

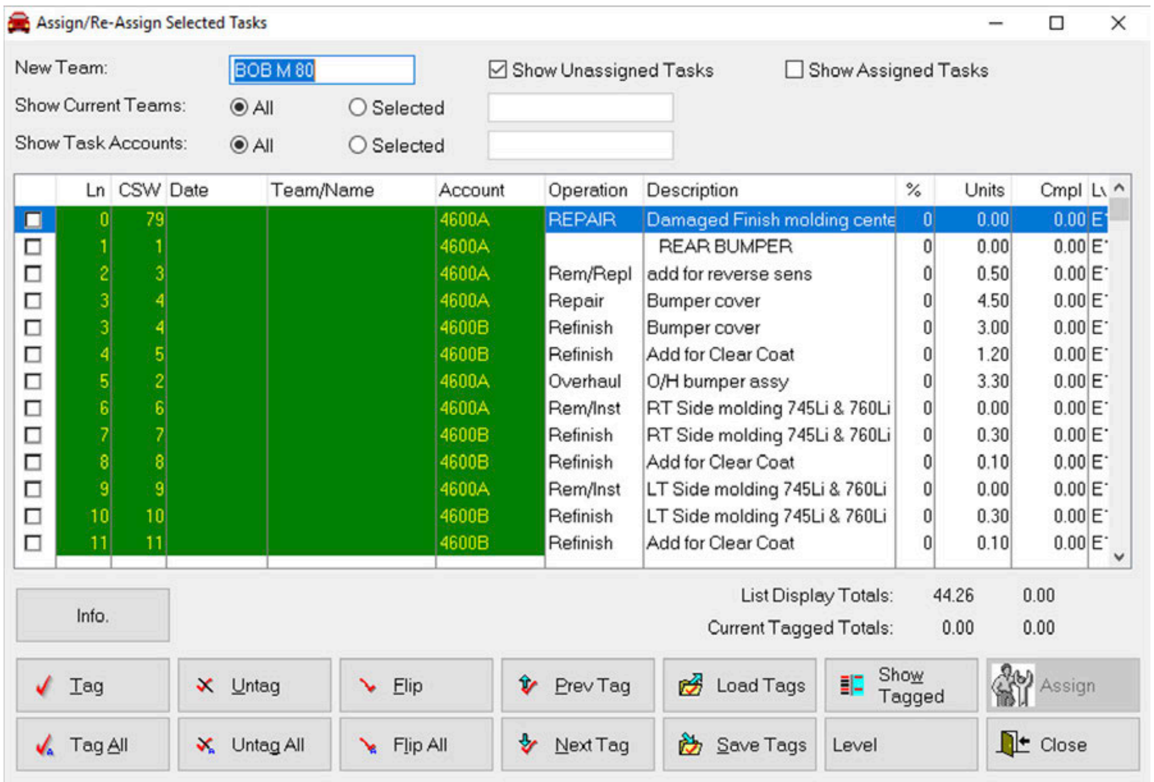
IMPORTANT: If the technician does not have an hourly rate or cut setup for this account code there will be no cost and the tech will not be paid. 2 hours x $0 = $0

If you change a tech's rate or cut, it will not affect jobs he has already been assigned to. You will need to un-assign the tech and re-assign him and then the new rate will be reflected in the line.

ASSIGNING MANUALLY

1. Press the Manual button to assign a tech to any unassigned line on the job. The team list will pop-up so you can choose the tech or team you will be assigning. Highlight the tech and hit select.

2. You will then be on the Assign/Re-assign Selected Tasks screen and the tech will be filled in for you. This screen by default, displays all of the unassigned lines on the job. If you wish to see the lines that have been assigned you can check the box next to “Show assigned Tasks”.



3. Then check the box at the beginning of each line that you want to assign the tech to. If you want to filter the display to show only a certain account code put the dot in selected next to “Show Task Accounts” and enter the account you are looking for.

4. When you have all the lines that you want to assign checked press the Assign button and those line will be assigned to the tech you choose.

When a technician is assigned, cost is generated on the transaction according to the rate set for that account code for that technician. If the tech does not have a rate set there will be no cost and he will not be paid for it. (He might be a little angry) If you change a technicians rate it will NOT change the cost on any lines that have been assigned. You must un-assign then re-assign the tech so the new rate is factored in.

UN-ASSIGNING A TECH

If you want to un-assign a line or group of lines you need to highlight one of the lines you want to un-assign and press the Un-Assign button.

1. A window will pop-up offering the following choices:

    By Selected Task - Will un-assign the currently highlighted task only.

    By Technician Team - Will allow you to select a tech or team and un-assign him from whatever he is assigned to.

    By Account Code - Will allow you to unassign an entire account code, all tech assigned to the account code you select will be un-assigned.

2. Select an option and hit OK.

If you select the by Team or Account code option the next window will have a check box that says, “Un-assign completed (not paid) tasks” If any of the lines you are trying to un-assign have been flagged you will need to check this box to un-assign them. Click OK to un-assign or cancel to exit without un-assigning.

NOTE: Any lines that have been committed cannot be un-assigned. They must be uncommitted first, then you can un-assign them.

RE-ASSIGNING A TECH

If you want to un-assign a tech and re-assign another in his place you would do a re-assign.

1. Highlight one of the lines you want to re-assign and press the Re-assign button. This step is very important you need to make sure the line highlighted is correct because it using what is selected to determined what is being re-assigned.

2. You will be presented with 4 choices:

    By Selected Task - This will re-assign only the highlighted line.

    By Technician Team - This will reassign ALL of the labor for the tech that was assigned to the highlighted line, regardless of the account code.

    By Account Code - This will re-assign all of the lines associated with the account code on the highlighted line to the tech you select.

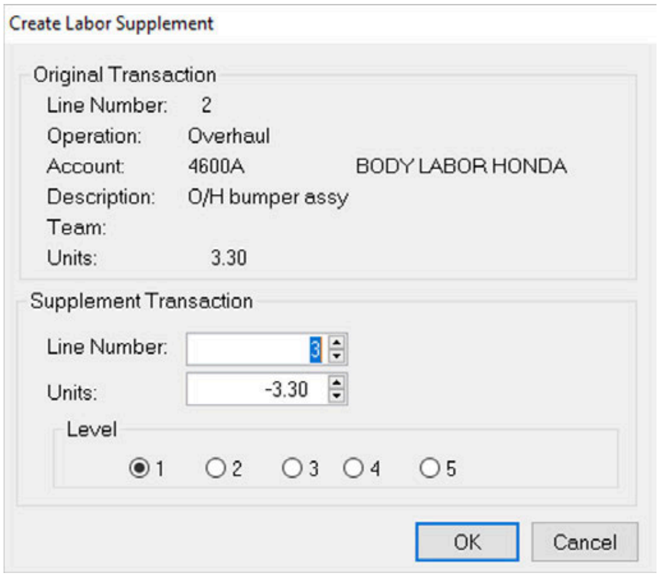
    By Tagging Tasks - This will bring up a window allowing you to check off which lines you want to be reassigned to a new technician.

3. Select an option and hit OK.

NOTE: If a line has been committed the reassign will not work on that line.

ADDING A LABOR SUPPLEMENT

The Supplement button on the Labor management screen allows for easy insertion of a supplement to a labor line. Highlight the line you wish to create a supplement for and press the Suppl button.



A window will pop up detailing the line you highlighted and giving you some choices. The line number field will set the new supplement line to the line number you choose. Rome Management will then re-number the lines around it to keep the line numbers sequential. The Units field will allow you to set the units of the supplement. It defaults to negative units of the line you highlighted in case you want to remove the transaction from the ticket. Level set the level of the supplement(S1, 52, etc.) is assigned to. Note adding supplements with this method will not update your estimating system, you will have to input the supplement into your estimating system so that they balance. You may find it easier to make the supplement in the estimating system and bring it over to Rome Management.

PAYING/FLAGGING TECHNICIANS

Paying a single technician

To pay a single tech for all the units of a specific account code you would use the Pay button.

1. Press the pay button and Rome Management will prompt you to select the tech you want to pay.

2. Select the tech you want to pay and hit OK, and Rome Management will prompt you to select the account code you wish to pay.

3. Select the account code you want and hit Select.

4. A window will pop up with the team/tech name and the account code you selected. If these are not correct you may change them at this point. There is also a date field that defaults to todays' date OR the last date you entered so be careful to verify it.

The date field is important because it is the date that shows up on the Labor worksheet that you will generate when you do payroll.

Select the date you want and hit OK and all the tech units for that account code will be marked as paid/flagged. You should see the pay date in field in front of there team/tech name.

If you want to flag all of the remaining labor on RO you would press the Pay All button. You will then be prompted for a date. Select the date and hit OK and all remaining labor for every tech will be flagged(paid) on the date you selected.

NOTE: Any flagged labor that has not been committed will have its pay date changed to the date that entered when you did the Pay All.

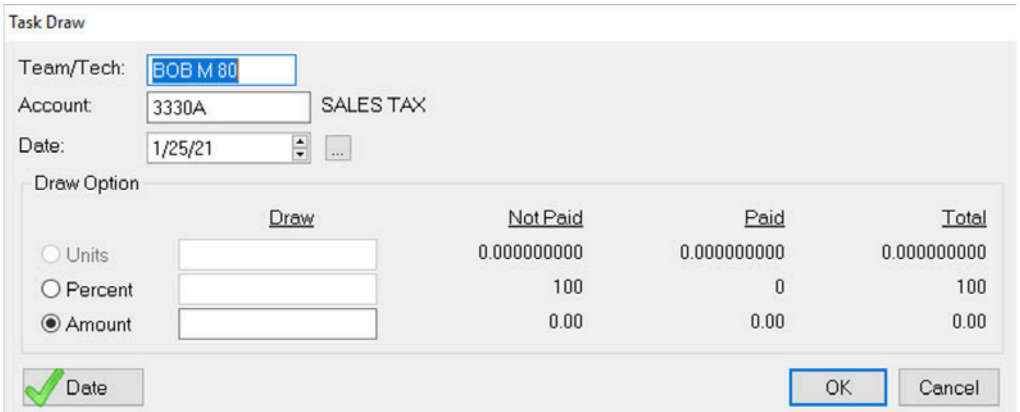
DRAWING A TECHNICIAN

If you need to pay only a portion of total units the tech has you would do a draw.

1. Hit the Draw button and Rome Management will prompt you to select the tech you want to pay.

2. Select the tech you want to pay and hit OK, Rome will prompt you to select the account code you wish to pay.

3. Select the account code you wish and hit select



4. The Draw window will come up with the tech name, the account code and the pay date. You may adjust these if they are not what you wanted. In the Draw Option section is where you can specify how much you will be paying the tech. It also displays the total hours on the job, the number of hours Paid(committed) and the hours Not Paid.

5. There are three ways to calculate the draw; Units, Percent, & Amount. For Units, you would select the number of unit hours you want to pay the technician. For percentage, you enter the percentage of the total hours that you want to draw. Ex: 50 for 50%. For Amount, you would enter the dollar amount you want to pay the technician. The system will never let you pay more then the number of hours available as long as you properly commit payroll.

6. When you enter the draw amount and hit OK, the system will flag the lines associated with the account code beginning at the top and going down. It will flag all hours on each line until it gets to a line that has more hours then what is left to draw. It will then partially pay that line. After you have committed payroll if you do another draw you will only be able to draw the remaining amount.

MAKING A LABOR LINE INTO A SUBLET OR PART

If you need to change a labor line into a part or sublet you would highlight the line and press the Make Part or Make Sublet button. Make sure the line is not assigned because you cannot change a line with cost on it. If it is assigned, un-assign it and then you will be able to move it. Before the conversion Rome Management will ask you if you are sure you want to convert it into a part. Answer Yes

Rome Management will remove the line from the labor screen and place it into either the Parts or Sublet screen. The transaction is changed from unit hours to a dollar figure based on the rate of the line being changed. On the worksheet the line will go from having unit hours in the labor or refinish column to having dollars in the Part or Sublet column.

For Example, you go to change a 2-hour body labor line into a sublet. The rate of the line is $30/hour. It will calculate 2 hours at $30/hour to come up with a $60 sublet.

NOTE: The account type will not be changed it will remain as Body, Paint Frame or Mech labor and if you want to changer it you will need to do so AFTER you have made the conversion.

LABOR (TIME CARD SHOPS)

You don’t need to assign the tech to the jobs in a timecard shop. Either the production manager enters the timecards into the system or the techs themselves can clock in and out of jobs. If you want to assign techs to the jobs so that you can create route sheets you can, BUT make sure you do not give them a flat rate in their Employee setup otherwise you will double cost the job and mess up the profit margin on the job.

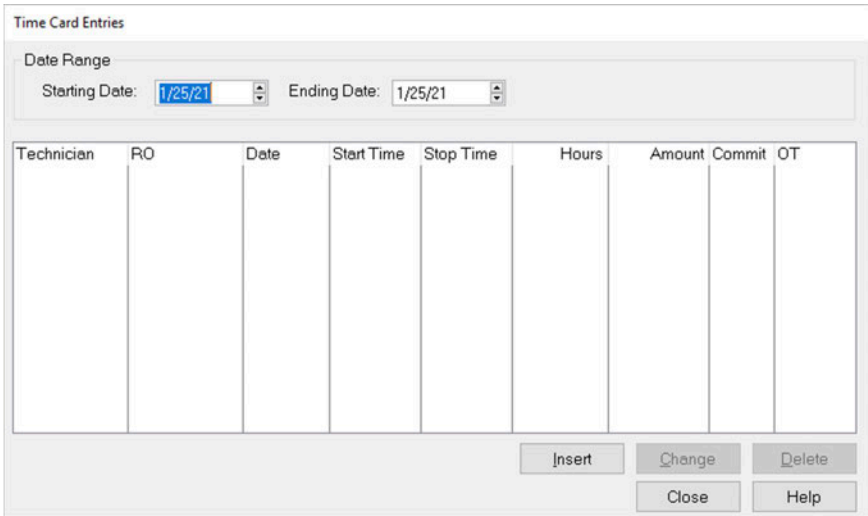
ENTERING TIMECARDS AUTOMATICALLY

Technicians can use the Tech Station module to clock in and out of ROs as they go about their work. They can access the Tech Station by clicking the icon on their desktop. They can also bring it up by clicking the File menu in Rome Management, highlighting Payroll then Timecard then clicking on Automatic Timecard Entry.

When you log into the tech station you will be asked to select the RO from a list that you will be logging into. The list only display repair orders that are open, meaning they are not dated out. Select the RO you are going to be working on. The RO will be loaded and you will see traffic lights in the tasks that need to be done for this job. To clock in the tech press the Job button and select the account code he will be working on. It will automatically log the start time for that tech. When that tech logs in again and selects the same RO and account code it will set the time out and clock him out for that RO. He can then login to another RO and repeat the process.

ENTERING TIMECARDS MANUALLY

Click on the File menu on the Rome Management main menu and highlight Payroll. In the menu that pops up highlight Timecard then select Manual Time Entry. The Time card entry screen should appear.



Click Insert to enter a new timecard entry.
Select the RO the entry is for and press Select.
Enter the Tech the entry is for and the account the work was for.
The Start Date/Time will default to the current time. Edit it to when the work was begun.

Enter the Stop Date/Time of when the work was ended and Rome Management will calculate how many hours were worked and the amount of pay the technician will get. If the work was considered overtime and the tech should be paid his overtime rate check the overtime box.

Press OK to save the time card entry.

ROME

2421 Mountain Road
Pasadena, MD 21122

800-373-ROME
www.rometech.com