

AJC Configuration

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Department Setup

Department Setup

Job Costing > Configuration > Department setup

The screenshot displays the 'Department Management - Department Search' window. On the left, a sidebar contains the 'Job Costing Module' and a 'Configuration' menu with options: Department Setup, Function Maintenance, Template Task Setup, Quote Template Setup, Job Team, and Task Activity Group. The main window features a search bar labeled 'Department Name:', a toolbar with 'Search', 'Add', 'Edit', 'Delete', and 'Print Grid' buttons, and a table with the following data:

#	Code	Name
1	DEPT01	Department 1

Departments are the entities organizations form to organize people,

Reporting Hierachy, and work in a way that best supports the realisation of the organization's goals.

Add button: to insert a new Department Management Item.

Edit button: to view or edit an already added Department Management Item.

Delete button: to delete the currently selected Department Management Item.

Print Grid button: to print the displayed grid of Department Management Item.

The screenshot shows a software window titled "Edit Department" with a close button (X) in the top right corner. Inside the window is a sub-form titled "Department Maintenance" with a help icon (?) in its top right corner. The sub-form contains two text input fields: "Department Code:" with the value "DEPT01" and "Department Name:" with the value "Department 1". At the bottom of the sub-form are four buttons: "Save and New" (with a purple floppy disk icon), "Save and Close" (with a green floppy disk icon), "Save" (with a blue floppy disk icon), and "Close" (with a red X icon).

Department Maintenance Window.

This form is used to add departments by entering the code and the name of the department

Save And New – Saves the form and then reopens it so you may create multiple forms without have to close and reopen constantly.

Save And Close – Saves the form then closes it.

Function Maintenance

Function Management

The screenshot displays the 'Function Management - Function Search' window. On the left, a sidebar shows the 'Job Costing Module' and a 'Configuration' menu with options: Department Setup, Function Maintenance, Template Task Setup, Quote Template Setup, Job Team, and Task Activity Group. The main window has a title bar 'Function Management - Function Search' and a ribbon with buttons: Search, Add, Edit, Delete, and Print Grid. Below the ribbon is a search bar labeled 'Function Name:'. A table below the search bar shows one record with the following data:

#	Code	Name
1	FUNC01	Function 1

search tab shows available management functions.

The user can search function by name.

The Navigation Ribbon is used to action the following functions:

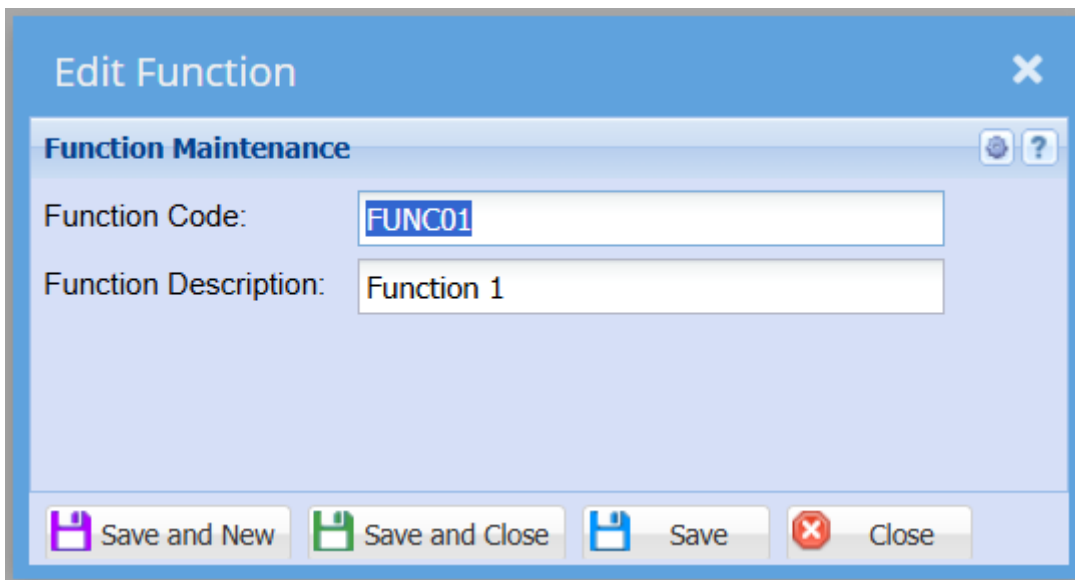
Search button: the search function will return Function Management Item records based on the search criteria entered

Add button: to insert a new Function Management Item

Edit button: to view or edit an already added Function Management Item

Delete button: to delete the currently selected Function Management Item

Print Grid Button: to print the displayed grid of Function Management Item



Edit Function

Function Maintenance

Function Code: FUNC01

Function Description: Function 1

Save and New Save and Close Save Close

Function Management

This form allows the user to create new functions management by entering the code and the description

Save And New – Saves the form and then reopens it so you may create multiple forms without having to close and reopen constantly.

Save And Close – Will Save the form then close it.

Template Task Setup

Template Task Setup

Training Video 2020 - [Click Here](#)

Job Costing > Configuration > Template Task

Template Tasks are only available in the Job Costing Module. They allow the user to define a sort of Bill of Materials with an exception. This task which is created allows one to insert many stock items, service and custom type items into a Task. The task only takes the quantity of the items when setting up, but once inserted into a quote it will pull all cost and selling prices at that time.

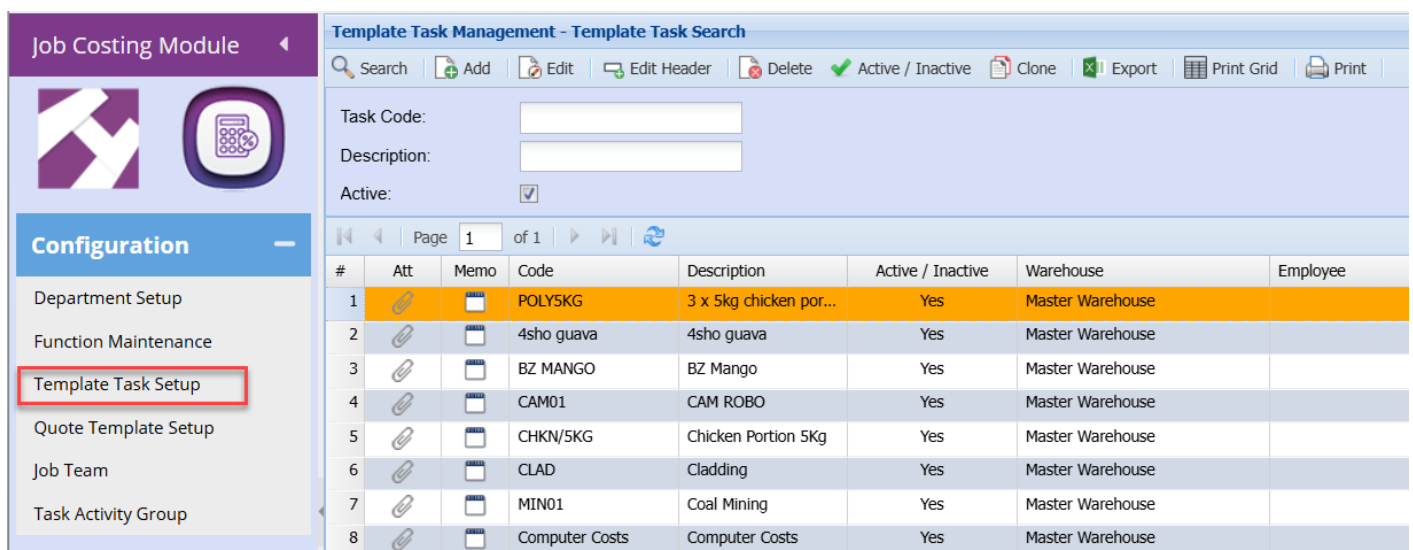
The task that is created consists of many items, these items are broken up into individual lines within the job management. The customer only sees the name of the task but none of the line items.

The line items of the task has costs and selling prices which then make up the overall cost and selling of the task.

One can have tasks under tasks, it does not matter as the system will always take the lowest lever of items into the managing of the job.

The example we will use to show you how a task is setup will be the making of a motor car.

Template tasks makes it easy for the users not to understand what the components are made of. It gives the user the detail list of all the items by just selecting the main task.



Job Costing Module

Configuration

- Department Setup
- Function Maintenance
- Template Task Setup**
- Quote Template Setup
- Job Team
- Task Activity Group

Template Task Management - Template Task Search

Search Add Edit Edit Header Delete Active / Inactive Clone Export Print Grid Print

Task Code:

Description:

Active: ☒

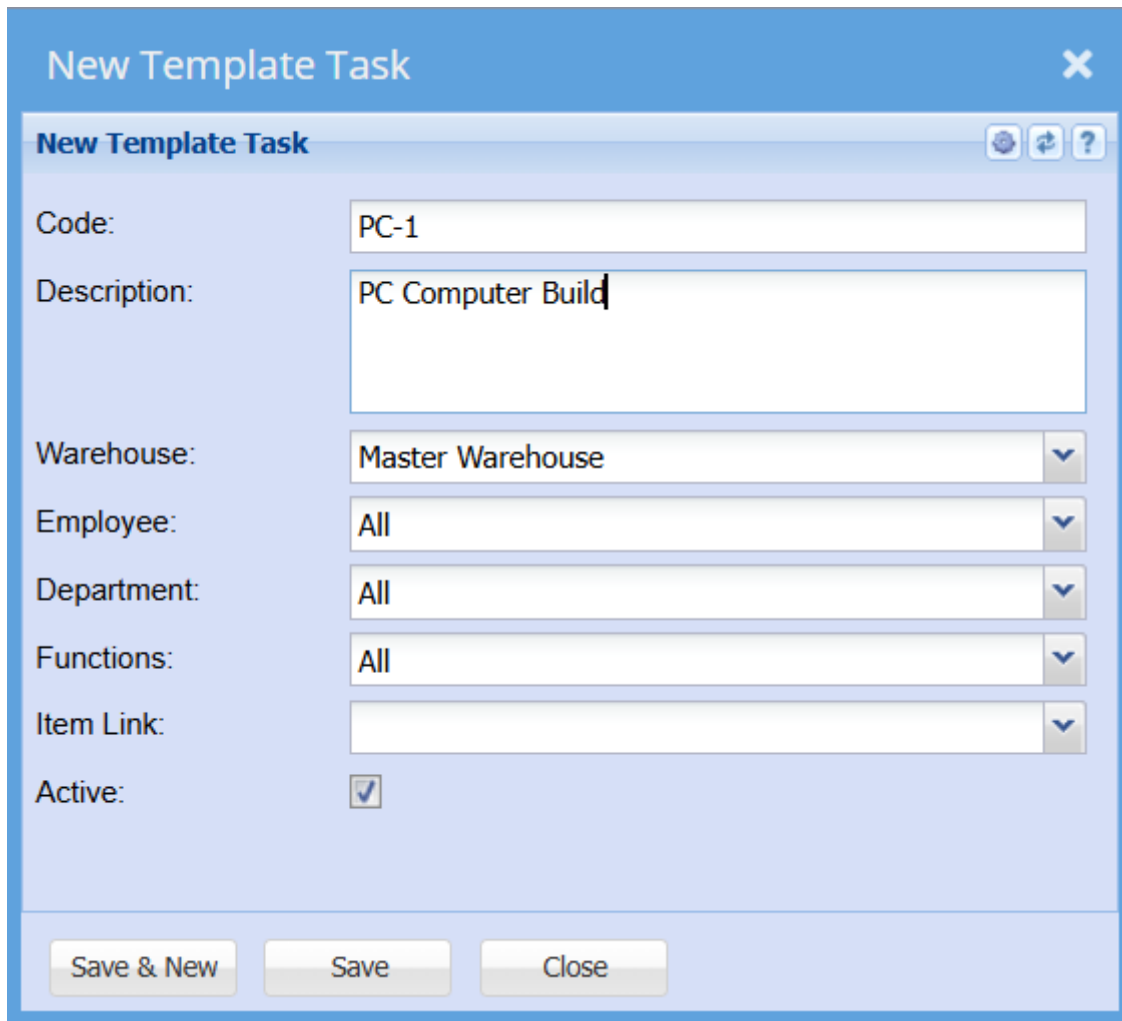
Page 1 of 1

#	Att	Memo	Code	Description	Active / Inactive	Warehouse	Employee
1			POLY5KG	3 x 5kg chicken por...	Yes	Master Warehouse	
2			4sho guava	4sho guava	Yes	Master Warehouse	
3			BZ MANGO	BZ Mango	Yes	Master Warehouse	
4			CAM01	CAM ROBO	Yes	Master Warehouse	
5			CHKN/5KG	Chicken Portion 5Kg	Yes	Master Warehouse	
6			CLAD	Cladding	Yes	Master Warehouse	
7			MIN01	Coal Mining	Yes	Master Warehouse	
8			Computer Costs	Computer Costs	Yes	Master Warehouse	

To create a template task go to the Job Costing Configuration Template Task.

Click on the add button to create a new task.

Give a code and Description of the task



New Template Task

Code: PC-1

Description: PC Computer Build

Warehouse: Master Warehouse

Employee: All

Department: All

Functions: All

Item Link:

Active: ☒

Save & New Save Close

In the figure below you will notice there a small window that opens up to give you some functions to add parent tasks.

The menu is divided up into Parent and items tasks. Parent tasks are names of the group of items below it.

Menu explained

Add Parent Task - Create another header for items below the main header

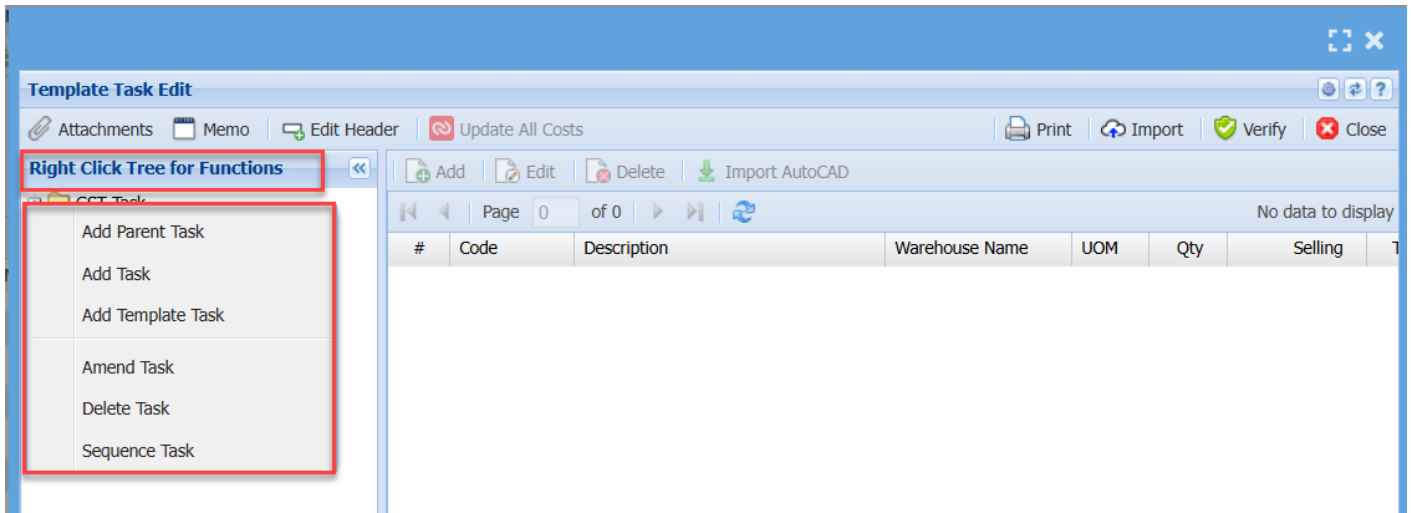
Add Task - Creates a name of a header for task, this task allows the user to add stock, custom and service items below this header.

Add Template Task – This allows one to add another Template task to be

added with all of its children items below

Delete Task - Highlight the task in the tree view to delete it

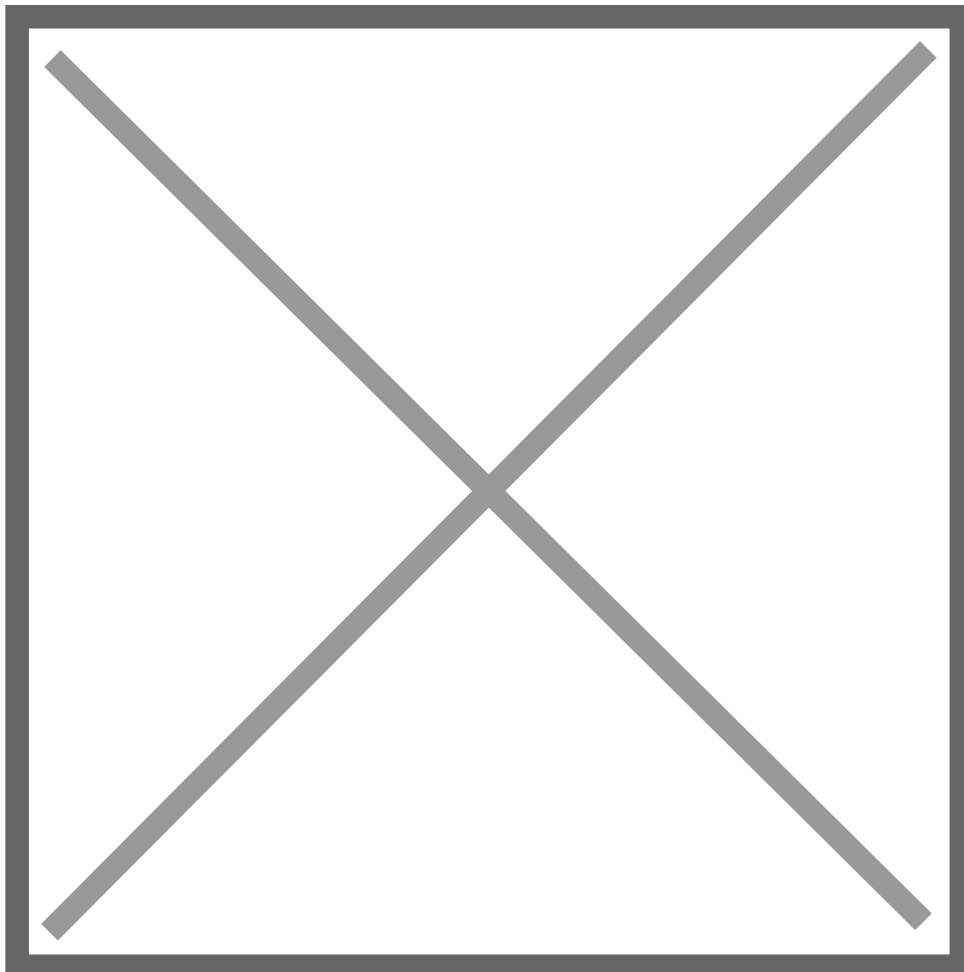
After right clicking on the tree view and then selecting the Add Stock Task option the following window comes up.



When you click on the save button, you will be brought back to the Template task detail with a new heading under the Main heading.

To add stock click on the "PC Stock" header.

Select your stock items and the quantity that is required to complete this task.



We have now added many stock items to the parent stock task.

After setting up your task click on the close button to be taken back to the Template task search screen.

The screenshot shows the 'Template Task Edit' window. On the left, a tree view under 'GST Task' has 'Stock' selected. The main area displays a table of stock items. The table has columns: #, Code, Description, Warehouse Name, UOM, Qty, and Selling. There are three rows of data. The interface includes a top menu bar with 'Attachments', 'Memo', 'Edit Header', 'Update All Costs', 'Print', 'Import', 'Verify', and 'Close'. Below the menu bar are buttons for 'Add', 'Edit', 'Delete', and 'Import AutoCAD'. A pagination bar shows 'Page 1 of 1' and 'Displaying 1 - 3 of 3'.

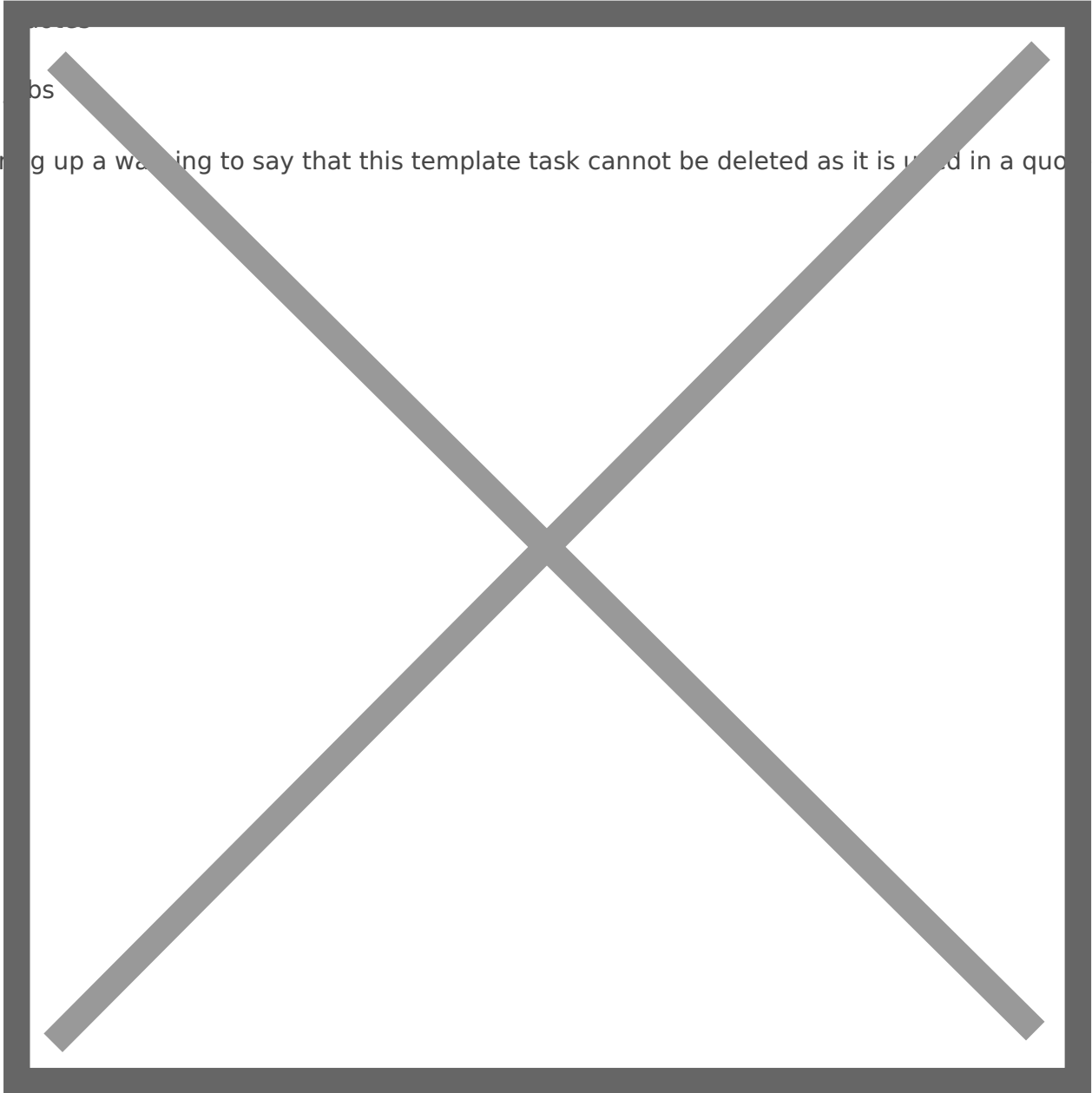
#	Code	Description	Warehouse Name	UOM	Qty	Selling
1	421143	JIVO CONCENTRATE BELOW ZERO ...	Master Warehouse		1	2.0
2	421233	JIVO CONCENTRATE MILK BLEND M...	Master Warehouse		2	6.0
3	POLY1	Polybags	Master Warehouse		1	0.5

Template Task Delete Rules

A check is in place to not allow a delete of a template task if it is used in:

1. Quotes
2. Jobs

Bring up a warning to say that this template task cannot be deleted as it is used in a quote or job



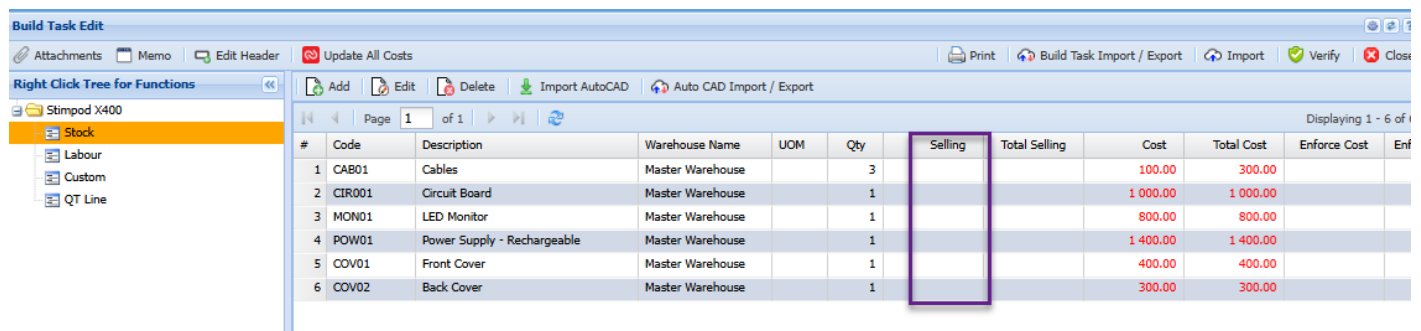
Task Setup - Retain Sell Price

When using build tasks on the jobs, there are instances when the underlying components may change on the actual job during manufacture. the replacement component may have a different sell price compared to the original item on the task.

If you then edit the task and replace the item, then the sell price quoted to the client will change.

to ensure that the selling price does not change, there are 2 ways to amend the task:

1. **Task Setup:**Setup the task with all the components as zero selling price. The cost prices are added as normal.



The screenshot shows the 'Build Task Edit' window. On the left is a 'Right Click Tree for Functions' with 'Stock' selected. The main area displays a table with columns: #, Code, Description, Warehouse Name, UOM, Qty, Selling, Total Selling, Cost, Total Cost, Enforce Cost, and End. The 'Selling' column is highlighted with a purple box. The table contains 6 rows of data for various components like Cables, Circuit Board, LED Monitor, Power Supply, Front Cover, and Back Cover.

#	Code	Description	Warehouse Name	UOM	Qty	Selling	Total Selling	Cost	Total Cost	Enforce Cost	End
1	CAB01	Cables	Master Warehouse		3			100.00	300.00		
2	CIR001	Circuit Board	Master Warehouse		1			1 000.00	1 000.00		
3	MON01	LED Monitor	Master Warehouse		1			800.00	800.00		
4	POW01	Power Supply - Rechargeable	Master Warehouse		1			1 400.00	1 400.00		
5	COV01	Front Cover	Master Warehouse		1			400.00	400.00		
6	COV02	Back Cover	Master Warehouse		1			300.00	300.00		

Then add an additional Custom line item with only the selling price

Build Task Edit

Attachments Memo Edit Header Update All Costs Print Build Task Import / Export Import

Right Click Tree for Function

- Stimpod X400
 - Stock
 - Labour
 - Custom
 - QT Line**

Amend Build Task Item

Inventory Overview Supplier Update Costs Edit Item

Item: CUSTOM - PO Custom

Description: Stimpod X400

Warehouse: Unit Of Measure:

Quantity: 1 Markup %: 100.00

Cost Value: 0 Enforce Cost on Job: ☐

Selling Price: 6500 Enforce Selling on Job: ☐

Employee Assigned: Days from Start:

Save & New Save & Close Close

when this is added onto the job and there is a need to replace one of the components with another item, then do not manage the item not being used and add and manage the new item.

This will affect the managed cost on the job correctly. And the selling price as quoted initially will not be affected.

2. Using Replacement item option

Manage Job

Search Memo Attachments Create Reminder Info Workflow Ready For Invoice Functions View Doc Print Doc Print Reports

Days to Completion: **-1626** Job Status: **Started**

Functions Date Details Address Shipping / Link Progress

Copy to Job Create RFQ Support Log

Clear Line History Production Tracking Time Log

Delete Job Line **Replace Item** Quick Time Log

Change Line Type Checklist

CTC to SC Complete

The purpose of the replacement item is to retain the ID position, SELL price and quantity of the budget And importantly that it is positioned within the Task Including whether it is a CTC, scope creep or quote. We also need an indicator to tell us this was replaced before. So would need a user log entry Including a flag on the manage job line that it was replaced

Job Lines Planned Time Job Line History Sub Job Link BOM Links Notes

Page 1 of 1 Remove Paging: 1 Manage line A Cost To Company B Scope Creep C Quote 2 Job Detail 3 Line History

#	To Inv	Item S	Notes	Line Type	QT No	B-Status	J-Status	Unit Sell	Days Re	Line Status	Track It	Task Code	Related To
1				Quote	QT53	▲		195	-1424	Not Started			Stock
2				Quote	QT53	✓		195		Complete			Stock
3				Quote	QT53	✓		192.83	-1423	Active			Stock
4				Quote	QT53	▲		67.5	-1953	Not Started			Stock
5				Quote	QT53	●		100	-1422	Acti			
6				SC		✓		117		Acti			
7				CTC		✓		0		Acti			

Replace item button only becomes active if the item has no managed items

Replacement form will allow to replace one to one or one to many

As long as one puts the sell price of what was quoted onto the new line, it does not look at the item pricing structures etc.

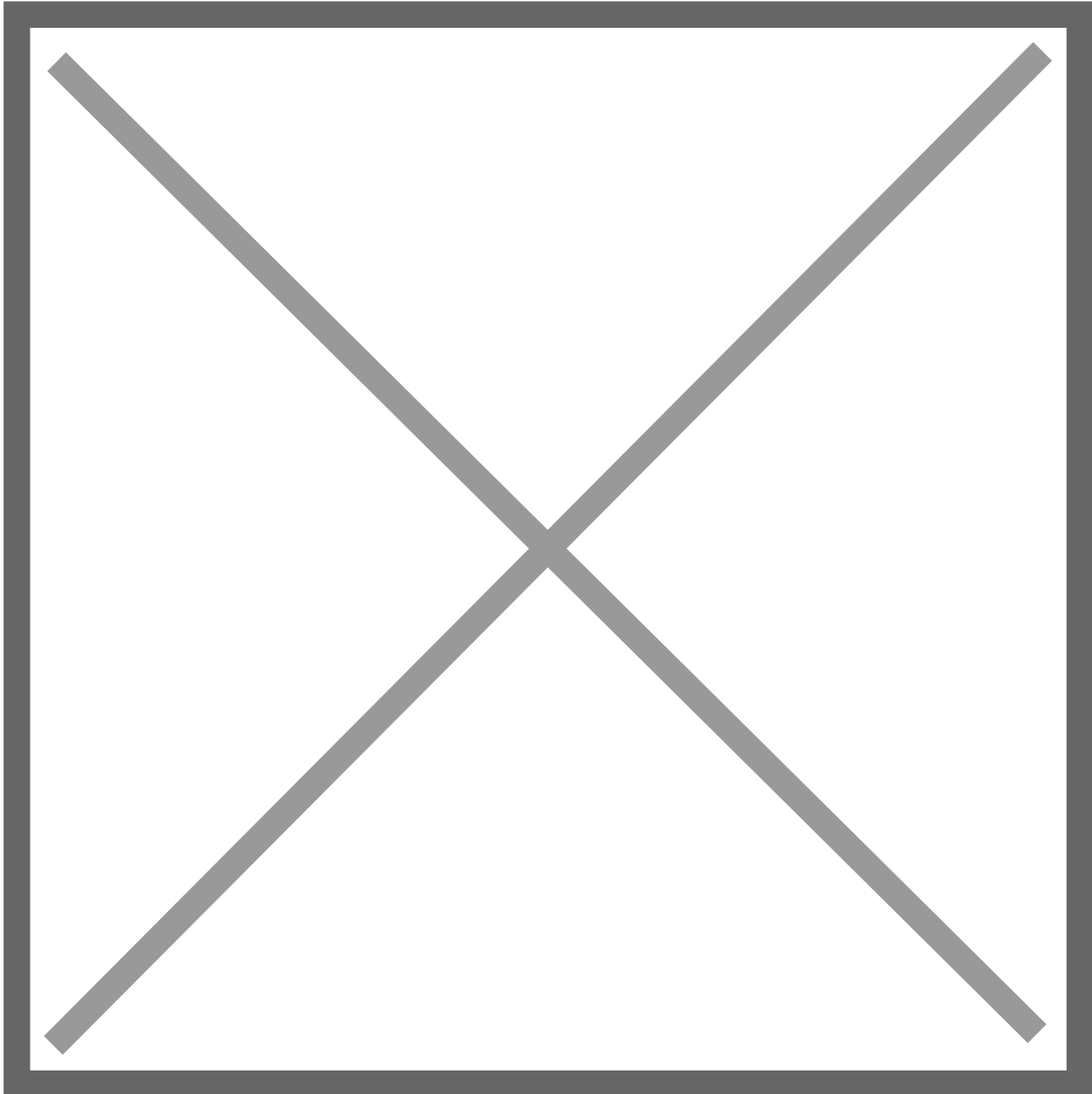
Quantity needs to be the same.

The Replace Item button is only active if no quantity has been managed on the line.

Quote Template Setup

Quote Template Setup

Quote Template Setup



This will be a copy made from existing quote.

once saved it gets listed in the quote Templates

One can search by description, enter the description template and search or search for all quote template by leaving the description field empty

Search button - searches available quotes template

View button – to view a quote template

Delete button – to delete a quote template

Edit code & description – allow making changes on the quote template search

Job Team

Add or Edit Job

Job Costing>Configuration>Job Team

Job Team

Search

Add

Edit

Cancel

Print Grid

Status:

All

Job Team:

Active:

Active

Page 1 of 1

Displaying 1 - 6 of 6

#	Team	Seq	Code	Name	Active	Status	Captured By	Captured Date Time
1		999.99	Star002	Starsound Instal Team	YES	Created	Chris Stone	2021-12-03 06:12:16
2		1.99	RED	Team Red	YES	Created	Chris Stone	2021-12-03 06:00:12
3			T2	Team Two	YES	Created	Chris Stone	2021-10-29 08:11:06
4				TeamWithoutAColour	YES	Created	Chris Stone	2021-10-29 06:59:51
5			JBLT001	JBL Install team	YES	Created	Chris Stone	2021-09-30 03:37:08
6			T1	Team One	YES	Created	Chris Stone	2021-09-29 18:26:25

Edit Job Team

Close

Job Team Code: Star002

Seq: 999.99

Active: ☒

Set As Default: ☐

Job Team Name: Starsound Instal Team

Team Colour: Light Green 

Job Manager: Chris Stone

E: ☐ S: ☐

Account Manager:

E: ☒ S: ☐

Job Capturer: Gerrit van Rooyen

E: ☐ S: ☐

Billing Dept.:

E: ☐ S: ☐

Available

Page 1 of 1

Displaying 1 - 32 of 32

User Name	Prefix
Acck Support	ACCK
	AX
Andrew Skene	AS
	BX
	CMS
	CJ
	DX
First name Last name	AW
	GF
Imraan Salijee	IS
	JX
Malcolm Granville	MG
New Test	

Selected

Page 1 of 1

Displaying 1 - 4 of 4

User Name	Prefix
	GVR
Gerrit van Rooyen	GVR
Paige Granville	PG
Thabile Khumalo	TK

Save

Close

Job Team Code

Seq	
Job Team Name	
Job Manager	
Job Capturer	
Active Tick	
Set As Default Tick	
Team Colour	
Account Manager	
Billing Dept	

Task Activity Group

Add or Edit Task

Job Costing>Configuration>Task Activity Group

Task Activity Group

Search

Add

Edit

Clone

Delete

Print

Task Activity Group:

Task Activity Name:

Active:

☒

Group

Action Links

Page 1 of 1

#	Group Code	Group Name	Team	Total Days
1	JBL	JBL Install	JBL Install team	3.00
2	MD	Measure Downpipes	Team One	6.00
3	MRCS	Measure Roofing Cladding Spouting	Team One	9.00
4	Star01	Star Sound	Starsound Instal Team	5.00

Task Activity Group

Add

Edit

Delete

Print

Close

Group Code:

MD

Active:

☒

Group Name:

Measure | Downpipes

Team Default:

Team One

Total Days:

6

Total Hrs:

48

Default:

☒

Page 1 of 1

Displaying 1 - 2 of 2

#	Seq	Task Activity Code	Task Activity Description	Team	Task Duration Days	Duration Hrs	Lag Day
1	1.00	M001	Measure	Starsound Instal Te...	1.00	8.00	1.00
2	2.00	DPIPES	Down Pipes	Starsound Instal Te...	5.00	40.00	0.00

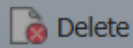
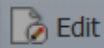
Save And Close

Save

Close

Group Code	
Group Name	
Team Default	
Default Tick	

Task Activity Group



Group Code:

MD

Group Name:

Measure

Team Default:

Team One

Default:



Page

1

of 1



#	Seq	Task
1	1.00	M001
2	2.00	DPIF

Task Activity Group Lines

Task Activity Code:

M001 - Measure

Task Activity
Description:

Measure

Working Hours:

8

Task Duration Days:

1

Hrs:

8

Lag Days:

1

Hrs:

8

Team Assigned:

Starsound Instal Team

Exclude Days:

Saturday:



Sunday:



Sequence No:

1

Active:



Save And New



Save And Close



Save



Close

Task Activity Code

Task Activity Description

Working Hours

Task Duration Days

Lag Days

Team Days

Sequence No

Active Tick