



Ascente Mobile Pro Job Cost Processing

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www.compusource.com

<http://www.servicecontractorsoftware.com/>

Ascente Mobile Pro Job Cost Processing

Objective

At the end of this presentation you will be able to know how to use Ascente – Mobile Pro to dispatch technicians to service orders that are linked to Job Cost Jobs. This makes it possible to utilize the benefits Mobile Pro provides for the Service module, with the Job Cost module.

Technicians will be able to:

- Apply labor hours and costs to the job
- Apply parts, quantities and costs to the job
- Add Jobsite component records for major equipment added to the job



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Benefits

- Your office will be able to dispatch technicians to Job Cost – Jobs just as they do for service calls.
- Technicians can do all the entry for labor and material used from the field.
- Your office will not need to do these entries or try to read the technicians writing because the technicians are doing their labor and part entries. Your office still has the final say and gets to review, edit and update the technician's entries.



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Benefits

When the entries are done by the technicians at the time of service:

- The entries will get to the office sooner.
- No more waiting for paperwork from the technicians.
- Office operations should get done faster.
- The Job Cost Reporting should be more current.
- Technicians may not need to come into the office as much.



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Benefits

- Technician Management
- Labor Hours Entered by Technicians
- Labor Reports Available to Technicians
- Material and Other Costs Entered by Technicians
- Component records can be added



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Assumptions

- You only process
- You
- A Job
- Jobs tech
- A se
- The wor
- All

Call Taking

Service Order JCW1 Call Taken By: sa Date 6/8/2020 Time 01:05 PM

General **Billing** Invoice Tech Log Scheduling Recalc Pricing Recalc Taxes

User Defined

Builder
Lot#
User Field 5
User Field 6
User Field 7

Customer Information

Customer AustinCox Create Customer...
Name Austin Cox
Address 1 123 Crab Tree
Address 2
City Salisbury Region MD
Postal Code 21802 Country USA (310)
Phone (412) 555-8765 Fax (412) 874-5152
Email qsmith@austincox1.biz

Invoice

Summarize No Summary
Invoice Print Print Detail
Invoice Method Time & Material
Price 0.00
Salesperson REM Remy
Dist Code Std Standard
Currency ID USD US Doll

Maintenance

Maint. Contract:
Maint. Date: Labor Grade:

Job Cost

Job JCW1 JC Webinar 1
Phase

Created: 6/8/2020 1:08:13 PM Changed: sa 6/8/2020 1:10:08 PM 6/8/2020 1:19 PM

will

the
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– Job
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Cost Application

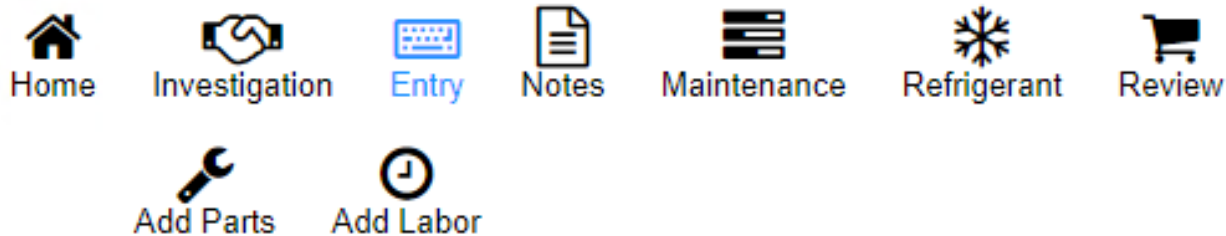
- All costs for the Job Cost – Job entered in Mobile Pro will be applied to the Job and not to a work order. No work order labor or parts records will be created.
- Mobile Labor entries will update from Mobile Pro to the Ascente – Timecard records so timecards can be edited, reviewed and updated by the office in Ascente.
- Mobile Part entries will all result in Ascente – Inventory to Job records, unless linked to a purchase order, so they can be edited, reviewed and updated by the office in Ascente.



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Labor Hour/Cost Entry

Labor entry in Mobile Pro for a Job Cost – Job is no different than it is for service other than you will be prompted for a cost code.




posting TechLog

▼ Parts

No Parts Have Been Entered

▼ Labor

Source	Tech	Part #	Hours	Pay Code	Hourly Rate	Work date	Pay Distribution	Delete
Tech	Mark A	L	4.00	REG	130.00	06/09/20		

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Labor Hour/Cost Entry

After the labor is entered in Mobile Pro and the 'Upload Call to Server' is done, the labor entry can be seen in the Ascente – Timecard program where you can review, edit and update the labor hours.

Timecard Entry

Employee:

Current Payroll Year: 2020

Earning Code	Posted Hours	Earning Code	Unposted Hours	Earning Code	Total Hours
		REG	4.00	REG	4.00
Total Posted: 0.00		Total Unposted: 4.00		Total Hours: 4.00	

Work Date: 6/12/2020 | Union: (None) | Skill Level: | Earning Code: REG Regular | Pay Rate: 20.000 | Hours Worked: 4.00 | Dollars Charged: 80.00

Pay Type: Job Cost | Job: JCW1 | Phase: | Cost Code: Labor Sheet Metal | JC Webinar 1

Labor Class: TEC Technicians | Department: Techs Technicians | W/H State: CA | W/H Local: (None) | SUI State: CA | Worker's Compensation: 5183

Line	Work Date	Pay Type	Job	Cost Code	Earning Code	Hours Worked	Pay Rate	Dollars Charged	Work Orde
1	6/12/2020	Job Cost	JCW1	Labor Sheet Metal	REG	4.00	20.00	80.00	JCW1

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Parts Quantity/Cost Entry

Parts entry in Mobile Pro for a Job Cost – Job is no different than it is for service other than you will be prompted for a cost code.

⚙ Add Parts

Air Conditioning ▾ AC Units ▾

GSX130301 | GSX130301 GOODMAN 2.5T 13 SEER AC ▾

Part


Description

Component ▾

Unit Cost


Sell Price

Location ▾

 Cost Code ▾

PO

Qty Used



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Parts Quantity/Cost Entry

When you click on the [Add Item] button, you will see the following:

Home Investigation **Entry** Notes Maintenance Refrigerant Review

Add Parts Add Labor

▼ **Parts**

Source	Part #	Description	Order	Used	BO	Unit Cost	Sell Price	Location
Tech	GSX130301	GSX130301 GOODMAN 2.5T 13 SEER AC	0	<input type="text" value="1"/>	0	852	2,000.00	204 Lin

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Parts Quantity/Cost Entry

After the part is entered and the 'Upload Call to Server' is done, the part entry can be seen in the Ascente – Inventory to Job program where you can review, edit the entrees. The Inventory to Job Register can be used to update the entrees.

Line	Part	Description	Cost Code	Location	G/L Account	Quantity	Unit Cost	Extended Cost
1	GSX130301	GSX130301 GOODMAN 2.5T 13 SI	Material-Refrigerati	204 Lin	1200.00.00	1.000	852.0000	852.00

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Ascente – Job Cost Report Results

Here are the Job Cost Report results to the job JCW1 from the labor and parts entries that were made from Mobile Pro:

6/12/20 6:53 am		4.2 Test Company Job Cost by Cost Code Report Sorted By Job						
Sorted by Job: JCW1		Job: JCW1		Branch Los Angeles County Branch			SisRep REM	
JC Webinar 1 1234 Beach Blvd Huntington Beach, CA 92647							Job Status Open	
Customer: AustinCox Austin Cox	Contract Amount	10,000.00	Billed to Date - Tax	.00	Start Date	06/08/2020		
	Change Orders	.00	Retention to Date	.00	End Date			
	Adjustments	.00	Paid to Date	.00	Percent Complete	16.26%		
	Pending	.00	Percent Billed	.00%	(Actual / Estimated)			
	Revised Amount	10,000.00	Actual/Billed	.00%				
		<----- Quantities ----->			Dollars \$----->			
Cost Code	Description	Unit	Est Qty	Actual Qty	Est \$\$	PO Bal	Actual	Remaining
Labor	Labor							
Labor Sheet Metal	Labor Sheet Metal	Hour	50.00	4.00	2,000.00	.00	164.00	1,836.00
Labor-Refrigeration	Labor-Refrigeration	Hour	12.00	.00	500.00	500.00	.00	500.00
Labor	Labor	Total	62.00	4.00	2,500.00	500.00	164.00	2,336.00
Material	Material							
Material-Refrigerati	Material - Refrigeration	Each	1.00	1.00	3,000.00	.00	852.00	2,148.00
Material-Sheet Metal	Material-Sheet Metal	Each	1.00	.00	750.00	.00	.00	750.00
Material	Material	Total	2.00	1.00	3,750.00	.00	852.00	2,898.00
Report Totals for Job: JCW1.			64.00	5.00	6,250.00	500.00	1,016.00	5,234.00

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Ascente – Job Cost Detail Report Results

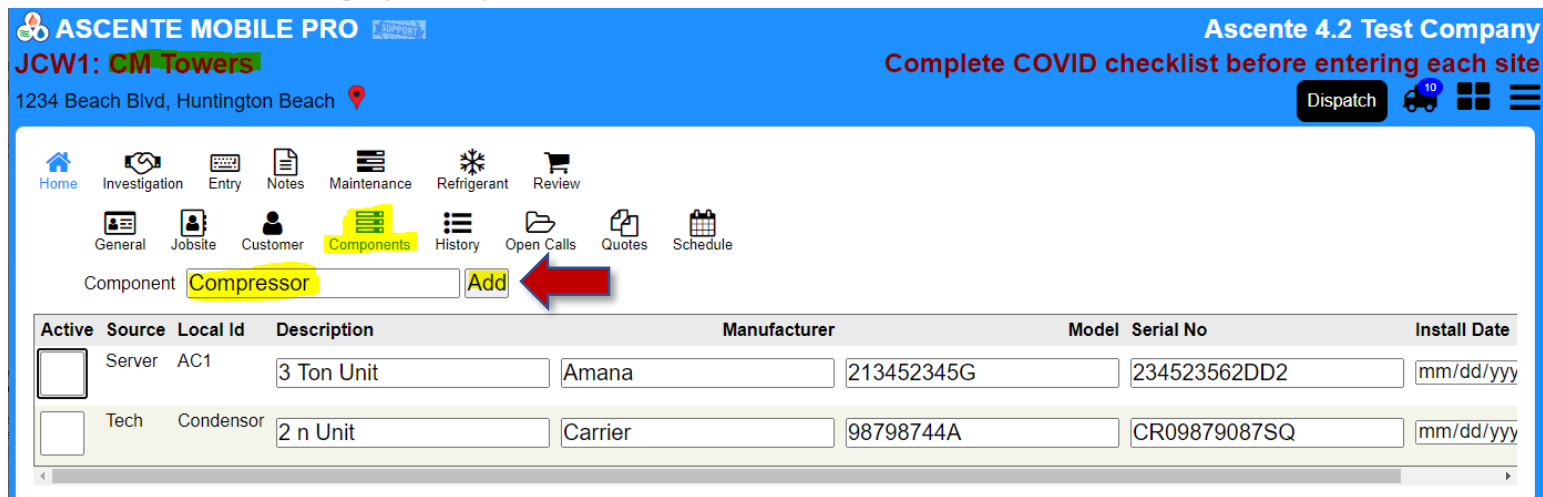
Here are the Job Cost Detail Report results to the job JCW1 from the labor and parts entries that were made from Mobile Pro:

6/12/20 7:00 am		4.2 Test Company Job Cost Detail Report				Page 1 of 1	
Description	Reference	Reference Description	Units	Closed	Post Date	Quantity	Dollars
Job:	JCW1						
Phase:							
Group:	Labor						
Cost Code:	Labor Sheet Metal						
REG 6/12/2020	Mark A	Allman, Mark	Hour	No	06/12/20	4.00	164.00
Cost Code Labor Sheet Metal Totals:						4.00	164.00
Group Labor Totals:						4.00	164.00
Group:	Material						
Cost Code:	Material-Refrigerati						
GSX130301	GSX130301	GOODMAN 2.5T	GSX130301	GOODMAN 2.5T	Each	No	06/12/20
						1.00	852.00
Cost Code Material-Refrigerati Totals:						1.00	852.00
Group Material Totals:						1.00	852.00
Phase Totals:						5.00	1,016.00
Job JCW1 Totals:						5.00	1,016.00
Grand Total:						5.00	1,016.00

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Component Records (Adding & Viewing)

Mobile Pro makes it possible for technicians to add component records for major equipment installed on the job's associated jobsite record. This information is very valuable for support, maintenance contract processing and marketing purposes.



ASCENTE MOBILE PRO Ascente 4.2 Test Company

JCW1: ~~CM Towers~~ Complete COVID checklist before entering each site

1234 Beach Blvd, Huntington Beach Dispatch   

Home Investigation Entry Notes Maintenance Refrigerant Review

General Jobsite Customer **Components** History Open Calls Quotes Schedule

Component

Active	Source	Local Id	Description	Manufacturer	Model	Serial No	Install Date
<input type="checkbox"/>	Server	AC1	<input type="text" value="3 Ton Unit"/>	<input type="text" value="Amana"/>	<input type="text" value="213452345G"/>	<input type="text" value="234523562DD2"/>	<input type="text" value="mm/dd/yyyy"/>
<input type="checkbox"/>	Tech	Condensor	<input type="text" value="2 n Unit"/>	<input type="text" value="Carrier"/>	<input type="text" value="98798744A"/>	<input type="text" value="CR09879087SQ"/>	<input type="text" value="mm/dd/yyyy"/>



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Jobsite Maintenance

Jobsite: **CM Towers**

General | Defaults | Maintenance | **Components**

Local Identifier: **Compressor**

General | Tasking | Part List

General	
Description	2 HP Unit
Model	TR123443299C
Manufacturer	Trane
Serial Number	Y234234wA
Equipment	(None)
Contract	(None)
Installation Date	6/10/2020
Warranty Date	6/10/2020
Extra Date	6/10/2020
EPA Required	<input type="checkbox"/>

User Defined	
Coverage Type	(None)
Contractor	(None)
Component Notes	

Refrigerant	
Refrigerant	(None)
Working Charge	0.00
Unit of Measure	(None)

Capacity	
Size	0.00
Unit of Measure	(None)

Created: 1/13/2016 2:20:35 PM Changed: sa 6/10/2020 5:32:34 AM 6/10/2020 6:23 AM



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Considerations, Recommendations & Questions ...

How will the technicians know what Cost Code to select?

You will need to provide them with that information. A cost code is required for service orders linked to a Job Cost - Job. It can be edited by the office before the entries are updated.



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Considerations, Recommendations & Questions ...

Can I filter the Call Inquiry for only Job Cost Calls?

If your company has dedicated technicians for only Job Cost – Jobs, in the Ascente – Call Inquiry you may want to filter the calls by supervisor. That will make it possible to just see the Job Cost or Service calls without having them all on one screen. Just assign the technicians to the appropriate supervisor (*Job Cost or Service*).



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Considerations, Recommendations & Questions ...

Why are no cost codes available when I go to select a cost code?

You most likely did not enter an estimate for the Job with estimated costs.



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Considerations, Recommendations & Questions ...

Do I have to add a service order for each technician that is going to work on the same job?

No, you can schedule multiple technicians to the same service order.



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Considerations, Recommendations & Questions ...

Do I need to invoice or cancel the service order I created for the job when all work has been performed?

You should never invoice the service order used for the Job Cost – Job, that is done in the Ascente - Job Cost module. You can X-Cancel or zero invoice the service order if you like. These will clutter up the Call Inquiry and cause performance issues if they are not removed. They serve no further purpose.



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Considerations, Recommendations & Questions ...

Can I add a purchase order for a part?

Yes, you can do this from Parts Entry



Thank You!

We thank you for attending this webinar or watching this video and for choosing Ascente.

Please let us know if you have any questions or would like a follow-up call to discuss this in more detail.

More training videos like this are available on our website www.compusource.com

<http://www.servicecontractorsoftware.com/>

