

# User Guide – Booking an Equipment Item

## Job Management

To book an equipment item for a job, you need to quickly create a [Job](#), create a [Purchase Order](#), and create a [Job Line item](#) first.

### Creating New Jobs

1. Click on Job Management
2. Click Jobs
3. Click Add

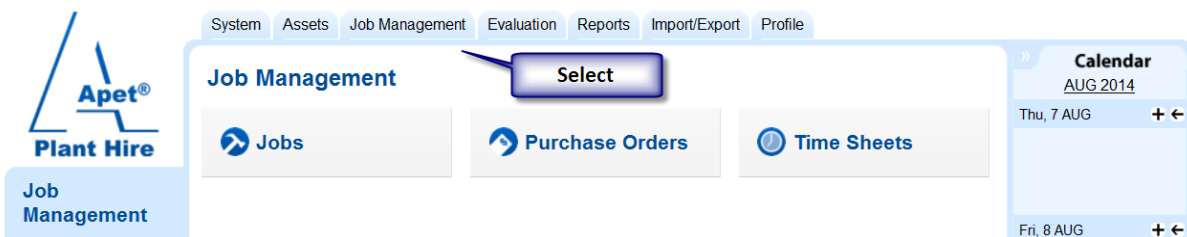


Figure 1 Job Management home screen

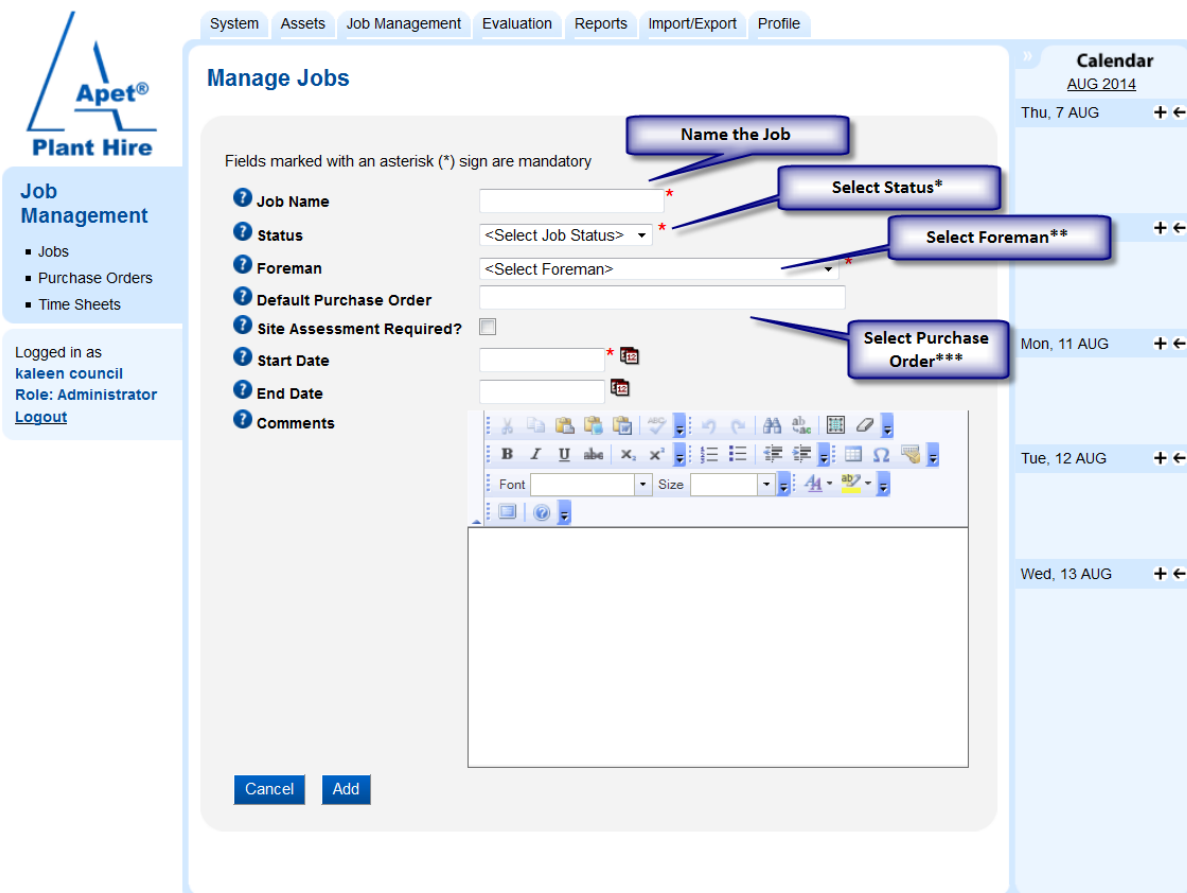


Figure 2 Add new Job

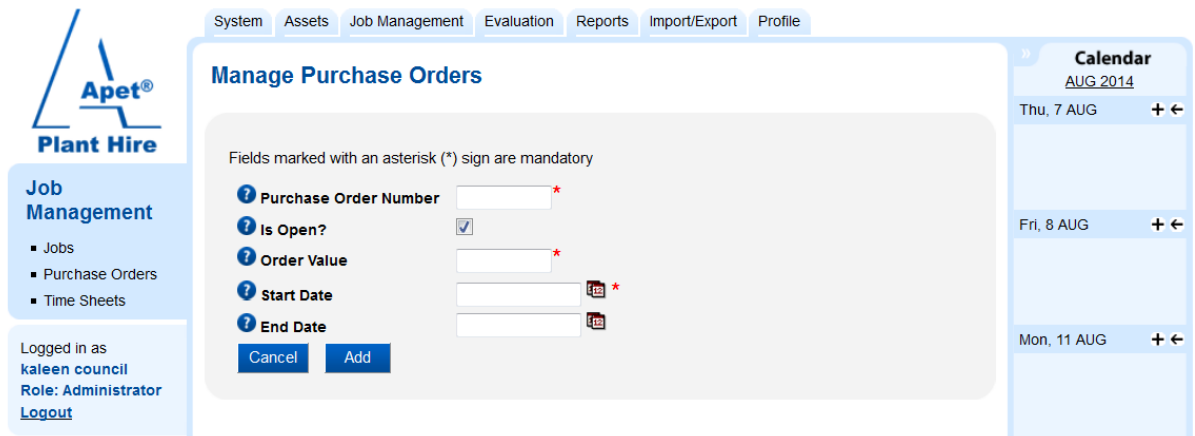
\* Job Status descriptions can only be created in Reference Data

- \*\* Foreman Users can only be set up by Admin
- \*\*\* Purchase order is optional here but an order will be required to add line items to the job. The order can be added later

## Purchase orders

To add POs individually:

1. Click on Job Management
2. Click Purchase Orders
3. Click Add



The screenshot shows the 'Manage Purchase Orders' form in the Apet Plant Hire software. The form is titled 'Manage Purchase Orders' and is located under the 'Job Management' tab. The form includes the following fields:

- Purchase Order Number**: A text input field with a red asterisk indicating it is mandatory.
- Is Open?**: A checkbox that is currently checked.
- Order Value**: A text input field with a red asterisk indicating it is mandatory.
- Start Date**: A date picker field with a red asterisk indicating it is mandatory.
- End Date**: A date picker field with a red asterisk indicating it is mandatory.

At the bottom of the form, there are 'Cancel' and 'Add' buttons. A note above the form states: 'Fields marked with an asterisk (\*) sign are mandatory'. On the right side of the screen, there is a calendar widget showing the month of August 2014, with dates from Thursday, 7th to Monday, 11th.

Figure 3 Adding a new Purchase Order

To add by batch of purchase orders, go to Import/Export tab (See Setting up a PlantHire Account User Guide). You can download a sample csv file to populate and import

## Job Line Items

A Job line Item is a specific line item to a job (Ensure a [PO](#) exists in your PlantHire account before creating a Job Line Item)

1. Click on Job Management
2. Click Jobs
3. Select your Job
4. Under 'Manage Job Line Items', click Add.
5. Enter the Job line item details
6. Depending on the Hire Type you select, different Search options will display
  - ▶ **Contractor** - is for a person only, like a flagman or security person
  - ▶ **Dry** – the equipment on its own
  - ▶ **Wet** – the equipment, and provides the opportunity to nominate a contractor to operate the equipment
  - ▶ **Wet - No Contractor** - the equipment complete with an operator from the hire company

- For PlantHire to sort by Value For Money (VFM) you need to have Ratings associated with the equipment.
  - Small box beside Company or Equipment = More details about the Company or the piece of Equipment.
  - Red equipment text means equipment is already booked
7. Click 'Select' alongside the preferred contractor/piece of equipment
  8. Enter the remaining Job Line item details
  9. The Status dropdown allows the User to close off a Job Line item and remove it from cluttering the view
  10. Choose the preferred method to notify the Company, Contractor and Foreman and click Add.
  11. You can also provide notes in the Comments box for the Contractor
  12. Once you click Add, the notifications are sent out

**Manage Job Line Items**

Fields marked with an asterisk (\*) sign are mandatory

Title  
 Purchase Order 123456 \*  
 Start Date 23-Apr-2015 \*  
 End Date  
 Hire Type <Select Hire Type> \*  
 Status <Select Job Line Status> \*  
 Is Difficult?  
 Budget Amount  
 Actual Amount  
 Establishment Cost  
 Disestablishment Cost  
 Comments  
 External Reference No  
 Is Invoiced?  
 Notify

Company: By email  By SMS   
 Contractor: By email  By SMS   
 Foreman: By email  By SMS

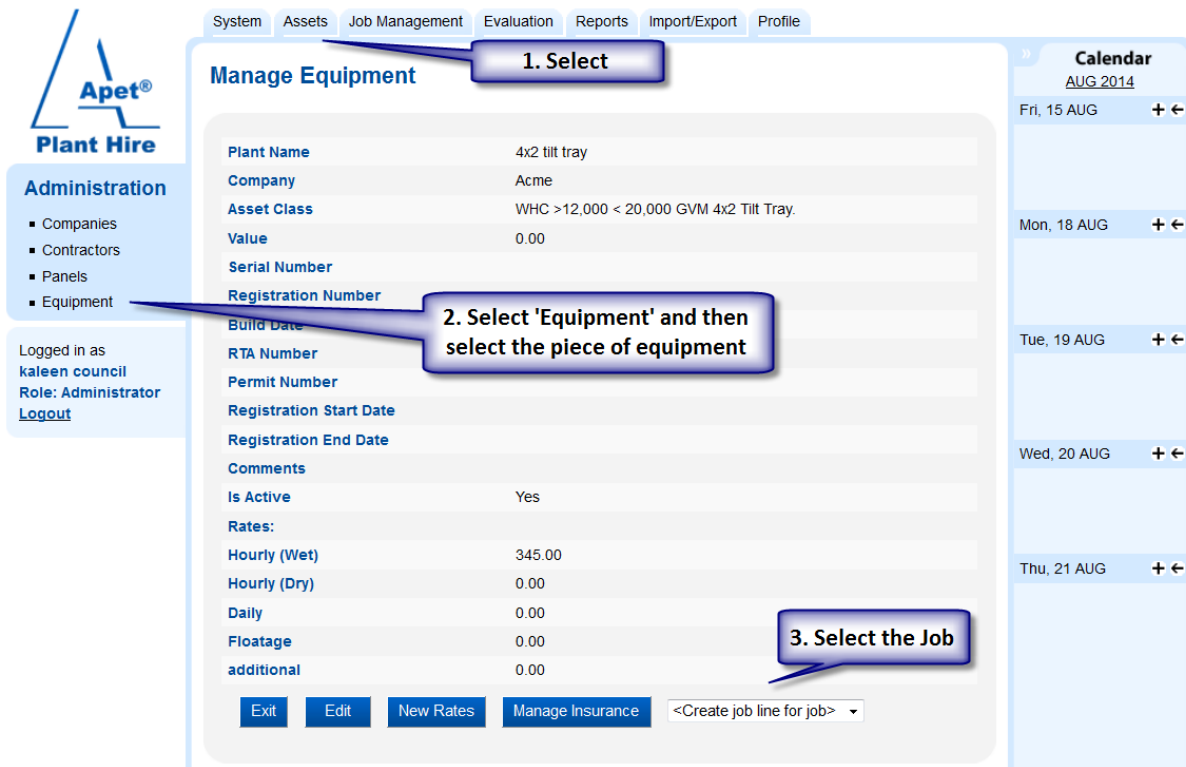
Figure 4 Adding a Job Line item

### Alternate way to add Job Line Items

An alternative way to add a job line item is via the Assets menu.

Navigate to Assets > Equipment > Select the piece of equipment > Select the Job that you would line a Job Line created for > Complete the remaining Job Line Items details (in the Manage Job Line Items

view).



The screenshot shows the 'Manage Equipment' interface. The top navigation bar includes 'System', 'Assets', 'Job Management', 'Evaluation', 'Reports', 'Import/Export', and 'Profile'. The left sidebar has 'Administration' with sub-items: 'Companies', 'Contractors', 'Panels', and 'Equipment'. The main area displays equipment details for '4x2 tilt tray' from 'Acme' company. At the bottom, there are buttons for 'Exit', 'Edit', 'New Rates', 'Manage Insurance', and a dropdown menu '<Create job line for job>'. A calendar on the right shows dates from August 15 to 21, 2014.

Figure 5 Alternate way to add a Job Line Item

1. Click 'Assets' tab
2. Click 'Equipment'
3. Select the different filtering options (Equipment Type, Company, Equipment Status etc) and then 'Search'
4. Select the preferred piece of Equipment
5. Once selected, you'll be able to see all of the details relating to that piece of equipment
6. Towards the bottom of the view is the option to create a **Job Line item** for a Job (select the Job name from the drop-down list)
7. Once you've selected the Job, the view will change to the Manage Job Line Item view and you'll be able to enter the remaining Job Line item details and select the confirm the preferred price of equipment.

#### Checking and closing the Job

1. Click on Jobs
2. Change the status to 'Completed' = hidden from Job Management view