Workshop Job Management

The axis diplomat Workshop Job Management module is designed to provide a simple method of booking, controlling and invoicing workshop jobs.

The Workshop Job Management module

The Workshop Job Management module allows jobs to be entered, in a similar way to orders, and then to book costs (labour and parts) against those jobs. Invoices can be raised for given jobs based on the costs booked against them.

Workshop Jobs may be entered as batches or on an individual basis and are recorded against a particular Customer Account. Customer Discounts and Settlement Terms are picked up from the Customer Account but may be amended if required. Both customers references and internal references may also be recorded against each job. Jobs may be recorded using Trade or Retail Prices and space is also provided to record Job Status and Instructions/Notes.

Labour lines can be added at any time and any labour charges will be consolidated at the foot of the invoice produced.

Workshop Job Reports

A wide range of Workshop Job Reports are available, including:

- Outstanding Job List

- Total Job List

- Outstanding Jobs by Product / Customer

- Jobs by Product / Customer

- Job Profitability by Customer

- Workshop Job Enquiry

Workshop Job Reports cont...

Enquiries can be made on a particular job with the job being selectable by job number or by customer order number - this is particularly useful when customers call to enquire about the progress of their orders. A Workshop Job Status Enquiry gives current status information on any job and gives information about the number of items currently outstanding and their due dates etc.

A Job Sheet Print function offers an opportunity to extract any Job in the form of a paper copy.

After the initial job has been entered, labour charges can be booked against the job at any time. This function can be used as many times as necessary and all labour costs will be consolidated at the foot of any invoice produced. In this way labour can be booked onto the Job at the time that work is done. In a similar way, parts and materials used in the job can also be booked to a job, either as a batch or as they are used.

Invoice Creation

When invoicing takes place, the current stock on hand for each item (parts and materials) is reduced by the quantity of any stock released. However, exceptions to this rule do exist and are covered under part deliveries. When invoices are raised, the option to allow Part Deliveries is provided. If Part Deliveries are permitted, then part release of jobs will continue for items held in stock. If they are not permitted, then the release of any item on the job will be halted if that item cannot be fully delivered.

Completed and invoiced jobs will remain on the system for reporting purposes until such time as the function "Remove Completed Jobs" is run to remove them.