Wholegood Automatic Job Creation

On creation of a Trade In wholegood it is possible to automatically create a workshop job to refurbish it. In addition, new machines received from suppliers can have a PDI job created automatically to inspect and prepare for sale.

Set Up

Wholegood Groups
(System Management, Wholegoods/Workshop, Wholegood Group Maintenance)

New fields have been added to the wholegood group code to provide defaults for creating an inspection/refurbishment job through the "Order Entry / Receive Into Stock" and "Invoice & Self Bill" programs.

Key Entry Fields (# indicates default setting)

Default Wholegood WSJ Details	No # Wgd Received Wgd Ordered Wgd on Advice	Select to be offered the option to create a workshop job when a wholegood is ordered, received or added to a sales advice.
Workshop Invoice Type		Enter the invoice type to use when creating the workshop job. Should be internal.
Internal Customer Account		Enter the customer account number to use when creating the job. Must be in the range for the invoice type selected.
Job Description Line 1		Enter text to use for the first line of the workshop job description.
Standard WSJ Job Instructions		Enter a standard story number to be transferred to the workshop job instructions.

Wholegood Models

If Wholegood Standard Models are in use, extra fields are available for default PDI Hours/Cost. These relate only to new machines received through the Order Entry program and not to Trade Ins.

Key Entry Fields (# indicates default setting)

New PDI Cost		Enter the estimated cost to PDI a New Wholegood of this model.
New PDI Hours		Enter the estimated number of hours to PDI a New Wholegood of this model.

Wholegood Receipt
(Wholegoods, Order Entry/Receive Into Stock)

When ordering a new Wholegood based on details from the standard model file, the estimated PDI Cost and Hours will be completed if available.
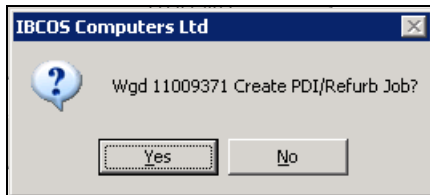

On receiving the wholegood, providing the wholegood group code has been set to allow auto-job creation, a message will be displayed prompting to create a workshop job to PDI the machine. Select 'Yes' to create a workshop job or 'No' to ignore.
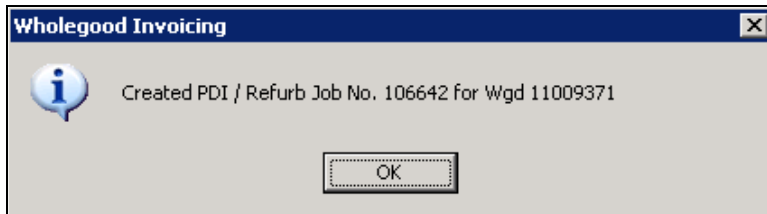
Invoice/Self Bill

(Whoelgoods, Invoice/Self-Bill)

When creating a Trade In/Self Bill, new fields have been added for estimated PDI/Refurbishment hours and cost. There is also a function, "**Pdilns**" (F8), for instructions to add general workshop instructions.

When the invoice is raised, a message is displayed prompting for creation of a PDI/Refurb workshop job for the machine.

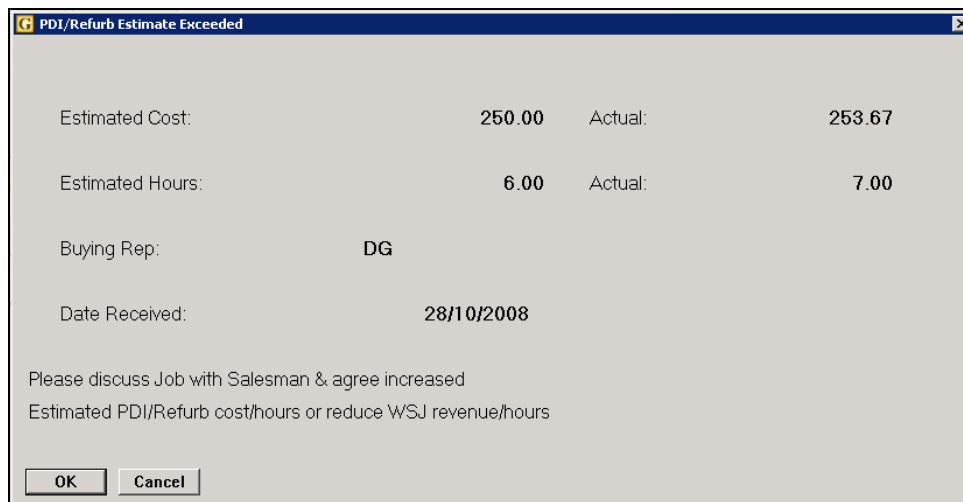Select 'Yes' to create the job or 'No' to ignore.

To create the job before the invoice is raised there is an additional function "**Crt.PDI**" available on the Trade In tab.

Workshop Job
(Workshop Control, Workshop Entry)

Parts used and labour are added to the created job as normal.

When the job is complete the Invoice tab will display a warning if the job has gone over either the hours or the cost of PDI/Refurb.

In order to continue with the invoice either the existing PDI/Refurb Cost/Hours need to be agreed and increased or a password needs to be entered.

The WSJ PDI Cost Exceeded password is set up in Company Control file under the General section, Passwords.