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.

G Wholegood Group Codes Maintenance	x
Details Nominals	
Depot Code: 1	Ibcos Computers Ltd
Group: UTRA	
Description:	USED TRACTOR
Prefix Code:	SH
Commodity code:	
Allow Non-Stock WG Costs ?:	No 💌
Plant Group Code:	
WEB Classification:	
Planned Maintenance Link?	No 🔽
Create WSJ Jobs at Wgd GRN/Tr	rd In/Advice?
Default Wholegood WSJ Details :	- No
Workshop Invoice Type:	25 Refurbi Create when Wgd received Create when Wgd ordered
Internal Customer Account:	658 REFUR Create when Wgd on advice
Job Description Line 1:	Auto Refurb Job
Standard WSJ Job Instruction No	0
OK Cancel Cpy Dep	Cpy Grp Cpy All

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		Enter the invoice type to use when creating the workshop job. Should be internal.
Type Internal Customer		Enter the customer account number to use
Account		when creating the job. Must be in the range for the invoice type selected.
Job Description		Enter text to use for the first line of the
Line 1		workshop job description.
Standard WSJ Job		Enter a standard story number to be
Instructions		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.

G Wholegood Model Maintenance				×
Model Code:	SK210NLC	Sub Code		
General Specification Costing / S	ales Percentage Increa	se Discounts Currency		
Wholegood/Vehicle:	Wholegood -			
Group:	NEQU NEW E	QUIPMENT		
Make Code:	NF			
Model:	NF EXCAVATOR			
Engine HP:				
Retail Price:	45800.00	DoT Code:		
Cost Price:	35800.00	Commodity Code:		
Trade Price:	38800.00	Country of Origin:		
Commission Value:		Mileage Between Services:	0	
Weight (Kilos):	21100	Max Months Between Services:	0	
Length (cm):	941	Warranty Months:	12 End Clock: 0	
Width (cm):	280	New PDI Cost:	250.00	
Height (cm):	293	New PDI Hours:	3.00	
VAT Code:	1	Supplier Code:	SK210NLC	
Volume Code:	<u> </u>	Obsolete? No 💌		
Parts Spend:		Labour Spend:		
OK Cancel				

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.

G Inserting Wholegood *A	UTO*					×
Order No: *AU	TO* (1 Line)	Depo	ot: 1 Ibcos Com	puters Ltd	Total:	35800.00
Wgood No: XAU	TO* Supplier	Type: SUPF	PLIER Account:	1133	Main Franchis	se Supplier
General Wholegoo	d Spec. Receive Or	ders Serials / Details	Bonus			
Wholegood No:	*AUTO*			Final	Invoice:	T
Make Code:	NF	Normal Franchi	ise Stock Cat:	New	 Wgd Type: 	Wholegood -
Model Code:	SK210NI	.C				
Model Description:	NF EXC4	AVATOR	Qualifying W	holegood?:	Ye	is 🔻
Group Code:	NEQU .	. NEW EQUIPME	ENT			
VAT Code:	1					
Retail price:		45800.00 (GBP)	Estimated P	DI Cost:		250.00
Trade Price:		38800.00 (GBP)	Estimated P	DI Hours:		3.00
Estimated Cost:		35800.00 (GBP)	Warranty En	d Clock:		
Received:						
Stock Status:						
OK Cancel		l Cpy Wgd <u>F</u> in Inv	<u>C</u> rt.PDI			

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.

G Main Wholegood Inserting line 1 of 1					
Stk No:	11009371 NEW WHOLEGOOD			0 Attachm	ents
Make Code:	NF Normal Franchise	Reg No.:		RRP:	0.00
Model Code:	SK210NLC	Reg Date:		Hide Attch:	No 👻
Model Desc:	NF EXCAVATOR				
Group:	NEQU NEW EQUIPMENT	Estimated Cost:			35800.00
Serial No:		Cost Price:			36050.00
Clock:	0 VAT: 1 Hide: No 💌	R.R.P.:			45800.00
MOT Date:		Retail Price:			45800.00
WARRANTY:-	STANDARD EXTENDED	VATInc Price:			54960.00
End Date:	3/04/2012	Disc Value:			0.00
End Clock:		VATInc Disc:			0.00
Customer Delivery:	0/00/0000	Sett Value:			0.00
Received Date:	0/00/0000	Final Inv:	NO	Qualifying:	YES
OK Cancel Ser Amd Wgd Spc SaleVal Pm Cnt. Bonus PDVREF					

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

IBCOS Computers Ltd 🛛 🔀				
?	Wgd 11009371 Create PDI/Refurb Job?			
	<u>Yes</u> <u>N</u> o			

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

Wholegood Invoicing				
i	Created PDI / Refurb Job No. 106642 for Wgd 11009371			
	ОК			

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.

G PDI/Refurb Estimate Exceeded			×	
Estimated Cost:	250.00	Actual:	253.67	
Estimated Hours:	6.00	Actual:	7.00	
Buying Rep:	DG			
Date Received:	28/10/2008			
Please discuss Job with Salesman & agree increased Estimated PDI/Refurb cost/hours or reduce WSJ revenue/hours				
OK Cancel				

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.