

## Workshop Split Invoicing

A new option allows the invoicing of a single workshop job in multiple parts.

This option has many uses, for example if a workshop job turns out to be part warranty and part chargeable, an invoice can be produced for the chargeable elements of the job. The type could then be changed to a warranty and a second invoice produced for the remaining lines.

Each part line or labour line entered can have a sequence number added. If flat rates are in use each flat rate is given a sequence number.

### Gold Set Up

#### Invoice Type File

(System Management, Invoice Type File)

Each invoice type needs to have the “Allow WSJ Split Invoices” option set to ‘Yes’ to give the option of producing multiple invoices. A workshop job can still be invoiced under a single invoice if required.

The screenshot shows the 'Invoice Type Maintenance' dialog box with the 'Parts/WSJ' tab selected. The 'Allow WSJ Split Invoices' option is set to 'Yes'. A line from the text above points to this option.

Invoice Type:	21
Standard Story Number:	99
Apply discount matrix:	No
Invoice Detail WSJ/POS:	Normal
Calc Next Service Date:	No
Parts Retail Base:	Retail
Parts Base % Uplift:	0.00
Direct Discount:	0
Prevent Short-Ship?	No
Split Payments:	Yes
Allow WSJ Split Invoices:	Yes
Apply Special Discounts/Promotions?	No
Labour This Invoice:	Yes
Min Parts Margin %:	0.00
M.M.% Override Password:	
Minimum Invoice Value:	0.00
Charge Consumables:	Yes
POS Link to Wholegood:	No

## Setting Sequence Numbers on a Workshop Job.

### Parts

On the parts tab the “Amd Seq” button can be used to add a sequence number onto a part line.

The screenshot shows a software window titled 'CREATED' with a header section containing job details: Job: 106876, Inv Type: 21, Workshop Invoicing, Parts: 49.74, Cust: 1211, Mr T.Hogg, 13/07/11, Labour: 0.00. Below the header is a table with columns: Part Number, Description, Price, Sold, Bin, Disc, Value, and Sequence. The table contains five rows of part data. At the bottom of the window, there is a status bar with 'QOH: 35 Ord: 0 All: 0 Sell: 2.72 Cost 1.65 M% 39.33' and a row of buttons: Insert, Amend, Delete, Options, Amd Seq, Find, and ChgDisc. A black arrow points from the text above to the 'Amd Seq' button.

Part Number	Description	Price	Sold	Bin	Disc	Value	Sequence
SL-350 5304	FUEL FILTER	2.72	1	NS	0.00	2.72	
SL-664 4205	COLLAR SCREW	1.85	2	NS	0.00	3.70	
SL-791 2090	HANDLE BAR HOSE	35.24	1	NS	0.00	35.24	
SL-350 5350	FILLER CAP	4.61	1	NS	0.00	4.61	
SL-350 5026	TANK CAP	3.47	1	NS	0.00	3.47	

A sequence number between 1 and 99 can be entered together with a description if required.

The screenshot shows a dialog box titled 'Amend Invoice Sequence'. It has two input fields: 'Sequence No.' with the value '1' and 'Description:' with the value 'Chgable'. At the bottom, there are 'OK' and 'Cancel' buttons.

### Labour

On the labour tab the “Amd Seq” button can be used to add a sequence number onto a labour line.

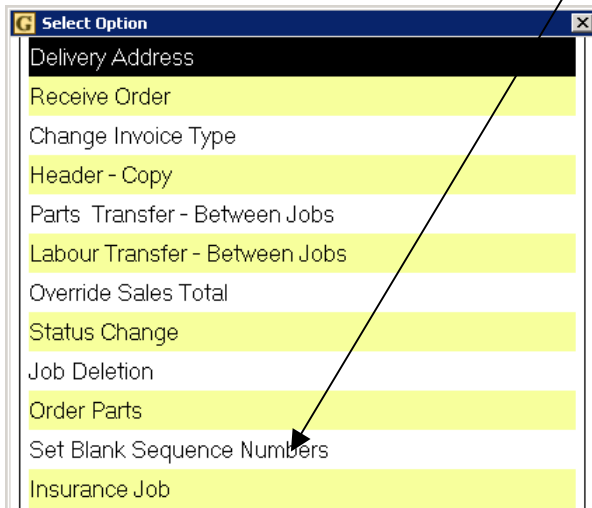
### Flat Rates

On the flat rate tab the “Amd Seq” button can be used to add a sequence number onto a flat rate.

In this case the individual parts and labour lines do not need a sequence number as they are assigned to a flat rate.

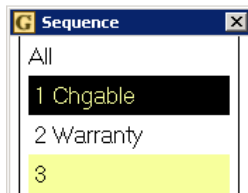
### Options

On the Options tab, "Set Blank Sequence Numbers" allows a selected sequence number to be set globally for all lines without a sequence number.



### Invoicing a Workshop Job.

When invoicing a job a list of sequences outstanding for invoicing is displayed.



An individual sequence can be selected for invoicing which will only include lines with the relevant sequence number on the invoice.

The job remains open after the invoice is raised.

It is then possible to change the invoice type on the job, for example from chargeable to warranty, and produce a subsequent invoice for the next sequence.

This process can be repeated multiple times. When only one sequence number remains the sequence option is not offered and a full invoice for all remaining lines is produced.