The Revelation Pro WORKSHOP MANAGER for Windows

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The WORKSHOP MANAGER for Windows

It's here at last! A simple, yet comprehensive package designed for companies that use a "Job Card" system. No more lost Job Cards or huge filing cabinets! All Job Cards are held indefinitely in the computer and may be accessed anytime at the touch of a button using the Job number, Client Name or the Serial Number of the serviced item. Another quality product from the Revelation Accounting team.

The Revelation **Workshop Manager** is a computerised package designed for service or manufacturing companies which use a "Job Card" system to control work in progress. Job Cards are held indefinitely in the computer and may be amended and added to as a Job proceeds. A Job Card listing a breakdown of Parts, Outwork (Buyouts) and Labour may be printed at any time (as often as required). Once completed, a Job may be Invoiced out.

The Workshop Manager is supplied as an optional add-on module to the Revelation Pro Integrated Accounts system. Together, they provide a complete accounting solution with all the necessary controls to ensure a healthy and profitable business.

Here are some highlights of the RevPro Workshop Manager for Windows:

- All Work-in Progress and Completed Jobs are held on file indefinitely. This allows analysis of Jobs in categories such as Job types, a Date Range, etc.

- To speed up the entry of Job Cards into the computer, standard jobs with all the associated Parts, Labour, etc. can be stored in a Job "template" file. From there, the "template" can be imported directly into a Job Card.

- Quotes may be issued to prospective customers listing full details of the potential Job. A Quote is held on file until it is accepted by the client whereupon it may be "converted" into a Job Card without having to re-enter it. There is also a Quote "template" file for commonly issued Quotes.

- Up to 9 custom fields on Job Cards that you can label according to your type of business (a Service station could use MODEL, MAKE, YEAR, ODO, etc).

- Job Cards can be up to 999 lines long and remain open indefinitely.

- For Guarantee purposes, you may specify a Serial Number on the JobCard for the item being serviced (eg: Vehicle Registration Number). The Job may be searched for using the Serial number, Job number or Client Name.

- Up to 26 Labour Hourly Rates and up to 250 Employees are catered for. Any number of employees may work on a Job and full details of hours worked (@ Cost & Selling prices) for a specified period are available.

- In manufacturing Jobs (where you manufacture items in your Stock file from component items also in your stock file), you can now manufacture serialised items (and attached serial numbers to each of the manufactured items.

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HARDWARE REQUIREMENTS

Refer to the Hardware requirements laid out in the Revelation Pro manual.

As Job Cards, Quotes, Templates, etc may be held on file indefinitely, a relatively large capacity Hard Disk drive should be used. The "housekeeping" function in the Workshop Manager that allows you to "purge" old data from the files is user driven. This means that you may retain Workshop data on file for as long as you wish and only old purge data when you feel it is necessary.

However, very large files can impact negatively on the performance of the system, so it is wise to purge old data from time to time.

INSTALLATION

The Revelation Pro for Windows Accounts package must have already been installed before you can install the Workshop Manager module.

If on a Local Area Network, the Workshop Manager should only be installed when there are NO Users operating the Revelation Pro Accounts package.

NOTE: If you are operating RevPro on a Network, as with the RevPro installation, you must install the Workshop Manager on EACH PC ON THE NETWORK that RevPro was installed on. It must also be installed on the File Server if it is a stand-alone PC.

Exit out of RevPro on ALL the terminals. Insert the Workshop Manager CD into the CD Drive and wait for 20 to 30 seconds for Windows to check the CD. The installation program should load automatically and display instructions. If not, use Windows Explorer to display the contents of the CD and double-click on the "SETUP.EXE" program to start the installation.

After installation, the Workshop Manager will appear on the "Additional options" (AddOns) menu. The first time you access it, you will be prompted to insert the serialised Workshop Manager stiffy disk that accompanied the package. You would then contact Revelation Accounting on 011 794-5533 and read them the displayed info related to the disk. You will be given a Release code to type in which will make the new module fully operational on your system.

INSTALL A DEMO VERSION

Should you just wish to test the Workshop Manager to see if it will suit your particular requirements, follow the same procedure as set out above. When prompted to insert the serialised stiffy disk, select the "Demo mode" option.

In the Demo mode, you will only be allowed access to the Workshop Manager module 50 times in order to examine its facilities.

ACCESSING THE WORKSHOP MANAGER

Run RevPro as usual. Click the [Additional Options] button on the Quick Access menu (or click the [Addons] dropdown menu) & select the "Workshop Manager".

INITIAL SETUP OF WORKSHOP PARAMETERS

On loading the Workshop Manager for the first time, you should first set up the following parameters in order for the Workshop Manager to perform correctly (note that these parameters may be amended later if required). Click the "Setup" dropdown menu and select the appropriate option. Then click the appropriate [Tab] to amend the required preferences.

- **LABOUR RATES**: If you intend to keep track of the hours worked on your Job Cards, you must use this option to input the various hourly rates (at Cost and Sales Prices) for your different types of Labour. The Workshop Manager caters for up to 26 different Labour Rates. You are also prompted to input the Nominal Ledger account number into which the "sale" of each Labour Rate must be credited. This allows you to analyse the revenue from each Labour rate in the accounting section of the system. RevPro will prompt you with the General Sales a/c number as the default. You can amend this or leave it until you are ready to set up this form of analysis.

  On inputting a Labour entry into a Job Card (using the "=L" directive), you must select the Labour Rate applicable and the number of hours worked.

- **EMPLOYEES**: This option allows you to allocate a NAME to each Employee number to be used (1 to 99). The default Labour Rate which must be used whenever that employee appears on a Job Card must also be entered (the default Labour Rate may be overridden on the Job Card if required).

  Having the Employee Names on file allows you to search for the required employee by NAME when entering Labour items into Job Cards.

- **JOB TYPES**: For analysis of Jobs into various categories, this option allows you to define each "type" of Job you are likely to undertake. When opening a Job Card, you are prompted to select the type of Job from the "types" you enter here. Some examples of Job Types you could use are:

  PAID REPAIR: This is the most common type of repair where a client is simply billed for the complete job.

  GUARANTEE REPAIR: This would be used for Jobs in which the goods being repaired free of charge as they were originally supplied by you under guarantee. You could to bill your Sales division for the cost of the repair.

  REPEAT REPAIR: This allows you to keep track of "repeat" repairs.
  OTHER REPAIRS: This could cater for unusual types of Jobs.

- **JOB STATUS**: You can also classify the various stages of a Job's progress by creating different Job Status Codes and Descriptions. Most Job reports allow you to select a range of Jobs by Status Code as well. This allows you to print reports listing Jobs at their various stages of completion. For example, if a Job is completed, but has not yet been invoiced, you can still

classify it as completed using the appropriate status code thus allowing you to include it in certain reports.

- **CUSTOM FIELDS**: RevPro allows up to 9 user-definable fields which you can use for customer-related information unique to your type of business. For example, a Service station would have fields called: Make, Model, Year, Odometer, etc. This option allows you to input Descriptive Labels for those fields that you intend to use.

- **DOCUMENT NUMBERS**: If you need to amend the Job Card or Quote numbers, use this option. PROCEED WITH CAUTION! Beware of using a range of numbers that have already been used to avoid duplication. RevPro will check for duplication before allocating a new number when a new JobCard or Quote is created.

- **INSTRUCTIONS**: If you have a list of simple instructions on your manual Job cards that you placed a tick against based on the client's instructions (eg: 'Rotate tyres?' or 'Sharpen blades?' or 'Realign tube?', etc), use this option to create a list of these instructions to be printed at the top of the Job Card that is handed to the workshop technician.

  Input up to 20 instructions into the following displayed fields and then Save them to disk. When you next open a New Service Job Card, a window will be displayed containing the instructions you entered.

- **Enable/Disable the "Single-line per Job" entry** printed on abbreviated Job Invoices. If disabled, 3 separate lines are printed (1 for each category of the Job: parts, outwork and labour).

- **UPDATE TEMPLATE PRICES**: If you use the Job/Quote template facility, you may wish to run this option to update the prices of stock and labour items to the current prices on file. Note that this is only necessary for Template reports as Revpro automatically uses the latest prices when a Template is imported into a Job or Quote.

- SET WORKSHOP **TERMINAL** PREFERENCES: This sets the following parameters for each Terminal using the Workshop Manager program. These parameters must be set up for each individual terminal.

- Select the various Document Layout files (JobCards, Invoices, etc)
- The Printer, Printer Port and associated controls for Job Cards.
- The Length of printed Customer Receipts (for service items).
- Job Card Tracking Labels Printer, Port, Layout and Number.

- SET WORKSHOP **USER** PREFERENCES: This sets the necessary parameters for each User (Operator) using the Workshop Manager. These parameters must be set up for each individual User. These parameters allow you to disable selected fields on JobCards, Quotes, etc.

A FINAL WORD ON THE INITIAL SETUP...

Remember that ALL the parameters referred to above may be amended at any time by clicking on the [Setup] dropdown menu on the main Workshop screen.

If you perform various "standardised" types of Jobs and/or Quotes, you may wish to capture their details using the Job/Quote "Template" options (available on the [Service], [Quote] and [Manufacture] dropdown menus on the main Workshop screen). This allows you to input each standardised job Description as well as its stock components, labour, etc. into a Job or Quote "template".

When opening one of these standardised Jobs for a client or issuing a Job Quote to a prospective client, you would simply import the required template directly into a new Job/Quote, make any minor amendments or additions (if necessary) and proceed. This saves you having to laboriously enter the same job information time after time. Refer later in this manual for more details.

This "template" facility is available for Manufacturing Jobs as well where the template is a form of "recipe" listing all the component stock items (and labour) required to build another stock item.

ESCAPING FROM OPTIONS SELECTED IN ERROR

Often, without realising it, you may select the wrong option in the Workshop Manager by mistake - especially while you are still learning how to use it. In virtually ALL areas of the package, simply by pressing the [Esc] key, you are able to "reverse" out of the option selected in error.

CONVERTING WORKSHOP DATA FROM DOS REV's

If you have upgraded to the Workshop Manager for Windows from a Dos RevPro or RevPlus, you have the option of converting all your existing Workshop data from the Dos Rev into the new Windows Workshop Manager.

First convert the DOS accounting data to Windows as laid out in the RevPro manual. Run RevPro and select the converted Company. Select the Workshop Manager as described above

RevPro will sense that there is no Workshop data in the Windows files and will offer you the option of converting Dos Workshop data.

As prompted, input the Drive No. & Directory where the DOS Revelation is installed (eg: C:\RV   C:\REVPRO). Input the Company number that contains the Workshop data you wish to convert.

NOTE: As the Serial Number mechanism in RevPro is different to that of RevPlus, the serial numbers of stock items issued in the RevPlus Workshop Manager cannot be converted to RevPro. However, the Serial numbers of items booked in for service are retained. Component Serial numbers from a Dos RevPro are converted Ok.

THE WORKSHOP MANAGER MODULE

OPEN A NEW SERVICE JOB CARD

A Service Job is opened where a customer books in an item (such as a TV set, Vehicle, etc) to be serviced by you.

Use this option to create a new Job Card. All details entered into a Job Card may be amended or added to as often as required until the Job is closed and invoiced out to the client. As stock items are entered into a Job Card, their Stock records are updated to reflect the movement.

If you wish, you can open a "blank" Job card (ie: with the customer details, but no line items). You can then add the Job details using the Amend Jobs option on the Workshop menu).

You may print the Job Card as often as required using "Print existing Job Cards" option on the Workshop menu (even after it has been closed and invoiced).

TIP: Press [F1] at any time to display a context-sensitive Help Screen.

Click the "Service" dropdown menu and select "Open a New Job card". Select whether the Job is for an existing client (Debtor) or a C.O.D (Cash) Job.

If you are using the Debtors Ledger section of the package and have an account for the client concerned, click the "New Job card for a Debtor" button. This saves you having to type in all the customer details into the Job Card. Locate the required Debtor's account using the usual procedure.

For "off-the-street" or C.O.D. clients, click the "New COD Job card" button. These Job Cards are captured as "Cash Sale" Jobs. If you decide to open an account for this client while this Job is in progress, you can convert it from a Cash Job to the Debtor's account using the "Move a Job to another a/c" option. For Cash Jobs, you are prompted to input the client's details.

TIP: If this is a NEW client and you wish to open an account for them, press click the [Debtors] button on the Supermenu, press [Esc] and then click [New] to Open a New Account. If you called up an existing account and you notice that the Name & Address details are incorrect, click the [Debtors] button on the Supermenu and amend the Name & Address.

"Do you wish to use a pre-defined Job "template" for this Job?"

The Workshop Manager allows you to capture the details of "standard" types of Service Jobs into a Job Template. This allows you to "import" a Job Template into a New Job Card saving you the time wasted in typing in all the details again. Once imported, these details may be amended or added to. Refer to the Job Template section later in this manual. Note that all Prices related to items and labour on the Template are updated automatically to the latest prices on file when the Template is imported into the new Job Card.

If you have a Job Template of the Job you are now opening, click [Yes] to the above prompt. To enter all the details of a New Job from scratch, click [No].

If you clicked [Yes], you are prompted to use RevPro's incremental search facility to locate the Template by typing in the CODE allocated to the required Template. You can also use the [PageDown] and [PageUp] keys to scroll through the displayed Templates. Press [Enter] to select the hi-lighted Job.

The contents of the Job Template are imported into the New Job Card.

NOTE: If there are one or more Labour entries (#L) on the imported Template, you are reminded that you will have to allocate an Employee to each Labour record before the new Job Card will be accepted. Likewise, any Serialised items on the imported Template must be allocated Serial Numbers before the Job is accepted. This is done by pressing [Enter] through each displayed Labour and Serialised item line.

You may import more than one Job Template into a Job Card

"FILLING IN" A JOB CARD

INSTRUCTIONS: If you setup the "Instructions " option (under "Workshop System Preferences" on the "Setup" dropdown menu), the instructions are displayed. Next to each instruction, you would place a 'tick' in the box (or leave it blank) depending whether the client wants that function performed.

CLIENT'S ORDER NUMBER: If applicable, input the client's Order Number here. If you never have Order Numbers, you can switch this field off by using the Set Workshop User parameters on the Set Workshop Parameters menu.

DATE OPENED: This is the Date the Job was opened. You are prompted with today's date (RevPro's System Date).

DATE PROMISED: If you undertake to complete the Job by a certain date, input that date here. If you never use the Promised Date field, you can switch it off (Set Workshop parameters->Set Users Workshop Parameters).

SERIAL NUMBER: If the Item being booked into the Job Card for repair or service has a Serial Number, you should type it into this field. For example, you may repair TV sets and offer a 3 month guarantee on a repair. By entering the TV's Serial Number here, it is retained in the Guarantee file along with the date of repair which allows you to confirm whether a repaired item is still under Guarantee if a query arises. If you have repaired the item before, details of the last Job will be displayed. Also, if the item was a serialised stock item that you sold to the client, you can have RevPro display the details of the original sale (Workshop parameters->User parameters).

JOB TYPE: If your business relies on classifying Jobs into different types, use this field for that purpose. Two default Job types are provided (Ordinary Repairs and Guarantee Repairs). Setup the Job Types in "Workshop System

preferences" on the "Setup" dropdown. To display the available Job types, click the down-arrow or press [F5].

JOB STATUS: If you wish, you can specify different stages of a Job by using this field. For example, this is useful where a Job is finished, but cannot be Invoiced out yet. You amend the Job and set the Job Status field accordingly. Various reports can be printed based on Job Status fields. Setup the Status types in "Workshop System preferences" on the "Setup" dropdown. To display the available Job Status types, click the down-arrow or press [F5].

REPCODE: If you allocate Jobs to Reps, input the appropriate Repcode here, otherwise leave it blank. When the Job Card is invoiced out, the proceeds will be allocated to the selected Repcode.

CUSTOM FIELDS: Whichever of the 9 Custom fields you have allocated a Label to, you will be prompted to input the appropriate data. These fields can be used to customise the Workshop Manager to your type of business. For example, a Vehicle Service station could label these fields: MAKE, MODEL, YEAR, ODOMETER, etc. To input Labels for these fields, click the [Custom fields] tab under "Workshop System preferences" on the "Setup" dropdown.

You are now prompted to "fill-in" the "body" or details of the Job Card.

JOB DESCRIPTION: Use RevPro's "in-line" message facility to input a Description of the Job as follows. In the first Stockcode field, press [F9] to display the menu of special directives. Click [Input message] to input a message. Type in a description of the customer's requirements for this job. Repeat this procedure for as many lines as it takes to describe the Job.

Should you have a number of common Job Descriptions, you can use RevPro's "stored-message" facility to save you having to type in the same description every time. On the special directives menu ([F9] in the Stockcode field), click [Standard message]. The Stored-message window is displayed. Click [Add Msg] to add a new message. Type in the message and press [Enter] to save it. From now on, to retrieve a stored-message, call up the Stored-message window, hi-light the required message & press [Enter] to insert it into the Job.

TIP: After inputting items into the Job, you may wish to add more lines of description at the top of the Job Card. Simply move the cursor to the line where you would like to insert information and press the [Shift] + [Insert] keys together. This inserts a blank line by moving everything else down. You can also delete a line by pressing [Shift] + [Delete].

If you only intend to input the Job Card details later (as the Job progresses), leave the Job Card detail lines blank and click [Finish] (or press the [Esc] key) to exit. Then click [Save] to Save the New Job Card. You would later use the "Amend existing Job Cards" on the "Service" dropdown when wishing to add details to the Job.

FILLING IN JOB CARD DETAILS

For those of you familiar with the Revelation Invoicing module, you will notice that the Job Card body layout is identical and operates in a similar way. Each line on the Job Card screen would be used to enter Job details such as Stock Items supplied, Labour entries, "outwork" or "buy-outs" entered (also known as "odd items"), etc.

ENTERING STOCK ITEMS:

This requires you to type in the Stockcode and Quantity of each item being issued. Prices and Descriptions are retrieved from your Stock file and displayed on the Job Card screen. A number of "special" options are available by pressing [F9] in the stockcode field to input special items such as Labour, Odd Items (Outwork or Buy-Outs) and messages. These are described later in this section.

The Stock records (in the Stock file) of items entered into a Job Card are updated to reflect the movement when the Job Card is accepted and written to disk. The movement is NOT reflected as a sale - it is shown under the "Stock Issued" heading on Stock enquiries and reports.

Type the Stock Item's Stockcode or part thereof. If you only input a portion of the Stockcode, a window displaying items whose codes match the code you entered is superimposed over the Job Card screen. Use the Arrow-Up and Arrow-Down keys to hi-light the required item and press [Enter]. You can also use RevPro's incremental Search facility by typing the item's stockcode while the search window is displayed.

You may also search for an item by typing in its DESCRIPTION and pressing the [F4] key (instead of [Enter]). Any items with matching Description fields are displayed in a window for you to choose from.

You can also search for an item by typing in its CATEGORY and pressing the [F3] key (instead of [Enter]). Any items with matching Category fields are displayed in a window for you to choose from.

TIP: To create a New Stock record at this point, click the [Stock] button on the Super-Menu, press [Esc], then click [New] to input the New item's details.

If access to the TAXCODE field has been enabled (using the Set User Parameters on the Workshop Parameters menu), you are prompted to input the appropriate TaxCode for the supply of this item. You are prompted with the TaxCode from the item's stock record. Press [F5] for a list of available TaxCodes. You should avoid using another code unless absolutely necessary as changes may lead to queries from the Receiver of Revenue.

Where countries still use the GST form of Tax, the VAT Code field will be replaced by the code for Exempt tax if the Debtor's record concerned has a GST Exemption number. You may also override this code if required.

Enter the QUANTITY to be supplied. The Total Price will be calculated and displayed in its column. If the Quantity entered exceeds the Stock-on-Hand figure, a warning is displayed. You can override this message (the On-Hand quantity will go into negative) or cancel the issue of that item. You can disable the warning message in the "Set Invoicing Parameters" under the "Set User Parameters" option on the System Maintenance menu.

The PRICE used for the line total calculation is based on various factors:

- the Debtor concerned has their own Price List file in RevPro.

- a Stock Price Link linking the Debtor's record to a Discount% in the Stock record (the link is a number 1 to 6 in the Debtor's "StockPrc" field).

- A Quantity Discount structure is present in the Stock record.

Refer to the special directives below to change the Price for this line only.

If you wish, you can give a LINE DISCOUNT applicable only to the item on this line. Leave it set at zero if no discount is to be given. This field can be disabled for selected users if preferred (using the Set User Parameters option on the Workshop Parameters menu). The maximum % Discounts, etc can be controlled for each user in the Set Invoicing Parameters option under the Set User Parameters option on the System Maintenance menu.

Next, you are now prompted to type in the Stockcode for the next item on the Job Card. Proceed as described above until all items have been entered.

Up to 999 lines may be entered on a Job Card. The Job Card window is a scrolling window which scrolls up automatically as needed with the current line number being displayed below the Job Card Totals. To scroll the window directly, press the Arrow-Up and Down or PageDown & PageUp keys when in the stockcode field.

When finished, press <Esc> to exit out of the body of the JobCard.

Finally, you have the option to press <S> to accept and process the JobCard, <F7> to amend it or <Esc> to cancel and exit.

ENTERING ODD ITEMS (SUCH AS BUY-OUTS, ETC)
Use this method when entering an Item that does NOT appear in your Stock file. For instance, if you were unable to repair a part of an item and had to send to another company for repair, you would enter the cost of that repair as an Odd Item into the client's Job Card.

In the Stockcode field, press [F9] and click the [Odd Item] button.

A window will open asking you to input details about the Odd Item such as a Description, Unit-of-Sale, CostPrice, Selling Price as well as which Nominal Ledger account must be credited with the proceeds of this sale when the Job is eventually closed and invoiced out. You prompted with the General Sales account number as the default.

After inputting the Odd Item's details, you are returned to the Job Card window to input the Quantity supplied, Discount% (if any), etc. A separate total of all odd items is displayed at the bottom of the JobCard.

If you need to amend an Odd Item entry made earlier, left click the "#O" on that line's Stockcode field. -or- use the Cursor Up/Down keys to reach the Stockcode field of the line to be amended. The cursor should be flashing on a '#O' code. Type '=O' sign over the '#' sign and press [Enter]. The Odd Item window is displayed for you to amend.

ENTERING LABOUR COSTS INTO A JOB CARD

Labour costs have been specially catered for within the Workshop Manager. As Labour entries are entered into a Job Card in exactly the same way as Stock items, you may enter as many as you wish into a Job Card.

In the Stockcode field, press [F9] and click [Labour Charge] button.

A Labour window pops up and you are prompted to input the Employee number (1 to 250) who performed the work you are about to enter into the Job Card. Only numbers with a valid Employee Name attached will be accepted (refer to the Set Workshop Parameters section). Click the down-arrow at the end of the field or press [F5] to display a list of available Employee names to choose from.

Next, you are prompted with that Employee's default Labour Rate that you can amend if required (press [F5] for a list of available Labour Rates).

Type in the number of hours worked on this labour entry. The time field caters for 2 decimal places (eg: input one and a quarter hours as 1.25).

Finally, type in the date on which the Labour was worked.

To amend a Labour entry, use the Arrow Up/Down keys to reach the '#L' symbol in the Stockcode field of the Labour entry. Type an '=' sign over the '#' sign and press [Enter]. The Labour window is displayed for you to amend.

If you imported a Job template, only the Labour Rate and Hours worked are imported. As you "cursor-down" through the imported items, RevPro will prompt you to enter the above details for any Labour entries encountered.

SPECIAL DIRECTIVES & OPTIONS IN JOB CARDS

A number of other "special directives" are available similar to the Odd Item and Labour options described above:

LEAVING BLANK LINES IN A JOB CARD

You can leave blank lines anywhere in a Job Card to improve readability. Simply press [Enter] to move to the next line leaving the current one blank.

INSERTING AND DELETING LINES IN A JOB CARD

After inputting all the items into a Job Card, you may wish to insert new items somewhere in the middle of the existing items. Move the flashing cursor to the Stockcode field of the line where you wish to insert information and press the [Shift] + [Insert] keys together. This inserts a blank line by moving everything else down.

To delete an existing line, move the flashing cursor to the Stockcode field of the line to be deleted and press the [Shift] + [Delete] keys together.

PRICE CHANGE

You are able to change the Price of an item for this Job Card only. In the Stockcode field, press [F9] to display the Special Directives menu followed by [P] to select Price Change. "Price Change" will flash at the bottom right of the screen. Now call up the item you wish to change the Price on (using its Stockcode). You are prompted to input the new price. This Price does NOT affect the Selling Price in the item's Stock record.

If a Supervisor Override Password is present, it will be called for whenever the Price Change facility is used.

If in the VAT mode, you have the option of entering the VAT INCLUSIVE price followed by the [F5] key (instead of the [Enter] key). The computer will then calculate and display the VAT Exclusive price.

MODIFYING THE DESCRIPTION FIELD

If you would like the option of amending the Description field of selected Stock items (for the current Job Card only), you can enable this feature in the Set User Parameters on the Workshop Parameters menu. User Parameters can be set differently for each User.

INPUTTING MESSAGES INTO THE JOB CARD BODY

RevPro's has an "in-line" message facility to input messages and Descriptions directly into the body of a Job Card. In the Stockcode field of the line that you want to input the message into, press [F9] to display the menu of special directives. Click [Input message] to input a message. Type in the message to be required. Repeat this procedure for as many lines as it takes to input the complete message.

TIP: If the message is meant to describe an item on the Job Card, input the message on the line immediately below the item it is describing. RevPro will place it in the same position when printing the Job Card.

you can use RevPro's "stored-message" facility to save you having to type in the same message every time. On the special directives menu ([F9] in the Stockcode field), click [Standard message]. The Stored-message window is displayed. Click [Add Msg] to add a new message. Type in the message and press [Enter] to save it. From now on, to retrieve a stored-message, call up the Stored-message window, hi-light the required message & press [Enter] to insert it into the Job.

PLU KEYS

If you have allocated Stockcodes of selected fast-moving items to RevPro's PLU (Programmed Lookup Keys), you may press the associated PLU combination to insert a sale of that item. The PLU keys are programmed using an option on the System Maintenance menu. They consist of the following combinations: [Shift] + [F1 to F10], [Ctrl] + [F1 to F10] and [Alt] + [F1 to F10]. This allows for 30 PLU keys. When in the Stockcode field on a Job Card, you simply press the appropriate PLU key combination and the associated item will be automatically inserted.

BARCODE SCANNER

If a BarCode scanner is 'wedged' into this Terminal's keyboard cable and you have used the Barcode as the Stockcode in your stock records, you can 'swipe' the scanner across the item's barcode and RevPro will insert a issue of one of these items into the JobCard/Quote.

SUPERMENU

The buttons on the Supermenu (on the sidebar at the left of the screen) allow you to perform detailed enquiries on accounts and stock records, create new accounts or stock items 'on the fly'. On completion, press [Esc] on the SuperMenu and you are returned to the point where you were.

HELP SCREENS

Pressing [F1] anywhere in the Job Card will display a "context-sensitive" help screen describing most of the above options.

AMEND AN EXISTING JOB CARD

As a Job progresses, you may need to add new items (or amend existing ones) in the computerised Job card. Use this option to do so.

Select the "Amend existing Job cards" on the "Service" dropdown menu to Amend an Existing Job card.

Locate the Job Card to be amended by using the Job Number, Client Name, Phone number or the Serial Number of the Item that is being serviced.

Use RevPro's incremental search facility by simply typing the Name, Phone or Serial number. As you type each character, it is displayed at the top of the window and only Jobs where the selected field matches what you have typed so far are displayed.

NOTE: When searching by Name or Serial Number, Jobs are displayed beginning from the most recent Jobs for each Name/Serial number moving downwards to the oldest jobs.

If you elect to search by Job Number, left click in the "…Job number" field at the bottom-left of the window and type in the required Job number. Note that the leading zero's used by the computer do not have to be entered - for instance, Job No. 000002 may be entered as '2').

If you are not sure which job you want to amend, hi-light each potential job and click the [Display Job] button to display the detailed Job card on screen.

You are first prompted to confirm the Name & Address details on the Job Card. If you amend these details, you are prompted whether you wish the amendments to update the Debtor's account record as well.

The selected Job Card is displayed for you to amend.

TIP: To go directly to the next available "blank" line on the Job Card, press the [End] key anywhere in the Top section of the Job Card. This places the cursor in the first Stockcode field on the Job Card. Press [End] again to move the cursor to the next available blank line.

If you amend the Quantity of a Stock item on the Job card, the difference is automatically reflected in the On-Hand figure in that item's record in the Stock file.

To remove an Item line from a Job card, use the [↓] and [↑] keys to position the cursor in the stockcode field of the line to be erased and then press the [Shift] + [Delete] keys together. If a Stock item is removed from a Job card, the Quantity originally issued is returned to the Stock record in the Stock file.

If you wish to amend a Labour entry, use the [↓] and [↑] keys to reach the Stockcode field of the line to be amended. You will notice that the cursor is now flashing on a '#L' code. Type an '=' sign over the '#' sign and press [Enter]. The Labour window will pop up allowing you to amend that entry.

If you need to amend an Odd Item entry made earlier, left click the "#O" on that line's Stockcode field. -or- use the Cursor Up/Down keys to reach the Stockcode field of the line to be amended. The cursor should be flashing on a '#O' code. Type '=O' sign over the '#' sign and press [Enter]. The Odd Item window is displayed for you to amend.

All the special directives described in the previous section also apply when amending a Job Card.

CANCEL AN EXISTING JOB CARD

Use this option to cancel a Job Card in the computer. You may only cancel current "work-in-progress" Job Cards - not Closed and Invoiced Job Cards.

All the On-Hand and related fields in the stock records (in the Stock file) for those items appearing in a cancelled Job Card are updated to reflect the Quantities originally issued now being returned to stock.

NOTE: CANCELLED JOBS CANNOT BE RE-INSTATED!

Select the "Cancel existing Jobs" option on the "Service" dropdown menu.

Locate the Job to be cancelled using the usual methods.

Once selected, you are prompted to confirm that you wish to Cancel the displayed Job Card. If a Supervisor Override Password is present, you are prompted to type it in before the selected Job Card is cancelled.

As prompted, confirm that you want to delete the selected job. If a Supervisor Override Password is present, you are prompted to call the Supervisor to type the Password in order that the Job Card may be deleted. The prompt for this password can be disabled in the Set User Parameters option on the Workshop Parameters menu.

DISPLAY AN EXISTING JOB CARD

This allows you to display all existing Job Cards including Current Jobs, Cancelled Jobs and Closed (Invoiced) Jobs. While the Job Card is displayed, you can also display that Job's costs by category (parts, outwork and labour).

PRINT A JOB CARD

You may print out a Job Card as often as you wish. For instance, when first opening a Job, print out a Job Card for use as a "picking list" or requisition to be handed to the stores to draw the stock items required (the Stock BIN Location is also printed for each item where applicable).

You would also print a "client-copy" of the Job Card after completing the Job to attach to the Invoice for issue to the client. All Serial Numbers (where applicable) are also printed on the Job Card for the client to retain for guarantee purposes.

Job Cards are printed on "plain" paper using a pre-defined Layout. If you would prefer to customise the layout to suit your business, contact Revelation Systems where this can be done for a small fee.

NOTE: If any VAT Rates have changed since the Job was opened, you should call up the Job Card using the "Amend an Existing Job Card" option on the Workshop menu and then re-save it to disk in order for the various costings to be re-calculated based on the new data. Do this BEFORE printing the Job Card.

Select the "Print existing Job cards" option on the "Service" dropdown menu.

As above, locate and select the Job you want to print. Click the [Print] button to print the Job card or [Email] to email it to the client.

A menu of print options is displayed:

1. **Print a Job Card that only shows Selling Prices**. This usually handed to the Client. Note that there is an Invoicing option that prints the entire Job Card on the invoice when the job is closed & invoiced.

2. **Print a Job Card that shows ALL Prices (including Cost Prices).** This is usually only for internal purposes which clients do not have access to.

3. **Print a "Picking List".** This prints the job Card with NO prices and is usually handed to the technician to use as a requisition when drawing the stock required for the job from the warehouse or stock room.

4. **Print Job Tracking Labels for the Job**. This prints a set of labels containing basic information about the job that can be stuck onto the item being serviced or onto the manual job card used by the technician. This assumes that the selected Label printer is loaded with the label stationery. To set up the parameters controlling the Tracking Labels (which printer, labels size, how many labels to print, etc) can be set up under the Set Terminal Parameters option on the Set Workshop Parameters menu.

5. **Print a Receipt for the item being serviced**. If you use a PC to open Job Cards for service items as they are brought in, you can use this option to print a Receipt to hand to the client for the item being serviced.

CLOSE A JOB AND PROCESS AN INVOICE

After a Job is completed and all the parts and labour have been entered into the computer, select this option to "close" the Job and invoice it out to the client. The act of Invoicing a Job actually closes the Job Card. So, until a Job is invoiced out, it remains open indefinitely.

There are 2 Invoicing options on the "Service" dropdown menu:

- **Totals Only:** This prints an abbreviated breakdown of the Job's details (Total Parts, Outwork and Labour) on the invoice. You could then attach a copy of the Job Card to the invoice. The 2 advantages to this invoicing method are: you can close and invoice more than one job on a single invoice and you can sell additional items from your stock file on the same invoice.

- **Detailed:** This prints the entire Job Card on the Invoice, in a similar layout to the printed job Card. This option only allows one Job per Invoice and you cannot sell additional items on the invoice. If you have to include additional items, go back and amend the Job Card and include the new item there.

THE ABBREVIATED INVOICING OPTION

Here, we will only discuss the importing of a Job Card into an Invoice. A Job Card is automatically closed when the Invoice is printed. If necessary, a closed Job Card may be re-opened by re-importing it into an Invoice which is then printed as a Credit Note. This is described more fully later in this section.

NOTE: If any VAT Rates have changed since the Job was opened, you should call up the Job Card using the "Amend an Existing Job Card" option on the Workshop menu and then re-save it to disk in order for the various prices to be re-calculated based on the new data. Do this BEFORE importing the Job Card into an Invoice.

Select the "Invoice Jobs (Totals only)" option on the "Service" dropdown menu.

You have the option of printing the invoice or you can just process it and print it later (all invoices processed through RevPro can be reprinted at any time). If you are printing the invoice, ensure that the invoice layout and invoice printer displayed in the window below the menu are correct and that the printer is switched on and is on-line.

Click the first button to close and invoice Debtor Job or [2] to close and invoice a Cash Job. Also available are buttons to process Cash Received from a Debtor for credit of their account and Reprint old invoices

If you selected to close and invoice a Debtor's Job, locate the Debtor's account using the usual search methods. If required, specify a Delivery Address to which the serviced item must be sent (this prompt can be disabled for selected users in the Set Invoicing Parameters option under the Set User Parameters option on the System maintenance menu).

TIP: If you captured the Job card as a Cash Job because the client did not have an account with you, but now you wish to open an account for him/her, click the [Debtors] button on the SuperMenu, press [Esc] and click [New] to open a new account. Input the client's details after which you are automatically returned to the Invoice module where you can call up the new account just opened and to continue processing the invoice.

A Blank Invoice is displayed for you to fill-in.

IMPORTING A JOB INTO THE "TOTALS ONLY" INVOICE
In the Stockcode field, press [the [F9] key and select option [Import Jobcard] to import a Job Card. You have the option of searching for the required Job using the Job Number, the Client's Name or the serviced item's Serial Number.

If you are invoicing a Debtor's account, only Job's processed against this Debtor can be imported into this Invoice. However, if the Job was opened as a Cash Job, you are able to import it into a Debtor's invoice (although RevPro will warn you that it is a Cash Job before accepting it).

The selected Job is imported and displayed as 3 lines on the invoice: Parts, Outwork and Labour. If you prefer, RevPro can print a single line showing the total Job value. Refer to option [Single line Job] tab under "Workshop System preferences" on the "Setup" dropdown menu on the main workshop screen.

If you wish, you can import more than one Job into an "Totals Only" invoice. You can also input normal stock items, odd items, messages, etc as you would on an ordinary Sales Invoice.

If you find you imported the wrong Job into the Invoice, you can remove it as follows. Move the cursor into the Stockcode field of the FIRST line of the Job to be removed (the "#J….PARTS" line) and press the [Shift] + [Delete] keys together. All 3 Job lines are erased from the invoice and any lines below it are moved up to take their place.

On completion, press [Esc] (or click [Finish]) to exit the body of the invoice. You have the option of giving an overall % discount (on the whole invoice) as well as charging Freight or Delivery fees (if any). These prompts can be disabled for selected users in the Set Invoicing Parameters option under the Set User Parameters option on the System maintenance menu.

Finally, you have the option to click [Save] to accept, process and print the Invoice, [Narration] to attach a Narration to the invoice transaction, [Amend] to amend the Invoice or [Cancel] to cancel the invoice and exit.

THE FULL INVOICING OPTION

This option closes and invoices a single Job. All the Job's details are printed on the Invoice in a similar format to the Job Card layout.

Ensure that the invoice layout and invoice printer displayed in the window below the menu are correct and that the printer is switched on and is on-line.

As prompted, search for and select the Job to be invoiced. The Job is imported and displayed on the Invoice screen. This looks a little unusual because the Job's Master file details (Job number, Serial number, Custom fields, etc) are displayed as Message lines in the body of the invoice. Although it cannot be seen, the rest of the Job details (Parts, Labour, etc) have also been imported and will appear on the printed invoice.

You are prompted to input the Date, Order number, RepCode and Overall Discount% for this invoice (if any). These prompts can be disabled for selected users in the Set Invoicing Parameters option under the Set User Parameters option on the System maintenance menu.

Finally, you have the option to click [Save] to accept, process and print the Invoice, [Narration] to attach a Narration to the invoice transaction, [Amend] to amend the Invoice or [Cancel] to cancel the invoice and exit.

NOTE: On the Detailed Invoicing window, there is a button for "Closing a Job without Invoicing it". If you do manual partial invoicing of Jobs that stay open for long periods, use this option to close those jobs when they have been completed and fully paid for.

RE-OPENING A JOB CARD CLOSED IN ERROR

If, after processing and printing an Invoice, you discover that you imported the wrong Job Card or the client requests additional work to be done, you can "reverse" the Invoice and re-open the Job Card as follows.

Select the "Invoice Jobs (Totals only)" option on the "Service" dropdown menu. Depending whether you are re-opening a Debtor's or a Cash Job, click the appropriate [Credit Note] button to process a Credit Note.

In the Stockcode field of the invoice, press [F9] and click the [Import Jobcard] button. Locate and select to import the "closed" Job. A message warning you that the Job is closed is displayed. Click [Yes] to override and import it.

On exiting, if you gave an Overall Discount on the original Invoice, then you must give the SAME % discount again to ensure that it is properly reversed.

As this is now a Credit Note, RevPro prompts you to allocate the credit either to an Aged Period (Balance forward a/c's) or the original invoice (Open Item).

Once processed and printed, the Job Card is re-opened and you may use the "Amend and Existing Job Card" option to make any further amendments before Closing and Invoicing the Job again.

PROCESSING JOB QUOTES

The Workshop Manager provides the facilities for you to print Quotes for prospective clients. A Quote is identical to a Job Card, but does not update Stock items, Labour records, etc.

You are able to specify the period that the Quote is valid for (in days) which is then printed on the printed Quote to be handed to the client.

If the prospective client accepts the quote, you are able to convert the quote into a Job Card in seconds. The Quote remains on file indefinitely (for historical purposes), but there is an option on the Workshop menu to "purge" Quotes older than a certain date.

TIP: If you often issue identical or similar Quotes, use option [B] on the Workshop menu to capture these as Quote "templates" which you can then import directly into a Quote saving you typing it in repeatedly. You can then add to or amend them as circumstances dictate.

Click the "JobQuotes" dropdown menu on the main Workshop screen.

The options to Input a New Quote and Amend, Delete and Display an existing Quote are displayed and operate in the same manner as processing a Job Card. Refer to the section earlier on how to process Job Cards.

When creating or amending a Quote, you are prompted to specify how many days the Quote will be valid for. The default number of days entered during the System Setup section is used. Unless amended, this normally defaults to 30 days.You may overtype this if required.

To amend the default number of days for a Quote, select the [Orders/Quotes] tab under "System Preferences" on the "Setup" dropdown menu on the REVPRO main screen (not the Workshop main screen).

PRINTING A JOB QUOTE

A quote may be printed as often as required. In order to accommodate all the Job fields, the Quote is printed using the same layout as a Job Card. However, the expiry date of the Quote is printed at the top.

Click the "JobQuotes" dropdown menu on the main Workshop screen and select the "Print existing Job Quotes" option

Search for the Quote you wish to print.

From the displayed menu, select how the Quote should be laid out when printed (show prices, full details, etc).

CONVERT A QUOTE TO A JOB

Use this option to convert a previously issued Quote into a Job Card.

Click the "Service" dropdown menu and select "Open a New Job card". Click the [Convert a Job Quote into a Job Card] button

Locate the Job Quote that you wish to convert using the usual methods and select it.

The Quote is imported into a blank Job Card. If any imported items do not have sufficient stock on-hand, a warning is displayed. You can continue with the import (accepting a negative on-hand condition) or you can postpone the import until later when you have sufficient stock.

NOTE: The actual conversion only occurs later when you finally accept the Quote as a New Job (refer below). You may cancel the conversion at any time before then by pressing the [Esc] key a number of times.

The Quote is now displayed to you as if it was a New Job which you may now amend or add to. The only amendments you should make should be to add additional details such as Order numbers, Serial Numbers for lines containing serialised items (if applicable) and employee details for any labour entries.

Although you may add or remove items from the contents of the imported Quote, this may not be wise unless the client has agreed to the amendments. Otherwise, this may invalidate the original Quote.

On completion of any amendments, press [Esc] to exit the Job Card body.

Finally, you have the option to click [Save] to complete the actual Quote-to-Job Conversion, [Amend] to make further amendments or [Cancel] to cancel the conversion and exit.

PRINT OUTSTANDING QUOTE REPORT

To assist you in tracking Job Quotes issued to potential clients, the Workshop Manager provides a report which only prints Quotes that will expire in a specified Date Range.

This report could be printed once a week for Quotes expiring in the following week. You would then telephone the clients concerned warning them of the impending expiry of their Quotes.

This provides an ideal follow-up tool to prevent the loss of potential sales or Jobs.

Click the "Reports" dropdown, select "Workshop reports" and then select the "Outstanding Quotes" option.

MANUFACTURING JOB CARDS

RevPro's Workshop Manager also provides a facility for manufacturing internal Stock items for later resale. This option is not to be confused with the Bill-of-Materials option found elsewhere in RevPro.

This allows you to open a Manufacturing Job Card to manufacture selected Stock items in your stock file. In this Job Card, you would specify all component items, labour, outwork, etc necessary to build the item(s).

As with a Service Job card, a Manufacturing Job card can stay open indefinitely until the Job is completed whereupon the manufactured item(s) is then booked into stock ready for resale. The costing of the manufactured item is recalculated based on the cost prices of the component stock items as well as any costs incurred in the job (labour, outwork, etc).

To speed up the process, you can also create Manufacturing Job "templates" for items that you manufacture repeatedly. This is like a "recipe" that contains all the component items, labour, outwork, etc required to manufacture ONE of the items. Manufacturing templates can be created using the "Manufacturing Templates" option on the "Manufacture" dropdown menu

To manufacture the item, you open a New Manufacturing Job card and then import that item's template into it and instruct RevPro how many of the item you wish to manufacture. RevPro calculates the required number of component items based on the template and creates the Job Card.

You can add to or amend Manufacturing Job Cards as the Job progresses.

You may also manufacture "serialised" stock items. When completed and being booked-into stock, RevPro will prompt you to input the serial numbers for each item being booked in.

Click the "Manufacture" dropdown menu on the main Workshop screen.

OPENING A NEW MANUFACTURING JOB CARD

Select "Open a New Job card" on the "Manufacture" dropdown menu.

If you have a Manufacturing "template" for the item you wish to manufacture, click [Yes] to the displayed prompt and select the template to import. If not, select the Stock item that you wish to manufacture.

Input how many of the selected item you wish to manufacture. Note that a stock record for the manufactured item must exist in your stock file <u>before</u> you can manufacture it.

A blank Job Card will be displayed for you to "fill in".

NOTE: If you did not import a manufacturing template, you must specify the correct number of component items necessary to manufacture the number of items you selected to manufacture.

The procedure for filling in a Manufacturing Job Card is identical to that of a Service Job Card. Refer to that section for details or press [F1] for Help.

Once opened, all On-Hand and "Issued" fields in the component stock items' records specified in the Manufacturing Job Card are updated and the "Being Made" field in the manufactured item's record is updated with the quantity being manufactured.

AMEND/PRINT/DISPLAY MANUFACTURING JOB CARDS

To call up Manufacturing Job Cards to Amend or Print, you have to use either the Job NUMBER or the Stockcode of the item being manufactured (on that Job Card).

You can Display or Print both Current and Completed Manufacturing Jobs. Completed Jobs cannot be Amended or Deleted.

When printing a Manufacturing Job card, you have the option of printing it with Prices or as a "picking-list" to use for drawing stock for the workshop.

BOOK COMPLETED MANUFACTURING JOBS INTO STOCK

When a Manufacturing Job is completed, use this option to book the completed stock items into stock. Press [8] on the Workshop menu followed by [M].

Search for and select the Job to be booked-in. RevPro will calculate the Cost Price of the manufactured item based on the cost prices of the component items plus labour, outwork, etc.

If the manufactured item's stock record has a Markup% in it, a new Selling Price will be calculated and displayed. You can either accept this Selling price, type in your own calculated price or leave the Selling Price as it was.

If the manufactured stock item is a "serialised" item, you will be prompted to input serial numbers for each item being booked in.

Once accepted, the Job is closed and the manufactured item's On-Hand in its stock record is updated. If enabled, the Work-in-Progress and Stock Control accounts in the Nominal Ledger are also updated with Journal entries.

PRINTING WORKSHOP REPORTS

The Workshop reports allow you to monitor various aspects of your Workshop. These reports can be printed on your printer or to the screen.

Click the "Reports" dropdown, select "Workshop reports" and then select the required report as described below.

WORK-IN-PROGRESS REPORT

As the name suggests, this will list all or part of the unfinished Job Cards that have not been completed and closed yet.

A parameter screen is displayed in which you can specify exactly which unfinished Jobs you want to include in the report. Leave those parameter fields that do not apply to you blank. The parameters include:

- Service or Manufacturing Jobs

- The order in which they must be printed (Number, Name or Serial Number)

- A Job Number range (from…to)

- Only Jobs of a specified Job TYPE

- Only Jobs that are allocated a specified Job STATUS code

- Only include Cash or Debtor Jobs (leave blank for all)

- Only include Jobs belonging to Rep Codes in a specified range

On the parameter screen you can specify which data to include on the report:

- Print each Job's breakdown (Parts, Outwork, Labour plus profit margins)

- Print the 9 Custom Field Labels and data for each job

- Print the client's Name, Address, Phone and Contact Name for each job

If necessary, you may restart the report from somewhere in the middle if you ran out of paper or something.

Next, you are prompted to input the Date Range into which the DATE OPENED field in the Work-in-Progress Jobs must fall. For example, you may wish to print only those jobs opened this week. Input Monday's date into the "from" field and Friday's date into the "to" field. All work-in-progress jobs where the Date Opened field falls between these dates (inclusive) will be printed (depending on the other parameters you specified above).

To print ALL Work-in-Progress Jobs, leave the date fields blank.

Finally, select which device to output the report to.

COMPLETED JOBS REPORT

This will list all the Job Cards that have been completed and closed. To be regarded as closed, Service Job Cards must be invoiced out and Manufacturing Job Cards must have been booked into stock.

Follow the same procedure as defined above for Work-in-Progress reports. However, here you are prompted to input a Date Range based on the date that the completed Jobs were CLOSED.

STOCK MOVEMENTS TO/FROM THE WORKSHOP

This prints a list of all Stock movements to and from the Workshop via the Workshop Manager program.

Outward movements usually reflect items drawn from stock when Job Cards are opened and amended. Inward movements generally refer to items returned from amended/cancelled Jobs or manufactured items completed on a Manufacturing Job Card.

Note that, if you originally issued 4 of an item on a Job Card and then go and amend that to 3, this will generate an inward movement of 1 item.

You have the option of printing the report for movements in the Current period or in one or more Past periods.

As prompted, specify the Date Range for the Workshop movements.

You have the option of only printing the Total of movements for each item or a detailed list of movements including Job No's, Dates, Clients and Prices.

You can also print the movements of all stock items or a single item.

SERVICE JOB CARD HISTORY BY CUSTOMER

This prints basic details of all Service Job Cards opened for a selected customer.

NOTE: For this report to succeed, the Client's NAME field on the Job Cards must have all been spelt exactly the same. This usually is'nt a problem on Debtor's Jobs, but Cash Jobs prompt you to type in the Client's Name which can lead to slight spelling differences.

From the displayed list, select one of the Job Cards belonging to the client in question. You have the option of only printing Completed Jobs. Also, specify whether or not to include the Cost Prices and Profit Margins on the report.

Input the Date Range for when the required Jobs were Opened. Leave blank to include all Jobs for the selected client.

The client's Jobs are printed from the most recent Job to the earliest Job.

SERVICE HISTORY BY SERIAL/REGISTRATION NUMBER

This prints list of all Service Jobs carried out on an item with a specified Serial Number. This is based on the number inputted into the "Serial/Reg.No" field on the Job Cards.

NOTE: The Serial number must be identical on all the Job Cards in order for this report to trace them. If the number was entered as KWR832T on one Job Card and KWR 832 T (with spaces) on another card, they are not assumed to have the same number. Do NOT use spaces in Serial Numbers.

From the displayed list, select one of the Job Cards with the required Serial Number. You can use RevPro's "incremental-search" facility to locate the Serial number by typing the Serial number while the list is displayed.

You have the option of only printing Completed Jobs. Also, specify whether or not to include the Cost Prices and Profit Margins on the report.

Input the Date Range for when the required Jobs were Opened. Leave blank to include all Jobs for the selected Serial/Registration Number.

The Jobs are printed from the most recent Job to the earliest Job.

JOB HISTORY BY MANUFACTURED ITEM

This prints details of all Manufacturing Jobs carried out to manufacture a selected Stock item.

From the displayed list, select one of the Job Cards used to manufacture the selected item. You can use RevPro's "incremental-search" facility to locate the item by typing its Stockcode while the list is displayed.

You have the option of only printing Completed Jobs. Also, specify the Date Range when the required Jobs were opened. Leave blank for all. The Jobs are printed from the most recent Job to the earliest Job.

PRINT EMPLOYEE'S HOURS WORKED

This prints details of hours worked for one or more employees on Service and/or Manufacturing Jobs. This information can be used to calculate wages plus monitor the performance of your employees.

A parameter screen is displayed allowing to define which Jobs to include in the report. You can also specify to only print the Total Hours worked for each employee as well as whether you only want to include Completed Jobs.

Finally, specify the Date Range of Jobs to include in this report. This is based on the Date that the Jobs were OPENED.

The report lists each employee with details of each Job they worked on. This includes the Job Date and Number, the client, the Invoice number (if the Job has been closed), the Labour Rate, the Cost & Selling Prices as well as the %Profit Margin.

CANCELLED JOBS REPORT

This lists all Jobs that were Cancelled in a specified date range. Cancelled Jobs are retained on file to for audit purposes.

This report allows you to keep track of cancelled jobs to ensure that no fraud is being committed by your staff.

PRINT TEMPLATE DETAILS

If you are using the Job/Quote Template facilities, this allows you to print a condensed list of each of the different type of Templates on file.

Before printing this report, it might be wise to run the "Update Template Prices" option (select the [Upd.Template] tab under the "Workshop System Preferences" on the "Setup" dropdown menu). This will update all the Prices and Labour costs on all the Templates on file. This will give a more accurate reflection of each Template's value on the Template report.

NOTE: **This is only for the Report's benefit – when Templates are imported into Job Cards or Quotes, the Prices are automatically updated to the latest Prices on file.**

Select which range of Templates you wish to print.

PRINT OUTSTANDING QUOTES

This prints a condensed list of all the outstanding Job quotes issued by you that have NOT been converted to Jobs. You can then follow up these Quotes and, hopefully, convert them into Jobs.

Input the Date Range into which the Date EXPIRES field in the Quotes must fall.

EXPORT DATA (TO SPREADSHEETS, etc)

If you need to analyse your Workshop data in greater detail, this option allows you to export selected data into an external "text" file and then import it into a Spreadsheet (or external) program.

You have the option of exporting either Master file data (Names, Addresses, Serial Numbers, Job Totals, etc) or Contents file data (Items, Stockcodes, Descriptions, Prices, etc) for any of the three Job categories: Service Jobs, Manufacturing Jobs or Job Quotes.

You are prompted to select which fields to export.

Follow the displayed instructions.

MOVE A JOB TO ANOTHER DEBTOR A/C

If you opened a Service Job as a COD or Cash Job and have since opened an account for that client in your Debtors ledger, you can use this option to convert the Cash Job to a Debtors Job.

You may also convert a Debtor Job to another Debtor account as well.

Select "Move Jobs to other Accounts" on the "Service" dropdown menu.

Locate and select the Cash Job to be converted. Now select the Debtor's account to which you wish to convert the selected Job. Note that RevPro does NOT check whether the Name & Address fields on the Job card match those in the Debtor's account. Ensure that you have selected the correct a./c.

You are warned that the Name & Address details currently on the Job card will be replaced with those in the Debtor's account record.

The Job card is then converted to a Debtor's Job card.

CREATING JOB/QUOTE TEMPLATES

These options allow you to create "templates" of standard or common Jobs that you perform often. When opening a new Job or issuing a Quote, you then simply import the associated template into the Job or Quote instead of typing in the same data over and over again. If necessary, you can then make amendments or additions to the imported data.

On the Workshop menu, there are Template options on each of the "Service", "JobQuotes" and "Manufacture" dropdown menus.

When you create a template, you are prompted to give the template a unique code and description. This code will be used to locate the template when you select to import it into a Job card or Quote.

Inputting data into a template is very similar to that of an ordinary Job Card or Quote. You can even input Labour and Outwork entries.

Labour entries will only call for a Labour Rate. The Employee will only be called for when you import the template into a Job card.

Serial Numbers for serialised items entered into templates are not called for.

PURGING OLD WORKSHOP DATA

There is NO automatic "purging" of old data from the Workshop Manager files. It has been designed this way in order that you may retain old Job Cards and Quotes on file for as long as you wish (or until you run out of space on your Hard Disk).

However, if the files become too large, it will adversely affect the performance of the system. It is wise, therefore, to perform some "housekeeping" from time to time. This takes the form of "purging" data from the Workshop files that is older than a Date that you would specify.

NOTE: DO NOT WAIT UNTIL YOU RUN OUT OF DISK SPACE BEFORE PURGING THE FILES. When purging data, the Workshop Manager "copies" the data to a new file leaving any obsolete data in the old file. On completing the purge operation, it deletes the old file. THERE MUST BE ENOUGH ROOM ON THE HARD DISK TO ACCOMMODATE THIS PROCEDURE. A good rule of thumb is that the available space on the Hard Disk must NOT be less than the size of the LARGEST file in the Company directory to be purged.

To allow you to retain data in certain files longer than others, you are able to purge data from the Service Job file, the Quote file and the Manufacturing Job file separately. Quotes are normally only valid for 30 days whereas you may want to keep Service and/or Manufacturing Jobs longer.

TIP: To assist you in keeping track of the most recent "purge" dates for each of the Workshop files, these dates are always displayed at the bottom of the main Workshop screen.

During a purge, all selected Jobs/Quotes are actually deleted from the workshop files. If you wish to retain the Job data for historical purposes, use RevPro's facility to copy the entire company's data to another company number. This option is found on the "Tools and Utilities" menu on the main REVPRO screen.

As the purge process analyses all Jobs and Quotes, it can take quite some time. If there are a large number of Jobs/Quotes in your files, it may be advisable to run the purge process overnight.

Click the "Setup" dropdown menu and select the "Purge Old Workshop data" option. If present, you will need to type in the SUPER Password in order to gain access to this option.

You are prompted to type in the Purge Date for each of the files (Service Jobs, Manufacturing Jobs and Quotes). All records opened prior to this date will be purged from the files.

For files that you do not wish to purge, leave the associated date field blank.