

WORKSHOP WARRANTY

CREATING WORKSHOP JOB FOR WARRANTY WORK

We create a Warranty job in the same screen as we create any other Workshop job. So, depending on your shops procedure, whether it be in Main Workshop, Planner or even Scheduler. Go to this screen and New Job

We must select the customer. Not the supplier that the Warranty is under

Select / Add the unit

The screenshot shows the 'Add a new Job' dialog box with the following details:

- Buttons: Select Estimates, Web Booking Mer...
- Radio buttons: The Dealership, Customer
- Fields: Select Customer (LAURA BAFF), Unit/Job Dropped Of... (LAURA BAFF)
- Insurance Job: Select Insurer, Not an insurance job
- Claim Number: (empty)
- Radio buttons: No Unit for this job, Select Unit Later, Unit
- Fields: Find unit (KTM 390 Duke 2021), Current Odo: 0, Unit Recall Date: 13.11.2021, Current Hour: 0.0

Then when selecting the Work Type you should have one in there called WTY Check for Warranty

The screenshot shows the 'Job Types' dialog box with a list of job types. The 'WTY CHECK FOR WARRANTY' job type is highlighted.

Job Type	Description
MAJSER	MAJOR SERVICE
MINSER	MINOR SERVICE
MISC	MISCELLANEOUS REPAIRS
PD	PRE DELIVERY
RWC	ROADWORTHY CERTIFICATE INSPEC
SS	SHOCK SERVICE
TFOB	TYRE FIT ON BIKE
TFWO	TYRE FIT WHEEL ONLY
UBC	USED BIKE CHECKOVER
UBPS	USED BIKE PREPAE FOR SALE
VC	VALVE CLEARANCES
WTY	CHECK FOR WARRANTY

Buttons: Search..., Select, Insert, Change, Delete, Manage Check List, Close

If you don't have this work type and / or you are Inserting a new work type you need to select this box

The screenshot shows the 'Adding a Job Type' dialog box with the following details:

- Fields: Job Type, Description, Default Effort, Benchmark... (Time (minutes):, Charge (\$):)
- Radio buttons: Regular Service, Internal / Assembly/Pre Deli..., Repair, Warranty / Recall, Other
- Buttons: Select, Clear
- Text: Default Labour Ra... ** None Selected **
- Text: Default Notes: (empty)
- Checkboxes: Always bill the dealership/supplier for this work (i.e. warran, Disable SMS followup for these jobs
- Buttons: OK, Cancel

Important – You can only have Warranty work on a warranty job card.. You cannot combine say a Service and Warranty work on the same job card. You must make 2 separate jobs

Update Start date, promise date. Booking only / work starts immediately status etc as required and then click over to details

The screenshot shows the 'Add a new Job' dialog box with the 'General' tab selected. The 'Details' tab is highlighted in green. The form contains the following fields and options:

- Estimates:** 'This job is based on Estimates:' with buttons for 'Select Estimates' and 'Web Booking Mer...'
- Customer:** Radio buttons for 'The Dealership' and 'Customer' (selected). 'Select Customer' is set to 'LAURA BAFF'. 'Unit/Job Dropped Of...' is also 'LAURA BAFF'.
- Insurance:** 'Insurance Job:' with 'Select Insurer' and 'Not an insurance job'.
- Claim Number:** An empty text field.
- Unit:** Radio buttons for 'No Unit for this job', 'Select Unit Later', and 'Unit' (selected). 'Find unit' is set to 'KTM 390 Duke 2021'. 'Current Odo:' is '0' and 'Unit Recall Date:' is '13.11.2021'. 'Current Hour:' is '0.0'.
- Types:** 'WTY' is entered. There are three 'Select work typ...' buttons.
- Short Description:** 'CHECK FOR WARRANTY' with a color selection palette.
- Status:** A text field with a status selection palette.
- Order Nbr:** An empty text field.
- Labour Rate:** 'Default Labour Rate: ** None Selected **' with 'Select' and 'Clear' buttons.
- Dates:** 'Start date:' is '4/9/2024' and 'Promise Date:' is empty.
- Booking Options:** Radio buttons for 'Booking Only - work will not start immediately', 'Received - but work doesn't start yet', 'Work starts immediately' (selected and highlighted in green), and 'Job already completed. (Labour+Parts to be added)'. 'Effort (for planning):' is empty.
- Payments:** 'Upfront Initial Cash Payment:' is '\$0.00' and 'Final Fixed Price:' is empty.
- Printing:** Checkboxes for 'Print New Job card', 'Print Repair Authority', 'Print Label', '2 Copies', 'Notify Pickup Ready via SMS', 'Pre sales Assembly (pass cost onto eventual buyer)', 'Email one of the authority forms', and 'Print Pick List for Parts Already Sold to Job'.
- Location:** 'Location:' is 'Main Store' with a 'Change' button. 'Key Location' is empty.
- Buttons:** 'Weekly Plann...', 'Create Job', and 'Cancel'.

Update job notes as required and Create Job

The screenshot shows the 'Add a new Job' dialog box with the 'Details' tab selected. The 'General' tab is highlighted in green. The form contains the following fields and options:

- Notes:** A large text area containing the text 'CHECK UNIT FOR INDICATOR SENSOR RECALL'.
- Buttons:** 'Weekly Plann...', 'Create Job', and 'Cancel'.

WORKING ON THE JOB / FINISHING THE WORK

Continue to treat job like normal. Add Parts and labour as required. There is no need to adjust the value of the parts and labour

Type	Part/Mechanic	Description	Qty	Quote	Line Disc	Total	Total-Disc
Parts	93811023000	GEAR INDICATION €	1			\$177.35	177.35
Labor	BEN	Labour	0:30			\$55.00	55.00

Discount Scope:
 Spares ... Fixed \$
 Entire Job Capped \$

Discount (%): 0.00%
Discount (\$): \$0.00
Spares Line Discount: \$0.00
Labour Discount: \$0.00
Total: \$211.23
GST: \$21.12
Less Discount (inc): \$0.00
Grand Total: \$232.35
Fixed Final Price: []

When the job is finished and the customer has their bike we need to complete and pickup the workshop job just like any other job

You will see that it is Blue. Signifying that it is a warranty job

Warranty Repair - Supplier

Job No: 158576 Booking Clerk:aura
Type: WTY
Description: CHECK FOR WARRANTY
Order Nbr:
Start Date: 4/9/2024
Completion Date: 4/9/2024
Invoice Date: 4/9/2024
Unit: KTM 390 Duke 2021
Reference: 345678 history
Purchase Date: 13.10.2021
Odo: 0 Next Recall date: []
Hour: 0.0

Send SMS Followup: Y... SMS will be sent a few days after job invoice

LAURA BAFF Code: BAFL
XX Pottery Court Phone Main:
Brunswick VIC, 3056 Phone Fax:
Phone Mobile:
ABN:
Note: This job is a warranty repair and will be billed against the dealership

Job Attachments Unit Attachments Key Location
Flag job in progress << Previous Next >> Cancel

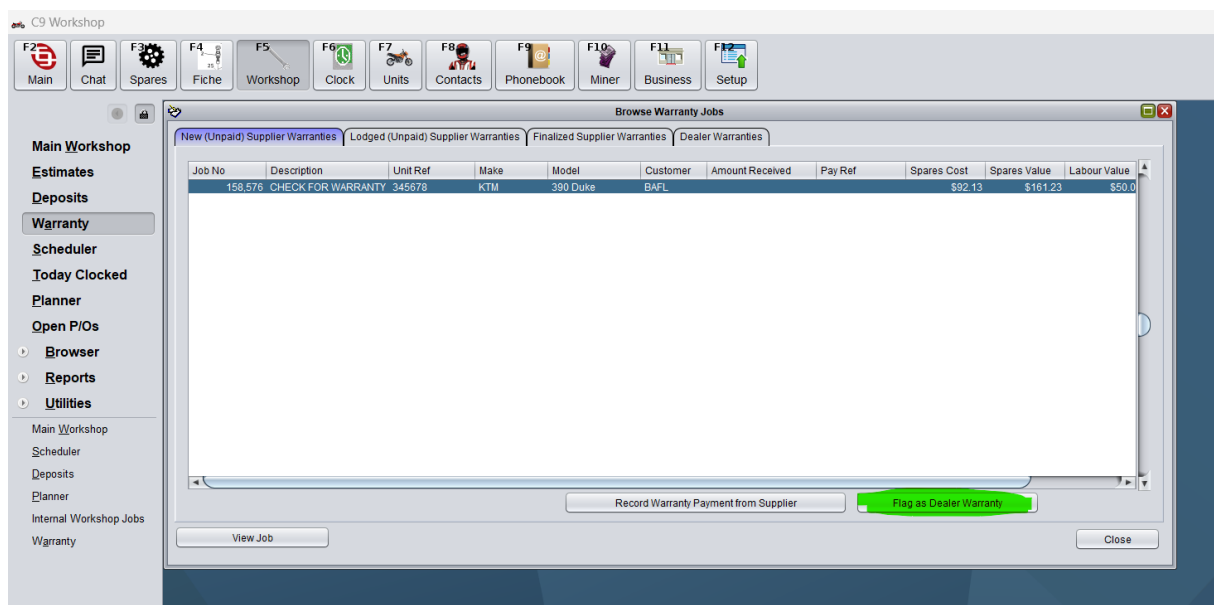
When we finish picking up the job it will not ask you for payment. Rather it moves the job into the Warranty Section waiting on payment from the supplier

Collecting Payment / Credit for the Warranty Work

Workshop > Warranty

This is where you will find your Warranty Jobs awaiting finalisation

If it is a warranty you are covering click Flag as Dealer Warranty



Alternatively, if you have received something from a supplier click Record Warranty Payment from supplier

You will get this screen

Click Claim Processed and finalised

Enter date of Credit Note / date money went into your account – depending on whether they gave you a credit or money

Enter Credit Note number or reference

If they gave you a credit against your account you need to select supplier the credit is going to sit against.

Alternatively if they gave you money into your bank you do not select a supplier

Enter the amount they gave you. Does not need to match the total of the job

Click Finish

Job No:	158,576		
Description:	CHECK FOR WARRANTY		
Reference:	345678	Code:	BAFL
Make:	KTM	Name:	LAURA BAFF
Model:	390 Duke	Finished:	4.9.24
Spares Cost:	\$92.13	Labour Value (-gst):	\$50.00
Spares Value (-gst):	\$161.23	Total Job Value (-gst):	\$211.23

Status: Claim Lodged but not yet processed
 Claim Processed and Finalized

Date of Payment:

Reference:

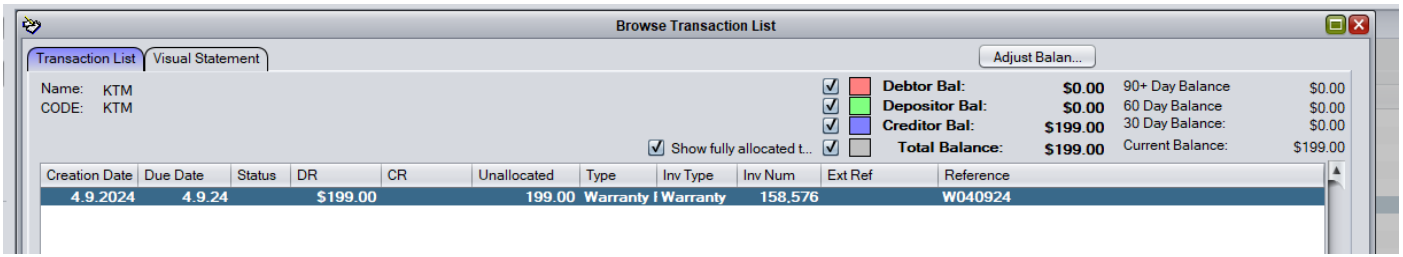
Creditor Supplier:

Amount (-GST):

GST:

Amount (+GST):

If you select a supplier, Credit Notes will look like this



In terms of reporting you can look at Workshop > Reports > Warranty

This will show you things like how much the job was retail vs how much you got paid from Warranty Work

Supplier Warranties paid in a given date range

Type	Job No	Description	Reference	Make	Model	Code	Pickup	Spares Cost	Spares Value	Labour Value	Value	Paid Out	Paid
Sply+	158,576	CHECK FOR 1	345678	KTM	390 Duke	BAFL	4.9.24	92.13	161.23	50.00	211.23	4.9.24	180.91
								92.13	161.23	50.00	211.23		180.91

You can also see it reflected in the Business > Reports > Profit Summary report

Supplier Warranty							
Supplier Warranty Spares		1			92.13	-92.13	-100.0%
Supplier Warranty Payout		1	180.91		180.91	180.91	+100.0%
Supplier Warranty Totals			180.91	0.00	180.91	92.13	+100.0%
Grand Total			243.32	0.00	243.32	149.04	+100.0%