

EXCELLON 5.5

SERVICE | Job Card Process

QUICK START GUIDE V1.0



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INTRODUCTION

About This Guide

This document is a quick start guide for **Job Card** process of **Service** module in Excellon 5.5 for Kataria Automobile Private Limited application.

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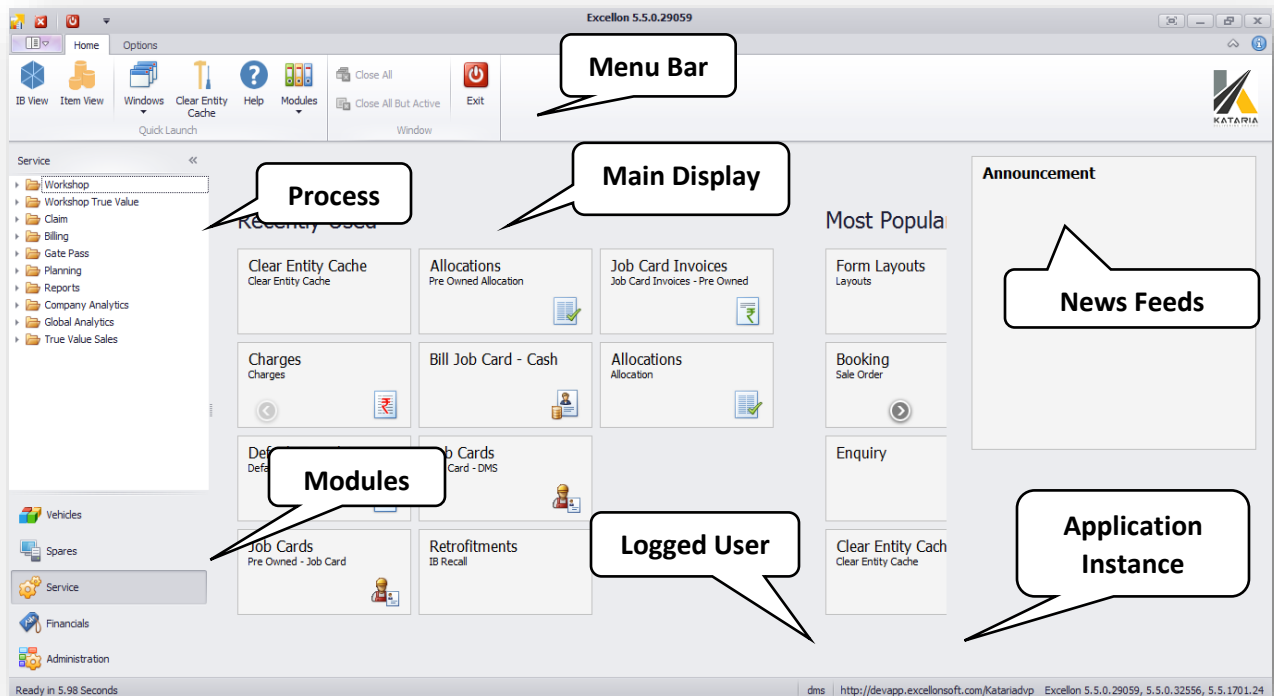
Phone

PRE-REQUISITES

To use the **Job Card** process, you must have:

- Excellon 5.5 application installed and configured. Refer to **Excellon 5.5 Installation and Application Overview** quick start guide for more details.

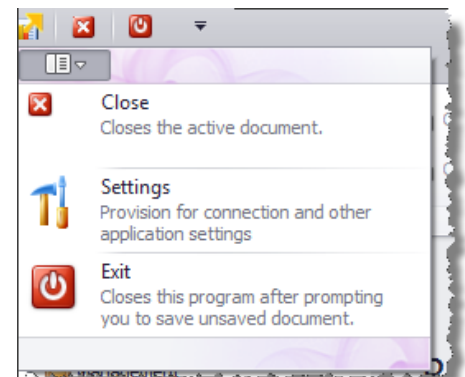
GENERAL

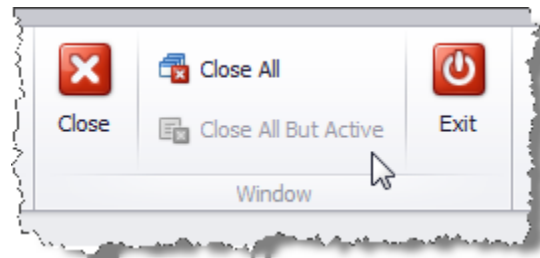
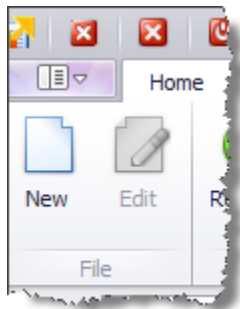


Menu Bar

This section displays controls change the view, quick access to function, print the document and so on. You can use the main menu to change application settings, to close the currently active document or to exit the application.

In the **File** menu, click **New** to create a new record. Click **Edit** to update the currently selected record.

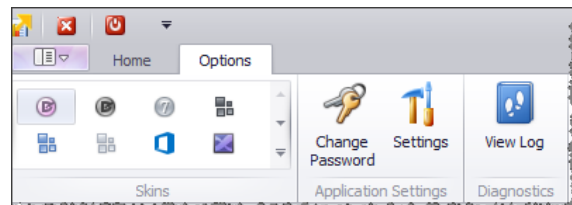




In the **Window** menu, click **Close** to close the currently open tab. Click **Close All** to close all the currently open tabs. Click **Close All But Active** to close all the tabs except the currently active tab. Click **Exit** to close the Excellon 5.5 application.

[Note] The application will prompt you to save any unsaved changes before closing a tab or exiting the application.

The Options menu tab enables you to change the application theme, update the application settings, change the log-in password or view the application log file.



[Note] The menu controls change as per the module and the currently selected process. Refer to the Excellon 5.5 User Guide for details of menu control for each window.

Footer

The application footer displays the user name of the currently logged-in user and the URL and version details of the current application instance.

OVERVIEW

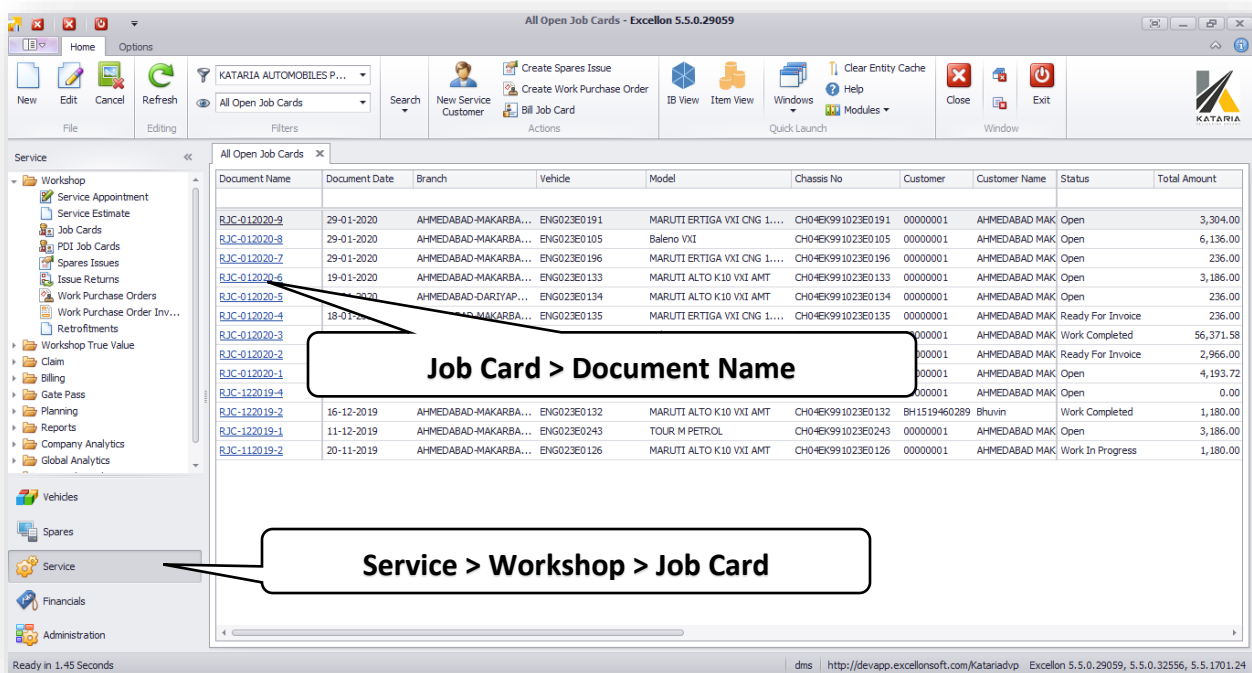
Job card is the document which keeps the record of service performed on the vehicle. It maintains details such as labour work done on a vehicle and parts used in servicing. It also covers the vital information like which job is done by the mechanic, at what time the service started and finished, applicable rate for the job, KM Reading for vehicle, job type under which the job is performed etc.

After issuing all the parts and completing all labor for the vehicle, the job card is marked as 'Ready for Bill' and then later the user can generate the invoice and deliver the vehicle to customer.

PROCESS FLOW

To access job card process:

- In the Excellon 5.5 application, go to **Service** module → **Workshop** → **job card**

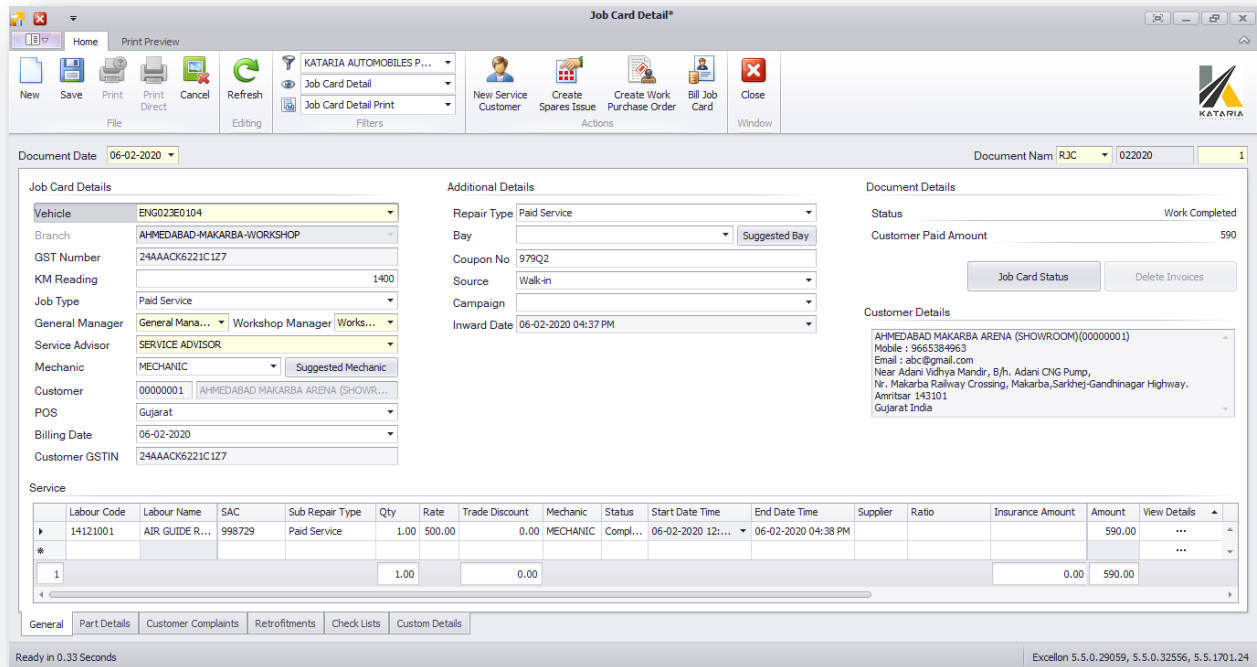


Job Card > Document Name

Service > Workshop > Job Card

Document Name	Document Date	Branch	Vehicle	Model	Chassis No	Customer	Customer Name	Status	Total Amount
RJC-012020-9	29-01-2020	AHMEDABAD-MAKARBA...	ENG023E0191	MARUTI ERTIGA VXi CNG 1....	CH04EK991023E0191	00000001	AHMEDABAD MAK	Open	3,304.00
RJC-012020-8	29-01-2020	AHMEDABAD-MAKARBA...	ENG023E0105	Baleno VXi	CH04EK991023E0105	00000001	AHMEDABAD MAK	Open	6,136.00
RJC-012020-7	29-01-2020	AHMEDABAD-MAKARBA...	ENG023E0196	MARUTI ERTIGA VXi CNG 1....	CH04EK991023E0196	00000001	AHMEDABAD MAK	Open	236.00
RJC-012020-6	19-01-2020	AHMEDABAD-MAKARBA...	ENG023E0133	MARUTI ALTO K10 VXi AMT	CH04EK991023E0133	00000001	AHMEDABAD MAK	Open	3,186.00
RJC-012020-5	18-01-2020	AHMEDABAD-DARIYAP...	ENG023E0134	MARUTI ALTO K10 VXi AMT	CH04EK991023E0134	00000001	AHMEDABAD MAK	Open	236.00
RJC-012020-4	18-01-2020	AHMEDABAD-MAKARBA...	ENG023E0135	MARUTI ERTIGA VXi CNG 1....	CH04EK991023E0135	00000001	AHMEDABAD MAK	Ready For Invoice	236.00
RJC-012020-3	16-12-2019	AHMEDABAD-MAKARBA...	ENG023E0132	MARUTI ALTO K10 VXi AMT	CH04EK991023E0132	BH1519460289	Bhuvn	Work Completed	56,371.58
RJC-012020-2	11-12-2019	AHMEDABAD-MAKARBA...	ENG023E0243	TOUR M PETROL	CH04EK991023E0243	00000001	AHMEDABAD MAK	Ready For Invoice	2,966.00
RJC-012020-1	20-11-2019	AHMEDABAD-MAKARBA...	ENG023E0126	MARUTI ALTO K10 VXi AMT	CH04EK991023E0126	00000001	AHMEDABAD MAK	Open	4,193.72
RJC-122019-4						00000001	AHMEDABAD MAK	Open	0.00
RJC-122019-2	16-12-2019	AHMEDABAD-MAKARBA...	ENG023E0132	MARUTI ALTO K10 VXi AMT	CH04EK991023E0132	BH1519460289	Bhuvn	Work Completed	1,180.00
RJC-122019-1	11-12-2019	AHMEDABAD-MAKARBA...	ENG023E0243	TOUR M PETROL	CH04EK991023E0243	00000001	AHMEDABAD MAK	Open	3,186.00
RJC-112019-2	20-11-2019	AHMEDABAD-MAKARBA...	ENG023E0126	MARUTI ALTO K10 VXi AMT	CH04EK991023E0126	00000001	AHMEDABAD MAK	Work In Progress	1,180.00

User Interface (General)



Job Card Detail*

Document Date: 06-02-2020 Document Name: RJC 022020 1

Job Card Details

Vehicle: ENG023E0104
 Branch: AHMEDABAD-MAKARBA-WORKSHOP
 GST Number: 24AAACK6221C127
 KM Reading: 1400
 Job Type: Paid Service
 General Manager: General Mana... Workshop Manager: Works...
 Service Advisor: SERVICE ADVISOR
 Mechanic: MECHANIC Suggested Mechanic
 Customer: 00000001 AHMEDABAD MAKARBA ARENA (SHOWR...
 POS: Gujarat
 Billing Date: 06-02-2020
 Customer GSTIN: 24AAACK6221C127

Additional Details

Repair Type: Paid Service
 Bay: Suggested Bay
 Coupon No: 979Q2
 Source: Walk-in
 Campaign:
 Inward Date: 06-02-2020 04:37 PM

Document Details

Status: Work Completed
 Customer Paid Amount: 590
 Job Card Status Delete Invoices

Customer Details

AHMEDABAD MAKARBA ARENA (SHOWROOM)(00000001)
 Mobile: 9665384963
 Email: abc@gmail.com
 Near: Adani Vidhya Mandir, B/h. Adani CNG Pump,
 Nr. Makarba Railway Crossing, Makarba, Sarkhej-Gandhinagar Highway,
 Amritsar 143101
 Gujarat India

Service	Labour Code	Labour Name	SAC	Sub Repair Type	Qty	Rate	Trade Discount	Mechanic	Status	Start Date Time	End Date Time	Supplier	Ratio	Insurance Amount	Amount	View Details
1	14121001	AIR GUIDE R...	998729	Paid Service	1.00	500.00	0.00	MECHANIC	Compl...	06-02-2020 12:...	06-02-2020 04:38 PM				590.00	...
					1.00		0.00							0.00	590.00	

General Part Details Customer Complaints Retrofits Check Lists Custom Details

Ready in 0.33 Seconds

Excellon 5.5.0.29059, 5.5.0.32556, 5.5.1701.24

Field Description

Field	Description
Vehicle	Select vehicle to create job card.
Branch	Select branch to create job card.
GST Number	Displays the GST number of branch.
Job Card Type	Displays the job card type.
KM Reading	Enter KM reading of vehicle.
General Manager	Select the name of General Manager
Workshop Manager	Select the name of Workshop Manager
Service Advisor	Select the name of service advisor.
Mechanic	Select the name of mechanic.
Customer GSTIN	Displays the customer GSTIN.
Billing Date	Select the billing Date
Repair Type	Select the repair type.

Bay	Select the bay where vehicle is getting serviced.
Coupon No	Enter the coupon number
Source	Select the source.
Campaign	Select the campaign.
Inward Date	Select the inward date
Customer Details	Displays the customer details
Labour Code	Select the labour code.
Labour Name	Displays the labour name.
Labour Description	Displays the labour Description.
SAC	Displays the Services Accounting Code of labour.
Sub Repair Type	Select the sub repair type for the selected labour.
Rate	Displays the rate of the labour
Trade Discount	Enter discount amount, if any.
Mechanic	Displays/Select the name of mechanic.
Status	Select the status of labour. It includes start/pause/completed.
Start Date Time	Displays the start date time based on status.
End Date Time	Displays the end date time based on status.
Supplier	Displays the supplier name if labour is selected as outside labour.
Insurance Amount	Enter the insurance amount if repair type is accidental repair.
Customer Amount	Displays the customer amount if repair type is accidental repair. It calculates automatically based on insurance amount.
CGST%	Displays the CGST% applicable.
CGST	Displays the CGST tax amount.
SGST%	Displays the SGST% applicable.
SGST	Displays the SGST tax amount.
Amount	Displays the total amount of the labour.

If outside labour is selected, then user is required to click outside service check box and fill the relevant details by clicking on **view details** browsing.

ST	Amount	View Details
110.25	1,445.50	...
9.00	118.00	...
		...

Service Details

☒ Outside Service

Supplier

Work Purchase Order

Demand Repair

Sub Demand Repair

Action

FRT

Actual Duration

Under Package

☒ Repeated

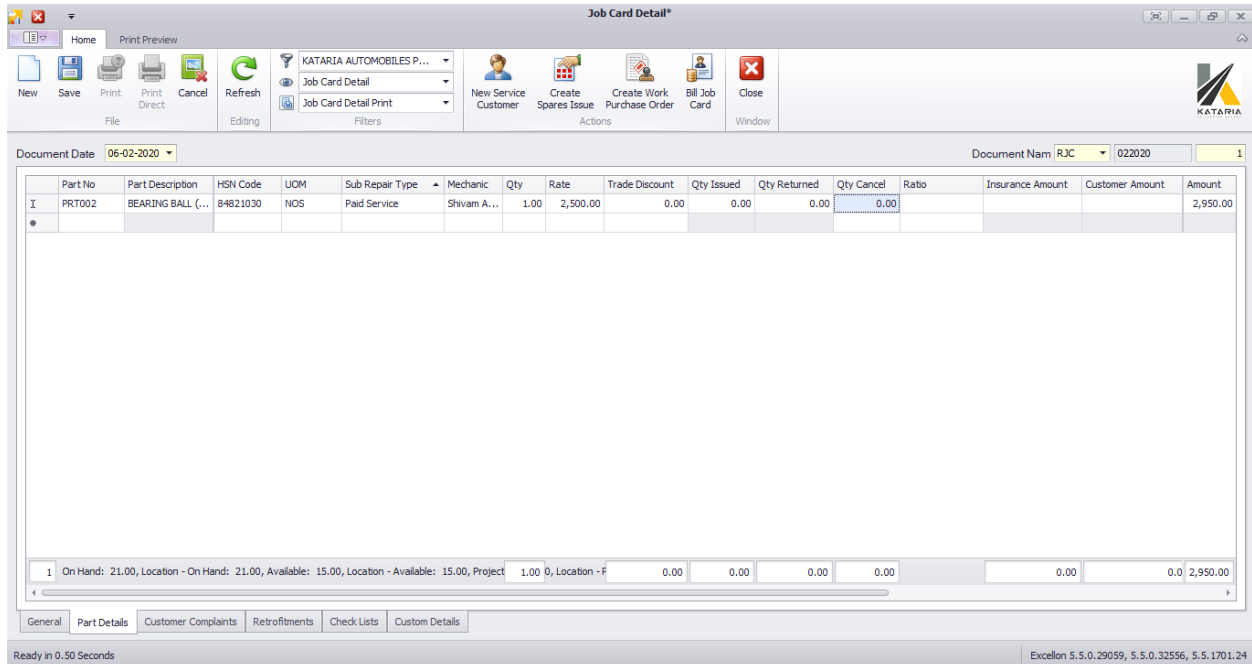
Mechanic/Supplier Allocations

Mechanic/Supplier	Work Allotted Percentage	Status	Start Date Time	End Date Time	Pause Remarks	Specific Job Required
Local Supplier Pvt Ltd	100.00	Started	29-10-2018 06:52 PM			

Click on outside service check box. Select the name of supplier for outside service. Displays the work purchase order number. User can select demand repair, sub demand repair and action.

Field	Description
Mechanic/Supplier	Displays the name of mechanic/supplier.
Work Allotted Percentage	Displays the work allotted percentage.
Status	Select the status of job.
Start Date Time	Displays the start date time based on status.
End Date Time	Displays the end date time based on status.
Pause Remarks	Enter the pause remarks, if any.
Specific Job Required	Enter the specific job required, if any.

User Interface (Parts Details)



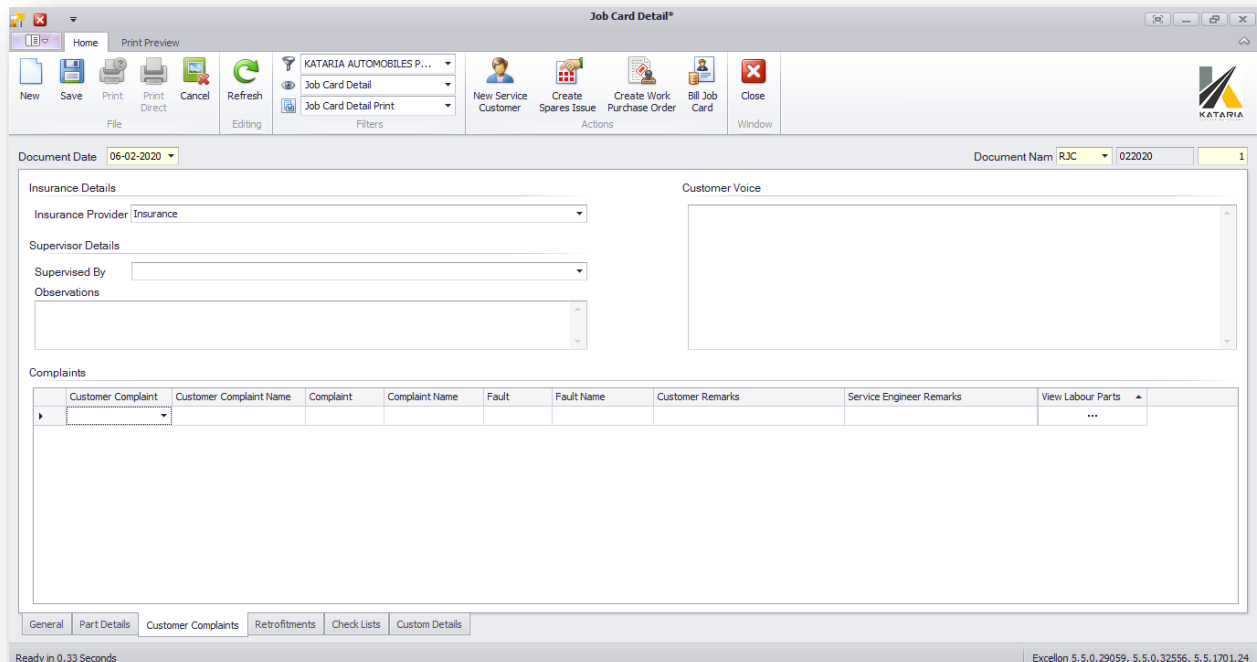
The screenshot shows the 'Job Card Detail*' window. It features a menu bar with 'Home', 'Print Preview', and 'KATARIA AUTOMOBILES P...'. Below the menu bar is a toolbar with buttons for 'New', 'Save', 'Print', 'Print Direct', 'Cancel', 'Refresh', 'Filters', 'New Service Customer', 'Create Spares Issue', 'Create Work Purchase Order', 'Bill Job Card', and 'Close'. The main area contains a table with columns: Part No, Part Description, HSN Code, UOM, Sub Repair Type, Mechanic, Qty, Rate, Trade Discount, Qty Issued, Qty Returned, Qty Cancel, Ratio, Insurance Amount, Customer Amount, and Amount. The table has one row with data: Part No: I, Part Description: PRTO02, BEARING BALL (...), HSN Code: 84821030, UOM: NOS, Sub Repair Type: Paid Service, Mechanic: Shivam A..., Qty: 1.00, Rate: 2,500.00, Trade Discount: 0.00, Qty Issued: 0.00, Qty Returned: 0.00, Qty Cancel: 0.00, Ratio: 0.00, Insurance Amount: 0.00, Customer Amount: 0.00, and Amount: 2,950.00. Below the table is a summary bar with fields for 'On Hand', 'Location - On Hand', 'Available', 'Location - Available', 'Project', and 'F'. The status bar at the bottom indicates 'Ready in 0.50 Seconds' and 'Excellon 5.5.0.29059, 5.5.0.32556, 5.5.1701.24'.

Field Description

Field	Description
Part No	Select the part no. from grid require for vehicle service.
Part Description	Displays the part description
UOM	Displays the UOM of part.
HSN Code	Displays the HSN code of the part.
Mechanic	Displays the name of the mechanic.
Qty	Enter the number of qty required.
Sub Repair Type	Select the repair type for part.
Rate	Displays the rate of a part.
Discount	Enter the discount, if any.
Qty Issued	Displays the number of issued qty.
Qty Returned	Displays the number of returned qty.
Qty Cancel	Enter the number of cancel qty.

Insurance Amount	Enter the insurance amount if repair type is accidental repair.
Customer Amount	Displays the customer amount if repair type is accidental repair. It calculates automatically based on insurance amount.
CSGT%	Displays the CGST% applicable on selected part.
CGST	Displays the CGST tax amount of selected part.
SGST%	Displays the SGST% applicable on selected part.
SGST	Displays the SGST tax amount of selected part.
Amount	Displays the total amount of part.

User Interface (Customer Complaints)



The screenshot displays the 'Job Card Detail*' application window. The interface includes a top menu bar with options like New, Save, Print, and Cancel. Below this is a toolbar with icons for various actions. The main area is divided into several sections: 'Insurance Details' with a dropdown for 'Insurance Provider', 'Supervisor Details' with a dropdown for 'Supervised By', and 'Observations' with a text area. To the right is a 'Customer Voice' section with a large text area. At the bottom, there is a 'Complaints' section with a table that has columns for 'Customer Complaint', 'Customer Complaint Name', 'Complaint', 'Complaint Name', 'Fault', 'Fault Name', 'Customer Remarks', 'Service Engineer Remarks', and 'View Labour Parts'. The 'Customer Complaint' column has a dropdown menu. The bottom status bar shows 'Ready in 0.33 Seconds' and 'Excellon 5.5.0.29059, 5.5.0.32556, 5.5.1701.24'.

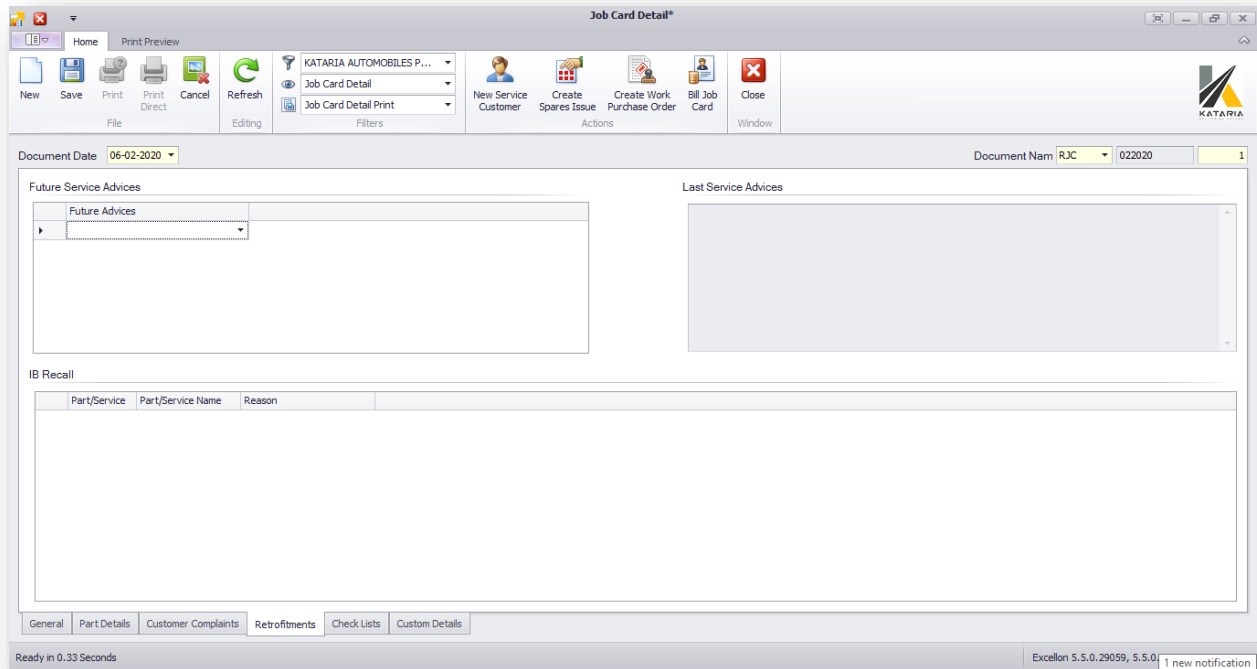
Field Description

Field	Description
Insurance Provider	Select the name of insurance provider.
Supervised By	Select the name of person who is supervising.

Observations

Enter the observations.

User Interface (Retrofitment)



The screenshot displays the 'Job Card Detail*' window. The top menu bar includes 'Home', 'Print Preview', and 'File'. The 'File' menu contains 'New', 'Save', 'Print', 'Print Direct', 'Cancel', and 'Refresh'. The 'Actions' menu includes 'New Service Customer', 'Create Spares Issue', 'Create Work Purchase Order', 'Bill Job Card', and 'Close'. The 'Filters' menu includes 'Job Card Detail' and 'Job Card Detail Print'. The 'Window' menu is also present. The main area is divided into several sections: 'Document Date' (06-02-2020), 'Document Name' (RJC), and 'Document Number' (022020). Below these are 'Future Service Advices' and 'Last Service Advices' sections. The 'Future Service Advices' section has a dropdown menu for 'Future Advices'. The 'Last Service Advices' section is a large empty box. Below these is the 'IB Recall' section, which contains a table with columns 'Part/Service', 'Part/Service Name', and 'Reason'. At the bottom, there are tabs for 'General', 'Part Details', 'Customer Complaints', 'Retrofitments', 'Check Lists', and 'Custom Details'. The status bar at the bottom indicates 'Ready in 0.33 Seconds', 'Excellon 5.5.0.29059, 5.5.0', and '1 new notification'.

If user want to record the future advice for the vehicle, then the same can be entered in future service advices column. If the vehicle is found under retrofitment, in this case the part and service with reason can be seen in retrofitment column. Last Service Advices can be seen if it records in earlier created job card for same vehicle.

Document Name
RJC
CL011819
123

Document Details

Status
Ready For Invoice

Customer Paid Amount
35.4

Job Card Status

Change Job Card Status
☒ Ready For Bill
Ready For Bill Date
30-10-2018

Job Summary

	Service	Parts
Paid	0/0	0/0
Claim	1/1	0/0
Expense	0/0	0/0

Expected And Actual Date/Time Details

	Expected	Actual
Started On	26-10-2018 06:34 PM	26-10-2018 06:35 PM
Ended On	26-10-2018 08:34 PM	26-10-2018 06:35 PM

Model Details
Registration No : ENGINE00021
Chassis No : CHASSIS00021
Engine No : ENGINE00021
Model : Jawa - 001
Model Name : JAWA 350 BLACK
Sale Date : 01-10-2018

Customer Details
Mr. Shankar Deshpande(981651796284)
Mobile : 9856656565
Email : shankar@gmail.com
Nagpur
Nagpur 440006
Maharashtra India

Amount Details

	Estimated	Actual
Service(Paid)	0.00	35.40
Part(Paid)	0.00	0.00
Service(Claim)	236.00	200.60
Part(Claim)	0.00	0.00
Service(Expense)	0.00	0.00
Part(Expense)	0.00	0.00
Customer Paid Amount		35.4

Date/Time Details
Delivered Date
Billed Date
Inward Date
26-10-2018 06:34 PM

After the completion of vehicle service, it is required to make the job card for “Ready for Bill”. Hence click on job card status button & check on “Ready for Bill” box and then user can proceed for billing the job card.

ABBREVIATIONS

Abbreviation	Description
UOM	Unit of Measurement
HSN	Harmonized System of Nomenclature
SAC	Services Accounting Code
GST	Goods and Service Tax
POS	Place of Supply
GSTIN	GST Identification Number
CGST	Central Goods & Services Tax
SGST	State Goods & Services Tax
IGST	Integrated Goods & Services Tax

-End of Document-