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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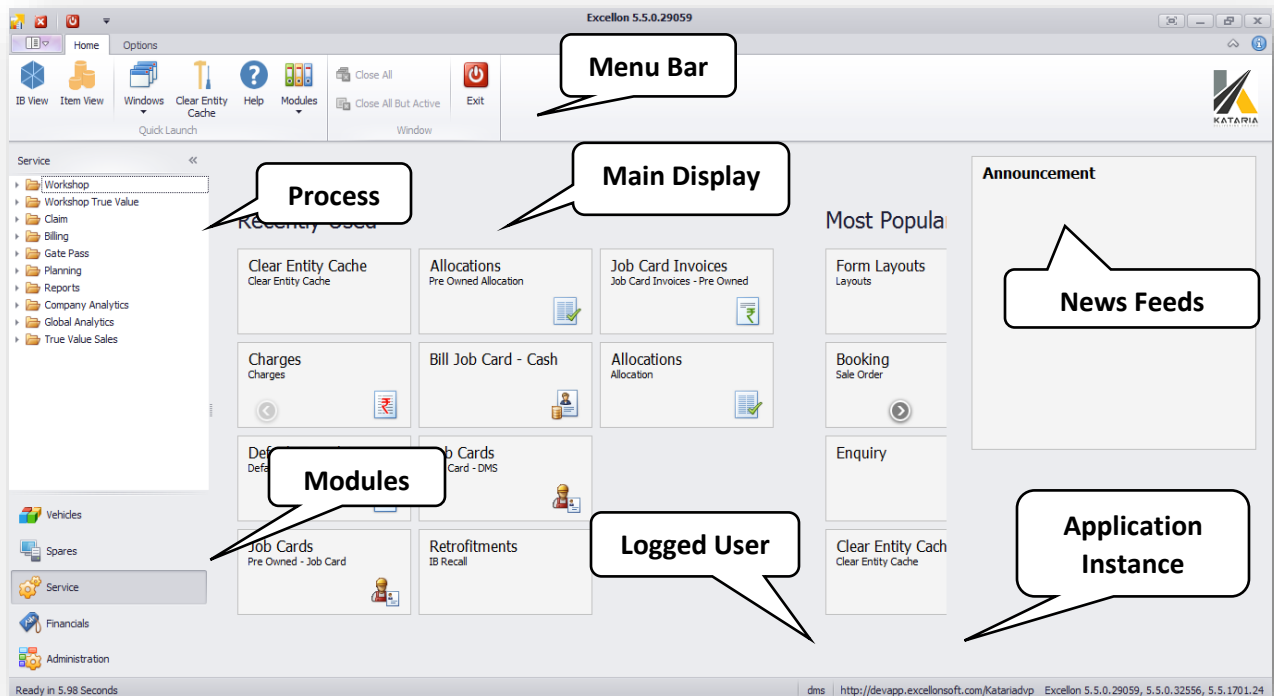South Ambazari Road, Nagpur – 440022 (India)

E-mail

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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.
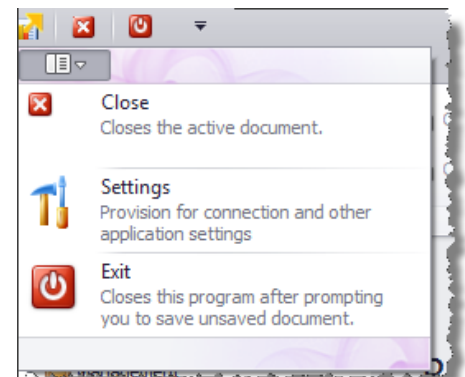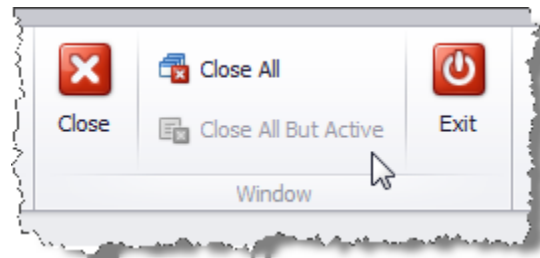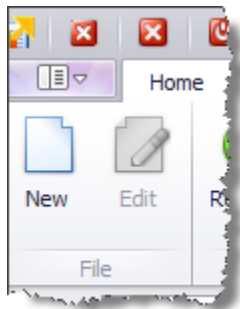
GENERAL

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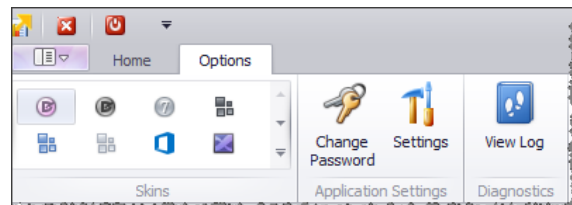
> [Note]The menu controls change as per the module and the currently selected process. Refer to the Excellon 5.5 User Guide for details of menu control for each window.

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.
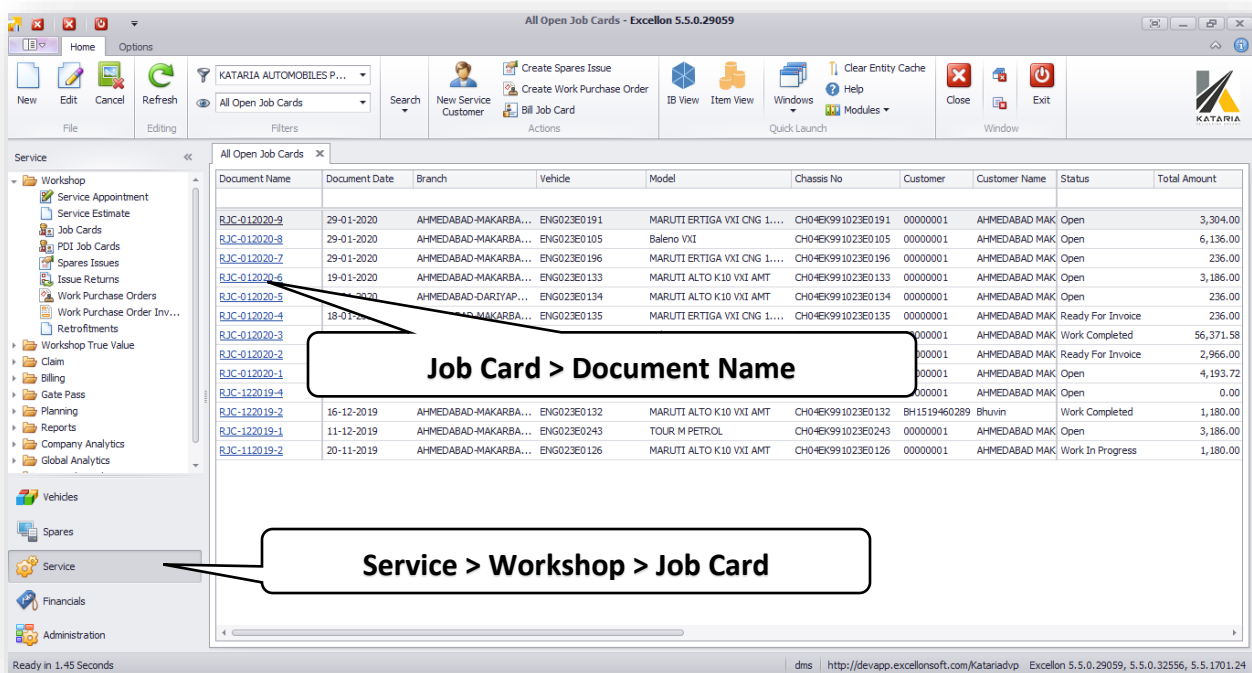
OVERVIEW

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**

User Interface (General)

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.

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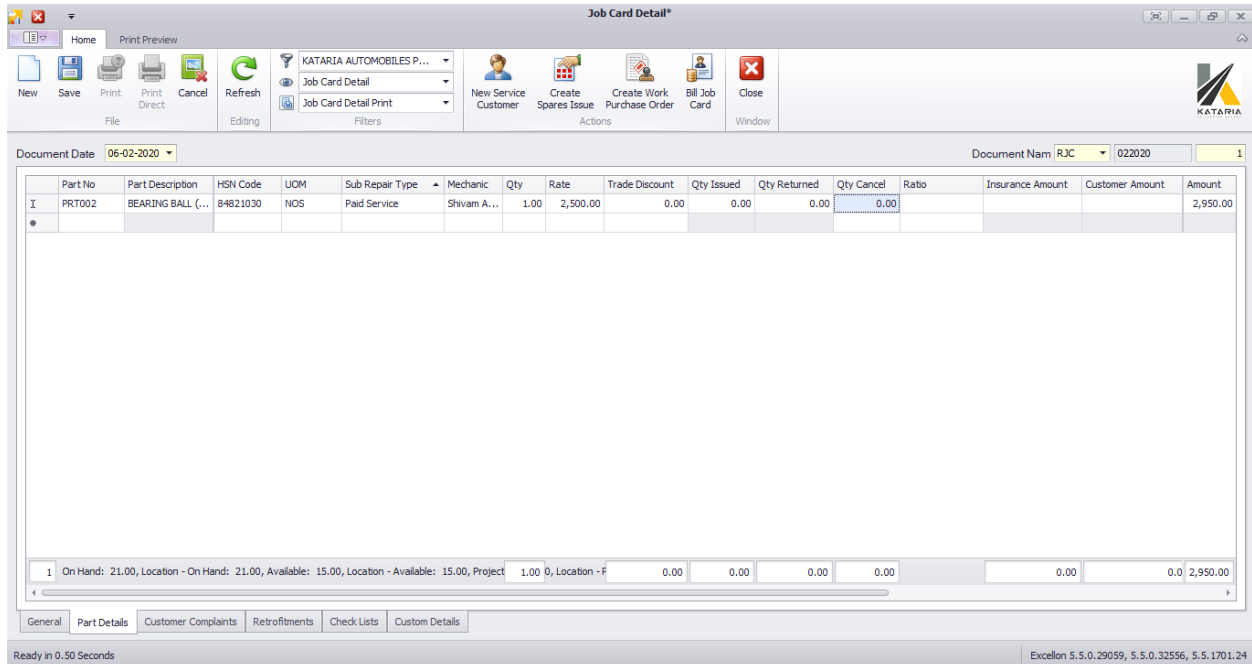
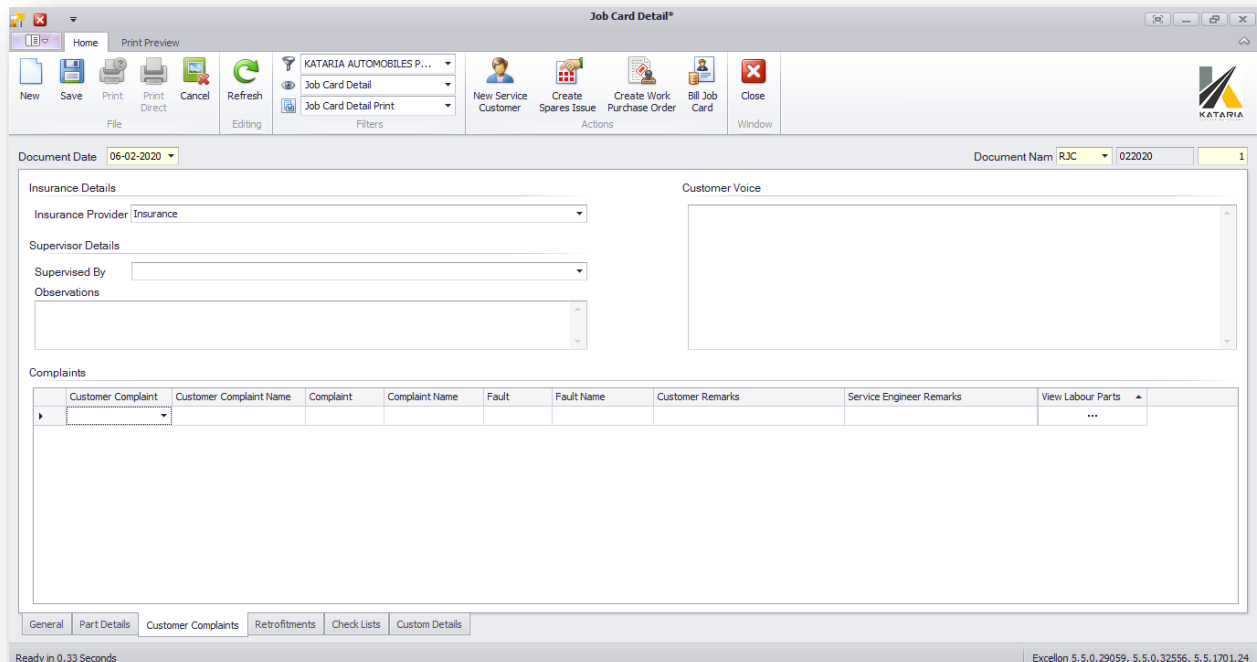| Field	Description
Mechanic/Supplier	Displays the name of mechanic/supplier.
Work Allotted Percentage	Displays the work allotted percentage.
Status	Select the status of job.
Start Date Time	Displays the start date time based on status.
End Date Time	Displays the end date time based on status.
Pause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

User Interface (Parts Details)

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)

Field Description

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

User Interface (Retrofitment)

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.

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.

ABBREVATIONS

Abbrevation	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

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