# BODYSHOP MANAGEMENT SOLUTIONS LTD - TRAINING RECORD



| Customer: | Trainee: |
|---|---|

**Courtesy Vehicles**
- ☐ Create & Amend Courtesy Cars
- ☐ Allocating Courtesy Cars to Jobs
- ☐ Booking Courtesy Cars back in
- ☐ Availability Report
- ☐ Maintain Damage Records
- ☐ Maintain Service Records
- ☐ Diary Lookup
- ☐ Courtesy Vehicle Search
- ☐ Production of Courtesy Car Agreement Form
- ☐ Courtesy Car Utilisation Report

**Estimating**
- ☐ Create New Job Shell
- ☐ Update Job
- ☐ Job Notepad
- ☐ Estimate Job
- ☐ Export Estimate – ADX / GMX
- ☐ Import Estimate – ADX / GMX / Other_____
- ☐ Print Estimate
- ☐ Print Jobsheet/Parts List
- ☐ Standard Letters
- ☐ Write Off Letter
- ☐ Customer Receipt
- ☐ Job Enquiry

**Parts**
- ☐ Parts Orders
- ☐ Orders Received
- ☐ Parts Returns
- ☐ Parts Control Enquiry
- ☐ Outstanding Parts Report
- ☐ Outstanding Credit Note Report
- ☐ Allocate Credit Notes
- ☐ Parts Enquiries
- ☐ Supplier Maintenance
- ☐ Job Notepad

**SMS Text Messages**
- ☐ Event Driven SMS Text Messages
- ☐ Send SMS To Customer
- ☐ View SMS Text Messages

**Purchase Ledger Programs**
- ☐ Invoices and Credits Awaiting Approval
- ☐ Invoice and Credit Approval
- ☐ Transfer
- ☐ Rejected Invoices and Credits

**TRIM**
- ☐ Use of Barcode Reader – Workshop
- ☐ Job Complete – Workshop Controller
- ☐ On Screen Barcoder
- ☐ Job Enquiry & Update
- ☐ TRIM Status Enquiry
- ☐ Manual Clock On
- ☐ Manual Clock Off
- ☐ Attendance Report
- ☐ PAYE Analysis Report
- ☐ Employee On Site Report
- ☐ Manual Time Posting

**Invoicing**
- ☐ Payment Details
- ☐ Price Parts and Labour
- ☐ Produce Invoices
- ☐ Cancel/Credit Job Invoice
- ☐ Special Invoicing and Credits
- ☐ Printing Copy Invoices
- ☐ Printing Invoice Tray
- ☐ Job Notepad
- ☐ Statements & Balance Listings
- ☐ Mark Paid Invoices
- ☐ Customer Receipt

**Admin Related Reports**
- ☐ Vehicles Due In
- ☐ Vehicles Due Out
- ☐ Vehicles On Site

**Periodic Routines**
- ☐ Day End Routine
- ☐ Sage Link
- ☐ Month End Routine

**Other – Please Specify**




| Signed (on behalf of Customer): | Date: |
|---|---|
| Signed (on behalf of BMS): | Date: |

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**Diary**
- [ ] Show Diary
- [ ] Add Diary Entry
- [ ] Delete Diary Entry
- [ ] Who's Off this Day
- [ ] View Additional Diaries
- [ ] Adding Diary Entries via Job Notes
- [ ] Special Diary Entries
- [ ] Diary Templates
- [ ] Diary Filter
- [ ] Print Diary

**HR Module**
- [ ] Configure Leave Year
- [ ] Add/Edit Bank Holidays
- [ ] Workshop Calendar
- [ ] Create Employee Calendar
- [ ] Employee Admin
- [ ] Allocating Employee Leave
- [ ] Printing Calendars
- [ ] Employee Leave Report
- [ ] Affect of HR on TRIM and Reports

**Booking System**
- [ ] View Historical Workshop Stats
- [ ] Affect of HR Module on Available Hours
- [ ] Show Booking Calendar
- [ ] Create/Amend Booking
- [ ] Deleting a Booking
- [ ] Putting a Job On Hold/Releasing a Job
- [ ] Booking Report
- [ ] Booking Exception Report

**Stock Control**
- [ ] Create & Amend Stock Item
- [ ] Supplier Accounts
- [ ] Stock Listing
- [ ] Stock Valuation Report
- [ ] Stock Orders
- [ ] Stock Deliveries
- [ ] Stock Issues
- [ ] Stock Returns
- [ ] Stock Activity Reports
- [ ] Stock Issue Reports
- [ ] Counter Sales

**Management Reporting**
- [ ] Courtesy Car Utilisation
- [ ] Courtesy Car Availability
- [ ] Average Repair Analysis
- [ ] Estimate Analysis
- [ ] Job Costing
- [ ] Job Labour Analysis
- [ ] Job Duration
- [ ] Production
- [ ] Sales Analysis
- [ ] Full WIP
- [ ] Full WIP (Costs)

- [ ] T/P Sales Analysis
- [ ] Outstanding Parts Report
- [ ] Outstanding Credit Note Report

- [ ] Employee Attendance
- [ ] PAYE Analysis
- [ ] Employee On Site
- [ ] Completed Jobs Not Invoiced
- [ ] Vehicles Ready to Start
- [ ] Lost Business Report
- [ ] Vehicle Due In Report
- [ ] Vehicle Due Out Report
- [ ] Vehicle On Site Report
- [ ] Job Source Analysis report
- [ ] Write Off's by Job Source Code

- [ ] Supplier Discount Analysis
- [ ] Supplier Turnover Report

**Other – Please Specify**

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|---|---|
| Signed (on behalf of BMS): | Date: |