

Invoicing a Job - with T/P Code

- Ensure that the job is completed - see separate sheet.
- Select Invoicing.
- Select Bodyshop Invoicing.
- Select Payment Details.
- The search screen will then be displayed.

Vehicle Registration	RJ020UH	>>	FORD	MONDEO
Estimated, Short Name	BMS	>>	BODYSHOP MANAGEMENT SOLUTIONS,REGUS HOUSI	
Excess, Short Name	BMS	>>	BODYSHOP MANAGEMENT SOLUTIONS,REGUS HOUSI	
Insurer, Short Name	NORWI	>>	NORWICH UNION,REPAIRER PAYMENT TEAM, PO BO	
Job Number	A09020187	Booked	<input checked="" type="checkbox"/>	Status <input checked="" type="checkbox"/> COMPLETED
Telephone Nr	01322 305405	Estimate Date	16/04/2009	
Contact Name		Write Off Date		
Drivers Name		Inspection Date	14/04/2009	
Policy Nr	890729	Sat. Note Date		
Claim Nr	890729/2	Invoice Date		
Engineers Ref		Date Recovered		
Order Nr		Estimated By	BKIL	
Excs/VAT Inv Nr		Entered By	JANM	
Insurers Inv Nr		Related Job/Ref		
Collection Ref		Hire/Loan Vehic'	AE58MDY	
T/P Assessment		Estimate Type	<input type="checkbox"/>	
Job Held		Key Tag	34	

- If the job you want is NOT the one displayed, click the door and search again. It is possible to use any field on the screen to search. In this example we have used the vehicle registration number.




Vehicle Registration	RJ020UH	
Estimated, Short Name		
Excess, Short Name		
Insurer, Short Name		
Job Number		Booked <input type="checkbox"/>


- Double click on the required job to select.

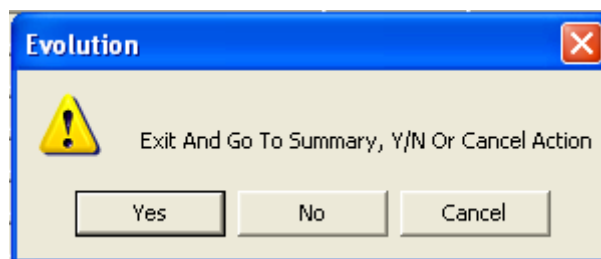
Job Nr	Date	Vehide	Estimated For	Value	Status	A	E	B	P	T	I
A09020187	16/04/09	RJ020UH,MONDEO	BODYSHOP MANAGEMEN	792	InProg's	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Click the tick to accept the displayed job.

Estimate For	Short Name	<input type="text" value="BMS"/>	Account Code	<input type="text" value="A28252"/>	TP Code	<input type="text"/>
<input type="text" value="BODYSHOP MANAGEMENT SOLUTIONS, REGUS HOUSE, ADMIRALS PARK, DARTFORD, DA2 6QD"/>						
Vehicle Detail	<input type="text" value="RJ020UH, FORD, MONDEO, ,"/>					
Drivers Name	<input type="text"/>					
Customer Account	Short Name	<input type="text" value="BMS"/>	Account Code	<input type="text" value="A28252"/>	TP Code	<input type="text"/>
<input type="text" value="BODYSHOP MANAGEMENT SOLUTIONS, REGUS HOUSE, ADMIRALS PARK, DARTFORD, DA2 6QD"/>						
Job Insured	<input type="checkbox" value="Y"/>	Recharge VAT	<input type="checkbox" value="Y"/>			
Insurer Account	Short Name	<input type="text" value="NORWI"/>	Account Code	<input type="text" value="E15373"/>	TP Code	<input type="text"/>
<input type="text" value="NORWICH UNION, REPAIRER PAYMENT TEAM, PO BOX 93, SURREY STREET, NORWICH, NR1 1SW"/>						
Customer VAT Liability %Age	<input type="text" value="100.00"/>	Invoice & Job Discounts				
Betterment Contribution	<input type="text" value="0.00"/>	VAT Rate	<input type="text" value="1"/>	Discount %Age	<input type="text" value="0.00"/>	
Excess Contribution	<input type="text" value="500.00"/>	Customer Pay Method	<input type="checkbox"/>	Discount Type	<input type="text" value="J"/>	

- Check that the Customer account, Insurance account, VAT, Betterment and Excess details are correct. Amend as required.
- Click the tick twice to save and exit to the search screen.
- Click the tick again to re-select the job.
- Check that the parts are correctly priced (retail and trade where applicable) and that all are fully delivered (see the status column). To amend any details click  the amend button.
- Amend as required. Then click the tick twice to save the details and move to the next screen.
- Click the door to exit.



- Click yes to view the summary.

(TOTALS.PER)		JOB SUMMARY				Est/Job Nr		A09020187
? Description	S	Agreed	WShop	Actual	Value	Disc	Nett	VAT
NEW PARTS					240.00	0.00	240.00	1
PAINT					189.45	0.00	189.45	1
STRIP OUT	C	0.90	0.90	0.00	31.05	0.00	31.05	1
NEW PANELWORK	C	2.00	2.00	0.00	69.00	0.00	69.00	1
REPAIR & RESHAPE	C	1.20	1.20	0.00	41.40	0.00	41.40	1
PAINT WORK	C	2.00	2.00	0.00	69.00	0.00	69.00	1
REFIT	C	1.80	1.80	0.00	62.10	0.00	62.10	1
VALETING & QA CHECKS	C	0.50	0.50	0.00	17.25	0.00	17.25	1
C/V FOR 8 DAYS (COSTED 0.00)					0.00	0.00	0.00	1
		8.40	8.40	0.00				

Excess Value	500.00	At Rate	1	0.00	Nett At Rate	1	719.25
Betterment Value	0.00	At Rate	1	0.00	Nett At Other Rates		0.00
Note					Inv Disc		
Labour Total Hours	8.40	W/S Hours Recovery			Total NETT		719.25
Pre Discount Labour	289.80	Rate		34.50	Total VAT		107.89
Fixed Price Labour	0.00	Invoiced Effective			Gross Total		827.14
Invoice Labour Value	289.80	Rate		34.50			

- Check the figures shown against your authority. If required, it is possible to double click any of the lines shown to go back to that section of the job and amend it.



- To change the Labour Rate click



- To change the Labour Discount click

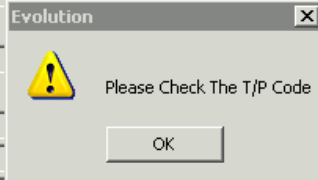
- When happy with the figures, click the door to exit and return to the summary screen.
- Click the tick again to re-select the job.


Job References & Contacts

Order Number	<input type="text"/>		
Policy Number	<input type="text" value="890729"/>		
Engineer's Reference	<input type="text"/>		
Claim Number	<input type="text" value="890729/2"/>		
Insurer's Contact	<input type="text"/>		
Driver's Name	<input type="text" value="BODYSHOP MANAGEMENT SOLUTIONS"/>		
Job Contact	<input type="text"/>		
Contact Telephone	<input type="text" value="01322 305405"/>		
Vehicle Return Date	<input type="text" value="23/04/2009"/>	Return Time	<input type="text" value="14:00"/>
Courtesy Car	<input type="checkbox"/> Y	<input type="text" value="AE58MDY"/>	
From	<input type="text" value="16/04/2009"/>	<input type="text" value="A"/>	Time Out <input type="text" value="08:00"/>
To	<input type="text" value="23/04/2009"/>	<input type="text" value="P"/>	Time Back <input type="text" value="14:00"/>
Mileage Back	<input type="text" value="1843"/>		

- Ensure that you have completed all required references and contacts as well as the Vehicle return date and courtesy car details.
- Click the tick to accept.


Job Number	A09020187	Vehicle	RJ020UH, FORD, MONDEO, ,	
Estimated For	BODYSHOP MANAGEMENT SOLUTIONS, REGUS HOUSE, ADMIRALS PARK,		Insured	Y
Bill To	BODYSHOP MANAGEMENT SOLUTIONS	Invoice Number		
BMS	REGUS HOUSE	Invoice Date	16/04/2009	
A28252	ADMIRALS PARK	Invoice Due Date	16/04/2009	
	DARTFORD	T/P Analysis Code	RETA	
Override Delivery Address	N	Nom. Acc / Dept		
		Customer Pay Method		
		Amount %Age/Type	00.00 J	
Bill To	NORWICH UNION	Invoice Number		
NORWI	REPAIRER PAYMENT TEAM,	Invoice Date	16/04/2009	
E15373	SURREY STREET	Invoice Due Date	31/05/2009	
	NORWICH	T/P Analysis Code	RETA	
Override Delivery Address	N	Nom. Acc / Dept		
		Cust. VAT Liability	100.00	
		Customer Excess	500.00	
		Customer Betterment	0.00	

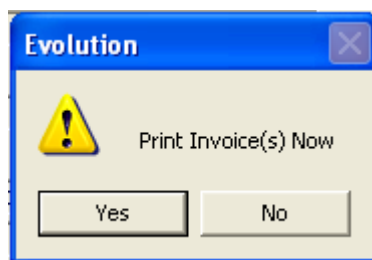


- Click Ok to Acknowledge the reminder.
- Click the Amend button .
- Click into the T/P Analysis Code box.

Invoice Due Date	16/04/2009
T/P Analysis Code	RETA
Nom. Acc / Dept	
Customer Pay Method	



- Enter the required Analysis Code or click  to display a list of available codes. Double click on the required code.
- Click the tick again to proceed with production of the invoice.



- Click Yes to print or click No to exit without printing.
- After Clicking Yes to print, the document(s) will be printed to screen using Adobe Acrobat. From here it can be printed or emailed as required.