



# | WORKSHOP MANAGEMENT

WORLDWIDE BUSINESS SOLUTIONS

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It caters for a wide range of products and industries, from large industrial equipment to consumer electronics companies, who are providing a service either through dealers or directly to the end user. In addition it is workflow enabled to allow the user to define the number and sequence of steps (sub status's and their dependencies) to be used.

Workshop Management enables the logging and subsequent tracking of both job and equipment from the original request for repair through transit to the repair depot, estimate/quotation repair and QA, through to the billing and return of goods. In addition credit processing for returned goods based on original sale, and ownership transferred to the company together with the required stock movements, are catered for.

Flexible billing processes allow for variable and fixed price jobs and estimates. Job price editing allows charge tailoring visibility of costs and margins. Pro-forma invoices can be produced for non-account customers and selective invoicing on demand also allows for counter collections.

Workshop Management fully complements System21 Service Management , both of which can run side by side using the same data structure. All the features available in Service Management contracts are also available to Workshop Management and are fully integrated with System21 Financials and Inventory Management.

### KEY FEATURES/BENEFITS

- integrated with other System21 applications
- supports multiple companies
- pre-booked calls are handled by: date and time booked; transport method; estimated transit time, arrival date time; pre-book batching; allocation of job number (RMA number)
- jobs booked in by job number. Batch number (bulk receipts), customer account/search
- details include: condition reporting (equipment and accessories); pre-booked or direct (carry in ) jobs; IRIS coding system; response time to repair, optional requested date and time for repair completion; warranty checking; repeat repairs are flagged; date of purchase details; credit request and reason code; estimate quotation flag

**System21**

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- job selection by user-defined sub status to provide functions such as: put away lists; pick for workshops; team job selection (bench/soak test/QA etc); estimate/quotation (sent/await reply etc); information required; waiting parts (held, shipped); credit processing; insurance claim
- escalation
- engineer diary
- engineer and machine messages
- multiple reports per job (hours, materials, miscellaneous costs/charges per task)
- bench stock availability/location
- links to Inventory Management and Distribution Requirements Planning for usage, ordering and auto replenishment
- IRIS reporting against time and parts
- quotation: fixed price repairs defaulted from product group, sub group, model
- estimate: forecast repair charge, can vary to maximum percentage ceiling
- economic repair calculation based on: cost price for warranty; selling price for customer
- supports multiple versions of quote/estimate
- job charges decided from job category (e.g. warranty) and equipment status (e.g. extended cover)
- pro forma invoicing
- job price with full visibility of cost, charge and margin
- invoicing in batch or selective (counter collection)
- production of zero priced invoices if selected
- goods received into predefined stockroom
- owner changed from dealer/end user to company account
- credit matched with original order or price list
- Advanced Sales Order Processing transaction generated to adjust stock and sales analysis
- selection of jobs for dispatch by user-definable sub status for:
  - internal inter company transfer
  - external inter company transfer
  - third party
  - write off
  - return to manufacturer
- production of advice note for shipping
- consignment note (batch summary of multiple advice notes)
- warranty reclaim
  - input of dealer claims for warranty re-imburement
  - claim validation and retention of original claim details
  - agreement or rejection letter
  - automatic generation of Advanced Sales Order Processing credit note.

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In our rapidly changing real-time e-business world, enterprises looking for “The Power to Thrive™” need look no further than Geac Enterprise Solutions™. With almost 40 years of experience in the industry, we offer feature-rich, reliable software and solid system expertise and creativity that let you drive your organization to success. We also have skilled, intelligent people who can help you maximize your existing technologies as well as utilize today’s e-business opportunities.

Furthermore, we can focus on helping customers like you get the most from your technology investments. How? By adding value to our core software applications and surrounding them with complementary solutions that truly allow you to thrive in today’s mission-critical, e-commerce marketplace.