

WorkPoint

Easy job management

WorkPoint provides job management from estimate to final invoice, integrating with Sage for stock control of WIP



To simplify job management by replacing the paper trail and making sure stock is accounted for:

- Labour reporting
- Partial, trial and final invoicing
- Full history of works
- WIP stock management
- Job scheduling
- Off-line estimating
- Account allocation

Supporting job enquiries

WorkPoint provides the information needed to answer enquiries at the touch of a button. It's simple to look up parts or a standard job from the library – big time savings and better customer service.

Estimates are easily produced in the system, printed or attached as a pdf to an email and converted to live jobs.

The complete process

From initial customer enquiry through to the final invoice; WorkPoint helps with the management of the whole process. Estimates can be kept before they are accepted and an active job has time and parts added until it's ready to invoice.

WorkPoint reflects the day-to-day running of a workshop and includes trial invoices and partial invoices for long-running jobs. The system helps to schedule jobs and manage resources for maximum efficiency by type, area, person etc.

Managing the job

The same techniques used on an estimate are used on a job itself. More items can be added, or existing items edited to an active job and it can be invoiced at any point.

Price and quantity are easily edited so the list price, discounted or final price changed.

'Parts Groups' help by allowing the production of an ad-hoc group of parts to show as a single line.

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Reporting

There are some useful reports on individual jobs and across multiple jobs such as:

- Customer Parts List
- Items on a job that can be shown to customers, with list price, discount but no costs
- Jobs by Start or Required Date
- One Line Job List
- Summarising active jobs, their progress and status, comparing estimate against actual
- Workshop Final Invoices Raised
- Select by daily, weekly, monthly accounting period or date range

ABC Leisure

'The tracking of our engineering operation from quotation through to invoice is a possibility which we are looking forward to fully utilising in the near future with WorkPoint.'

Service history

Clear access to full service history means that the information is available to reference and what's so useful is that you can use the data to send service reminders to customers through WorkPoint.

The screenshot shows the 'Estimate: 15' interface. It includes a 'Details' tab with fields for Title (Boat repair), Location (West dock), and Type (General). There are also fields for Order no (25461234), Required Date (03/12/2015), Start Date (02/12/2015), and Sales Analysis (General). A 'Details' section contains instructions: 'Take the boat out of the water', 'Clean up area of damage', 'Repair hull, fair outside, seal & match paint', and 'Make good inside'. At the bottom, there are buttons for 'Account', 'Unit', 'Service Hist', 'Print Estimate', 'Email Estimate', 'Value', 'Est. Duration', 'Save', and 'Cancel'.

WorkPoint™ Job: 20

The screenshot shows the 'Job: 20' interface. It includes a 'Details' tab with fields for Title (Fit new Galley), Location (Key side), and Type (Z General). There are also fields for Order no (007), Required Date (03/10/2017), Start Date (03/09/2017), and Sales Analysis (G General). A 'Details' section contains instructions: 'Prepare area for new Kitchenette area.', 'Install gas Cooker 5 ring.', 'Flush surface curved ends and fid's', and 'Colour to be chosen by owner.' A central window displays job details for 'Job No: 20', including Unit Name (Great Swan), Title (Fit new Galley), Location (Key side), and Job Type (Z). It also shows a 'Description of work required' and a 'Parts used' table with columns for Part No, Description, and Quantity. At the bottom, there are buttons for 'Account', 'Unit', 'Service Hist', 'Std Job', 'Value', and 'Close'.

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