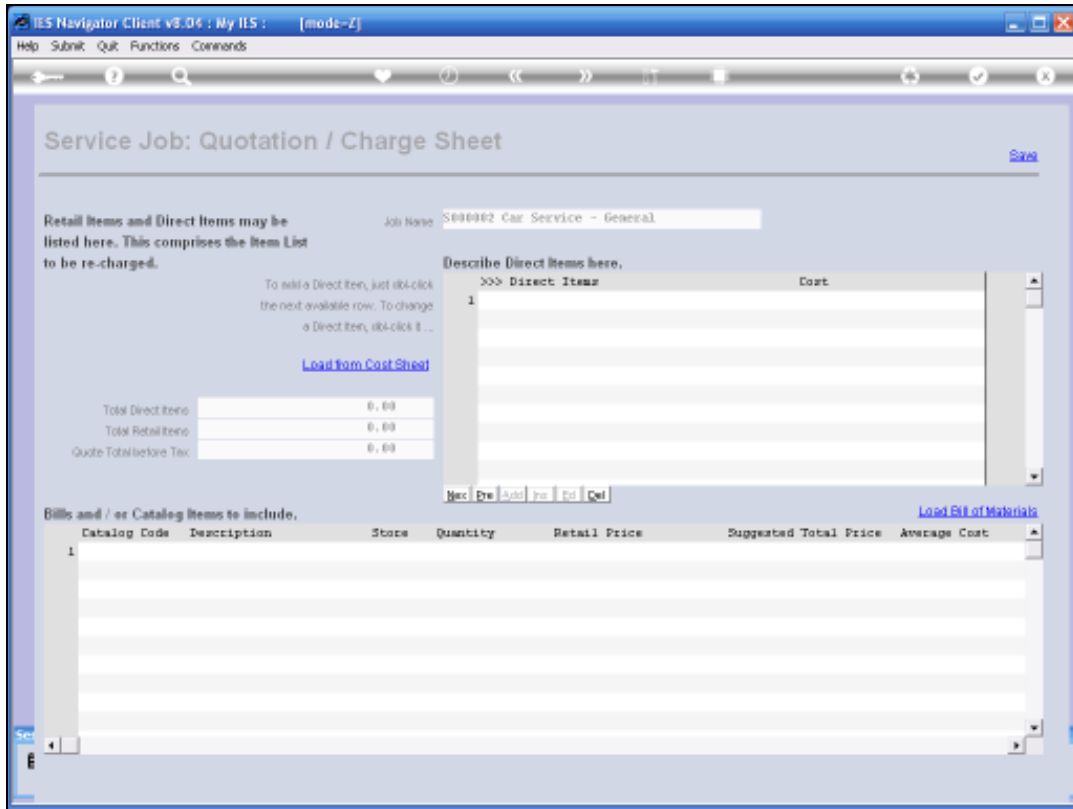


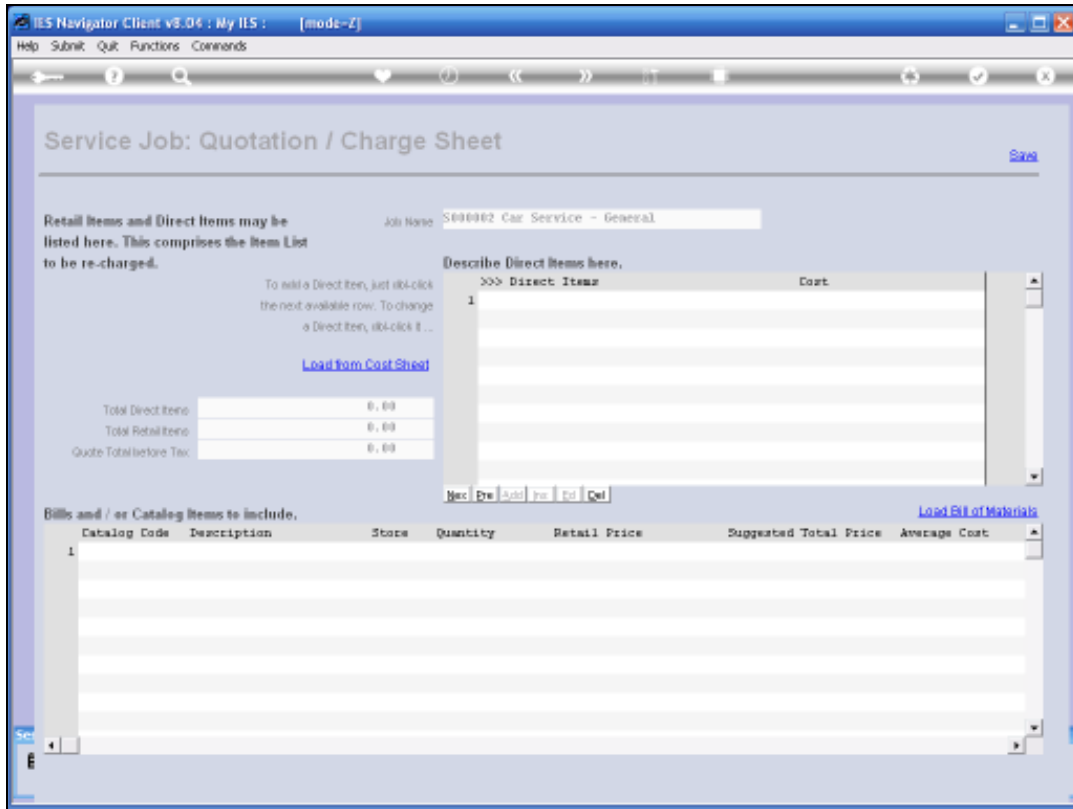
Slide 1
Slide notes:

We are busy working with a Current Service Job and in this session we are looking at the Charge Sheet which comprises that List of Items that we are Charging to the Customer. Of course every Service Job must be Re-Charged. Whether to an Internal or External Customer.



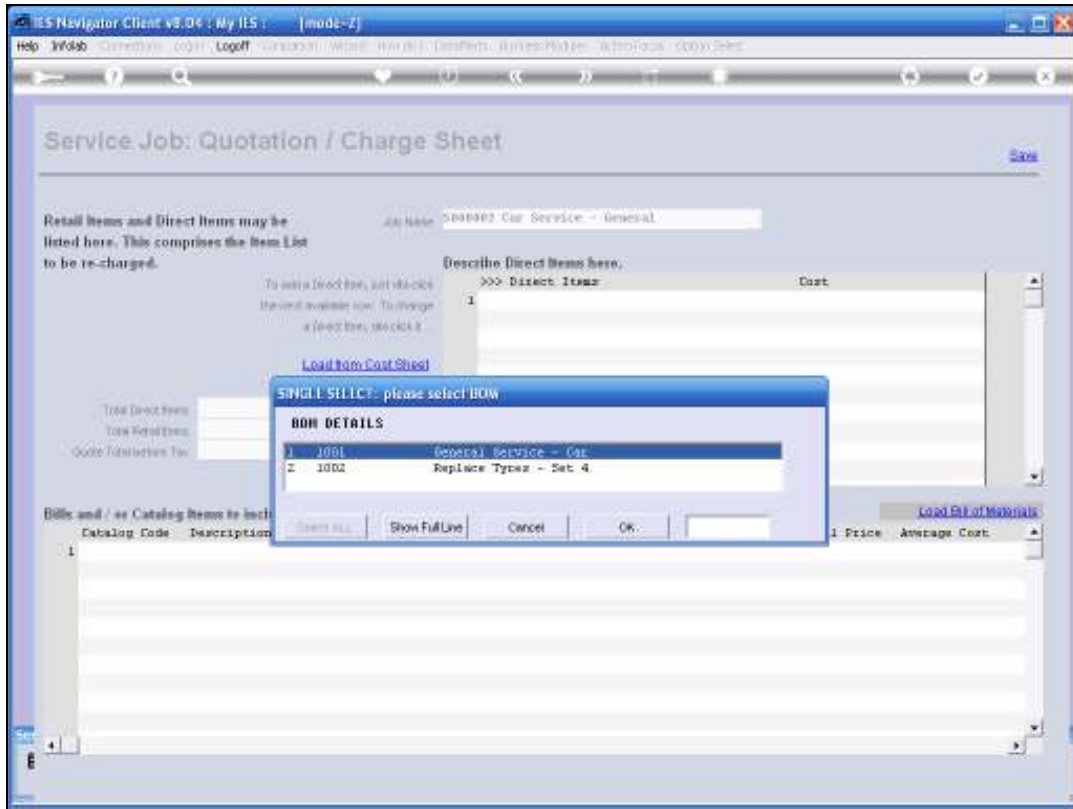
Slide 2
Slide notes:

So, when we choose the Charge Sheet, the System Opens the Charge Sheet and we can work on this Charge Sheet multiple times. In other words it is not necessarily fixed and we can actually add to the List as we continue with the Job.



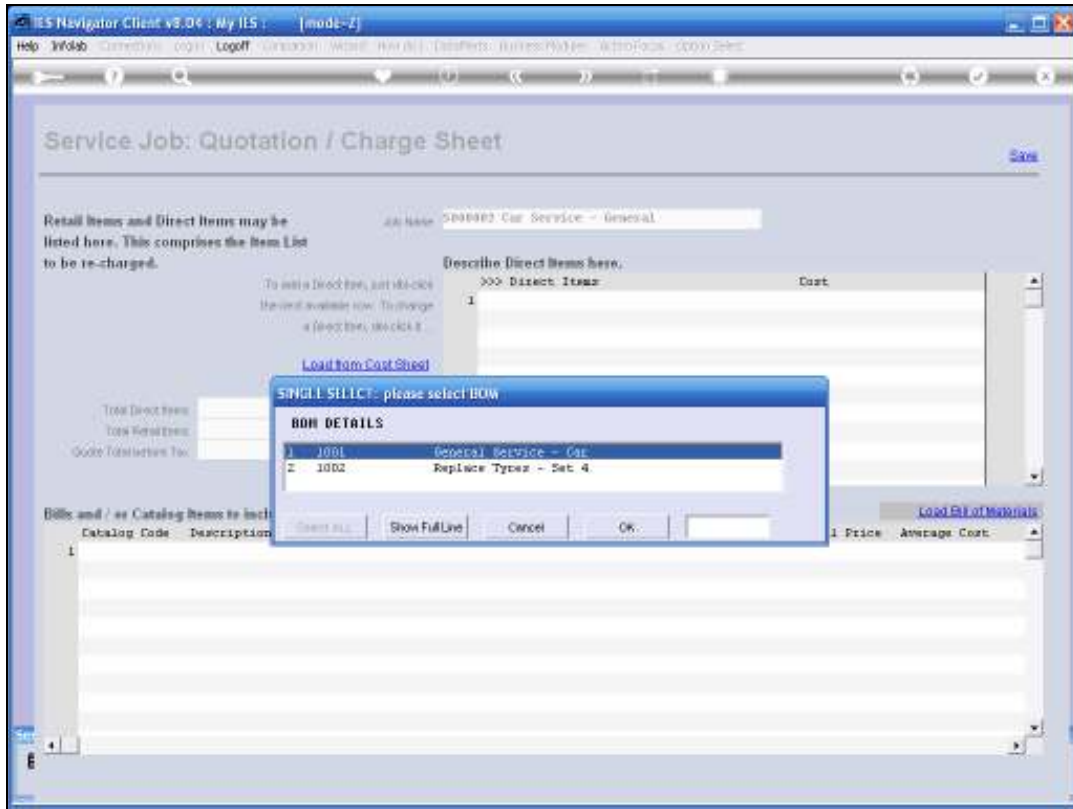
Slide 3
Slide notes:

Note that we have an Option to load from the Cost Sheet. In this particular example the Cost Sheet has not been done yet, so there is nothing to load from here. And it would not be the right thing for all Service Jobs, but there are many cases where we can simply do either the one Sheet or the other. In other words the Cost sheet or the Charge Sheet and then load the other one from the 1st one. In this case I am going to start by Loading a Bill of Materials.

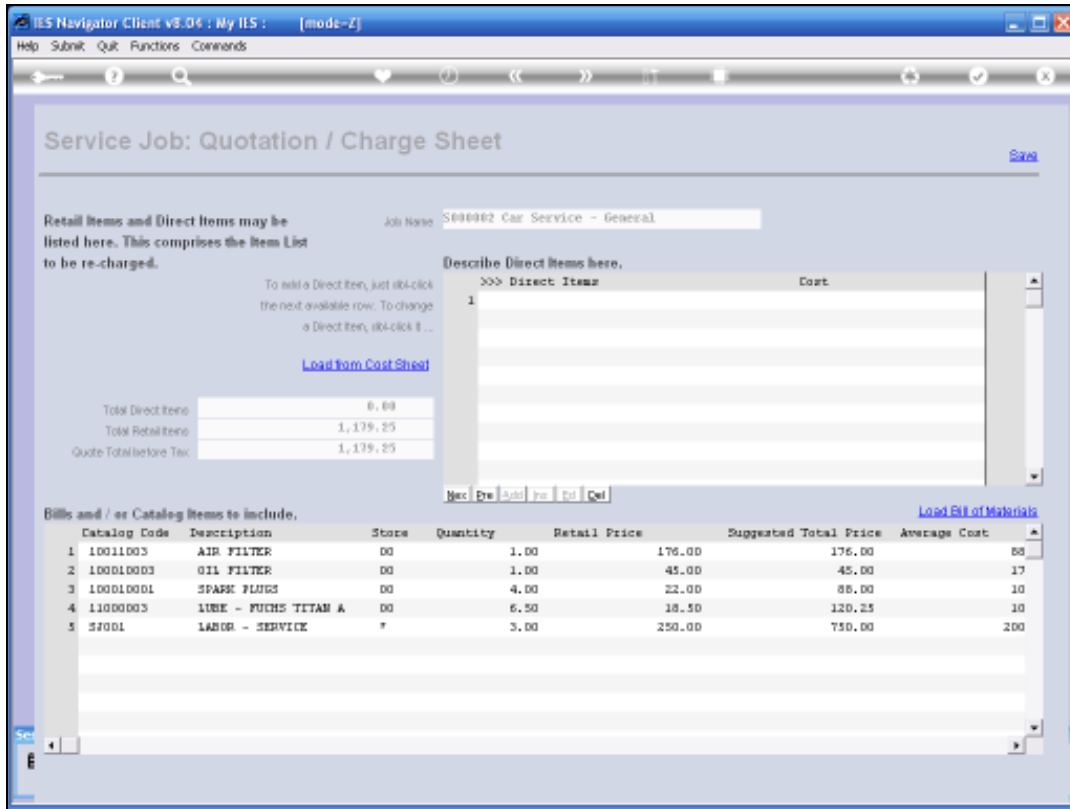


Slide 4
Slide notes:

From the Bills offered in this case I am interested in the General Service for a car. So I am selecting that one.



Slide 5
Slide notes:

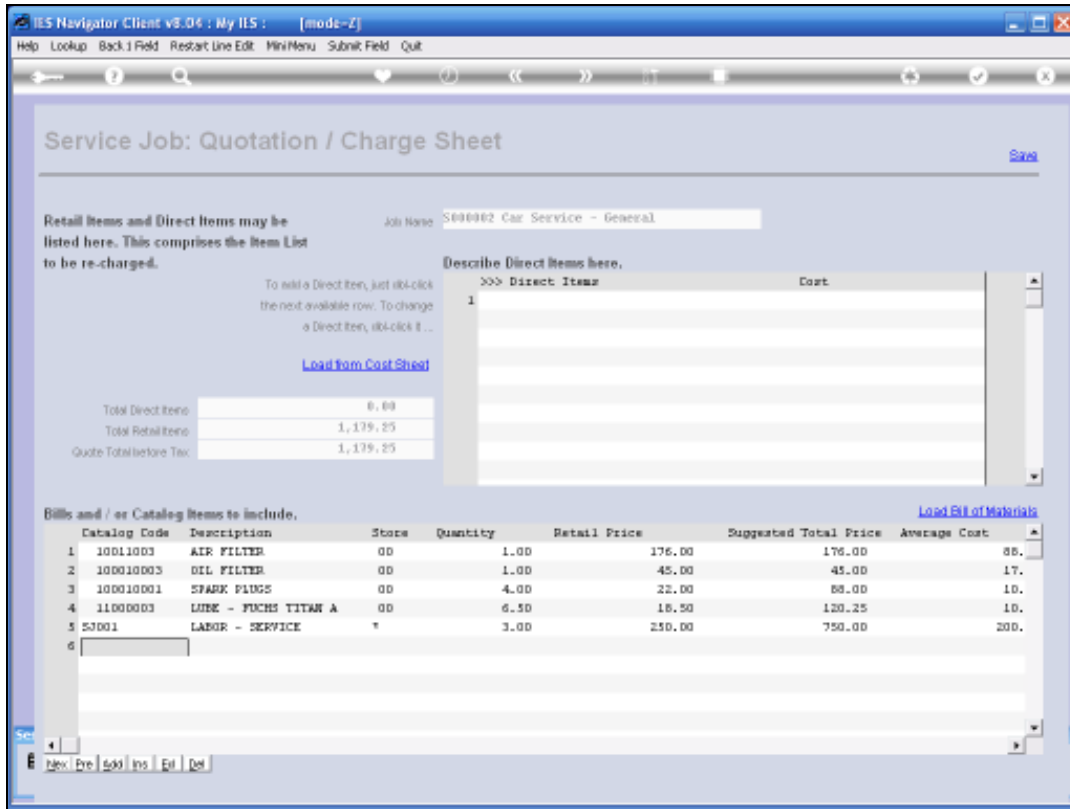


Slide 6
Slide notes:

Then of course the Charges are automatically populated from the Bill. Now notice, when we look at the detail here, we have a Catalog code and Description. We have a Store, Quantity, retail Price and a suggested Total Price, which is the extended Line Item Price.

Then we also have an Average Cost. Now this is the so-called Internal cost. So in terms of Charged to the Customer, the Charge for each line will be that shown under "Suggested Total Price."

But in terms of the Internal Charges for the Job. We will be using the lesser Cost and the margin derives from the difference between these two prices.



Slide 7
Slide notes:

Apart from loading one or more Bills of materials, we can also individually load Items from the Catalog, as we will see now.

Service Job: Quotation / Charge Sheet [Save](#)

Job Name: 5494962 Car Service - General

Retail Items and Direct Items may be listed here. This comprises the Item List to be re-charged.

To add a Direct Item, just click the next available row. To change a Direct Item, click it...

[Load from Cost Sheet](#)

Direct Items	Cost
1	

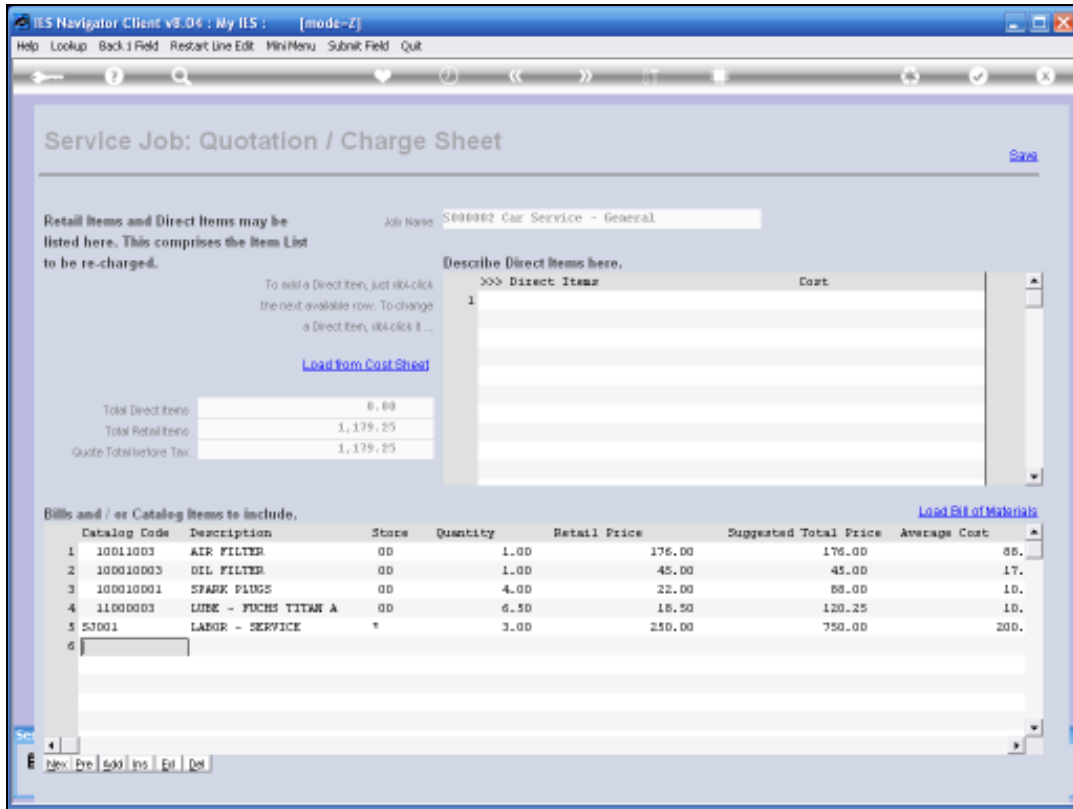
Total Direct Items	0.00
Total Retail Items	1,139.25
Quote Total before Tax	1,139.25

[Load Bill of Materials](#)

Catalog Code	Description	Store	Quantity	Retail Price	Suggested Total Price	Average Cost
1 10011003	AIR FILTER	00	1.00	176.00	176.00	88.00
2 100010003	OIL FILTER	00	1.00	45.00	45.00	17.00
3 100010001	SPARK PLUGS	00	4.00	22.00	88.00	10.00
4 11000003	LUBE - FUCHS TITAN A	00	6.50	18.50	120.25	18.00
5 53001	LABOR - SERVICE	*	3.00	250.00	750.00	200.00
6						

File Edit View Print Help

Slide 8
Slide notes:



Slide 9
Slide notes:

Service Job: Quotation / Charge Sheet

Job Name: 5496962 Car Service - General

Describe Direct Items here.

Direct Items	Cost
1	

SINGLE SELECT: Values Found

Catalog Item	Price	OH	Small	Order
1 31001 LABOR - SERVICE	250.00	0	0	0
2 31002 LABOR "A"	200.00	0	0	0
3 31003 LABOR "C"	300.00	0	0	0

Select ALL Show Full Line Cancel OK

Item	Description	QTY	Unit Price	Total Price	Order
1	10011003 AIR FILTER	00	1.00	176.00	86.
2	100010003 OIL FILTER	00	1.00	45.00	17.
3	100010001 SPARK PLUGS	00	4.00	22.00	10.
4	11000003 LUBE - PUMPS TITAN A	00	6.50	18.50	10.
5	31001 LABOR - SERVICE	*	3.00	250.00	200.
6					

Slide 10
Slide notes:

Service Job: Quotation / Charge Sheet [Save](#)

Job Name: 5444462 Car Service - General

Retail Items and Direct Items may be listed here. This comprises the Item List to be re-charged.

To add a Direct Item, just click the next available row. To change a Direct Item, click it...

[Load from Cost Sheet](#)

Item	Cost
1	

Total Direct Items: 0.00
Total Retail Items: 1,139.25
Quote Total before Tax: 1,139.25

Bills and/or Catalog Items to include. [Load Bill of Materials](#)

Item	Catalog Code	Description	Store	Quantity	Retail Price	Suggested Total Price	Average Cost
1	10011003	AIR FILTER	00	1.00	176.00	176.00	88.00
2	10001003	OIL FILTER	00	1.00	45.00	45.00	17.00
3	10001001	SPARK PLUGS	00	4.00	22.00	88.00	10.00
4	11000003	LUBE - FUCHS TITAN A	00	6.50	18.50	120.25	18.00
5	53001	LABOR - SERVICE	*	3.00	250.00	750.00	200.00
6							

File Edit View Print Help

Slide 11
Slide notes:

Service Job: Quotation / Charge Sheet [Save](#)

Retail Items and Direct Items may be listed here. This comprises the Item List to be re-charged. Job Name: 5498962 Car Service - General

To add a Direct Item, just click the next available row. To change a Direct Item, click it...

[Load from Cost Sheet](#)

Direct Items	Cost
1	

Total Direct Items: 0.00
Total Retail Items: 1,139.25
Quote Total before Tax: 1,139.25

[Load Bill of Materials](#)

Bill	Catalog Code	Description	Store	Quantity	Retail Price	Suggested Total Price	Average Cost
1	10011003	AIR FILTER	00	1.00	176.00	176.00	00
2	100010003	OIL FILTER	00	1.00	45.00	45.00	17
3	100010001	SPARK PLUGS	00	4.00	22.00	88.00	10
4	11000003	LUBE - FUCHS TITAN A	00	6.50	18.50	120.25	10
5	57001	LABOR - SERVICE	*	3.00	250.00	750.00	200
6	53003	LABOR "C"					

File Edit View Print Help

Slide 12
Slide notes:

Service Job: Quotation / Charge Sheet [Save](#)

Retail Items and Direct Items may be listed here. This comprises the Item List to be re-charged. Job Name: 5490962 Car Service - General

To add a Direct Item, just click the next available row. To change a Direct Item, click it...

[Load from Cost Sheet](#)

Total Direct Items	0.00
Total Retail Items	1,479.25
Quote Total before Tax	1,479.25

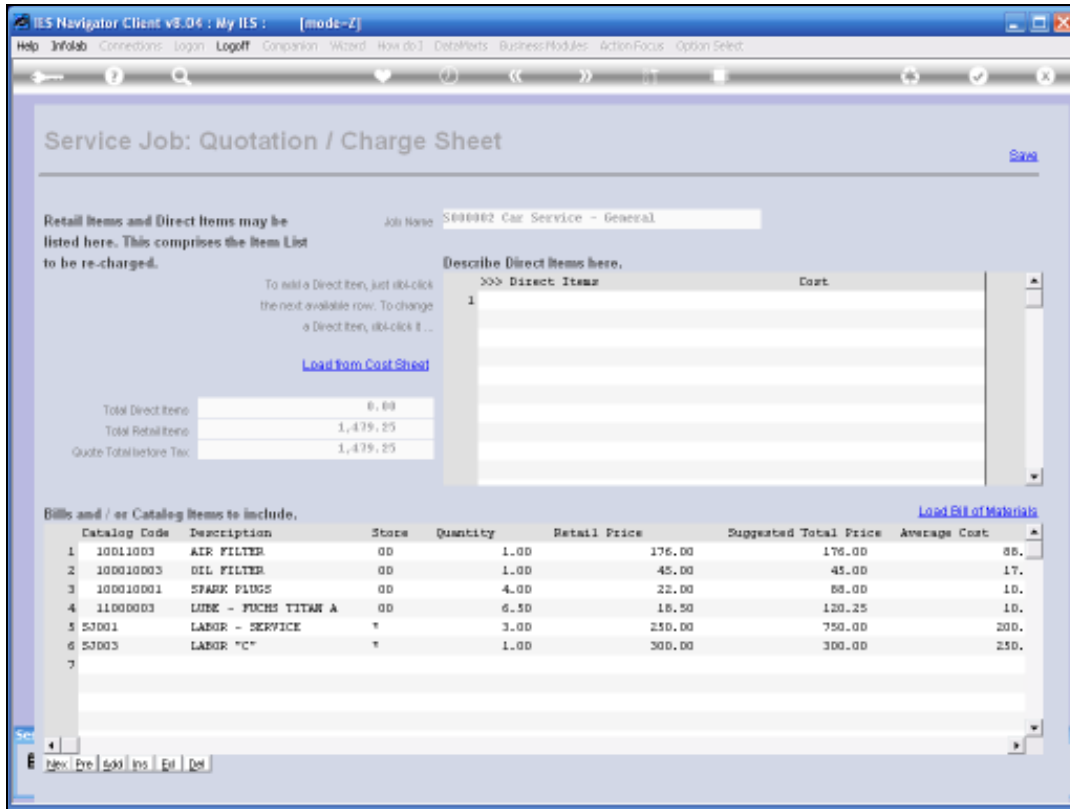
Describe Direct Items here.

>>> Direct Items	Cost
1	

[Load Bill of Materials](#)

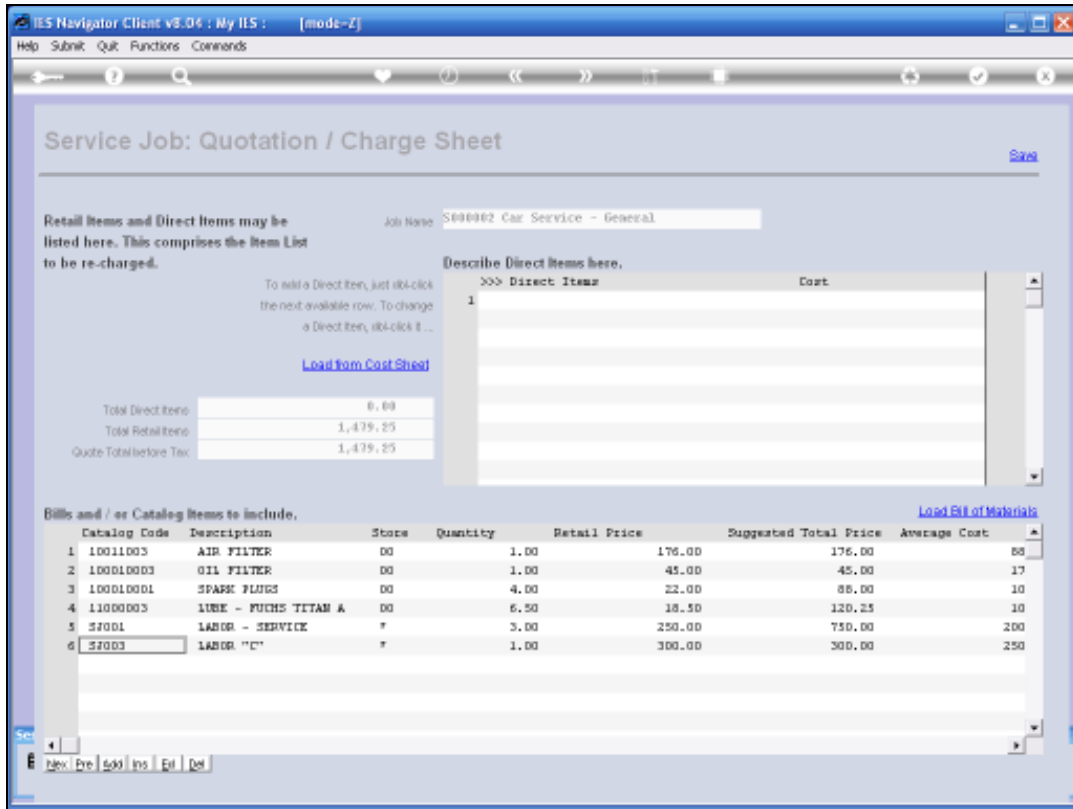
Bills and / or Catalog Items to include.						
Catalog Code	Description	Store	Quantity	Retail Price	Suggested Total Price	Average Cost
1 10011003	AIR FILTER	00	1.00	176.00	176.00	88.00
2 100010003	OIL FILTER	00	1.00	45.00	45.00	17.00
3 100010001	SPARK PLUGS	00	4.00	22.00	88.00	10.00
4 11000003	LUBE - FUCHS TITAN A	00	6.50	18.50	120.25	18.00
5 51001	LABOR - SERVICE	*	3.00	250.00	750.00	250.00
6 51003	LABOR "C"	*		300.00	300.00	250.00
7						

Slide 13
Slide notes:



Slide 14
Slide notes:

So we see how that can be done. In this example we do not want this particular line here. So I am going to remove it again.



Slide 15
Slide notes:

Optionally we can also load 1 or multiple Direct Items.

Service Job: Quotation / Charge Sheet [Save](#)

Job Name: S400002 Car Service - General

Retail Items and Direct Items may be listed here. This comprises the Item List to be re-charged.

To add a Direct Item, just click the next available row. To change a Direct Item, click it.

[Load from Cost Sheet](#)

Direct Items	Cost
1	

Buttons: [New](#) [Del](#) [Add](#) [Print](#) [End](#) [Del](#)

Total Direct Items	0.00
Total Retail Items	1,139.25
Quote Total before Tax	1,139.25

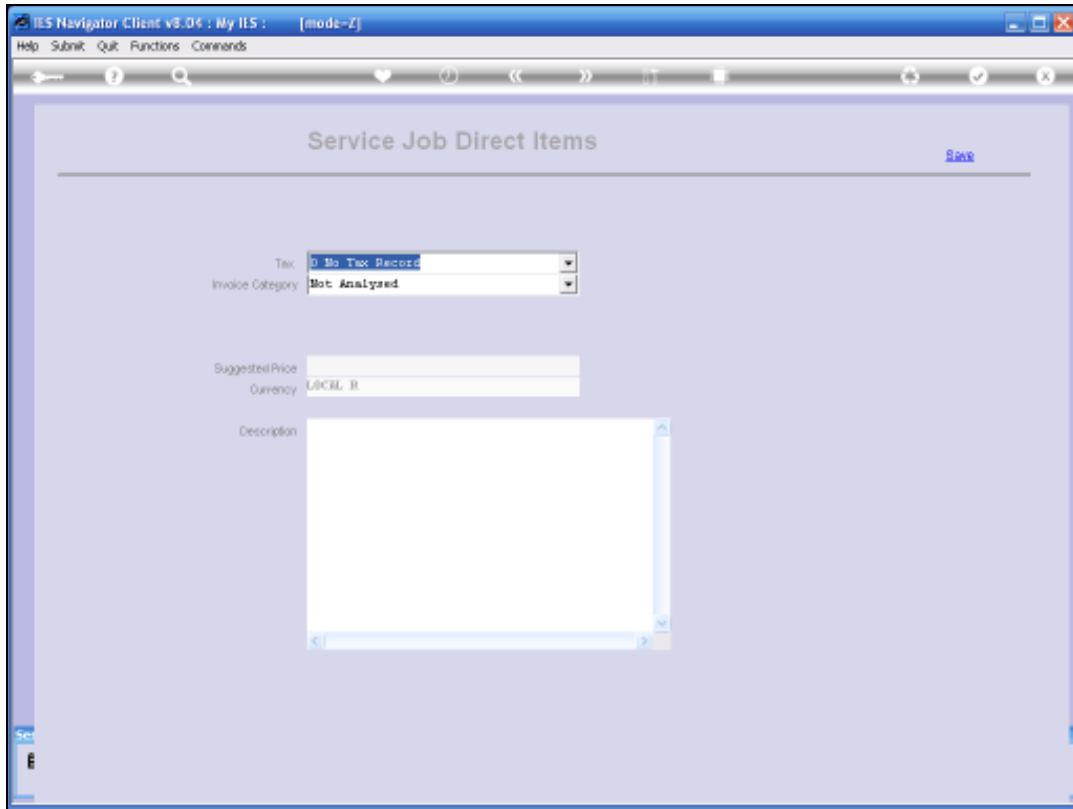
[Load Bill of Materials](#)

Bills and / or Catalog Items to include.

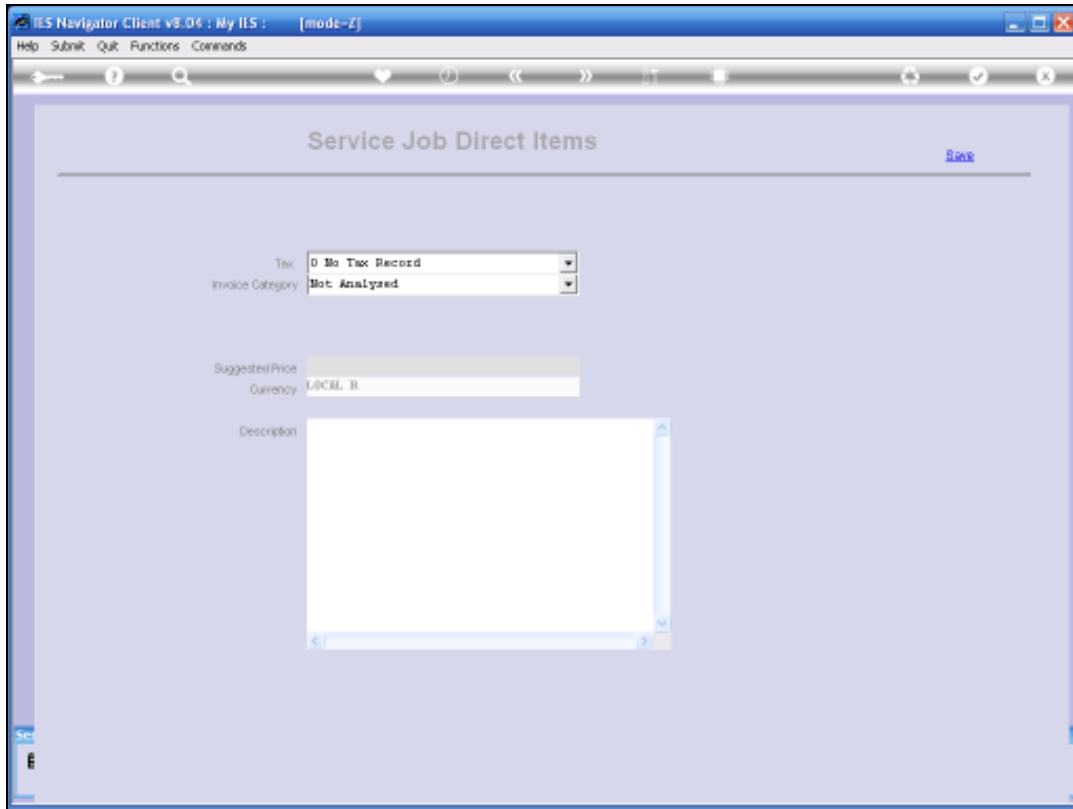
Catalog Code	Description	Store	Quantity	Retail Price	Suggested Total Price	Average Cost
1 10011003	AIR FILTER	00	1.00	176.00	176.00	00
2 100010003	OIL FILTER	00	1.00	45.00	45.00	17
3 100010001	SPARK PLUGS	00	4.00	22.00	88.00	10
4 11000003	LUBE - FUCHS TITAN A	00	6.50	18.50	120.25	10
5 S7001	LABOR - SERVICE	*	3.00	250.00	750.00	200

Session Info: Terren working in Demo Smart

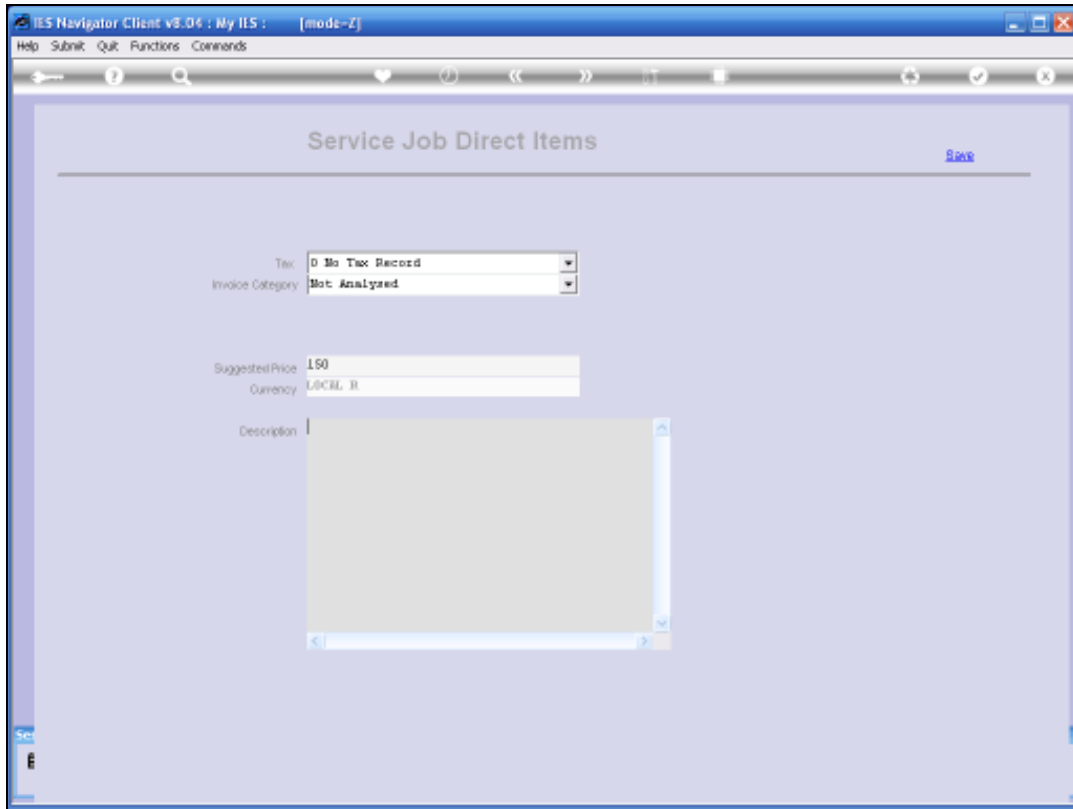
Slide 16
Slide notes:



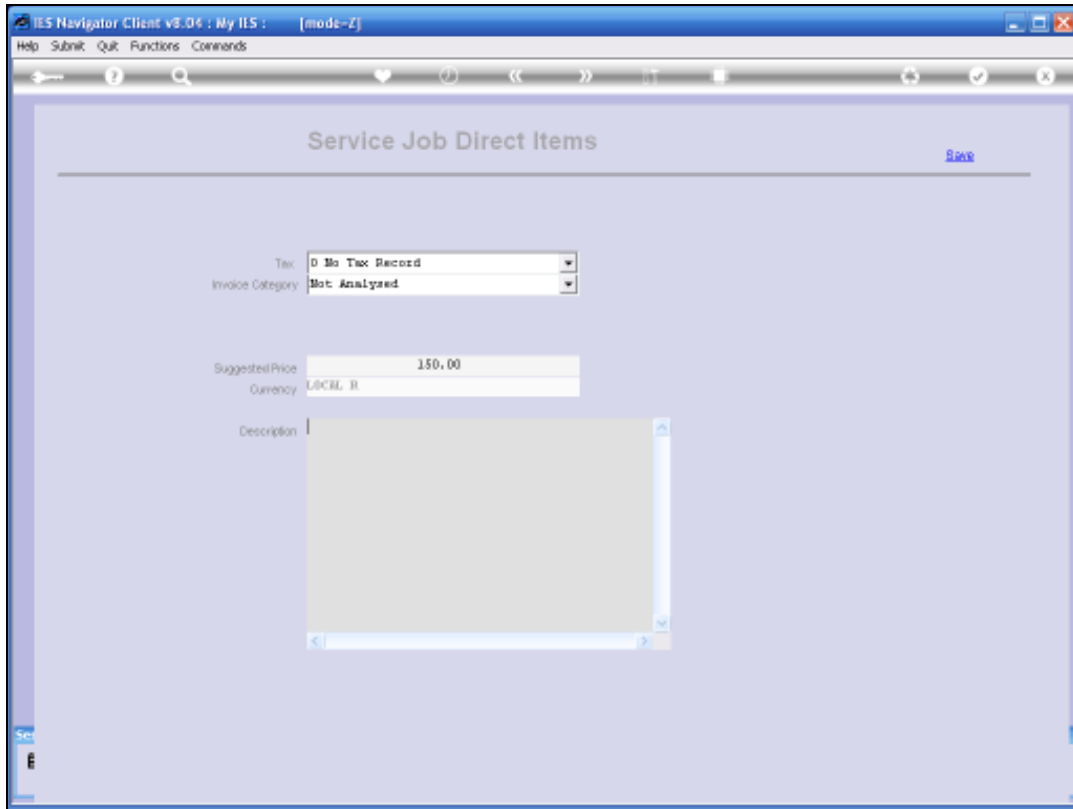
Slide 17
Slide notes:



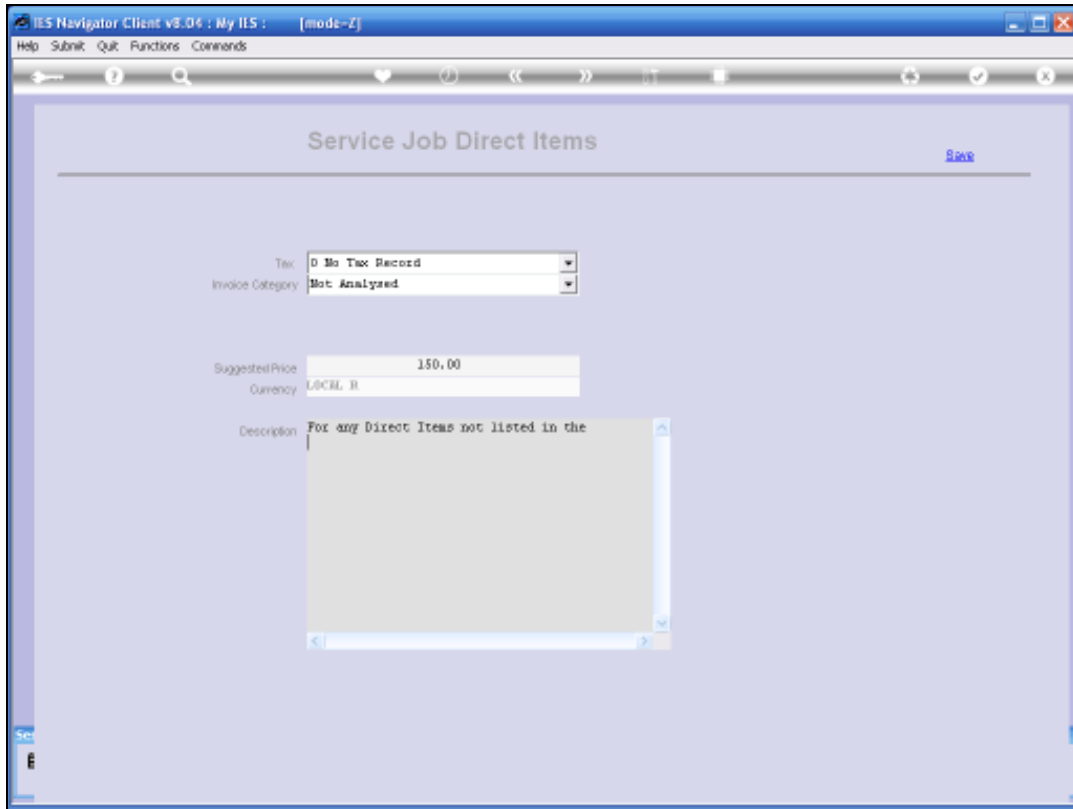
Slide 18
Slide notes:



Slide 19
Slide notes:



Slide 20
Slide notes:



Slide 21
Slide notes:

Service Job: Quotation / Charge Sheet [Save](#)

Job Name: 5499962 Car Service - General

Retail Items and Direct Items may be listed here. This comprises the Item List to be re-charged.

To add a Direct Item, just click the next available row. To change a Direct Item, click it.

[Load from Cost Sheet](#)

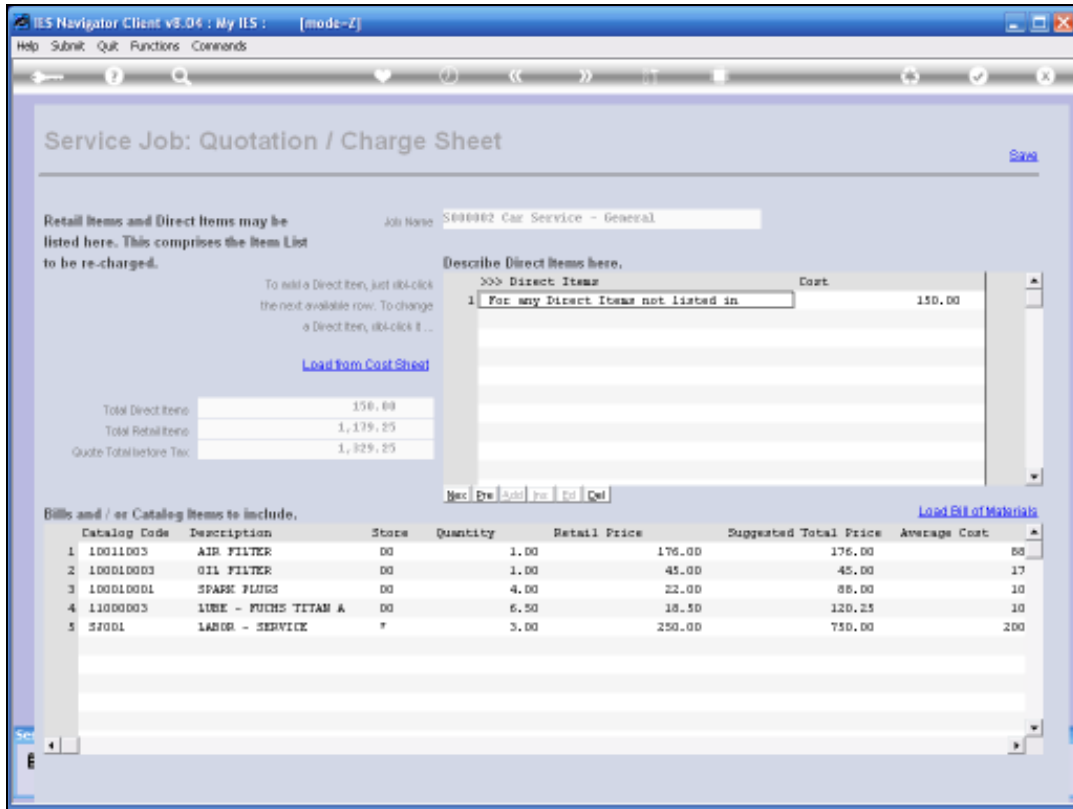
Direct Items	Cost
1 For any Direct Items not listed in	150.00

Total Direct Items: 150.00
Total Retail Items: 1,179.25
Quote Total before Tax: 1,329.25

[Load Bill of Materials](#)

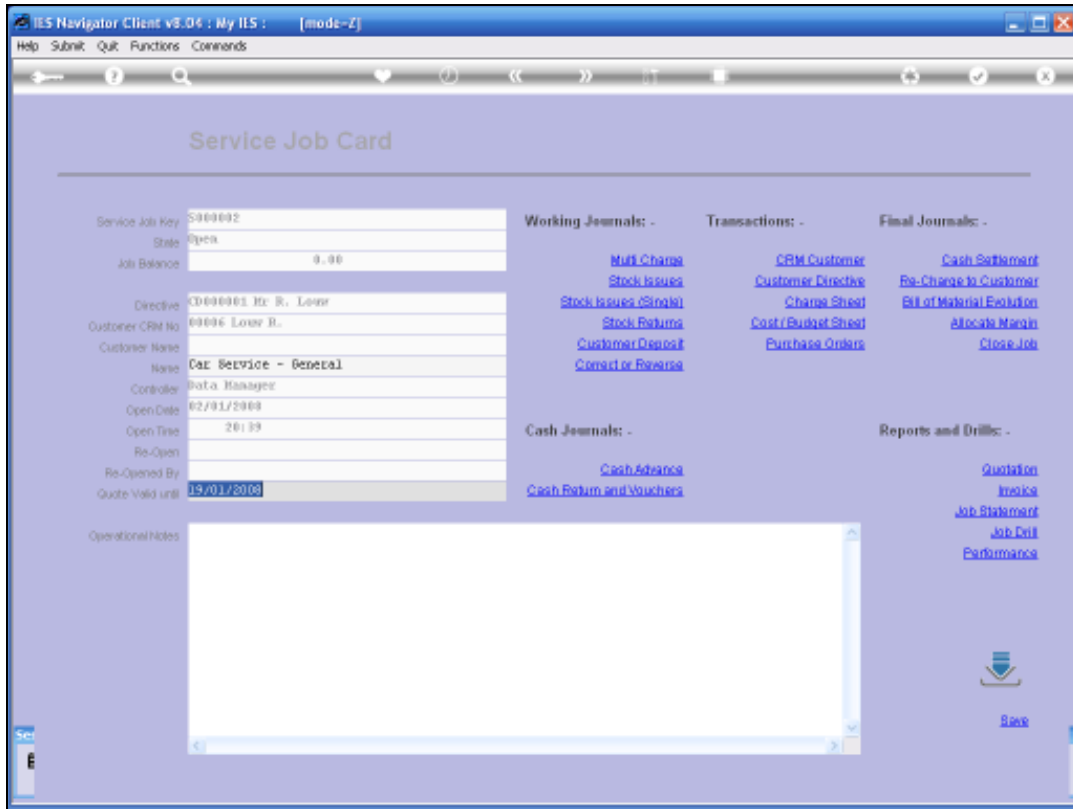
Catalog Code	Description	Store	Quantity	Retail Price	Suggested Total Price	Average Cost
1 10011003	AIR FILTER	00	1.00	176.00	176.00	00
2 100010003	OIL FILTER	00	1.00	45.00	45.00	17
3 100010001	SPARK PLUGS	00	4.00	22.00	88.00	10
4 11000003	LUBE - FUCHS TITAN A	00	6.50	18.50	120.25	10
5 37001	LABOR - SERVICE	*	3.00	250.00	750.00	200

Slide 22
Slide notes:

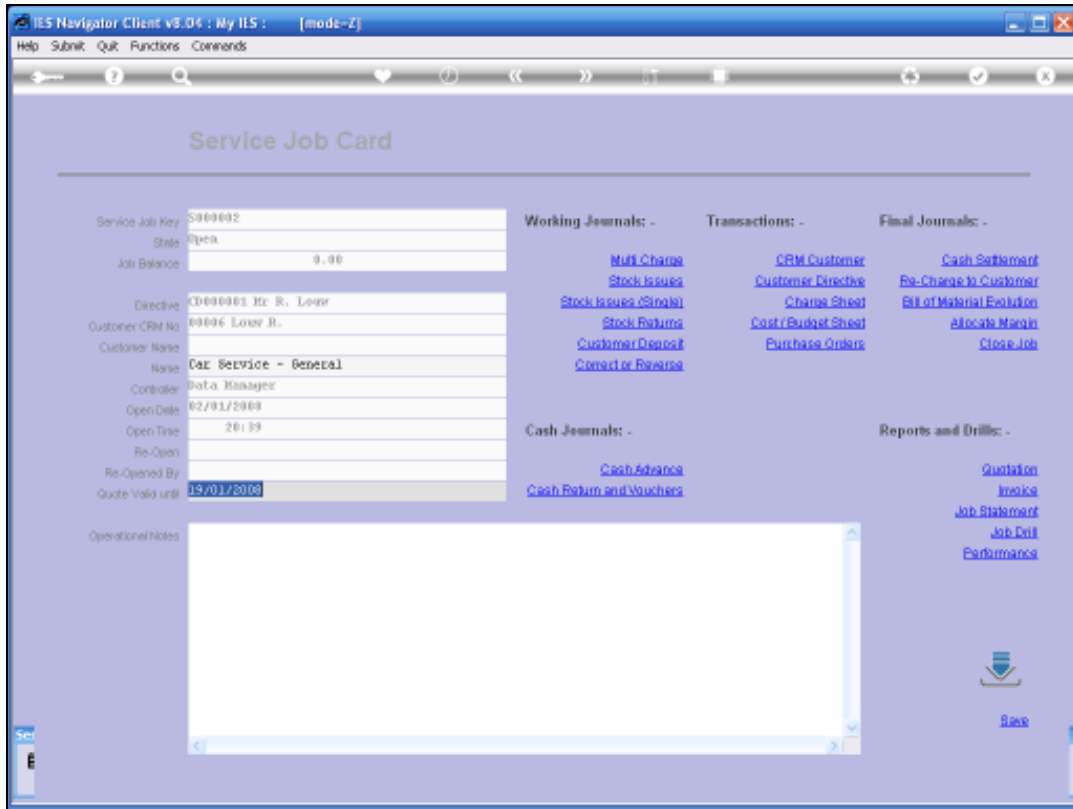


Slide 23
Slide notes:

We SAVE the Charge Sheet, but we can of course return to it any time.



Slide 24
Slide notes:



Slide 25
Slide notes: