

# WORKSHOP SOFTWARE

## Workflows

Last updated on: 28/03/25

This document contains 2 workflows and reference image pages.

**SIMPLE** Workflow - pages 2-6.

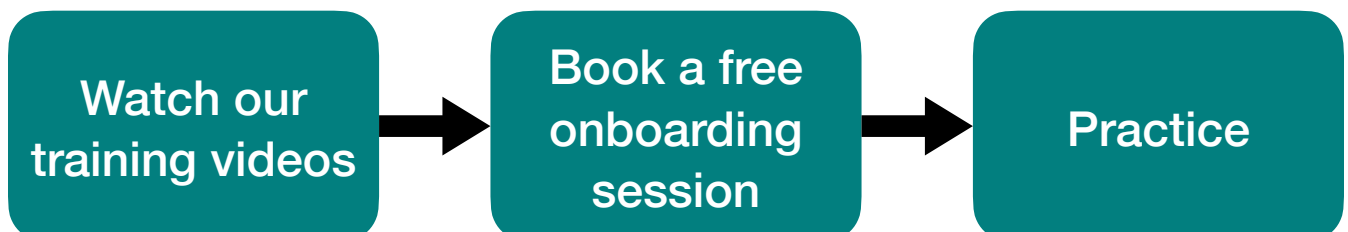
- Including Bookings → Jobs → Invoices → Payments.

**ADVANCED** Workflow - pages 7-18.

- Simple workflow + more details → Supplier Orders and Invoices.
- Additional content on quotes, credits, and deposits.

Book in an onboarding session (link in emails) to properly set up:

- **Integrations** (DO NOT integrate accounting software before we delete the demo customers and data).
- **Profile**
- **Company Settings**
- **Messages**
- **Reminders**
- **Mechanics**
- **User setup/maintenance**



# Simple Workflow



## Bookings



### Booking Diary

- Go to the Booking Diary > press '+' on the day you would like to make a booking.
- Add a customer and vehicle.
- Fill in the description and update the labour line + qty
- Customise the events in the diary by pressing the cog wheel icon on the labour line.
  - Add a mechanic/technician, a duration, and time/date
  - Go back into the cog wheel to create additional events for other people or days

If no booking is needed, skip straight to the Job

#### Tip:

- In workshop Software, the job takes place on the Customer Invoice page.
- The Job No. will appear when the invoice page is saved and the Invoice. No will appear when the page is processed.
- Turn on 'Invoice no. equals job card no.' in Company settings for a smooth experience.



## Jobs



### Customer Invoice - Jobs

If you have a booking, open the booking and press 'Start Job'.

To skip a booking, press '+' on the top of the screen > press customer invoice > add a customer and vehicle > press save.

- Add products by pressing the '+' in the product lines area or press the arrow to add products from an integrated automotive supplier. You can edit the product description, price, and qty on the product line.
- Add notes in the Invoice Notes area (shows on the invoice only) or in the Job Card Notes area (shows on the job card only).
- Confirm the Account Type (Cash = pay straight away, Account = Pay later).
- Print/email/sms the job card by pressing the share icon on the customer invoice line.

Tip: Remember to set up invoice footers and email message in Settings > Messages.



## Customer Invoice

### Customer Invoice - Invoice & Payment

- When the job is completely finalised, process the job with the Process button to lock the invoice and send it to your accounting software.
- Print/email/sms the invoice by pressing the share icon on the customer invoice line.
- **Account Type: Cash** will trigger a pop-up for Customer Payment.
  - Select the payment type and amount.
  - For split payments, press the '+' icon and select the method of payment.
  - Press Process to send the linked payment to your accounting software.
- **Account Type: Account** will add their balance to a statement in Reports > Statements.
  - **Send a statement** in Reports > Statements
    - Add a date range OR toggle '30/60/90' (aging balance) and select today's date.
    - Select the customer and press send (if no email is present, a PDF will be created).
    - To force the statement to print, change the 'Send To Customer As' to 'PRINT ALL'
  - **Record a payment** by pressing '+' on the top of the screen > Customer Payment.
    - Select a Customer > press the magnifying glass to view unpaid invoices.
    - Select invoices to be paid > adjust 'Amount Applied' to the amount they are paying
    - Select payment method & amount > press Apply.
    - Press Process to lock and send to your accounting software.

Tip: If you press cancel on the Customer payment pop-up, it will be treated like an account invoice where a balance owing is applied to the customer and they have a statement.

# Simple Workflow Reference Images

# Bookings

**Customer and vehicle**

**Customer: Demi Twogood**

**Customer Information**  
Demi Twogood  
29 Bright st  
Sydney NSW 2000

**Customer Contact**  
0409-876-543  
demilovato29@workshopsoftware.com

**Contact 1 Information**

**Vehicle: DEF456**

**Vehicle Details**  
DEF456  
KMHK281BTNU913871  
236,037

**Make/Model**  
Toyota LandCruiser  
Red

**Year**  
Apr 17, 2025  
Oct 23, 2025  
2018

**Inspections**

**Booking** (Open)

Reference: 60006 | CustomerOrder Number: | Booking Date: 24/03/2025 | Due By: |

Description	Product	Description	Unit Price	Qty	GST	Line Total
	LAB	Labour - Service	\$130.00	2	\$23.64	\$260.00

Subtotal: \$236.36  
Freight:   
GST: \$23.64  
Total: \$260.00

**Event Notes**  
Normal | B | I | U | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

# Simple Workflow Reference Images

## Jobs

The screenshot displays a software interface for managing jobs and invoices. The main content area shows a 'Customer invoice' for customer 'Demi Twogood' and vehicle 'DEF456'. The invoice details include 'Invoice No.', 'Job Card No.', 'Order Number', 'Post Date' (24/03/2025), 'Invoice Type' (Invoice), 'Account Type' (CASH), 'Follow Up Date', 'Odometer', 'Hours', and 'Next Service - KMs'. The 'Job Status' is 'Work in Progress'. The 'Customer Source' and 'Description' fields are also visible.

The 'Product lines' table is highlighted, showing a single entry for 'LAB' (Labour - Service) with a quantity of 2, a unit price of \$130.00, and a line total of \$260.00. The table columns are Product, Description, Hours, Unit Price, Qty, Unit Cost, GST, and Line Total.

The 'Invoice Notes' and 'Job Card Notes' sections are visible at the bottom, each with a rich text editor. The 'Invoice Notes' section has a 'Cancel' and 'Delete' button. The 'Job Card Notes' section has 'Add Template' and 'Edit Notes in New Window' buttons.

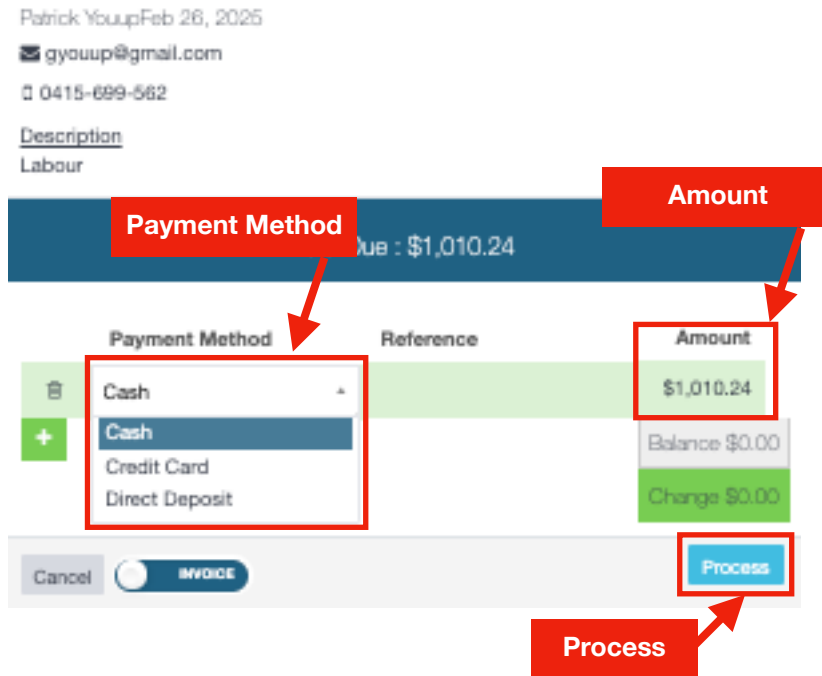
The 'Actions' menu is open, showing options like Analysis, Split, Mechanic Time Log, Copy Invoice, Create Inspection, Create Order, Create Loan Car, Open Booking, Rework, and Hide Cost Field.

Red callouts highlight the following features:

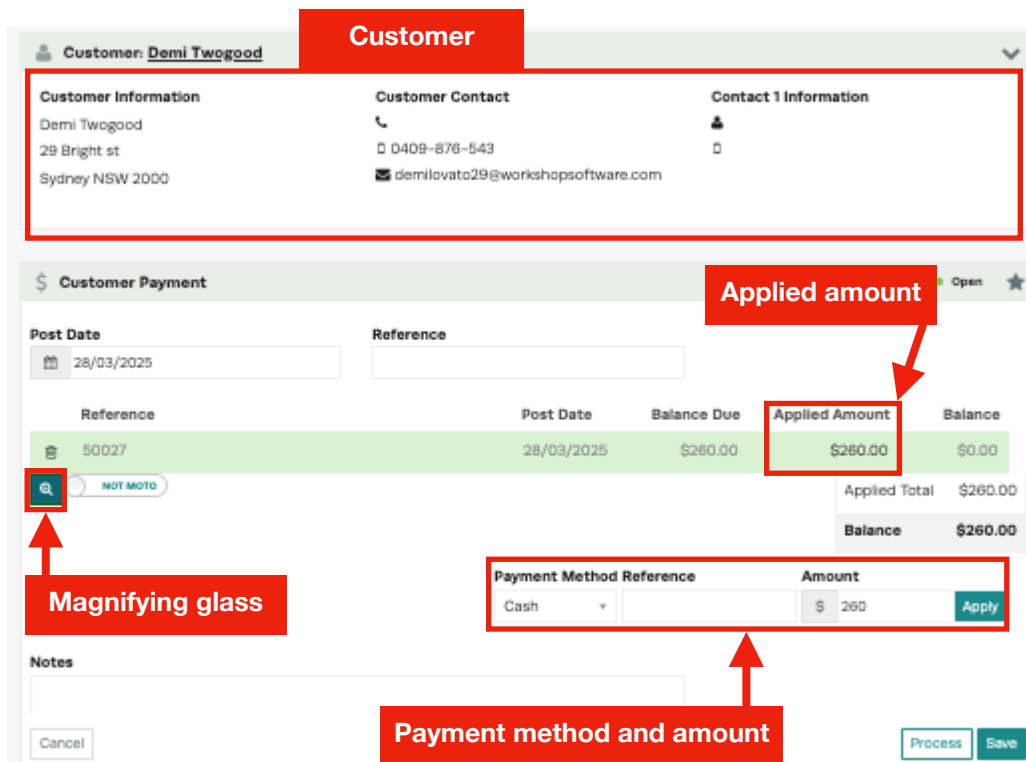
- Customer invoice line
- Customer Invoice line Star
- Share icon
- Account Type
- Job Status
- Product lines
- Add products
- Add notes
- Save invoice
- Process & lock invoice

# Payments

## Account Type: Cash Customer Payment Pop-up



## Account Type: Customer Payment Page



# Statements

**Email or Print PDF**      **Date range**

**Send To Customer As**  
EMAIL and PRINT

**Begin Date** 1/3/2025      **End Date** 31/3/2025

**Show Paid Transactions**  NO

**30/60/90 Statement**  NO

Customer	Email	Balance	Type
Demi Twogood	demilovato29@workshopsoftware.com	\$260.00	EMAIL

50 records | First Page | 1 | Last Page

**Send** → **Send**

---

**30/60/90 = Aging Statement**

**Send To Customer As**  
EMAIL and PRINT

**As At** 31/3/2025

**30/60/90 Statement**  YES

Customer	Email	Balance	Type
Demi Twogood	demilovato29@workshopsoftware.com	\$260.00	EMAIL

50 records | First Page | 1 | Last Page

**Send** → **Send**

# Advanced Workflow

Advanced - Page 1



## Bookings

### Booking Diary

- Go to the Booking Diary > press '+' on the day you would like to make a booking.
- Add a customer and vehicle.
- Fill in the description and update the labour line + qty.
- Customise the events in the diary by pressing the cog wheel icon on the labour line.
  - Add a mechanic/technician, a duration, and time/date.
  - Go back into the cog wheel to create additional events for other people or days.

If no booking is needed, skip straight to the Job.

#### Tip:

- In workshop Software, the job takes place on the Customer Invoice page.
- The Job No. will appear when the invoice page is saved and the Invoice. No will appear when the invoice is processed.
- Turn on 'Invoice no equals job card no.' in Company settings for a smooth experience.

#### Advanced Tip:

- For a quick way to create a booking or job for an EXISTING customer, type in the vehicle registration into the search bar at the top of the page > hover over the three dots > select an option from the list.



## Jobs

### Customer Invoice - Jobs

If you have a booking, open the booking and press 'Start Job'

To skip a booking, press '+' on the top of the screen > press customer invoice > add a customer and vehicle.

- Keep the Job Status and Job Status Comment fields up to date to easily identify the status of a job from the Transaction Centre.
- View the vehicle history by pressing the star on the vehicle line > Vehicle History.
- Text the customer by pressing the star on the customer line > SMS customer.
- Add products by pressing the '+' in the product lines area or press the arrow to add products from an integrated automotive supplier.
  - You can edit the product description, price, and qty on the product line.
- Add notes in the Invoice Notes area (shows on the invoice only) or in the Job Card Notes area (shows on the job card only).
- Add photos in the attachment dropdown.
  - You can choose to send attachments when emailing the invoice.
- For more actions, press the star on the customer invoice line then:
  - Press Analysis to check the profitability of the job.
  - Press Split invoice to split the invoice with an insurance company or manufacturer.
  - Press Create inspection to link an inspection to the job.
  - Press Copy invoice to duplicate the job (e.g. if there is an error on a processed job).
  - Press Open Booking to quickly find the booking link to the job.
- Confirm the Account Type (Cash = pay straight away, Account = Pay later).
- Print/email/sms the job card by pressing the share icon on the customer invoice line.

Tip: Remember to set up invoice footers and email message in Settings > Messages.



## Purchase Orders Next Page

# Advanced Workflow

Advanced - Page 2



**Purchase Order**

## Purchase Orders / Supplier Stock orders

You can create a purchase order from a job OR from the Supplier Stock Order page.

### **Create order from job:**

- Add products to the job from your saved products or from an automotive integration.
- Press the star on the customer invoice line > press create order.
- Delete any products you do not need to order.
- Make sure all products have the correct supplier in the supplier column.
- Press Confirm > open the Attached Orders dropdown.
- Order Status meanings:
  - Suggested = order created but not processed.
  - On Order = order has been processed.
  - Received = Supplier invoice has been processed for that order.
- Double click an order you would like to process.
  - For an automotive integration, press the star icon > Send order (to place the order).
  - Alternatively you can press the share icon to email the order to a supplier.
  - Or if you placed the order on an external website or phone call, just press process.
- Press Process to lock the order and to save a record of what you have ordered.

### **Create an order from the Stock order page:**

- Press the '+' at the top of the page > press Supplier Stock Order.
- Add a supplier and products from your saved products.
- If you would like to add & link a product to a job:
  - Save the page > press the star icon > press Attach to Invoice.
  - Select all the lines you want to link to a job by clicking the circles on the left of them.
  - Then press the green tick > select the job > press Select.
- If the products were originally imported from an automotive integration which is also the supplier of that order, you can place the order with them by pressing the star > Send Order.
- Alternatively you can press the share icon to email the order to a supplier.
- Or if you placed the order on an external website or phone call, just press process.
- Press Process to lock the order to save a record of what you have ordered.

To mark the order as received, the Supplier invoice must be processed.

**Advanced Tip:** It is not required to process an order if you receive a supplier invoice and can skip to the supplier invoice section



**Supplier Invoice**

## Supplier Invoice

- Press the '+' at the top of the page > press Supplier Invoice.

### **If an order was process in Workshop Software:**

- Add a supplier > add an order by pressing the star > press 'Add Items From Order'.
- Delete any products that were not delivered.
- Update the qty and costs to match the invoice.
- Add freight costs into the Freight field.
- Add the invoice number in the Reference field and fill the payment terms.
- Ensure the post date matches the invoice date.
- Press Process to lock the page and send the invoice to your accounting software.

### **If no order was processed in Workshop Software:**

- Add a supplier and products from your saved products
- If you would like to add & link a product to a job:
  - Save the page > then press the star icon > press attach to order
  - Select all the lines you want to link to a job by clicking the circles on the left.
  - Then press the green tick > select the job > press Select.

Add the payment terms, invoice no. to the Reference field, and the freight to the Freight field.



**Customer Invoice**

Next page

# Advanced Workflow

Advanced - Page 3



## Customer Invoice

### **Customer Invoice - Invoice & Payment**

- When the job is completely finalised, process the job with the Process button to lock the invoice and send it to your accounting software.
- Print/email/sms the invoice by pressing the share icon on the customer invoice line.
- **Account Type: Cash** will trigger a pop-up for Customer Payment.
  - Select the payment type and amount.
  - For split payments, press the '+' icon and select the method of payment.
  - Press Process to send the linked payment to your accounting software.
- **Account Type: Account** will add their balance to a statement in Reports > Statements.
  - **Send a statement** in Reports > Statements
    - Add a date range OR toggle '30/60/90' (aging balance) and select today's date.
    - Select the customer and press send (if no email is present, a PDF will be created).
    - To force the statement to print, change the 'Send To Customer As' to 'PRINT ALL'
  - **Record a payment** by pressing '+' on the top of the screen > Customer Payment.
    - Select a Customer > press the magnifying glass to view unpaid invoices.
    - Select invoices to be paid > adjust 'Amount Applied' to the amount they are paying
    - Select payment method & amount > press Apply.
    - Press Process to lock and send to your accounting software.

**Tip:** If you press cancel on the Customer payment pop-up, it will be treated like an account invoice where a balance owing is applied to the customer and they have a statement.

### **More Advanced Options:**

(Credits and quotes are found in the transaction centre by changing **Transaction Type**)

#### **Create a customer Credit:**

- Create a credit by pressing the '+' at the top of the page > Press Customer Invoice.
- Just like an invoice, add a customer, vehicle, product lines, and prices. (You can also create a custom product called credit or credit note).
- Change the Invoice Type to Credit.
- Ensure the invoice Account Type is set to ACCOUNT. (If the type is CASH it is considered a refund).
- Press Process. (Credit is displayed on the customer line of an invoice or the top of the customer's page).
- Print/email/sms the invoice by pressing the share icon on the customer invoice line.

#### **Apply a customer Credit:**

- A credit can be applied to processed invoices that are not fully paid (i.e. account invoices or cash invoices where the payment pop-up was cancelled).
- Press the '+' at the top of the page > Press customer payment.
- Add the customer > Press Apply next to the Credit available field.
- Select a credit that is available.
- Press the magnifying glass and select the invoices to apply the credit to.
- Fill in the Applied Amount field for each invoice > then press Apply.

#### **Create a Quote/Estimate:**

- Create a quote by pressing the '+' at the top of the page > Press Customer Invoice.
- Just like an invoice, add a customer, vehicle, product lines, and prices.
- Change the Invoice Type to Quote.
- Change the Job Status to 'Waiting for User Approval' after sending quote to customer.
- Once they reply, change the status to 'Finalised' and the Job Status Comment as APPROVED or DECLINED.
- For approved quotes, press the star on the customer invoice line > press Create Booking.
- Continue with the normal workflow now.

#### **Take a deposit**

- If you are not integrated with an accounting software, simply press the '+' under the balance due on a booking or invoice (not a quote) > press add deposit and add the payment method and amount.
- If you are integrated with an accounting software there are 2 options:
  1. For account customers you can follow the Credit process above.
  2. For account or cash customers you can create a stand alone invoice with a product line called 'Deposit' or 'Credit' and process it. Then immediately (so you don't forget) apply it as a discount to an open booking or invoice by pressing the '+' under the balance due area. Then press Add Discount and enter an amount > press green tick icon.

# Advanced Workflow Reference Images

## Bookings

A search results interface for the name 'george'. A red box highlights the search bar containing 'george' and a magnifying glass icon, with a red arrow pointing to a red box labeled 'Search'. Below the search bar, a list of results is shown. A red arrow points from the search bar to a three-dot menu icon next to a customer entry, which has opened a dropdown menu. A red box labeled 'Quick create booking or invoice' has arrows pointing to the 'New Booking', 'New Invoice', and 'Send SMS' options in the dropdown menu.

The 'Customer and vehicle' page. At the top, a red box labeled 'Customer and vehicle' spans the width. Below it, customer and vehicle details are shown. A red box labeled 'Description' points to the 'Description' field in the 'Booking' section. A red box labeled 'Labour line' points to the 'LAB' product in the booking table. A red box labeled 'Cog wheel' points to the gear icon in the 'Description' column of the booking table. The booking table has columns: Product, Description, Unit Price, Qty, GST, Line Total. A summary table on the right shows Subtotal, Freight, GST, and Total.

Reference	CustomerOrder Number	Booking Date	Due By
60006		24/03/2025	

Product	Description	Unit Price	Qty	GST	Line Total
LAB	Labour - Service	\$130.00	2	\$23.64	\$260.00

Subtotal	\$236.36
Freight	
GST	\$23.64
<b>Total</b>	<b>\$260.00</b>

The 'Update Event Time' form. It has fields for 'Estimated Hours' (2), 'Mechanic' (Ted Nixon), 'Date' (24/03/2025), and 'Time' (11:30 AM). A red box labeled 'Customise Event' has an arrow pointing to the 'Update' button.

The 'Event Times' table. It has columns: Name, Date, Time, Hours. A row shows 'Ted Nixon', '2025-03-24', '11:30 AM', '2.0'. A red box labeled 'Create New Event' has an arrow pointing to the 'Create' button.

Name	Date	Time	Hours
Ted Nixon	2025-03-24	11:30 AM	2.0

# Advanced Workflow Reference Images

## Jobs

The screenshot displays a software interface for managing jobs and invoices. The interface includes a top navigation bar with 'Dashboard', 'Booking Diary', and 'Transaction Centre'. A sidebar on the left lists 'Customers', 'Vehicles', 'Suppliers', 'Products', 'Loan Cars', and 'Analytics'. The main content area shows a 'Customer invoice' for 'Demi Twogood' with a balance due of \$260.00. The invoice details include 'Invoice No.', 'Job Card No.', 'Order Number', 'Post Date', 'Invoice Type', 'Follow Up Date', 'Odometer', 'Hours', and 'Next Service - KMs'. The 'Job Status' is 'Work in Progress'. The 'Product lines' table shows a single line for 'LAB' (Labour - Service) with 2 hours and a unit price of \$130.00. The 'Invoice Notes' and 'Job Card Notes' sections are at the bottom, each with a rich text editor. The 'Actions' menu is open, showing options like 'Analysis', 'Split', 'Mechanic Time Log', 'Copy Invoice', 'Create Inspection', 'Create Order', 'Create Loan Car', 'Open Booking', 'Rework', and 'Hide Cost Field'. The 'Process & lock invoice' button is highlighted at the bottom right.

Customer: **Demi Twogood** Unapplied Credit: Account Balance: Account Info: **Cash** ☆

Vehicle: **DEF456** Registration Not Verified ☆

Attachments

Activity Log

Customer invoice **Open** Balance Due: **\$260.00** ☆

Invoice No. Job Card No. 50027 Order Number

Post Date: 24/03/2025 Invoice Type: Invoice Account Type: **CASH**

Follow Up Date Odometer Hours Next Service - KMs

Job Status: Work in Progress Job Status Comment

Customer Source

Description

Product lines

Product	Description	Hours	Unit Price	Qty	Unit Cost	GST	Line Total
LAB	Labour - Service		\$130.00	2	\$0.00	\$23.64	\$260.00

Subtotal: \$236.36  
Freight:   
GST: \$23.64  
Invoice Total: \$260.00  
Balance Due: \$260.00

Invoice Notes: Normal **B I U G A** Insert text here ...

Job Card Notes: Normal **B I U G A** Insert text here ...

Cancel Delete

Process & lock invoice

Save invoice

# Supplier Orders

## Create Order Pop-up

**Create Stock Order From Invoice**

Search By Supplier  
Choose A Supplier... Update All Suppliers Clear All With Stock

Item Code	Description	SOH	Supplier	Order
Z123	Oil Filter	-4	Repco	1.0
A456	Air Filter	1	Burson	1.0
CONS	Consumables	0	Cooldrive	1.0

Delete Supplier

Cancel Confirm

## Attached Orders dropdown on a job

**Attached Orders**

Order Number	Order Date	Status	Item Code	Supplier
20008	28/03/2025	Received	CONS	Cooldrive
20007	28/03/2025	On Order	A456	Burson
20006	28/03/2025	Suggested	Z123	Repco

**Order Status**

## Supplier Order Page

**Supplier: Repco**

**Company Information**  
Repco

**Company Contact**

**Contact Information**

**Stock Order**

**Order Number**  
20006

**Order Date**  
28/03/2025

**Actions**

- Send Order
- Auto Create
- Attach To Invoice
- Copy

**Attach to Invoice**

**Star**

**Share icon**

Product	Description	Job Card No.	Due Date	Unit Cost	Cost W/Tax	Qty	Line Total	Total W/Tax
Z123	Oil Filter	50022		\$18.1818	\$20.0000	1	\$18.18	\$20.00

**Amount** \$18.18  
**Amount w/Tax** \$20.00

**Notes**

Cancel Delete Process Save

# Supplier Invoice

**Supplier: Repco**

**Company Information**  
Repco

**Company Contact**

**Contact Information**

**Reference field for invoice number**

**Post Date**

**Star + Add Items from Order**

**Share icon**

**Supplier Invoice** Open Balance Due: \$0.00

**Reference**

**Post Date** required 28/03/2025

**Invoice Type**  
Invoice

**Payment Terms**

**Price** YES

**Actions**  
Add items from order

**Payment Terms**

Product	Description	Job Card No.	Unit Cost	Qty	GST	Line Total
				0	\$0.00	\$0.00

Subtotal \$0.00  
Freight  
GST (10.0%) \$0.00  
Invoice Total \$0.00  
Paid To Date \$0.00  
**Balance Due \$0.00**

**Notes**

Cancel Process Save

Select an order

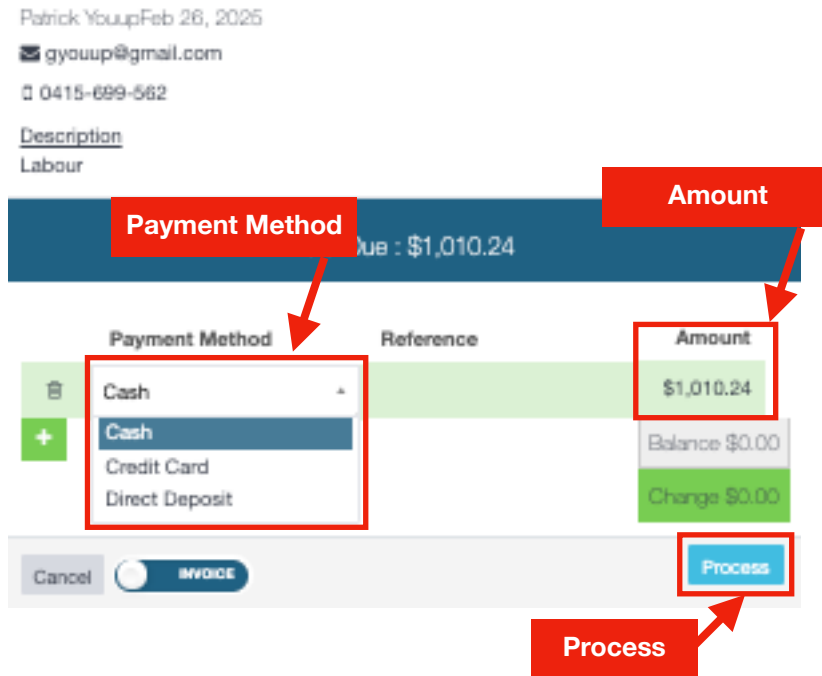
Please Select a Purchase Order

Order Number	Date	Amount
20006	28/03/2025	\$18.18

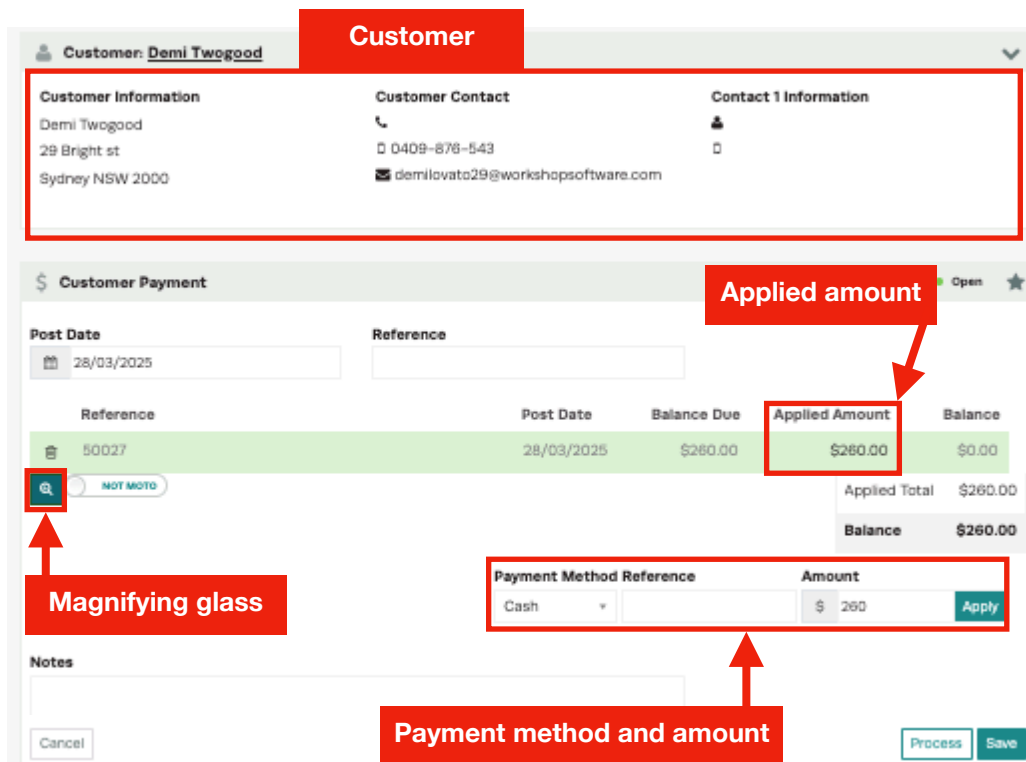
Cancel Select

# Payments

## Account Type: Cash Customer Payment Pop-up



## Account Type: Customer Payment Page



# Statements

Email or Print PDF

Date range

**Statements**

**Send To Customer As**  
EMAIL and PRINT

**Begin Date** 1/3/2025 **End Date** 31/3/2025

**Show Paid Transactions**  NO

**30/60/90 Statement**  NO

Customer	Email	Balance	Type
Demi Twogood	demilovato29@workshopsoftware.com	\$260.00	EMAIL

50 records First Page 1 Last Page

All Send

30/60/90 = Aging Statement

**Statements**

**Send To Customer As**  
EMAIL and PRINT

**As At** 31/3/2025 **30/60/90 Statement**  YES

Customer	Email	Balance	Type
Demi Twogood	demilovato29@workshopsoftware.com	\$260.00	EMAIL

50 records First Page 1 Last Page

All Send

# Creating Credits

Unapplied Credits

Unapplied Credit:

Account Balance: \$0.00 Account Info: Cash

Vehicle: ABC123

Registration Not Verified

Attachments

Activity Log

Customer Invoice

Open Balance Due: \$300.00

Invoice No.

Job Card No.

Order Number

Post Date

28/03/2025

Invoice Type

Credit

Account Type

ACCOUNT

Invoice and Account Type

Follow Up Date

Odometer

Hours

Next Service - KMs

Job Status

Booked In

Job Status Comment

Internal Invoice

NO

Payment Terms

Cash On Delivery

Customer Source

Description



Product	Description	Hours	Unit Price	Qty	Unit Cost	GST	Line Total
CRED	Credit		\$300.00	1	\$0.00	\$27.27	\$300.00

Product line with 'Credit' added

Subtotal	\$272.73
Freight	0
GST	\$27.27
Invoice Total	\$300.00

# Applying Credits

**Customer: George Robinson**

**Customer Information**  
George Robinson  
14 Alphabet rd  
Sydney NSW 2000

**Customer Contact**  
0401-234-567  
georgeezra14@workshopsoftware.com

**Contact 1 Information**

---

**Customer Payment**

Post Date: 28/03/2025  
Reference: [Empty]

**Available Credit**  
\$ \$300.00 **Apply**

Reference	Post Date	Balance Due	Applied Amount	Balance
[Empty]		\$0.00	\$0.00	\$0.00
Applied Total				\$0.00
Balance				\$0.00

Payment Method Reference: Cash | Amount: \$ | **Apply**

Notes: [Empty]

Buttons: Cancel, Process, Save

Available Credit

Apply Credit

Select a credit available

Select a Credit to Apply

Reference	Post Date	Total	Available Credit
10001	28/03/2025	\$300.00	\$300.00

5 records | First Page | 1 | Last Page

**Customer: George Robinson**

**Customer Information**  
George Robinson  
14 Alphabet rd  
Sydney NSW 2000

**Customer Contact**  
0401-234-567  
georgeezra14@workshopsoftware.com

**Contact 1 Information**

---

**Credit Number: 10001** | Credit Balance: \$300.00

Reference	Post Date	Balance Due	Applied Amount	Balance
50029	28/03/2025	\$600.00	\$0.00	\$600.00

Buttons: Cancel, Magnifying Glass, Applied Amount, Apply, Apply

Magnifying Glass

Applied Amount

Apply

Apply

# Advanced Workflow Reference Images

## Quotes

Customer: George Robinson Unapplied Credit: \$300.00 Account Balance: \$600.00 Account Info: Cash

Vehicle: ABC123 Registration Not Verified

Customer Invoice Open Balance Due: \$475.00

Invoice No. Job Card No. Order Number

Post Date: 28/03/2025 Invoice Type: Quote Account Type: CASH

Follow Up Date Odometer: 0 Hours: 0 Next Service - KMs

Job Status: Waiting For User Approval Job Status Comment: Waiting for customer reply

Customer Source

Description

Product	Description	Hours	Unit Price	Qty	Unit Cost	GST	Line Total
LAB	Labour	0	\$150.00	2	\$0.00	\$27.27	\$300.00
Z123	Oil Filter	0	\$40.00	1	\$20.00	\$3.64	\$40.00
A456	Air Filter	0	\$100.00	1	\$60.00	\$9.09	\$100.00
CONS	Consumables	0	\$10.00	1	\$6.00	\$0.91	\$10.00
PARTS	ABC	0	\$25.00	1	\$16.50	\$2.27	\$25.00

Subtotal: \$431.82  
Freight:   
GST: \$43.18  
Invoice Total: \$475.00

Invoice Type

Job Status and Comment

Job Status and Comment

Create Booking

Customer Invoice Open Balance Due: \$475.00

Invoice No. Job Card No. Order Number

Post Date: 28/03/2025 Invoice Type: Quote Account Type: CASH

Follow Up Date Odometer: 0 Hours: 0

Job Status: Finalised Job Status Comment: APPROVED

Customer Source

Actions

- Analysis
- Split
- Mechanic Time Log
- Copy Invoice
- Create Inspection
- Create Booking
- Create Order
- Create Loan Car
- Rework
- Hide Cost Field