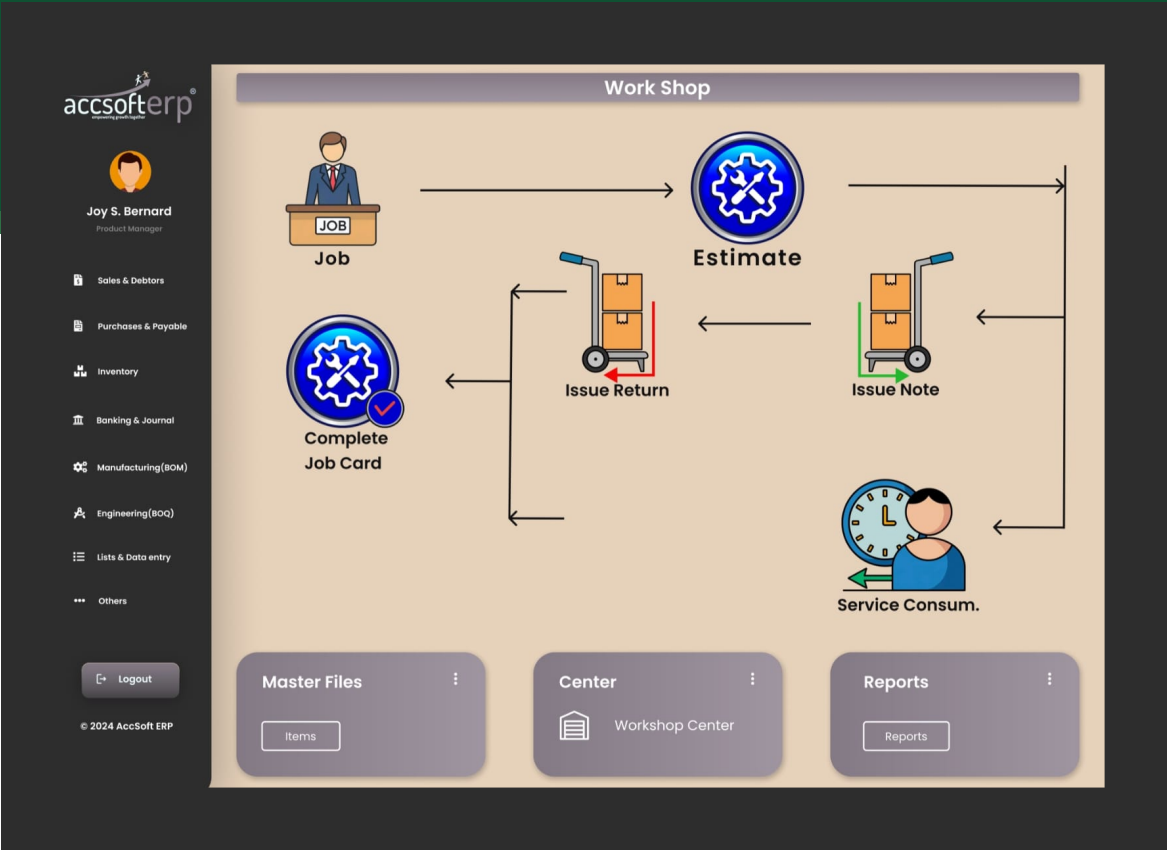


Workshop

Every job card estimated, approved, issued and closed, with parts and labour cost against the estimate

The Workshop module takes a job from booking to completed job card. The estimate is approved before any spare part leaves the store, every issue and return is approved before it moves cost, and the completed job card shows actual against estimate for parts and labour.



Module dashboard: the job card workflow from job to completed job card, with Master Files, Workshop Center and Reports

Approval on every document Jobs, estimates, issues, returns, services and completion each carry an approval level	Estimate to actual Parts and labour costed on the estimate and again on the job card	Spare parts control Issued against the approved estimate, returned to stock when unused	Serial number tracking Full service history of every unit, plus seven job card reports
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The job card workflow

Six documents, one chain, with an approval step between each, exactly as the module dashboard shows it.

1	Job Open a job for the customer and the item being serviced (vehicle, machine or equipment, with serial number), with start and due dates.
2	Approve The job is authorised before an estimate can be raised.
3	Estimate List the spare parts and labour the job needs, with quantity, cost and total cost per line and the estimate total. Print or email it to the customer for acceptance.
4	Approve The estimate is approved before any part is issued or work starts.
5	Issue Note / Service Consumption Issue spare parts from the store to the job card with a Spare Parts Issue Note, and record technician hours and outside services as Service Consumption. Each is approved before stock and cost move to the job.
6	Issue Return Return unused parts to stock, approved before it reduces job cost.
7	Complete Job Card Approve completion, compare actual against the estimate, and close the job card ready for invoicing.

Approval control on every document

A workshop moves high-value parts and skilled hours every day, so AccSoft ERP puts an approval level on every document in the chain. User permissions decide who can approve at each stage, and every document shows its Approved / Close status at a glance.

Document	What approval confirms
Job	The job is authorised before an estimate is raised
Estimate	Parts, labour and cost are agreed before anything is issued or work starts
Spare Parts Issue Note / Service Consumption	Stock and cost move to the job card only when confirmed
Issue Return	A reversal is checked before it reduces job cost
Complete Job Card	The job closes and is invoiced only after final sign-off

Key features

Jobs and Estimates

- Job header with customer, location, Class, project, stage, batch and template
- Start, complete and due dates on every job and estimate
- Spare Parts & Labour grid with item, description, quantity, cost and total cost per line, and the estimate total
- Copy lines and Create/View Invoice to bill the customer directly from the estimate
- Do not Reserve Stock and Allow Partial Delivery options per estimate
- Standard service packages defined once in Item Assembly and reused on every job

Labour and service costing

- Record technician hours and outside services as Service Consumption against the job card
- Labour rates carried from the estimate, so actual hours are compared to quoted hours
- Service cost sits alongside parts cost for a true job card cost

Complete Job Card

- Approve completion and compare actual parts and labour against the estimate
- Partial completion supported for jobs that span several visits
- Invoice raised from the completed job card with VAT and SSCL applied per line

Spare parts issues and returns

- Issue parts against an approved estimate with Select Estimate; Receive All pulls every line
- Issue from any location and batch, with MRN and Issue Note numbers for traceability
- Issue Returns put unused parts back into stock and reduce job cost

Serial number tracking

- Record the serial, chassis or engine number of the item being serviced on the job
- Track serialised parts issued to the job card
- Serial No Tracking report shows the full service history of any unit

Multi-currency and custom data

- Exchange rate captured on every document
- Custom fields on document headers for registration numbers, technician codes or bay numbers
- Memo and customer message fields for notes and printed instructions
- Approved, Close, To be Printed, To be Delivered and To be Emailed flags

Estimate entry

The Estimate screen holds the job, customer, location and stage on one header, with the Spare Parts & Labour grid below listing each line with quantity, cost and total cost, and the estimate total at the foot. Create/View Invoice bills the customer straight from the estimate once the job card is complete.

Job

Location

Class

Template

J00008

DCL HO

Estimate

Customer

Start Date

Complete Date

Ship To

Laboratory Equipment Company (Pvt) Ltd
No. 72, Mahavidhyala Mawatha,
Colombo - 13

14-01-2025

14-01-2025

Project

Stage

Estimate No

Date

Batch

1

EST-0045

14-01-2025

Spare Parts & Labour

Item	Description	Qty	Cost	Total Cost
1	Engine Oil 5W-30 Fully Synthetic (4L)	2	6,500.00	13,000.00
2	Oil Filter	1	1,850.00	1,850.00
3	Air Filter Element	1	2,400.00	2,400.00
4	Brake Pads Front (set)	1	9,800.00	9,800.00
5	Brake Disc Front	2	7,500.00	15,000.00
6	Spark Plugs Iridium (set of 4)	1	4,200.00	4,200.00
7	Wiper Blades 22 inch (pair)	1	2,600.00	2,600.00
8	Coolant Premixed 50/50 (4L)	1	3,200.00	3,200.00
9	Labour: Full Service (hrs)	3	2,500.00	7,500.00
10	Labour: Brake Overhaul (hrs)	2	3,000.00	6,000.00

Copy

Create/View Invoice

Estimate Total

65,550.00

☐ Approved
 ☐ Close
 ☐ To be Printed
 ☐ Do not Reserve Stock
 ☐ Allow Partial Delivery

Memo

Complete & Add To Stock

Save & Close

Save & New

Clear & New

Estimate for a vehicle service job: quantity, cost and total cost per line, with the estimate total

Issuing spare parts to the job card

The Spare Parts Issue Note pulls lines from the approved estimate with Select Estimate, records the location, batch, MRN and Issue Note numbers, and is itself approved before stock and cost move to the job card. The same layout is used for Issue Returns and Service Consumption.

Spare Parts Issue Note
✕

Job
J00008

Estimate
EST-0045

Class
Quick Books

Template
Job Card Issue Note

Customer
 Laboratory Equipment Company (Pvt) Ltd
 No. 72, Mahavidhyala Mawatha,
 Colombo - 13

Quo No
 M 46572

Date
 14-01-2025

Ship To

Location
 Main

Batch

MRN No

Pay Method

Custom Field
 (2) Two User

Issue Note No

Term

Due Date
 14-01-2025

Ship Date
 14-01-2025

Ship Via

Item	Description	Qty
1	Engine Oil 5W-30 Fully Synthetic (4L)	2
2	Oil Filter	1
3	Air Filter Element	1
4	Brake Pads Front (set)	1
5	Brake Disc Front	2
6	Spark Plugs Iridium (set of 4)	1

Select Estimate

Receive All

Show Estimate

☐ Approved
 ☐ Closed
 ☐ Amts Inc VAT
 ☐ To be Printed
 ☐ To be Delivered
 ☐ To be Emailed

Exchange Rate
 1

Memo
 Quick Books Service maintenance fee for the period

Customer Msg

Save & Close

Save & New

Clear & New

Spare Parts Issue Note against an approved estimate

Master files and Workshop Center

Items • One item master shared with Inventory, Purchasing and Sales, so spare part cost and selling price stay in sync • Serialised items tracked from purchase to issue on the job card	Workshop Center • Every job, estimate, issue, return, service and completed job card for a customer or unit on one screen • Open job cards and cost to date at a glance • Drill down to any document from the job
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Reports

Seven ready-made workshop reports, filterable by date range, job, customer, location and Class, and exportable to Excel and PDF.

Job cards	Costing and tracking
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Job cards

- Job Card (All)
- Job Card (Open)
- Job Card Estimate

Issues and costing

- Job Card Issues Summary
- Job Card Issues Details
- Job Card Actual Vs Standard

Tracking

- Serial No Tracking

Why AccSoft ERP for your workshop?

Fully integrated	Spare parts issues draw down Inventory, purchase costs flow in from Purchases & Payables, the job card invoice goes through Sales & Debtors, and every posting lands in the General Ledger, with no double entry.
Estimate to actual	Parts and labour are costed on the estimate and again on the job card, so you see the variance on every job.
Controlled store	Approval levels on every document mean no part leaves the store and no job closes unchecked.
Built for Sri Lanka	VAT, SSCL and local document formats are standard, not add-ons.
Proven since 1998	AccSoft Solutions has supported Sri Lankan businesses for over 25 years, with more than 5,000 installations.

Who uses this module

- Vehicle service centres and garages
- Motorcycle and three-wheeler dealers with service bays
- Generator, pump and industrial equipment repairers
- Air-conditioning and refrigeration service companies
- Computer, printer and electronics repair workshops
- Any business that services customer equipment against an estimate

Frequently asked questions

Which workshop documents require approval?

All of them. Jobs, estimates, spare parts issue notes, issue returns, service consumption and job card completion each carry an approval level, and user permissions control who can approve.

Can we send the estimate to the customer before starting work?

Yes. The estimate lists parts and labour with quantity, cost and total cost, and can be printed or emailed for the customer's acceptance before it is approved and work begins.

How is the job card cost calculated?

Actual parts issued, less returns, plus actual technician hours and outside services are accumulated on the job card. On completion the Job Card Actual Vs Standard report shows the variance against the estimate.

Can we track service history by serial number?

Yes. The serial, chassis or engine number is recorded on the job, and the Serial No Tracking report shows every job card raised against that unit.

Does a spare parts issue update stock immediately?

Yes. When the issue note is approved, stock at that location and batch is reduced and the cost moves to the job card. Issue returns reverse it.

Can we invoice the customer from the job card?

Yes. Create/View Invoice raises the customer invoice directly from the estimate or completed job card, with VAT and SSCL applied per line.

See the Workshop module in action

Book a free demo and we will walk your service team through a complete job card, from estimate and spare parts issue to labour costing and completion, using your own parts list.

erp.lk | AccSoft Solutions (Pvt) Ltd, Colombo, Sri Lanka