Handling sublet work can be problematical if one doesn't follow the same process all the time, the instructions below show the best way to complete sublet work in Automation.

Initial Setup:

Based on what work you normally sublet out to other service providers such as Wheel Alignments, Radiator, Transmission, Engine Reconditioning etc. you will need to create both services and buy in accounts to accommodate the processing of those supplier's invoices to allow adding them to your client's invoice. Although there are a couple of ways to handle this process the following is the preferred way for Automation.

In this example I will concentrate on **Wheel Alignments** only, although you will have to create the corresponding accounts for each sublet service that way you can use them multiple times.

Service details					×
Service Wheel Alig	nment		Code WA		
De	etails	Parts / service	e text	Co	mments
Fixed price	🗌 RSA trigger	6 months v			Labour rates
Category Account Follow on service	Wheel Alignment Labour	···	– Price (Inc. Ta Standard Wholesale	90.00 \$0.00	\$110.00 \$100.00
in Loyalty	months or	kms	Trade	\$0.00	\$90.00
Loyalty tri Points per do Point cost	igger plar 1 2000			✓ Included	
Estimated ho	urs				
Cancel					OK

As you can see, I have created a specific service for Wheel Alignments, enter the following.

- 1. Description.
- 2. Code.
- 3. Fixed Price.
- 4. Category. (*If no category exists, then create one*).
- 5. Standard. (The price you charge your client for the wheel alignment).
- 6. OK to Save.

iy-in	Setup.		
🎱 Part	Form		
Part	Wheel A	lignment	
	Details	Purchasing	Sales

Ruv-In Setun[.]

art Wheel	Alignment			Part number	WA	
Details	Purchasing	Sales Adj	ustments A	Allocations (Orders	Comments
Part type	Buy-In	~ 2		Sub-c	ontract	Inactive
Category	General Accounts -	Sublet Repair		Cost (Inc. Tax)	\$66.00	
Income Account	Parts			Price (Inc. Ta	x)	
COGS	Cost Of Goods Sold			Mibolocale	\$00.00	
account				Trade	-	
Location				made		
Barcode						
Units	each			Tax	GST	
CIVIL		Ches				ded
SKU		Cid55				
	Stock					
	On hand	0				
	Total value					
	Average value	\$0.00	Allocated	0		
	Purchase units		On order	0		
		Recalc	†↓ Adju	ust		
•						
Cancel		Itom solar				
Cancer		item sales				UK

As with Service I have created the corresponding Buy-In that is used with the service.

- 1. Part Description.
- 2. Part No.
- 3. Category. (If no category exists, then create one).
- 4. Cost (Inc. Tax).
- 5. Standard. (Inc. Tax).
- 6. OK to Save.

In this example both cost and standard are the same price as the value on the service represents the sublet cost and profit margin.

If your sublet repairer has different costs based on vehicle type IE passenger, 4W4, Trucks etc. then you have two choices either create one buy-in for each of the different types or prior to using this part you will need to edit the cost before you add it to the job. (Discussed Further).

Process Sublet Repair:

Start Clients job as normal click on Booking – Client – Choose Client – OK - Choose Vehicle or Add New Vehicle – OK – Choose Service Wheel Alignment – OK – At Booking Form either create the job or enter the date of availability i.e., when the vehicle is due to have the wheel alignment, OK to save.

There are two ways to continue from here, they are based on with or without a purchase order.

1. With a Purchase Order 2. Without a Purchase Order Go to Page 5

upplier	Category	Code	Addr	Phone	Phone 2	Fax	Orders	Contractor	Balance	cm
ΤO	Expense Item Supplier	ATO	23 Liability Street Canberr	130023233		1300252563			\$0.00	
mp	Expense Item Supplier	Amp	123 High Street Parramatt	9693 6547		9874 9665			\$0.00	
illy Bloggs		BB							\$0.00	
idgestone Tyres	Tyres	BT	42 GILL ST BOORAGOON	0123 456 789				Consignment	\$869.97	
udget Auto Parts [@]	Spare Parts Supplier	Budg	123 High Street Fremantle	9438 9955		9438 6655			\$1,776.93	
altex Lubricants [@]	Lubricants Supplier	Calt	35 Bracks Street Fremantle	9335 6666		9335 6598			\$0.00	
apricorn Society [@]	Buying Co-op	Capr	12 Burswood Road Burswo	9456 1111		9456 2222			\$0.00	
Allan Auto Spares [@]	Spare Parts Supplier	Allan`	244 High Street East Frem	9562 3366		9562 3344			\$263.84	
C B C Bearings [@]	Bearing Supplier	C.b.c.	12 Garrett Road Bassende	9564 8745		9584 9988			\$0.00	
Castrol Oils [@]	Lubricants Supplier	Castro	56 John Street Palmyra W	9875 6565		9875 4411			\$287.03	

Open Job Card: Click on Buy-in – Choose Wheel Alignment Supplier, OK – Click Orders Button. ↑

Supplier	Bridgestene T		1.000	Commo	ate 2	For Job #115	01061# 0132							
supplier	brugestone 1	nes		Comme	nts	-01 JOD #113.								
									/					
ems														
ltem		Description		Туре		Job	Service	Location	Purchase units	Quantity	Received C	Outstanding	Rate	Т
NA		Wheel Alignment		Buy-In		115 (Invoi	Wheel Alignment		0	1	0.00	1	\$60.00	
8														

Click on Add Buy-In and choose Wheel Alignment Buy-In – OK, item is placed on Purchase Order. 🛧

New Purch	ase Order												×
Details													
🔘 Bill	🔘 Credit	Purchase order			Date	28	8/10/24	Order#	# 0452				
Supplier	Bridgestone Tyr	es			Comments	F	or Job #115.				^ _		
Items													
Item		Description		Туре			Job	Service		Location	Purchase units	Quantity	Received OL
< Purchas	e Order 📢 Sort	Wheel Alignment		Buy-In Buy-In		∠)the	115 (I Image: Second system 92 (Ca 93 (Cr 93 (Cr 95 (Inv 95 (Inv 96 (Inv 96 (Inv 99 (Bo 104 (I 105 (R 115 (I Image: Second system	Scan	ment 🔽	/edit	0		0.00
Cancel		Job card	P	rint			Em	(Invoice) - Bo al	ooth - 8MN666]		←	9 →

Confirm part is assigned to correct job number and service if not place a tick in Checkbox, then click into Job cell and choose either booking or job number. Click OK button to close purchase order.

Booking: When job is to be done convert the booking into a job Wheel Alignment part will be on the job below the Wheel Alignment service with status of Ordered.

If job card is open the Wheel Alignment part will be on the job below the Wheel Alignment service with status of Ordered. Click OK to save and park the job back on to the Diary/Sales screen.

Processing Purchase Order:

Bills	Cr	edits Bills & credits Orders Outstanding	Month to date	~	From 01/10/24 To 28/10/24 Due date
Date	Inv/Ref#	Supplier	Outstan	Total (In	Comments
28/10/24	0452	Bridgestone Tyres	1	\$66.00	For Job #115.
25/10/24	0451	Wa Transmissions	1	\$86.90	For Job #97.
14/10/24	0450	Capricorn Society - Allan Auto Spares	20	\$503.36	
08/10/24	0448	Capricorn Society - Repco Auto Parts	1	\$76.45	
				\$732.71	
		Suppler Include sub-accounts	Invoice#		omment keyword
		Filt New Delete Paymen	t Locate	sto	

When you receive the invoice from the wheel alignment supplier you can either double click on the wheel alignment Buy=In (*Ordered*) part which will bring up the actual order or click on Purchasing – Orders this will bring up all orders.

Find the order concerned and double click to open it. **↑**

Purchase Order												
Oetails ● Bill ○ Credit	O Purchase order		Da	te 2	28/10/24	Order# 0453						
Supplier Bridgestone	Tyres		Commen	ts T	For Job #115.		A	-				
tems	Description		Туре		Job	Service	Location	Purchase units	Quantity	Received Out	standing	Rate
WA	Wheel Alignment		Buy-In		115 (Invoi	Wheel Alignment		0	1	0.00	1	\$60.00
		_										
<												
Purchase Order	↑↓ Sort 📿	Invent	tory 📅 Buy-	In	≣ Oth	er 🔠 Scan	🗘 View/edi	t GRemo	ove			
\bigotimes		1								6		
						(u)						

Place a tick in the Bill checkbox. 🛧

How to Handle Sublet Work



Click Convert it into a Bill. 🛧

Bill												
Details												
Bill O Credit	t O Purchase order		Da	te 2	28/10/24	Invoice/Re 6584587						
Supplier Bridgeston	e Tyres		Commen	ts 🛛	For Job #115.		,					
Terms 30 days EC	OM → Bill due 30/11/2	4										
Reneat	Nevt											
	V NEXC			L								
tems												
Item	Description	·	Туре	1	Job	Service	Location	Purchase units	Quantity	Rate	Total (Ex.)	Tax amt 1
WA	Wheel Alignment		Buy-In		115 (Invoi	Wheel Alignment		0	1	\$60.00	\$60.00	\$6.00 (
												37 12
											\$60.00	\$6.00
Bil	↑↓ Sort G	invento	ry 📅 Buy-I	n	🥌 Othe	r 🛗 Scan	View/edit	G Remo	ve 🗌	Update parts	5	
						-						
		2									∠ 🤇	
Cancel					Payment						OK	
						-						

Enter invoice number make sure bill and invoice date are the same click OK to process the bill off to Accounts Payable. Wheel Alignment part will be on the job below the Wheel Alignment service with status of Completed.

Without a Purchase Order:

outegoil	Code	Addr	Phone	Phone 2	Fax	Orders	Contractor	Balance o	mt
Expense Item Supplier	ATO	23 Liability Street Canberr	130023233		1300252563	ordero	Contractor	\$0.00	
Expense Item Supplier	Amp	123 High Street Parramatt	9693 6547		9874 9665			\$0.00	
	BB	-						\$0.00	
Tyres	BT	42 GILL ST BOORAGOON	0123 456 789				Consignment	\$869.97	
Spare Parts Supplier	Budg	123 High Street Fremantle	9438 9955		9438 6655			\$1,776.93	
Lubricants Supplier	Calt	35 Bracks Street Fremantle	9335 6666		9335 6598			\$0.00	
Buying Co-op	Capr	12 Burswood Road Burswo	9456 1111		9456 2222			\$0.00	
Spare Parts Supplier	Allan`	244 High Street East Frem	9562 3366		9562 3344			\$263.84	
Bearing Supplier	C.b.c.	12 Garrett Road Bassende	9564 8745		9584 9988			\$0.00	
Lubricants Supplier	Castro	56 John Street Palmyra W	9875 6565		9875 4411			\$287.03	
	xpense Item Supplier pare Parts Supplier ubricants Supplier uying Co-op pare Parts Supplier earing Supplier ubricants Supplier	Amp Amp BB BB yres BT pare Parts Supplier Budg uving Co-op Calt uving Co-op Capr pare Parts Supplier Allan' earing Supplier C.b.c. ubricants Supplier Castro	xpense Item Suppler Amp 123 High Street Paramatt BB BB 123 High Street Paramatt pare Parts Supplier Budg 123 High Street Premantle ubricants Supplier Calt 53 Bracks Street Fremantle uying Co-op Capr 12 Burswood Road Burswo pare Parts Supplier Allan' 244 High Street East Frem earing Supplier C.b.c. 12 Garett Road Bassende ubricants Supplier Castro 56 John Street Palmyra W	Amp 122 High Street Paramatt 9639 6547 yres BT 42 GILL ST BOOKAGOON 0123 456 789 pare Parts Supplier Budg 123 High Street Fremantle 9438 9955 ubricants Supplier Calt 35 Brack Street Fremantle 933 6666 uvring Co-op Capr 12 Burswood Road Burswo 9456 1111 pare Parts Supplier Allan' 244 High Street East Frem 9562 2366 earing Supplier C.b.c. 12 Garett Road Bassende 9564 8745 ubricants Supplier Castro 56 John Street Palmyra W 9875 6565	Amp 123 High Street Parramatt. 9693 6547 Bit 42 GLL ST BOORAGOON 0123 456 789 pare Parts Supplier Budg 123 High Street Fremantle 943 9955 Ubricants Supplier Call 35 Brack Street Fremantle 943 9955 ubricants Supplier Call 35 Brack Street Fremantle 943 9955 ubricants Supplier Call 35 Brack Street Fremantle 956 111 pare Parts Supplier Allan' 244 High Street East Frem 9562 3366 earing Supplier C.b.c. 12 Garett Road Bassende 9564 8745 ubricants Supplier Castro 56 John Street Palmyra W 9875 6565	Amp 123 High Street Paramatt 9693 6547 9874 9665 BB BT 42 GILL ST BOORAGOON 0123 456 789 B7 Yres BT 42 GILL ST BOORAGOON 0123 456 789 B7 Pare Parts Supplier Budg 123 High Street Fremantle 9438 955 9438 6655 Ubricants Supplier Calt S Brack Street Fremantle 935 6666 9333 6598 uying Co-op Capr 12 Burswood Road Burswo 9456 1111 9456 2222 pare Parts Supplier Allan' 244 High Street East Frem 9562 3366 9562 3344 eating Supplier Ch.c. 12 Garret Road Bassende 9564 8745 9584 9988 ubricants Supplier Castro 56 John Street Palmyra W	Amp 123 High Street Paramatt 9693 6547 9874 9665 BB BT 42 GILL ST BOORAGOON 0123 456 789 BT yres BT 42 GILL ST BOORAGOON 0123 456 789 BT pare Parts Supplier Budg 123 High Street Fremantle 9438 955 9438 6655 ubricants Supplier Call S Brack Street Fremantle 935 6666 9333 6598 uying Co-op Capr 12 Burswood Road Burswo 9456 1111 9456 2324 pare Parts Supplier Allan' 224 High Street East Frem 9562 3344 9563 2344 eating Supplier Ch.c. 12 Garter Road Bassende 9564 8745 9584 9988 ubricants Supplier Castro 56 John Street Palmyra W 9875 6565 9875 4411	Amp 123 High Street Paramatt 9693 6547 9874 9665 BB ET 42 GILL ST BOORAGOON 0123 456 789 ET Consignment pare Parts Supplier Budg 123 High Street Fremantle	xpense item Supplier Amp 123 High Street Paramatt 963 6547 9874 9665 \$0.00 yres BT 42 GILL ST BOORAGOON 0123 456 789 Consignment \$869,971 yres BT 42 GILL ST BOORAGOON 0123 456 789 Consignment \$869,971 yres Budg 123 High Street Fremantle 9438 955 9438 6655 Consignment \$869,971 ubricants Supplier Call 35 Frack Street Fremantle 9335 6656 9335 6598 \$0.00 uving Co-op Capr 12 Burswood Road Burswo 9456 1111 9456 2222 \$0.00 pare Parts Supplier Allan ¹ 244 High Street Esatt Frem 9562 3366 9562 3344 \$263.84 earing Supplier C.b.: 12 Garrett Road Bassender 9675 5655 9875 4411 \$287.03

When the Sublet Repair returns with the supplier's invoice bring the job up to screen and click on Buy-In − Choose Supplier − OK. ↑

How to Handle Sublet Work

11												
etails Bill O Credit	O Purchase order		Dat	e 2	8/10/24	Invoice/Re 6584587]				
Supplier Bridgestone Ty	yres]	Comment	s F	For Job #115.		2					
Terms 30 days EOM	Bill due 30/11/24 Next	ŧ										
ems												
Item	Description		Туре		Job	Service	Location	Purchase units	Quantity	Rate	Total (Ex.)	Tax amt
WA	Wheel Alignment		Buy-In		115 (Invoi	wheel Alignment		U	1	\$60.00	\$60.00	\$6.00
<											\$60.00	\$6.00
Bill	↑↓ Sort 🚱 I	nvento	ry 📅 Buy-In	l.	📁 Othe	r 🔠 Scan	🔷 View/edit	G Remov	/e 🗌 U	Ipdate parts		
8		1			2]					- •	

In the Purchasing Screen click on Add Buy-in and choose Wheel Alignment, click OK item is placed on Purchase Bill.

Enter invoice number make sure bill and invoice date are the same click OK to process the bill off to Accounts Payable. Wheel Alignment part will be on the job below the Wheel Alignment service with status of Completed.

🎱 Close job		×	
Charge to	Sean Booth		
Closing date	28/10/24]	
Job update			
Client Balance before job: \$229.00 Job Retail: \$90.00 Client Balance after job: \$319.00			
	🔑 Labour allocation		
	X Service reminders		
	ake payment		
Invoice			
🗌 Print	🗌 Email	 ☐ Include checklists ✓ Hide fixed price parts 	
Cancel		ОК	

Close job as normal and tick (Hide fixed price parts) click OK to close job and print invoice.

You will now see that the invoice below does not show the Buy-In, only the Service with the price you are charging your client. \blacklozenge

AA Automotives

1123 Kings Highway Fremantle WA 6959 ABN 12 365 894 789 Tel: 08 9568 4587 Fax: 08 9568 9966 Email: aaautos@bigpond.com.au Website: www.aaautomotives.com.au RTA: A U 12456



Tax Invoice

Inv. No. 58 Date 7/7/18	Order No. 227845 Sales ID John Smith			
Client Details	Vehicle Details			
Sean Booth 44 Tremble Way East Cannington WA 6107	Registration: 7LL555 Odo: 45889 Make/Model: Audi (Lnc) A3 1.8l Sedan 97/00 Type: Sedan			
Account 22 Home - Work (08) 94513508 Mobile -				
Work Done				
Complete Wheel Alignment And Road Test				
Services, Parts & Labour				
Fixed Price				
QtvDescription1Wheel Alignment	Unit Price \$81.82 Total (Ex) \$81.82 Tax \$8.18 GST \$8.18 Total (Inc) \$90.00 \$81.82 \$8.18 GST \$90.00 \$90.00			
Vehicle Report				
Rear Transmission Mount Soft Recommend Replacement Next Service				
Financial Summary				
Total (Ex. Tax) \$81.82				
Tax Total\$8.18	Paid \$0.00			
Total (Inc. Tax) \$90.00	Balance \$90.00			

Thank You For The Business