

WHEELZ

HOW TO CREATE A CUSTOMER?

A Customer account head is created under Accounts, with account type as "Customer / Sundry Debtors" How to create a supplier / vendor A Supplier or Vendor Account is created under Accounts, with account type as "Supplier / Sundry Creditors"

HOW TO CREATE VAT (VAT/TAX RATE)

VAT or Tax Account Heads are created under Masters - Accounts, with account group as "LIABILITIES" and account type as "TAXES". The Tax rate is mentioned in Tax/Charges tab.

HOW TO CREATE SERVICE TAX?

Service Tax Account Heads are created under Masters - Accounts, with account group as "DUTIES AND TAXES" and account type as "TAXES". The Tax rate is mentioned in Tax/Charges tab.

HOW TO SELECT A BILL / INVOICE FORMAT?

The Spares / Vehicle bill format can be selected under File - Setup - Report's Format

HOW TO CREATE NEW PARTS?

New Spare part is created under Masters - Parts by clicking on Add button. Multiple or long list of new parts can be imported through an excel file in the pre-defined format of Parts Import. This option is available in Imports - Parts file.

HOW TO IMPORT CURRENT PHYSICAL STOCK OF THE PARTS?

The current physical stock of the spares / parts is imported using Workshop - Physical Stock update option.

WHAT IS BILLING PROCESS FOR A NEW VEHICLE?

A new vehicle can be billed only after the vehicle is purchased and passes in Pre-Delivery Inspection (PDI).

Vehicle is purchased under Vehicles - Purchase

PDI of the vehicle is entered in Vehicles - PDI

The PDI passed vehicle is billed under Vehicles - Sales

WHAT IS THE BILLING PROCESS FOR VEHICLE SERVICE?

Both Free Service and Paid Service vehicles are first entered in Jobcards (Workshops - Jobcards),

Vehicle problem mentioned by customer are entered in "Complaints" tab of Jobcards

Parts consumed for repair or maintenance of the vehicle are entered in "Parts used" of Jobcards

Labor for the vehicle are entered in "Labor" of Jobcards

Finally the bill is printed in Spares - Sales, after selecting against "Jobcard" and entering the jobcard number.

HOW TO GENERATE REPORTS USEFUL FOR AUDITORS / SALES TAX RETURNS?

Reports useful for auditors or filing sales tax returns are available under Reports - Register, Sales / Purchase Register, Sales Tax Register and Sales Purchase Register.

HOW TO VIEW DAY'S STOCK REPORTS?

The stock report for any date range of the financial year can be viewed under Reports - Spares - Stock report. Other useful Daily Reports are Spares Sales, Spares Summary, Sales Register, Daily Sales, Daily labor etc.

HOW TO VIEW AN ACCOUNT LEDGER?

Account's Ledger can be viewed under Reports - Ledger for any date range of the financial year.

HOW TO GENERATE DROPOUT SERVICE CUSTOMERS?

Customers dropped out from service can be viewed under Reports - Workshop - Reminders - Regular/Free Service Dropouts.

HOW TO SEND SMS TO CUSTOMER?

Value added services such as SMS notifications can be sent to the customers using add-on module Wheelz Alert software

HOW TO VIEW REPORTS OF DIFFERENT FINANCIAL YEAR?

Previous financial year can be selected using Housekeeping - Change Year option

HOW TO VIEW A VEHICLE HISTORY?

Vehicle History can be viewed by selecting Workshop - History option and enter the Vehicle Registration Number.