

Service Department - Suggested End of Financial Year Process

Introduction

This page is dedicated to giving you a list of suggested processes that should be followed within the Service Department at the End of Financial Year.

On this page:

- Introduction
- Suggested Processes
 - Review and Manage
 - Reports to Print Off
 - Things to Consider before your Parts Department starts their stocktake
- Downloadable Document

Related pages:

- Suggested Duties - Service Department
- Parts Department - Suggested End of Financial Year Process
- Accounts Department - Suggested End of Financial Year Process
- Sales Department - Suggested End of Financial Year Process

Suggested Processes

Review and Manage

- Review all bookings, contact any customers who have missed their appointment and try to re-book them or cancel the Repair Order.
- Review all Repair Orders in progress, complete and invoice as many as possible.
- Review all Repair Orders with a held status and follow up any reasons why they have still not been completed.
- Review all Repair Orders that have been partially invoiced. Complete these and invoice them.
- Review all outstanding Repair Order Requests.
- Manage any expired Repair Orders. Either re-book or delete.
- Manage your Staff Hours to ensure all absentees have been added.
- Close off any 'Cleaning/Workshop duties' Repair Orders.

Reports to Print Off

Print off all the relevant reports we recommend:

- Open Repair Order Summary report - Run this report on the 30th of June. (*this report is found under the Service Analysis tab within the Standard Reports Menu*)
- Service Performance report - Once everything has been closed off. (*this report is found under the Service Analysis tab within the Standard Reports Menu*)

Things to Consider before your Parts Department starts their stocktake

- Check all Repair Orders with ordered parts to ensure you return anything not being used to the Parts Department and invoice what has been fitted to the Service Vehicle.

Downloadable Document

This page in a downloadable document format - [Service Department - Suggested End of Financial Year Process.pdf](#)