



## **Fixed Rate Pricing Adjustments on Repair Orders**

### **How to adjust your Service Issue to a Fixed Price**

Software Development  
RIMSS Business Systems Technology

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Document Type: Repair Order Doc. #: 10154 Inv. #: 0 CC Auth. #: Completion Status: Open Project #: Sub Project #:  
 Initiation Date: 6/9/2017 Customer PO #: Salesman: MICHELLE LE... Cust. Inv. Status: War. Inv. Status: Sub Project #:  
 Settlement Date: Service Writer: MICHELLE LEMOINE Service Type: BILLABLE CU...  
 Internal Memo: **FIXED PRICE \$1250.00** Service Type: BILLABLE CU...  
 Exp. Start Date: 6/9/2017 7:31 AM Exp. Comp. Date: 6/9/2017 8:31 AM Extract Date: 1/1/0001  
 Printed Memo:

Customer Name and Address

Name: Lemoine Trucking  
 Address 1: Address 2: City: State: Zip Code: Primary Contact: Lemoine, Michelle

Wholegood Information

WG ID: (465) Make: Model: UNIT Description: UNIT Year: 2016  
 Odometer In: 0.0 Odometer Out: 0.0 Hours In: 0.0 Hours Out: 0.0

The "Fixed Rate" option on Repair Orders can be used when you quote a flat rate price for a job to a customer that will be completed on a Work Order. You will create your Repair Order as you normally do. I have indicated this is a Fixed Price Repair Order in the Internal Memo to maintain the record of the quoted price on the Repair Order.

Hide Customer Information (F9)

Payment Terms: Net 30 Credit Limit: \$100,000.00 Days Past Due: 700 Price Level: Trade  
 Due Date: 7/9/2017 Available Credit: \$100,546.98 Balance: (\$546.98)

F2-Find Customer F6-Add Wholegood

	Items	Labor	Pre-Tax Subtotal	Tax	Deductible	Total	Taxable	Non-Taxable	Pre-Tax Subtotal
Customer	\$1,123.12	\$300.00	\$1,423.12	\$0.00	\$0.00	\$1,423.12	\$0.00	\$1,423.12	\$1,423.12
Warranty	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Internal	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total</b>	<b>\$1,123.12</b>	<b>\$300.00</b>	<b>\$1,423.12</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$1,423.12</b>	<b>\$0.00</b>	<b>\$1,423.12</b>	<b>\$1,423.12</b>

Subtotal Tax Group Non-Taxable

Customer Deposit	
Original Deposit	\$0.00
Deposit Applied	\$0.00
Unused Deposit	\$0.00

Create Deposit Return Deposit

### Add/Edit Service Issue

Type: Customer

Warranty Deductible: \$0.00

Warranty Customer:

Ignore on Misc. Shop Charge Calculations

Suppress Parts, Labor and Misc. Charge Detail

TIRES

Brakes

PM's

Drive Train

Description: REBUILD UNIT

Cause:

Fix:

Wholegood Component:

Time Slip Notes:

OK Cancel

**When creating your service issue, you will need to make sure that "Ignore on Misc. Shop Charge Calculations" is checked or the price will not calculate correctly.**

**You can also "Suppress Parts, Labor and Misc. Charge Detail" if you do not want the customer to see the details of the parts and labor for the the Fixed Price job. If you suppress the Charge Detail, the customer will only see the information typed into the Description, Cause, and Fix as well as the Fixed Price total. In this example, I am suppressing the detail on my Printed Repair Order.**

**You can have multiple service issues while using the Fixed Price option. The service issues can be a mix of Fixed Price, Non-Fixed Price, Suppressed Detail, and Non-Suppressed Detail. You can use Customer or Warranty Issue Types. This feature will not work with Internal type Service Issues.**

Item Number (Ctrl-N):  F3-Add Misc. Chrgs F4-Item Search F5-Apply Core Crdts F10-Apply Discount Print Item Picklist

Drag a column header here to group by that column

Service Issue	Is... #	Asso...	Type	Price Book	Item Number	Description	Quantity	QOH	Amount	Price	Discount	Subtotal	Tax Group	Total	Back C
REBUILD UNIT	1		Item	AGC	0470-343-AGC	GASKET	3.0	51.0...	\$49.77	\$16.59	0.00 %	\$49.77	Non-Taxable	\$49.77	
REBUILD UNIT	1		Item	NAV	55667788-149	Flange	1.0	1.0000	\$0.02	\$0.02	0.00 %	\$0.02	Non-Taxable	\$0.02	
REBUILD UNIT	1	D	Item	AGC	1021520M2-...	BELT	1.0	3.0000	\$19.44	\$19.44	0.00 %	\$19.44	Non-Taxable	\$19.44	
REBUILD UNIT	1		Item	NAV	H512802-14...	BEARING,KIT-BEARIN...	1.0	50.0...	\$1,053...	\$1,053.89	0.00 %	\$1,053.89	Non-Taxable	\$1,0...	

**The total of the Items Tab before taxes cannot exceed the total amount of the Fixed Price. If your Items total more than the Fixed Price, you will get an error when making the "Fixed Price Adjustment" and you will need to adjust the prices here to reduce the total to be equal or less than the total Fixed Price.**

**My Fixed Price on this Work Order is \$1,250.00. The total of the items tab does not exceed this amount, so I will be able to adjust the price with no errors.**

SUM=\$1,089.94

Deleted Lines

Drag a column header here to group by that column

Service Issue	Added By	Added By Date	Deleted By	Deleted By Date	Reason	Memo
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Add New Labor Bill Estimated Hours Bill Standard Hours Bill Actual Hours Apply Discount

Drag a column header here to group by that column

Service Issue	Issue #	Technician	Op Code	Description	Rate Code	Std. Hours	Estimated Hours	Actual Hours	Billed Hours	Rate	Subtotal	Hourly or Fixed	Discount
REBUILD UNIT	1	ELIAS WITHERSPOON	STANDARD LABOR	STANDARD LABOR	200	0.0000	0.0000	1.0000	1.2500	\$200.00	\$250.00	Hourly	0.00 %
REBUILD UNIT	1	Jason Bonner	STANDARD LABOR	STANDARD LABOR	200	0.0000	0.0000	0.7500	0.7500	\$200.00	\$150.00	Hourly	0.00 %

**You must have billed hours on all labor lines prior to adjusting to the Fixed Price. The adjustment to the Fixed Price will be allocated to each labor line according to the number of billed hours. The system will change the type to "Fixed" and populate the amounts required to bring the total of the Repair Order to equal the Fixed Price.**

**There can be no billed hours at 0.0 on a Fixed Price adjustment.**

1.7500 SUM=400

Drag a column header here to group by that column

Time Slip #	Service Issue	Technician	Op code	Description	Date In	Time In	Date Out	Time Out	Total	Notes
1689	1:REBUILD ...	Jason Bonner	STANDARD...	STANDARD...	6/9/2017	8:00 AM	6/9/2017	8:45 AM	0.7500	
1688	1:REBUILD ...	ELIAS WITHERSPOON	STANDARD...	STANDARD...	6/9/2017	8:00 AM	6/9/2017	9:00 AM	1.0000	

1.7500

Add New Service Issue Add Standard Service Issue

Drag a column header here to group by that column

Service Issue Type	Issue #	Description	Suppress Detail
Customer		REBUILD UNIT	<input checked="" type="checkbox"/>

Adjust to Fixed Billing

Once all information is complete on my Repair Order and I have verified that the total of my Items Tab does not exceed my fixed price and that I have Billed Hours on all Labor Lines, it is time to adjust the Service Issue to the Fixed Price.

To adjust the total of the service issue, I will navigate to the "Service Issues" tab and Right Click on the Service Issue that I want to adjust. There will be an option to "Adjust to Fixed Billing". Click on that option.

File View Company Customer Notes Receivable CRM Suppliers Employees Payroll Banking Fixed Assets Inventory Service Wholegoods Lease Rental Reports

RIMSS WinNetStar Service Repair Order - 10154 Wholegood Master List

File Save Save and Close Save and New Print Credit Cards Capture Signature Update Line Item Data Show Open Documents Custom Forms

General Info Service Issues Items Labor Notes Attachments Print History Preventative Maintenance Document Register Document Register Detail Order Status Report Customer Master

Add New Service Issue Add Standard Service Issue

Drag a column header here to group by that column

Service Issue Type	Issue #	Description	Suppress Detail
Customer	1	REBUILD UNIT	<input checked="" type="checkbox"/>

**Fixed Billing Adjustment**

Labor lines will be adjusted to achieve the fixed billing amount entered below.

It is recommended that you wait until all activity is complete on this service issue prior to making the adjustment as future edits to the charges will require you to select this option again to achieve the desired result.

Pre-Tax Fixed Billing Amount:

OK Cancel

**Once I have clicked on the "Adjust to Fixed Billing" option, I will get this pop up that will allow me to input the pre-tax Fixed Price amount for the service issue. Once you have entered the Fixed Price, click "OK". The system will automatically adjust the Labor Lines to bring your service issue to the Fixed Price amount.**

Add New Labor

Bill Estimated Hours

Bill Standard Hours

Bill Actual Hours

Apply Discount

Drag a column header here to group by that column

Service Issue	Issue #	Technician	Op Code	Description	Rate Code	Std. Hours	Estimated Hours	Actual Hours	Billed Hours	Rate	Subtotal	Hourly or Fixed	Discount
REBUILD UNIT	1	ELIAS WITHERSPOON	STANDARD LABOR	STANDARD LABOR	200	0.0000	0.0000	1.0000	1.2500	\$79.30	\$79.30	Fixed	0.00 %
REBUILD UNIT	1	Jason Bonner	STANDARD LABOR	STANDARD LABOR	200	0.0000	0.0000	0.7500	0.7500	\$47.58	\$47.58	Fixed	0.00 %

Now if I look at my labor lines, I see that the Hourly or Fixed was changed to "Fixed" and the total of the labor lines has changed to adjust for the Fixed Price.

1.7500

SUM=126.88

Drag a column header here to group by that column

Time Slip #	Service Issue	Technician	Op code	Description	Date In	Time In	Date Out	Time Out	Total	Notes
1689	1:REBUILD ...	Jason Bonner	STANDARD...	STANDARD...	6/9/2017	8:00 AM	6/9/2017	8:45 AM	0.7500	
1688	1:REBUILD ...	ELIAS WITHERSPOON	STANDARD...	STANDARD...	6/9/2017	8:00 AM	6/9/2017	9:00 AM	1.0000	

1.7500

[Is Void] = 'False'

Edit Filter



Add New Service Issue Add Standard Service Issue

Drag a column header here to group by that column

Service Issue Type	Issue #	Description	Suppress Detail	Cause	Fix	Warranty Deduct.	Warranty Customer	Total Parts	Total Misc	Total Labor	Total	Est. H
			<input type="checkbox"/>									
Customer	1	REBUILD UNIT	<input checked="" type="checkbox"/>			\$0.00		\$1,123.12	\$0.00	\$126.88	\$1,250.00	

**You can also verify the totals on the Service Issues tab. This is helpful if you have more than one Service Issue in order to ensure that the Fixed Price amounts are correct.**

**If you edit any Charges, Items, or Labor after adjusting your Fixed Price, you will need to Adjust the Fixed Price again to bring the total back to the correct amount. This adjustment should be the last step prior to closing and settling the document.**

\$1,123.12 \$0.00 \$126.88 \$1,250.00

Invoice #	10076	PO#	
Date	6/9/2017	Terms	PAID
Time	07:31	Due Date	7/9/2017

RO#	10154			
RO Date	6/9/2017			
Miles	In	0.0	Out	0.0
Hours	In	0.0	Out	0.0
Service Writer	MICHELLE LEMOINE			
Stock#	(465) K546825			
Serial#	AJ4A6D5156SS4			
Yr Make Model	2016 BOSCH UNIT FOR REBUILD			
Description	UNIT FOR REBUILD			
License				
Fleet#				
In Service Date				

Lemoine Trucking (578)

Contact: Lemoine, Michelle

**Service Invoice**

Customer

Memo

**Customer Service Issue # 1**

Com: REBUILD UNIT

Cause:

Fix:

<b>Subtotal</b>	\$1,250.00
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**Here is an example of a printed Repair Order with the Detail Suppressed and adjusted to the Flat Rate amount.**

Cash	Check	Check #	CC	CC Type	On Acct.	Mfg Credit	CIT	Deposit	Other
\$0.00	\$0.00		\$1,250.00	VISA	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Customer Signature

Date

Summary of Charges	
\$0.00	Taxable
\$1,250.00	Non-Taxable
\$1,250.00	Subtotal
\$0.00	Sales Tax
<b>\$1,250.00</b>	<b>PAY THIS AMOUNT</b>
\$1,250.00	Amount Tendered
\$0.00	Change Due
Exempt Tax Cert #:	
Expiration Date:	

Printed: 6/9/2017 8:36 AM