Jobs

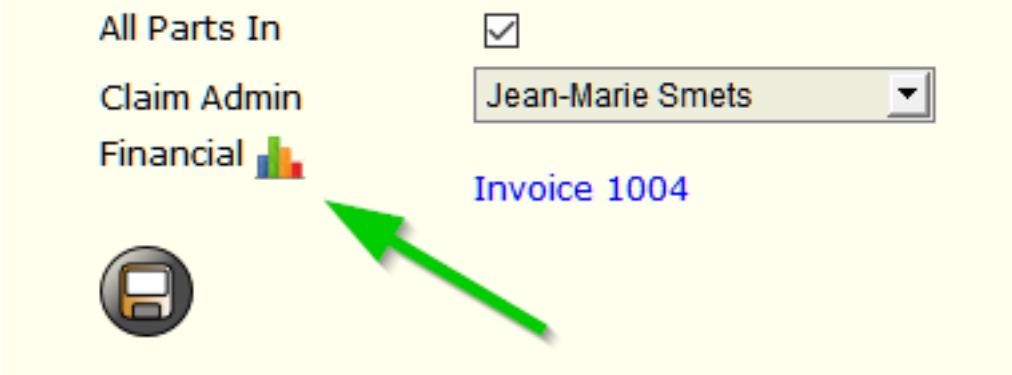
Margin on a vehicle / repair

Introduction

Margin calculation is the main reason for using PlanManager. You can see your margin per vehicle but also on all vehicles in a specific period . To see your margin calculation for all vehicles use the contribution report. This can be found under the menu Report - Financial - Contribution report. Your margin per vehicle can be found in the file itself.

Margin for a particular file

To find out how much margin you have on a particular vehicle, click the financial button next to the total cost in the file screen



This will open a popup window where your costs and your margin is shown by type.

Category	Estimate	Costs	Invoiced	Estimated Margin (£)	Estimated Margin (%)	Margin (£)	Margin (%)
Paint	£ 270.00	£ 91.25	£ 270.00	£ 178.75	195.89%	£ 178.75	195.89%
Work	£ 705.00	£ 295.23	£ 705.00	£ 409.77	138.80%	£ 409.77	138.80%
Anti-rust	£ 0.00	£ 0.00	£ 0.00	£ 0.00	---	£ 0.00	---
Environmental Charge	£ 0.00	£ 0.00	£ 0.00	£ 0.00	---	£ 0.00	---
Paint Product	£ 90.00	£ 76.50	£ 90.00	£ 13.50	17.65%	£ 13.50	17.65%
Part	£ 557.00	£ 438.05	£ 557.00	£ 118.95	27.15%	£ 118.95	27.15%
Utility	£ 11.14	£ 0.00	£ 11.14	£ 11.14	---	£ 11.14	---
rental	£ 0.00	£ 62.50	£ 0.00	£ -62.50	-100.00%	£ -62.50	-100.00%
Total	**£ 1633.14**	**£ 963.53**	**£ 1633.14**	**£ 669.61**	**69.50 %**	**£ 669.61**	**69.50 %**

Type	Number	Origin	Date	Amount Excl.	Vat	Amount Incl.
Invoice	1004		10-08-2017	£ 1 633.14	£ 326.63	£ 1 959.77
				£ 1633.14	£ 326.63	£ 1959.77

The column specifications showing the figures can be found on the claim referred to as Invoice claim.

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The cost column displays the cost of the activities performed. The labor cost per hour is multiplied by the hours worked by employees. In this column are also the ordered parts and the cost of the paint that was weighed shown on the paint weighing scale.

The column will show all invoices minus all credit notes. Only invoices and credit notes shows that were included in the journal.

The column estimated margin (€) is the column estimate minus the cost column.

The column estimated margin (%), is the estimate column divided by cost column.

The column margin (€) is the invoiced column minus the cost column.

The column margin (%), is the invoiced column divided by cost column.

At the bottom you will see all invoices and credit notes . A click on the line opens the invoice or credit note.

How to make a margin calculation before I make my invoice?

If you want to control the margin on the job before you make your invoice, you can click on the orange star in the middle right of the screen:

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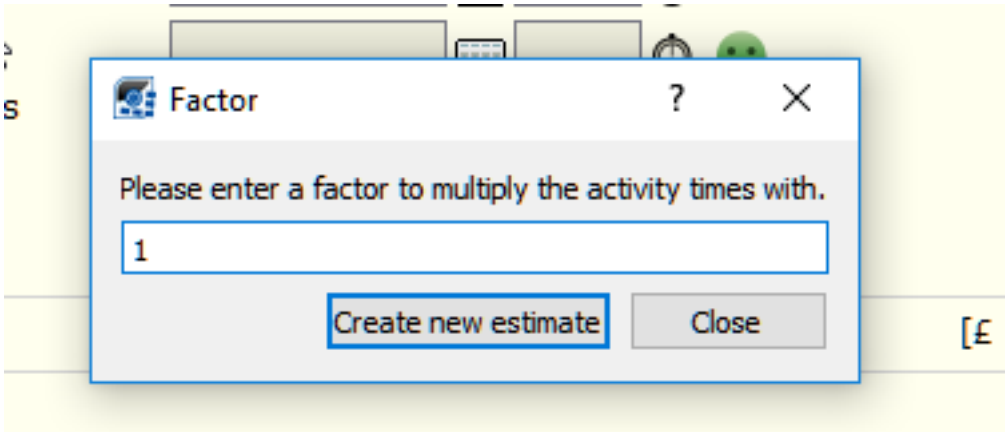
This will open next screen,



Here you can eventually enter a factor to multiply the activity with, if you click on “create new estimate” a new estimation will be created.

X amount is not completed in my margin calculation.

This is probably caused by a configuration setting that is missing.

If your labor costs are not filled this may indicate that you have not defined the hourly cost for your employees. An hourly wage can be defined by task type. But can also be set for each employee. (See Maintenance - Task Types and Maintenance - Personnel).

If your rental costs are not shown this indicates that you have not designated a dayly cost for your replacement cars. Make sure that this has been set in the menu Car Fleet - Courtesy cars.

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