# Process Sequences

Veculim requires a certain sequence of processes to be followed , in order for the flow to be right. Below is a list of each Process and the steps to follow.

## Quotes

1. Create a Quote Request (optional)
2. Create a Quote
3. Finalise the Quote once all figures have been captured, before you send it off to the client.
4. Approve (authorise) the Quote
5. Convert the Quote into a Job

## Jobs

1. Book in a Job (Jobs can be "pended" awaiting being booked in to permit parts ordering)
2. Purchase parts (only parts listed on the Job can be ordered)
3. Complete job and sign off on quality check sheet.
4. Ensure all parts ordered and received or pass savings on parts not required.
5. Review Job costing
6. Mark Job as "Completed"
7. Invoice any Excess payable (an Excess which is not % based can be invoiced immediately any time after the job has been created).
8. Invoice the Job

## Purchases

1. Create an Order
2. Book in all receipts (parts, consumables, expenses,etc.) on the daily PCR Sheets
3. Book out all Returns For Credit (RFCs) collected
4. Mark off (check in) parts and consumables received
5. Mark off all RFC's collected
6. Release PCR postings to the Pastel Ledger export file (Ledger Posting)

## Pastel Export - (This can be done daily, weekly, monthly or as required but at least at month-end)

1. Export Debtor Accounts
2. Export Supplier (Creditor) Accounts
3. Import the Debtor and Creditor export files into Pastel
4. Export Sales (Invoices and Credit Notes)
5. Export Debtor Journals
6. Export Purchases and RFCs
7. Export Petty Cash Schedules
8. Import all files (items 4 to 7) into appropriate Pastel batches
9. Once all imports are completed, delete all export files