

Procedure Manual

Dealership Name

Service Module Process Code: W100 Repair Order Entry



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High Level Process Definition

Process Name	Repair Order Entry
Process Intent	Accept and accumulate Repairs Orders and Repair Order Quotations for the Service Workshop
Process Owner	Service Manager
Process User	Service Adviser Service Booking Clerk Service Reception Personnel
Process Starts with	Request for Service - pre-book or walk-up
Process Ends with	Service Booked and Workshop Time Reserved
Process Customer	Vehicle Owner Workshop Parts Department Whole Goods Department



Process Flowchart













Process Map

Process Description: Service / Repair Booking – Existing Customer and / or Vehicle

Process (Major) Steps	Procedure	Internal Policy
 Prepare for Transaction Objective: Preparation for data entry transaction 	 a. Open the Service Resource Booking window then Click the 'New R/O' button b. Repair Order Entry window will display in readiness for the transaction 	
2. Load Vehicle and Driver Details Objective: Retrieve Vehicle & Driver details, validate / modify for transaction	 a. Select Branch (if required) and Vehicle Type – Workshop Vehicle, Stock Unit or Fixed Asset b. Enter the Vehicle Identifier (Registration Number, Stock or Asset Number) – use dropdown list or SmartSearch if required or Equipment List function c. Verify Vehicle/Driver data displayed adding any missing data if possible d. Click 'Enter Details' to record R/O details e. Respond to any Warning Messages relative to Credit issues f. Respond to any Warning Messages regarding existing R/O's for this vehicle g. Respond to warnings regarding Scheduled Services due Respond to warnings regarding any outstanding Recall 	
3. Enter Service Requirements Objective: Establish nature and description of work required to be performed	 a. Select Job Code – drop down list or SmartSearch b. Select Job Type – e.g. Retail, Fleet etc c. Add / Change Work Category, Labour Multiplier etc as required d. Continue adding Job Codes until Customer Service / Repair requirements are complete e. Click the 'Concise History' button and take appropriate action on any notes etc from prior services f. Review workshop resource availability for available time for booking and communicate to customer g. Select Arrival / Required Dates and Times, Record Odometer Reading if available, Customer Order Number if applicable. h. If Loan Car required and available complete Loan Car details i. Save R/O for subsequent Processing 	



Process Description: Service / Repair Booking – New Customer and / or Vehicle

Process (Major) Steps	Procedure	Internal Policy
1. Prepare for Transaction	a. Refer Service / Repair Booking – Existing Customer and / or Vehicle	
Objective: Preparation for data entry transaction		
2. Load Vehicle & Driver Details Objective: Retrieve Vehicle & Driver details, validate / modify for transaction	 a. Select Branch and Vehicle Type – Workshop Vehicle, Stock Unit etc b. Enter Registration Number – (NB – use of drop- down or SmartSearch functions will not be applicable if vehicle is not in system table) c. Respond to System Message indicating record does not exist – click Yes if new vehicle record is to be added d. Workshop Vehicle Maintenance window will display – complete data fields to the extent possible then Save e. Return (automatically) to R/O Order Entry window f. Verify Vehicle/Driver data displayed adding any missing data if possible g. Review available Workshop Time with Customer h. Click 'Enter Details' to record R/O details 	
3. Enter Service Requirements <i>Objective:</i> Establish nature and	a. Refer Service / Repair Booking – Existing Customer and / or Vehicle	
description of work required to be performed		



Process Description: Service Quotation

Process (Major) Steps	Procedure	Internal Policy
1. Prepare for Transaction	a. Refer Service / Repair Booking – Existing Customer and / or Vehicle	
Objective: Preparation for data entry transaction		
2. Load Vehicle / Driver Details Objective: Retrieve Vehicle & Driver details, validate / modify for transaction	 a. Tick Quotation Indicator and select Quote Expiry Date – if different to default date b. Refer Service / Repair Booking – Existing Customer and / or Vehicle 2(b) – (e) 	
3. Enter Service Requirements Objective: Establish nature and description of work required to be performed for which quotation is required	 Refer Service / Repair Booking – Existing Customer and / or Vehicle 3 (a) – (e) 	
4. Review / Negotiate factors affecting Service / Repair Price	a. Refer Quotation to Parts Department for review of Parts Pricing – if required	
Objective: Finalise the details of the quotation to be presented to the customer	 Review Service Department components of Service Cost and define allowances / reductions available – if required 	
	 c. Refer Quotation to Admin Dept for review of Discount extended to Debtor – if required d. Compile Quotation for approval and communication to Customer 	



Statement of Work

The Repair Order Entry window in EQUIP[™] may be accessed from the Service Resources Booking window

Service Resources B Parameters Branch: GG Date: 14/10/2010	• Advisor: • Team:			−Refresh- ≀efresh In	terval (min): 0 🍨	Hide Progress Statu: Hide Booked In Hide WIP+ Hide Collection+ Hide Carry Over	Refresh New R/O
Workshop Resource	es Booking	- Branch: GO	6, Date/Time: 14	/10/2010 0	9:55:09		A
Progress Status	Carry Over	Team Code	Advisor	Def. Sort	Arrival Time	Pick-Up Date/Time	Customer
Cust. Waiting	✓		jack	1	10/09/2010 07:00:00	10/09/2010 18:00:00	MICHAEL, Mr, , CLANCY
Booked In	×		1041	3	7/01/2010 07:00:00		BRINDAL, Mr, S, STEVE
Booked In	V		1041	3	8/04/2010 07:00:00	8/04/2010 18:00:00	TEAKLE, , , GREC
Booked In	×		1045	3	1/05/2009 07:00:00		FREEMAN, , , PAI &JULIE
Booked In	✓		1045	3	7/05/2009 07:00:00		HAMERSLEY, , , L & Daryl
Booked In			1045	3	12/05/2009 07:00:00	12/05/2009 18:00:00	SUCKLING, , A, A W
Customise Progress State	" us	Schedul	e Labour		Print	Print Preview Save	e to File Close

by clicking the 'New R/O...' button or from the Menu to display the following window ready for vehicle selection

Repair Order Entry							c	
Branch: GG	Workshop Vehicl	•	- Equi	ipment List		Quotation:		•
Workshop								
Workshop H	lours							
Thu 14/10								
Fri 15/10-								
Sat 16/10								
Sun 17/10								
Mon 18/10								
Tue 19/10								
Wed 20/10								
0 30	0 600 900							
	Hours							
Available Time Box	sked Time							
Click on graph bar to vie Resources Booking.	w Workshop	Code	Expiry	Units	Unit Type	Company	Ref	
<	• Type	Coue	00/00/0000	Units	onic type	Company	Kei	1
From: 14/10/2010 -	Today			7			1	
To: 20/10/2010	Detail	ar -					Enter Details	Close
		ai					Enter Details	ciose

The 'Workshop Hours' panel on the left side of the window displays a graphic representation of the daily hours available in the Workshop for the week (red bar) and the booked time (green bar) – the hourly scale is shown on the horizontal axis.



In order for Available Hours to be accurately displayed the 'Workshop Diary Maintenance' procedure must have been run for the particular month and Technician Set Up, Schedule Set Up, Public Holiday Adjustment and Technician Attendance maintained in 'Technician Maintenance' in an accurate and timely manner.

The date range displayed may be modified in a number of ways including selecting a date from the

calendar accessed through the symbol on the "From:' date or clicking the end of the 'Slider Bar' to advance or regress a day at a time. It is possible, by using this feature, to be able to assess workshop time availability very early in the Repair Order Entry procedure.

Business Policy

All Retail Repair Orders must be preceded by a formal Repair Order Quotation to be submitted for approval by customer.

Customer approval must be recorded on the Quotation before it is converted to a Repair Order.

Repair Order Quotations will be valid for a period seven (7) days from the date raised and such 'expiry date' must be recorded.

Repair Order Quotation conversion to Repair Order occurring beyond the Expiry Date must be approved by the Service Manager and, where applicable, the Parts Manager.

No work is to commence ahead of such approval and conversion.

All work will be limited to that defined in the Repair Order.

Service Quotations

The process for creating a Service Quotation is, with the exception of activating the 'Quotation' check box and confirming the 'Expiry Date' almost identical to that of raising a Repair Order described below (refer Service / Repair Booking – Existing Customer and / or Vehicle and Service / Repair Booking – New Customer and / or Vehicle).



Repair Order Entry									
Branch: GG 🗾 Workshop	Vehicl 💌 80	6635	- Equ	uipment Lis	t	Quotation	1:		•
Workshop	Reg.:	806635		Stock No	.:		Man. Ref. No.	:	
Workshop Hours	Driver:	11664		-		Vin No:	H09650S6860	66	
			TAPSCOTT	Title:	•	Chassis:			rans:
Thu 14/10	Surname:			ne: GLENN			JOHN DEERE	_	thise: JH 💌
	Street/City:				RAWA	▼ Model:]			ype:
Fri 15/10	State:	WA		ode: 6623	•	Model Name:			
Sat 16/10	County:		Home				30/06/2000	Del. Km	
Sun 17/10	Bus Phone:	08-99715	5043 Mo	bile: 0427-	715048	Build Date:		-	: RG6081H10
	Email:			_		Paint:		Key No.	
Mon 18/10	Cont Code:			No: 11664				Team	: <u> </u>
Tue 19/10	Bill To Acc.:	11664	Paym	ent: Accou	int 💌	Sold By:	891		
Wed 20/10	Acct Class:		•		a constant	41.150.00	No. of Lot		
Wed 20/10		PO BOX 2	TAPSCOTT		ail Credit: City: MORA	\$1,158.86	Need Lal Jobs:	bei Name	1
0 300 600 900	Notes 1:		294		LILY: MORA	AVVA	00JDTRAVE	-	JDPSS
Hours	Notes 1:						80JDPSSER		10P35
		16/10/20	09 Last RO:	45170	Inv. No.	305203			
Available Time Booked Time	Rem 1:	10/10/20	o. case ito.j	-15170		. 303203	RO Num	her:	
	Rem 2:						Loan Car (
Click on graph bar to view Workshop						-		,	
Resources Booking.	Туре	Code	Expiry	Units	Unit Typ	e Company	/ R	er	4
From: 14/10/2010 - Today			00/00/0000	1	1				
To: 20/10/2010 Detail	Clear						Enter Det		Close
	Clear						Enter Det	Laii5	Cluse

One of the primary reasons for issuing Quotations is to facilitate the negotiation of prices for services to be provided in the future and to ensure that the full costs are identified and communicated enabling the customer to commit to the transaction and eliminate potential disputes arising through 'misunderstandings' arising for any number of reasons. It is not unreasonable to expect that standard prices may be adjusted in order to win business in the face of an open competition environment.

Provision of Quotations is generally the responsibility of personnel specifically authorised to negotiate and approve prices.

Repair Order Quotations may be modified in terms of price by changing Labour Costs, Parts Costs and Discounts.

Where Parts Pricing adjustments are considered advice of the Quotation must be made to the Parts Manager with the appropriate request for review. Costs associated with the Service Department are able to be modified in Repair Order Maintenance and Invoicing and Discount changes can be effected by the Administration Department in Debtor Maintenance.

It is important to note that these changes may not 'feed-back' into the Repair Order Quotation and consequently some adjustment may be required to the Job Code details to correctly reflect the amounts quoted to the customer. These adjustment need to be made in Repair Order Maintenance and Invoicing.

Repair Order Quotations have a defined Expiry Date and should not be converted to a Repair Order beyond that date without specific approval. In addition expired quotations should be removed from the system on a regular basis.



Service / Repair Booking – Existing Customer and / or Vehicle

Enter / Select the applicable Branch Code, if this has not defaulted to a preset value or requires changing, and then select, from the drop-down list the type of vehicle to which the transaction will relate – Workshop Vehicle / Stock Unit / Fixed Asset.

💽 Repair Order Entry	
Branch: GG 🗨	Workshop Vehicl 💌
Madahan	Workshop Vehicle
Workshop	Stock Unit
Workshop Hours	Fixed Asset
workshop nours	

Enter / Select / Search for the vehicle identifier:

- Workshop Vehicle = Registration Number
- Stock Unit = Stock Unit Number
- Fixed Asset = Unit ID / Fixed Asset Number

An alternative method of identifying a Workshop Vehicle is to use the 'Equipment List' search function.

Click the 'Equipment List...' button....

Repair Order Entry		
Branch: GG	▼ Workshop Vehicl ▼	Equipment List
Workshop		

and the 'Customer Equipment List Inquiry' window will display.

The user Enters/ Selects / Searches for the appropriate Contact Code in this window then clicks the 'Retrieve' button to display a full list of all 'equipment' associated with the particular customer.



(ame: GJ & TA *	TAPSCOTT TRACEY TAPSCO	TT			
			94, MORAWA, W			Re	etrieve
Info	Reg No	Make	Model	Model Name	VIN/PIN	Delivery Date	Fleet
0	116649750				9750PARTS		
õ	806635	JOHN DEERE	JD 9650	JD 9650 Harvester	H09650S686066	30/06/2000	
O	806636	JOHN DEERE	JD 936D	JD 936D Platform	H00936D686664	30/06/2000	
0	50426	JOHN DEERE	JD 8970	JD 8970 Tractor	RW8970H006338	31/03/2000	
õ	50639	JOHN DEERE	JD CTS	JD CTS Harvester	H00CTSX665570	1/12/2001	
õ	70H002133	Non-Gen	4WD TRACTOR		RW8870H002133	31/12/1995	
õ	014414	Non-Gen	MFWD TRACTOR		RW7810H014414	12/11/1998	
õ	M02887	Non-Gen	2WD TRACTOR		4280H1867		
õ	N	Non-Gen	PLATFORM		43696806A	1/12/2001	
õ	806824	J.C.B.	3185	JCB 3185 Fastrac	SLPFT106650642207	9/01/2002	
		1		1			
•			1	1			•

The will, when clicked, activate the 'Workshop Vehicle Maintenance' program if additional information is required.

Options	tegn No.: 806635	•]	Red Boo	ok & Glass's Guid
ehicle Details Other Details Outstanding Repair Orders	Invoiced Repair Orders	Notes / Images	Merge To R	eg. Attachr	nents Reminde
Driver Details	Account Deta	ils			
Regn No.: 806635 Get. Veh.	Account No:	11664 💌	Account Code	e: 11664	•
Driver Code: 11664 🔹 Equipment List	Bill To Acc.:	11664		Equipme	nt List
Driver Coy.: GJ & TA TAPSCOTT	Company:	GJ & TA TAPSCO	TT	Title:	
Surname: TAPSCOTT Title:	 Surname: 	TAPSCOTT		Init:	
Name: GLENN & TRACEY Init:	Name:	GLENN & TRACE	Y		
Street: PO BOX 294	Street:	PO BOX 294			
City: MORAWA	City:	MORAWA	State:	WA	
State: WA Pcode: 6623	 Pcode: 	6623	County:		
County:	 Ph Bus: 	08-99715043	Mobile:	0427-715048	3
Ph Bus: 08-99715043 Ph Mobile: 0427-715048	Ph Home:		Fax:		
Ph Home: Fax:	Email:				
Email:					
Vehicle Details	Reminders/No	otes			
Make: JOHN DEERE Franchise: JH	 Reminder 1: 				
Model: JD 9650 Fleet No.:	Reminder 2:				
Variant:	Note 1:				
	Note 2:				
arranty Details					
Type Code Expiry Units Unit Type Co	ompany Re	f			
00/00/0000	•				

Identify the vehicle and double click on the line to populate the data to the 'Repair Order Entry' window.



Repair Order Entry										
Branch: GG 🔍 Workshop	Vehicl 💌 80	6635	-	Equipmer	nt List		Quotation	:		•
Workshop	Reg.:	806635		Stoc	k No.:		N	Man. Ref. No.	:	
Workshop Hours	Driver:	11664		-			Vin No: H	10965056860	66	-
	Company:	GJ & TA T	TAPSCOTT	rit	tle:	-	Chassis:		Т	rans:
Thu 14/10	Surname:	TAPSCOT	Т	Name: GL	ENN & TR	RACEY	Make: D	OHN DEERE	Franc	hise: JH 💌
	Street/City:	PO BOX 2	94		MORAW	/A	▼ Model: JI	D 9650	Т	ype:
Fri 15/10	State:	WA		Pcode: 6	623	<u> </u>	الإ : Iodel Name	D 9650 Harve	ster	
Sat 16/10	County:			me Ph:			Del. Date: 3	0/06/2000	Del. Km:	<u> </u>
► Cure 17/10	Bus Phone:	08-99715	043	Mobile: 0	427-7150	48	Build Date:		Engine:	RG6081H10
Sun 17/10	Email:						Paint:		Key No.:	
Mon 18/10	Cont Code:			ust No: 1		-	_		Team:	· ·
Tue 19/10	Bill To Acc.:	11664	Pay	yment: A	Account	•	Sold By: 8	391		
	Acct Class:		•		_					
Wed 20/10			TAPSCOTT	·	Avail Cre		\$1,158.86	Need La	oel Name	
0 300 600 900		PO BOX 2	.94		City:	MORA	WA	Jobs:		
Hours	Notes 1:							00JDTRAVE		IDPSS
	Notes 2:		_					80JDPSSER	VICE	
Available Time Booked Time	· ·	16/10/20	09 Last RC	D: 4	5170 Inv	. No.:	305203			
	Rem 1:							RO Num		
Click on graph bar to view Workshop	Rem 2:							Loan Car (Class:	
Resources Booking.	Туре	Code	Expiry	Ur	nits Unit	t Type	Company	R	ef	
· ·			00/00/00	00						
From: 14/10/2010 🔻 Today										
To: 20/10/2010 Detail		_								
	Clear							Enter Det	ails	Close

Verify the accuracy of the displayed data. If errors are identified the Workshop Vehicle Maintenance window is accessible by clicking on the 😡 symbol on the 'Registration Number' field.

Billing details are able to be changed (if authorised) by modifying the Contact / Customer Codes in the centre section of the window.

Warranty information for the specific vehicle is displayed at the foot of the window.

When ready to proceed click the 'Enter Details...' button.

Credit Issues

In the event that there are any issues regarding Credit Limits applicable to the customer the following message will display



The user will need to consider the appropriate action to be taken when this dialogue box appears which may include, but not be limited to, the following:

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- Reject the Order and advise the customer of the action
- Apply for a Credit Over-ride
- Initiate the process to increase the Customer's Credit Limit
- Change the Payment Method if authorised (at the time of Repair Order Invoicing

Depending on the action determined select the 'Yes' or 'No' buttons in the dialogue box.

Note – selecting 'Yes' will allow the transaction to proceed but when the Repair Order is finalised further Credit Checking will occur and the warning may be presented again

Open Repair Order

If there is an Open Repair Order for the particular vehicle being processed the following message will display



In such an event the user must decide whether to continue and create a new Repair Order – in which case select 'Yes' – or to modify the existing Repair Order by adding the additional requirements – in which case select 'No'. If the latter option is selected the existing Repair Order is able to be accessed from the Repair Order Maintenance and Invoicing window (refer separate procedure).

Selecting the 'Yes' option will allow the transaction to proceed.

Schedule Service

If the Dealership utilises the 'Service Schedule Maintenance' (refer separate Procedure) feature of EQUIP[™] and the vehicle has a Scheduled Service Code assigned the system will display the following message

S Repair Order Scheduled Servicing	? ×
Release Scheduled Item: 🗹	
Service Item: 1 Description: Test 1	
Schedule Type: 🕫 Retail 🛛 C Fleet	Proceed

If the Scheduled Service Item is to be included in the Repair Order check the 'Release Scheduled Item' check box, click the 'Proceed' button and the Job Codes associated with the Service Schedule item will be posted to the Repair Order automatically. To bypass the inclusion of the scheduled item(s)



uncheck the 'Release Scheduled Item' check box and click 'Proceed'. Where the scheduled service item is bypassed the message will display when the next Repair Order is raised for the vehicle.

Recall Campaign

Where the Dealership utilises the Recall Campaign feature of EQUIP[™] and the system detects an outstanding campaign for the particular vehicle a warning message will display

Recall Ca	impaign (AP003351)
2	There have been one or more Recall Campaign(s) identified for this vehicle, do you wish to view/select the Recall Campaign(s) for this vehicle
	Yes No

Selecting the option 'No' will allow the transaction to proceed ignoring the Recall warning. However if 'Yes' is selected the system will then display available information relative to the Recall and allow the user to make a selection (if more than one campaign is identified) and automatically post the appropriate Job Code to the Repair Order.

Entering Service Requirements

The 'Repair Order Details' window will be presented for the user to complete (if a Service Schedule or Recall Item(s) have been identified and included from the preceding steps these details will be displayed).

If there are further jobs to be performed on the vehicle add a fresh data input line (right click and select Add) in readiness for Job Code entry.

Repair Order Details									?	x
Workshop	Service Model			Repair Order No:	52739	Reg:	806635	i Na	Warranty	/
Workshop Hours	Job Code		Field	Descriptio	n	Туре	Work Cat.	Lab. Multiplier		
Thu 14/10	-					-	-	1.00 -	.0000	
Fri 15/10								Total Sale:	0.0000	
Sat 16/10										
Sun 17/10										
Mon 18/10	•									Þ
Tue 19/10	Line No Jo	b Cod	e	Туре		De	tail	Va	lue	
Wed 20/10										
0 300 600 900										
Hours										
Available Time Booked Time										
Click on graph bar to view Workshop	Arrival Date/Time:	14/10)/201	0 💌 07:00:00	PIN: *****	• Ta	x No.:	Parts Br: G	G	•
Resources Booking.	Date/Time Req.:	14/10)/201	0 • 18:00:00 (Ddo:	Orde	r No.:		Print:	
From: 14/10/2010 Today	Loan Car 🔲 L	.oan C	ar ID:		-	Loan Car	Class:	1	•	
To: 20/10/2010 Detail	Tag No.:							11	C Pre-Aut	th.
	Rem. 1:							1	C PIE-Au	un
	Rem. 2:									_
Schedule Labour Clear Copy from	RO/Quotation			Job Coo	de Search		Concise	History Sav	e Cl	ose



Enter / Select / Search for the relevant Job Code to add to the Repair Order.

If the work is to be completed away from the workshop (in the 'field') check the 'Field' check box.

Select, from the drop-down list the Job Type



Users are able to copy Job Code details from other Repair Orders or Repair Order Quotations. This is achieved by clicking the 'Copy from RO/Quotation' button to display the following pop up

Job Code	Type	Detail Line	Est Hours	Est. Labour	Est. Parts	Est. Other	Est. Sublet	ME	Ind
80GM06-CS-15	Retail	RE-ROUTE AIR CONDITIONER DRAIN TU	0.3000	0	0	0		0	
15JD9000T1505	Retail	RESET FRONT AXLE HEIGHT	0	0	0	0		0	
40JD7000T4004	Retail	FIT REVERSE BEEPER	0	0	0	0		0	

Select the Job Codes to be copied then click 'Copy' for the codes to be copied into the current Repair Order.

At this point a check of the 'Concise History' (click the 'Concise History' button to display any Notes, Comments and Reminders) is advised to ensure that all outstanding items from earlier Service / Repairs are addressed.

When all Job Codes have been added to the Repair Order define and enter the Arrival Date / Time and Required Date / Time.

If the current Odometer reading is known enter the value in the 'Odo:' field.

If the Parts for the Repair Order are to be provided by another Parts Branch change the Parts Branch field accordingly.



Where the Dealership provides Loan Cars and the EQUIP[™] Loan Car Management feature is utilised assign, if required, a Loan Car for the customer.

Enter the Customer Order Number (if required), check the 'Print' check box if immediate Repair Order print is required.

The Schedule Labour program in EQUIP[™] can be accessed immediately following completion of the Repair Order by checking the 'Schedule Labour' check box. (Refer Procedure W110 – Service Resource Booking & Schedule Labour for details on the use of this program).

Enter the user PIN (if not already done) then 'Save' the transaction.

If output has printed manage the documentation in line with internal requirements.

Service / Repair Booking – New Customer and / or Vehicle

Open / access the Repair Order Entry window as defined in the previous section.

Enter the Registration Number for the vehicle being booked for Service / Repair. If EQUIP[™] is unable to match the input with a Workshop Vehicle Record the following message will be displayed:



The user should confirm that a data entry error has not occurred and that the vehicle and / or the customer are new to the Dealership before selecting the 'Yes' option.

Selecting 'Yes' will display the 'Workshop Vehicle Maintenance' window:



Creating a Workshop Vehicle Record

🔮 Workshop V	ehicle Maintenance				_		8 🛛
Options © Worksho	p Vehicles 🔿 Stock Units	Regr	No.: WEI664	•		Red Book	& Glass's Guide
Vehicle Details	Other Details Outstanding	Repair Orders Invo	piced Repair Orders	Notes / Images	Merge To Reg	g. Attachmer	nts Reminder
Driver Detai	s		Account Detai	ls			
Regn No.: V	VEI664 Get. Veh.		Account No:	-	Account Code:		-
Driver Code:	·	Equipment List	Bill To Acc.:			Equipment	List
Driver Coy.:			Company:			Title:	
Surname:		Title:	Surname:			Init:	
Name:		Init:	Name:				
Street:			Street:				
City:		•	City:		State:		
State:	Pcode:	•	Pcode:		County:		
County:		v	Ph Bus:		Mobile:		
Ph Bus:	Ph Mobile:		Ph Home:		Fax:		
Ph Home:	Fax:		Email:				
Email:							
Vehicle Deta	ils		Reminders/No	tes			
Make:	Franc	nise: 🗾 🔻	Reminder 1:				
Model:	Fleet	No.:	Reminder 2:				
Variant:			Note 1:				
-			Note 2:				
Warranty Deta	iils						
Type Co	de Expiry Units	Unit Type Comp	oany Ref	F			
	▼ 00/00/0000		-				
Clear			Co	oncise History	Delete	Save	Close

Ensure that the 'Vehicle Details' tab is active and enter the minimum information required to establish the Workshop Vehicle Record – Company, Name, Address, Telephone etc. Select a Franchise Code and Account Details (initially a Cash Sales Account Code can be selected).

When a new customer requires Credit Facilities the appropriate applications and approvals can be completed and the Account Details modified accordingly.

Activate the 'Other Details' tab and collect and enter additional vehicle details if appropriate.

Save the Transaction and Close the window.

The system will return the user to the Repair Order Entry window and the information just collected and loaded to EQUIP[™] will be displayed.

Click the 'Enter Details' button.

Where the Vehicle Owner is already a customer of the Dealership there may be a Credit Alert displayed (refer previous section for guidance in this event) but there will not be any Service Schedule Alerts and Recall Alerts are unlikely unless Vehicle Details have been collected at this point.



Entering Service Requirements

The 'Repair Order Details' window will be presented for the user to complete.

If necessary add a fresh data input line (right click and select Add) in readiness for Job Code entry.

Repair Order Details							? X
Workshop	Service Model		Repair Order No: 5	2739 Re	g: 806635	i No	Warranty
Workshop Hours	Job Code	Field	Description	Туре	Work Cat.		Est Hours Est.
Thu 14/10	-				• •	1.00 -	.0000
Fri 15/10						Total Sale:	0.0000
Sat 16/10							
Sun 17/10							
Mon 18/10	•	m					•
Tue 19/10	Line No Jo	b Code	Туре		Detail	Va	lue
Wed 20/10							
0 300 600 900 Hours							
Available Time Booked Time							
Click on graph bar to view Workshop	Arrival Date/Time:	14/10/201			Tax No.:	Parts Br: GO	
Resources Booking.	Date/Time Req.:				rder No.:		Print: 🗖
From: 14/10/2010 - Today	Loan Car 🗌 L	Loan Car ID	:	▼ Loan	Car Class:	-	1
To: 20/10/2010 Detail	Tag No.:					JD	C Pre-Auth:
	Rem. 1:						
	Rem. 2:						
Schedule Labour Clear Copy from	RO/Quotation		Job Code	Search	Concis	e History Save	e Close

Enter / Select / Search for the relevant Job Code to add to the Repair Order.

If the work is to be completed away from the workshop (in the 'field') check the 'Field' check box.

Select, from the drop-down list the Job Type

39	Reg:	80663
	Туре	We
	Retail 👻	STAN
	Excess Fleet Internal	
	Policy Project Bill Retail	
	Sundry Warranty	

When all Job Codes have been added to the Repair Order define and enter the Arrival Date / Time and Required Date / Time.

Users are able to copy Job Code details from other Repair Orders or Repair Order Quotations. This is achieved by clicking the 'Copy from RO/Quotation' button to display the following pop up



Job Code	Туре	Detail Line	Est Hours	Est. Labour	Est. Parts	Est. Other	Est. Sublet	MD In
80GM06-CS-15	Retail	RE-ROUTE AIR CONDITIONER DRAIN TU	0.3000	0	0	0		0 🗆
15JD9000T1505	Retail	RESET FRONT AXLE HEIGHT	0	0	0	0		0 🗆
40JD7000T4004	Retail	FIT REVERSE BEEPER	0	0	0	0		0 🗆

Select the Job Codes to be copied then click 'Copy' for the codes to be copied into the current Repair Order.

If the current Odometer reading is known enter the value in the 'Odo:' field.

If the Parts for the Repair Order are to be provided by another Parts Branch change the Parts Branch field accordingly.

Where the Dealership provides Loan Cars and the EQUIP[™] Loan Car Management feature is utilised assign, if required, a Loan Car for the customer.

Enter the Customer Order Number (if required), check the 'Print' check box if immediate Repair Order print is required.

Enter the user PIN (if not already done) then 'Save' the transaction.

If output has printed manage the documentation in line with internal requirements.



Program Parameters

The following notes define the parameters applicable to applications described in this Procedure Manual (refer to Procedure Manual P000 – Tailoring EQUIP[™] to Site / User Requirements for more information)

Repair Order Entry

Parameter Function
Allow user to modify the Creation Date.
To define the mode in which the workshop Vehicle
Maintenance response window is opened (Enquiry or
Maintenance) when it is accessed from the Customer
Equipment List Inquiry window.
To specify a default Branch.
To allow / disallow the user to change Name, Surname and
Company Name, which is reflected in Contact
Maintenance.
Adds a dropdown selection to the Order No field; displays
all open orders from Purchase control.
To display Marketing Source dropdown and make it
mandatory to select.
To specify whether to advise sales person.
To choose a multiplier to be applied to the job code
estimates.
This is a required field for ASQ to function.
To enable ASQ Import.
To prevent branch selection from being changed
To restrict operators from creating RO entries for Sold or
Swapped stock units.
To specify a default a job code for the first line entry for RO
Entry. Default: Blank

Service Vehicle Maintenance

Parameter Name	Parameter Function
DefaultRegistration	To specify a default registration number.
EnforceValidMake	To enforce the entry of a valid 'Make' value in the
	dropdown before saving or processing.
AllowOdoSchedEdit	To permit the user to maintain both the odometer reading
	and service schedule code for invoiced repair orders in
	Vehicle Maintenance. This parameter must be set to 'N' to
	allow edit of the Concise History'
ChangeName	To allow / disallow the user to change Name, Surname and



	Company Name, which is reflected in Contact
	Maintenance.
WkshpVehEnqOnly	To define the mode in which the workshop Vehicle
	Maintenance response window is opened (Enquiry or
	Maintenance) when it is accessed from the Customer
	Equipment List Inquiry window.



User Notes