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Procedure Manual

Dealership Name
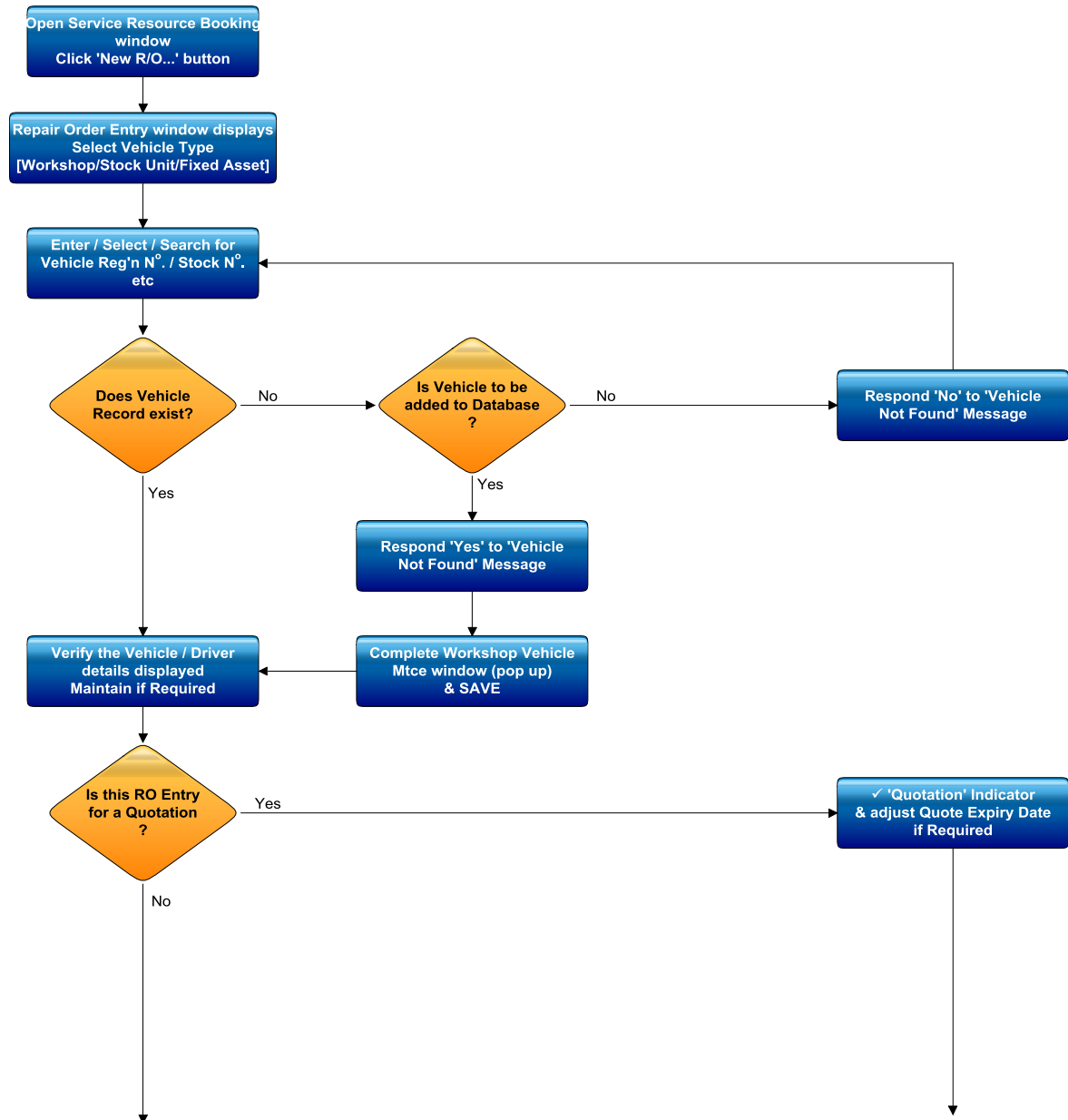
Service Module

Process Code: W100 Repair Order Entry
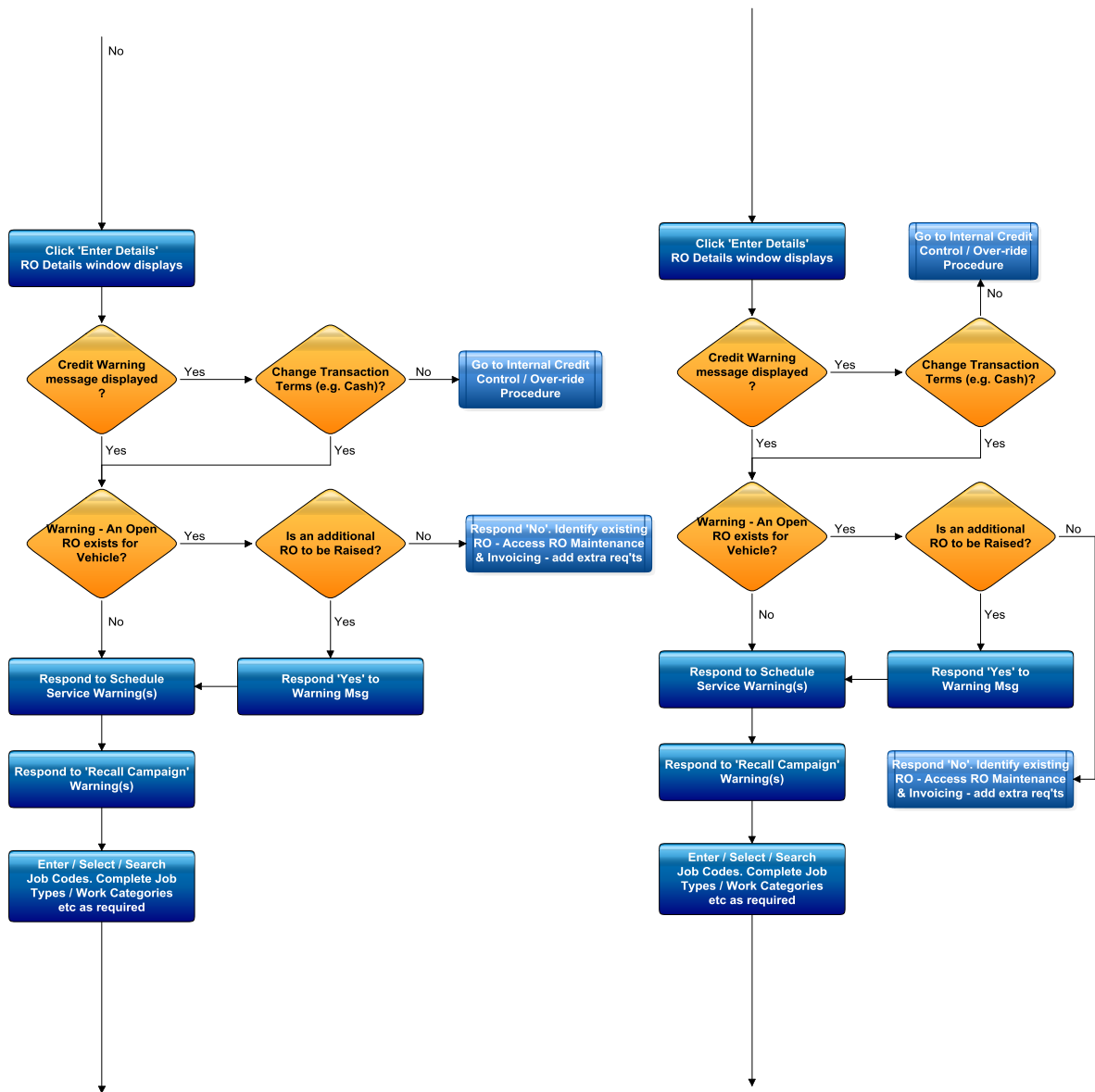
Contents

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

Open Service Resource Booking window
Click 'New R/O...' button

Repair Order Entry window displays
Select Vehicle Type
[Workshop/Stock Unit/Fixed Asset]

Enter / Select / Search for
Vehicle Reg'n N°. / Stock N°.
etc

Does Vehicle Record exist?

Is Vehicle to be added to Database?

No → Respond 'No' to 'Vehicle Not Found' Message

No

Yes

Yes → Respond 'Yes' to 'Vehicle Not Found' Message

Complete Workshop Vehicle Mtce window (pop up)
& SAVE

Verify the Vehicle / Driver details displayed
Maintain if Required

Is this RO Entry for a Quotation?

Yes → ✓ 'Quotation' Indicator
& adjust Quote Expiry Date if Required

No

No

Click 'Enter Details'
RO Details window displays

Credit Warning
message displayed
?

Yes

Change Transaction
Terms (e.g. Cash)?

No

Go to Internal Credit
Control / Over-ride
Procedure

Yes

Yes

Warning - An Open
RO exists for
Vehicle?

Yes

Is an additional
RO to be Raised?

No

Respond 'No'. Identify existing
RO - Access RO Maintenance
& Invoicing - add extra req'ts

No

Yes

Respond to Schedule
Service Warning(s)

Respond 'Yes' to
Warning Msg

Respond to 'Recall Campaign'
Warning(s)

Enter / Select / Search
Job Codes. Complete Job
Types / Work Categories
etc as required

Click 'Enter Details'
RO Details window displays

Go to Internal Credit
Control / Over-ride
Procedure

No

Credit Warning
message displayed
?

Yes

Change Transaction
Terms (e.g. Cash)?

Yes

Yes

Warning - An Open
RO exists for
Vehicle?

Yes

Is an additional
RO to be Raised?

No

No

Yes

Respond to Schedule
Service Warning(s)

Respond 'Yes' to
Warning Msg

Respond to 'Recall Campaign'
Warning(s)

Respond 'No'. Identify existing
RO - Access RO Maintenance
& Invoicing - add extra req'ts

Enter / Select / Search
Job Codes. Complete Job
Types / Work Categories
etc as required

Review 'Concide History' for any action items

Confirm and Set Dates / Times for Booking

Arrange 'Loan Car' if required

Save Transaction

Review 'Concide History' for any action items

Communicate Quotation to Parts Dep't for Parts Price Review - if req'd

Review Service Dep't Costing Factors / adjust as req'd

Review Debtor Discount opportunities / adjust as req'd & authorised

Compile Communicate Quote to Customer

Quotation accepted Convert to R/O?

No → Delete Quotation

Yes

Open RO Maintenance & Invoicing Window Enter / Select RO Number

Respond to Confirmation msg?

Yes

No

Confirm and Set Dates / Times for Booking

Un ✓ the 'Quotation' Indicator

Process Map

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

Process (Major) Steps	Procedure	Internal Policy
1. 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
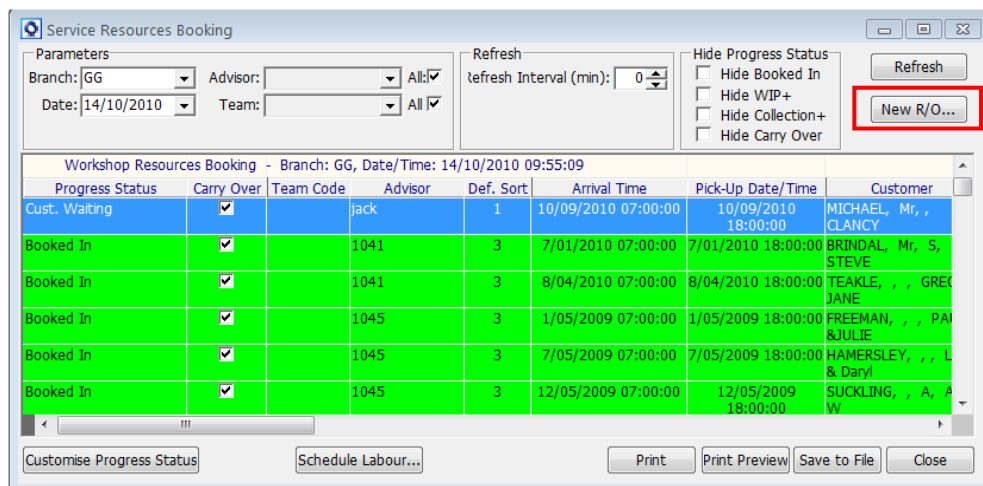
Process (Major) Steps	Procedure	Internal Policy
1. Prepare for Transaction ***Objective:*** *Preparation for data entry transaction*	a. Refer Service / Repair Booking – Existing Customer and / or Vehicle	
2. Load Vehicle & Driver Details ***Objective:*** *Retrieve Vehicle & Driver details, validate / 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 ***Objective:*** *Establish nature and description of work required to be performed*	a. Refer Service / Repair Booking – Existing Customer and / or Vehicle	

Process Description: Service Quotation

Process (Major) Steps	Procedure	Internal Policy
1. Prepare for Transaction **Objective:** *Preparation for data entry transaction*	a. Refer Service / Repair Booking – Existing Customer and / or Vehicle	
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*	a. Refer Service / Repair Booking – Existing Customer and / or Vehicle 3 (a) – (e)	
4. Review / Negotiate factors affecting Service / Repair Price **Objective:** *Finalise the details of the quotation to be presented to the customer*	a. Refer Quotation to Parts Department for review of Parts Pricing – if required b. 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

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

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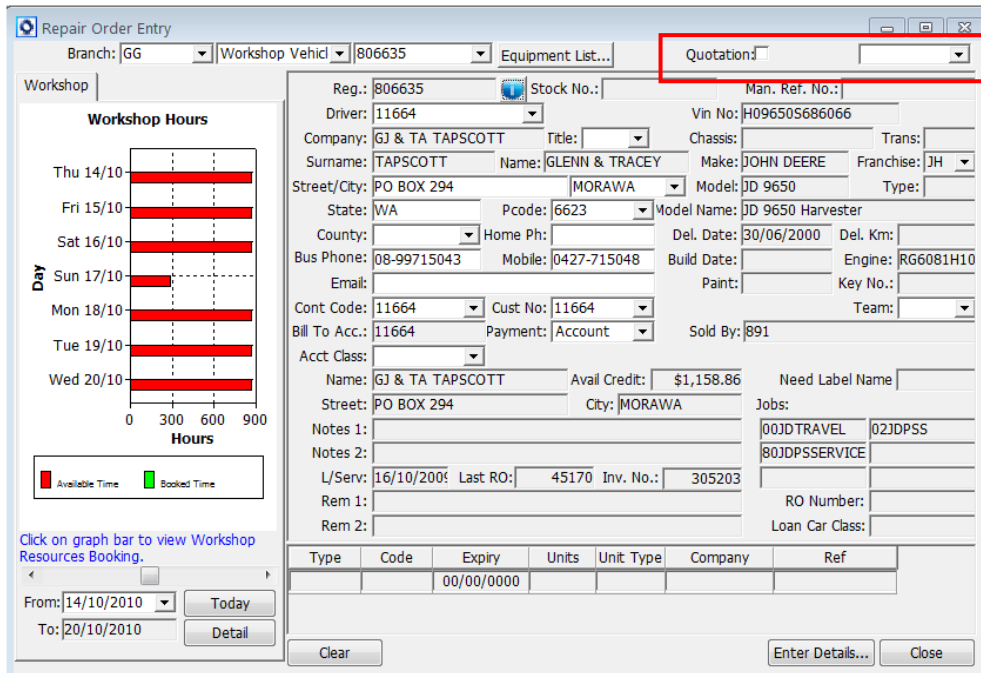
Repair Order Quotation conversion to Repair Order occurring beyond the Expiry Date must be approved by the Service Manager and, where applicable, the Parts Manager.

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).

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.
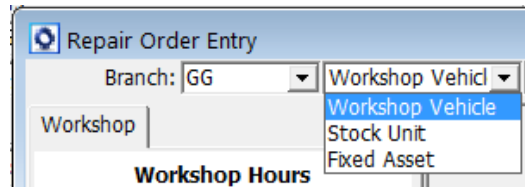
Enter / Select / Search for the vehicle identifier:

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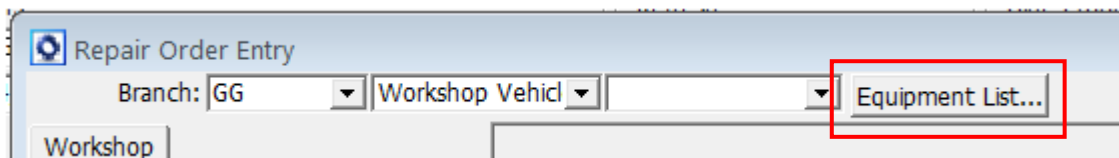
and the 'Customer Equipment List Inquiry' window will display.

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.

The symbol at the start of each line item, will, when clicked, activate the 'Workshop Vehicle Maintenance' program if additional information is required.

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

Verify the accuracy of the displayed data. If errors are identified the Workshop Vehicle Maintenance window is accessible by clicking on the [image] 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
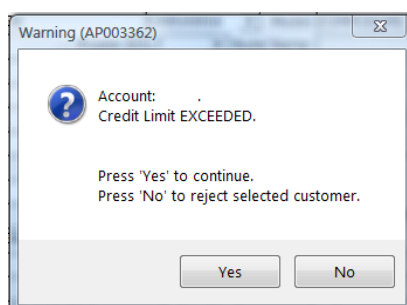
The user will need to consider the appropriate action to be taken when this dialogue box appears which may include, but not be limited to, the following:

- 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
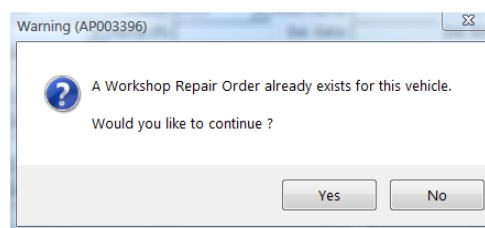

In such an event the user must decide whether to continue and create a new Repair Order – in which case select 'Yes' – or to modify the existing Repair Order by adding the additional requirements – in which case select 'No'. If the latter option is selected the existing Repair Order is able to be accessed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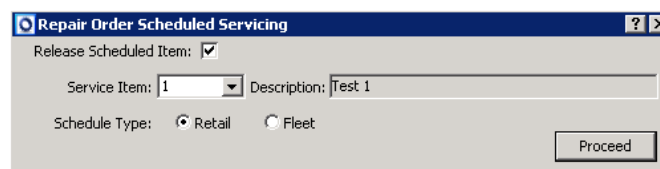

If the Scheduled Service Item is to be included in the Repair Order check the 'Release Scheduled Item' check box, click the 'Proceed' button and the Job Codes associated with the Service Schedule item will be posted to the Repair Order automatically. To bypass the inclusion of the scheduled item(s)

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
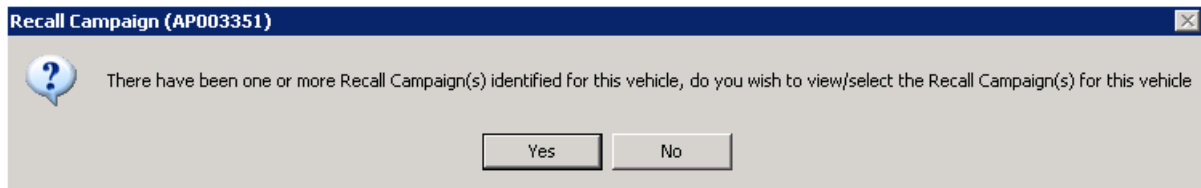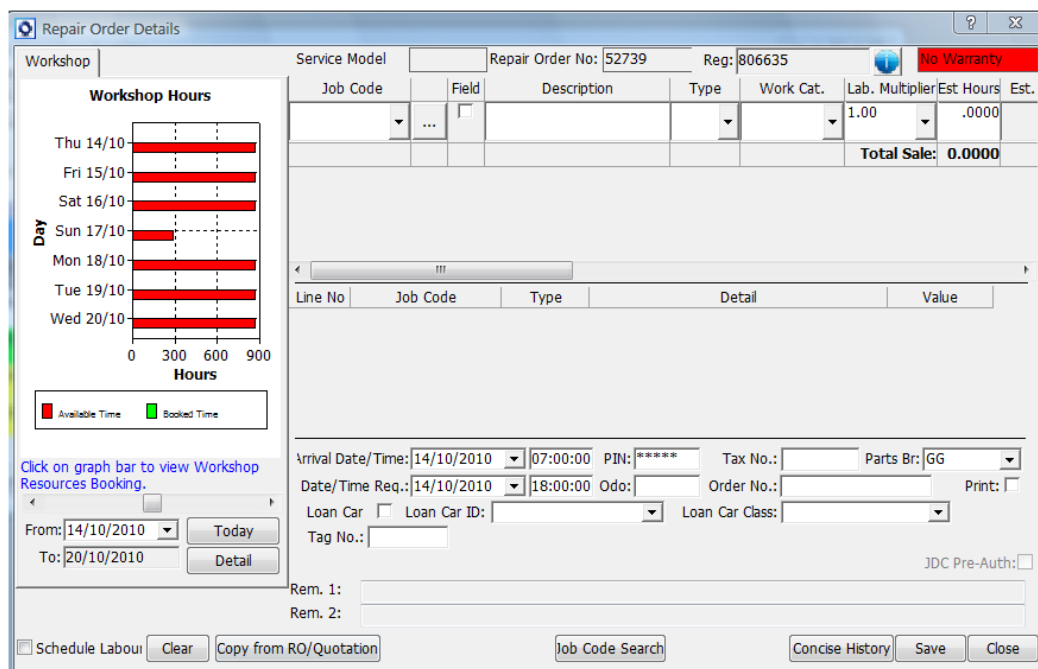

Selecting the option 'No' will allow the transaction to proceed ignoring the Recall warning. However if 'Yes' is selected the system will then display available information relative to the Recall and allow the user to make a selection (if more than one campaign is identified) and automatically post the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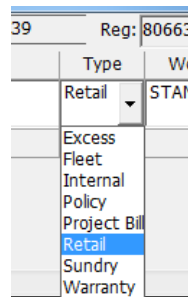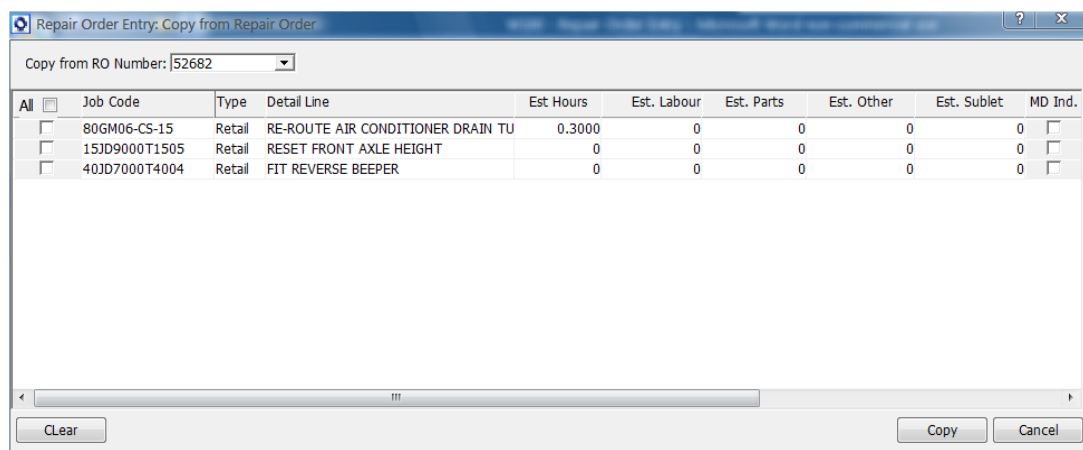
Enter / Select / Search for the relevant Job Code to add to the Repair Order.

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

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

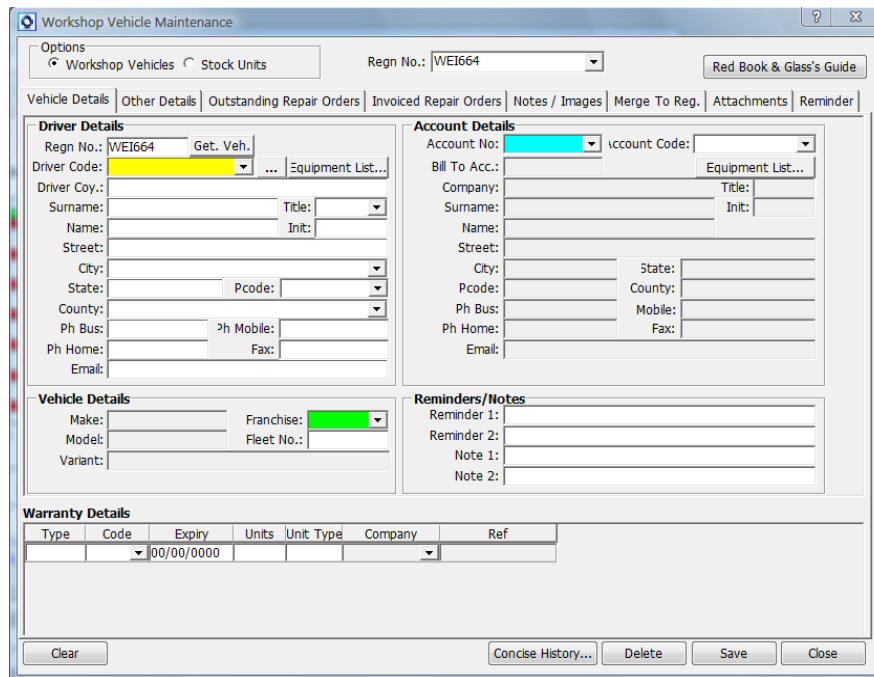Open / access the Repair Order Entry window as defined in the previous section.

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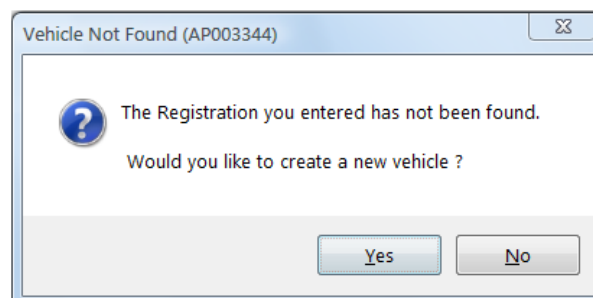
The user should confirm that a data entry error has not occurred and that the vehicle and / or the customer are new to the Dealership before selecting the 'Yes' option.

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

Creating a Workshop Vehicle Record

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.
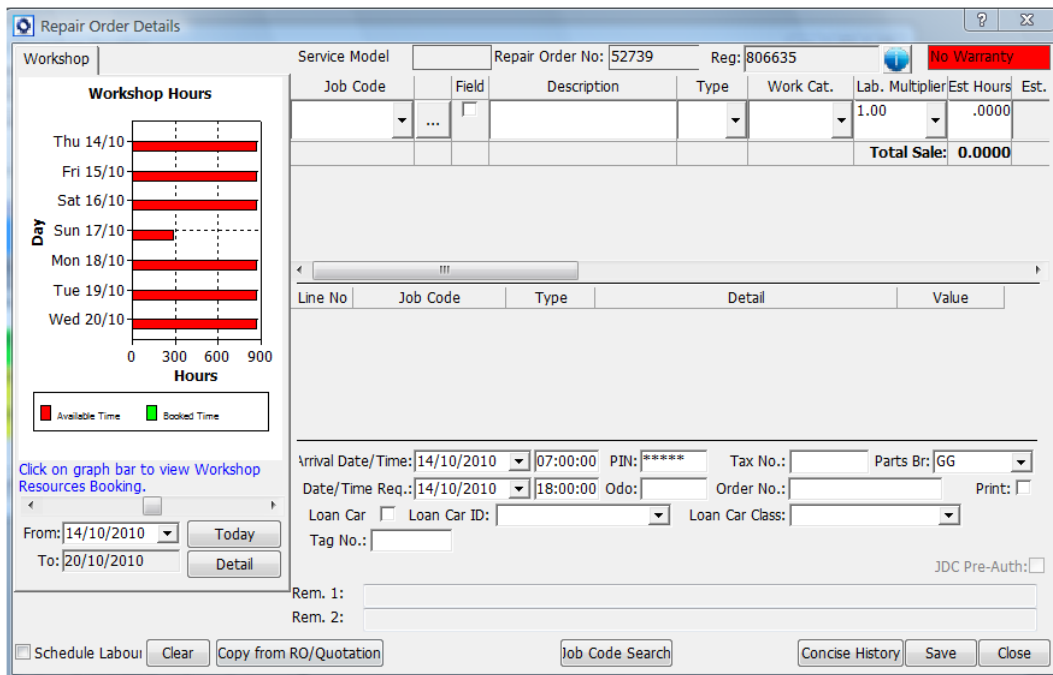
Click the 'Enter Details' button.

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.

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

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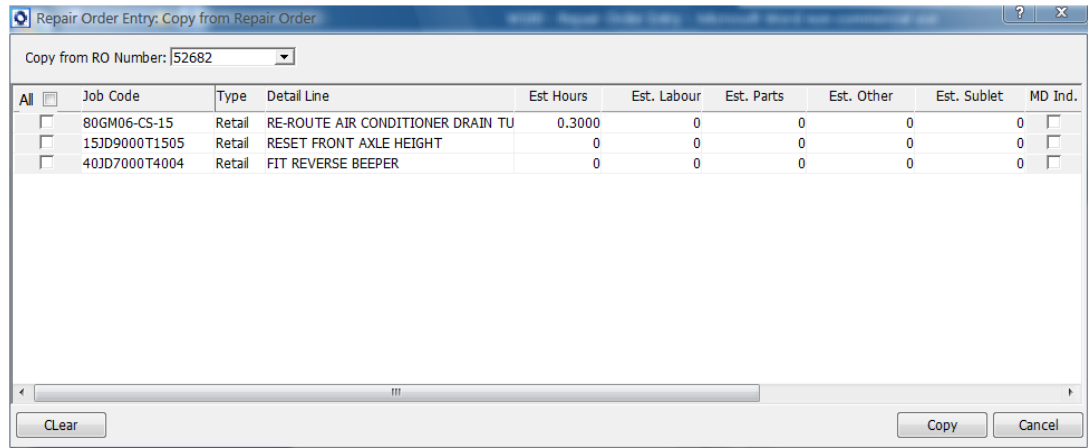
Select the Job Codes to be copied then click 'Copy' for the codes to be copied into the current Repair Order.

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 Name	Parameter Function
CreationDateUpd	Allow user to modify the Creation Date.
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.
Branch	To specify a default Branch.
ChangeName	To allow / disallow the user to change Name, Surname and Company Name, which is reflected in Contact Maintenance.
InternalOrder	Adds a dropdown selection to the Order No field; displays all open orders from Purchase control.
CaptureSource	To display Marketing Source dropdown and make it mandatory to select.
AdviceSalesperson	To specify whether to advise sales person.
AllowEditMultiplier	To choose a multiplier to be applied to the job code estimates.
ASQPartfranchise	This is a required field for ASQ to function.
ASQJCImportVisible	To enable ASQ Import.
DisableBranchSel	To prevent branch selection from being changed
StopOnSoldOrSwapped	To restrict operators from creating RO entries for Sold or Swapped stock units.
DefaultJobCode	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