



Eclipse Service

Eclipse

The New version was designed to make your life easier, and give you fast access to all the tools you use so frequently. It may take some time for you to learn your way around,

Service

Eclipse Service is a tool that allows service advisers and managers to fully manage and process their service repair orders in an easy and structured way.

If you are an existing customer you will notice that the service program has changed. We now have several system options which can be turned on or off, these options can dramatically change the way service works. The major of these system options changes being 'jobs'.

Jobs

The concept of jobs is a new way of breaking up each of the customers' requests/concerns into individual tasks that have their own parts and sublets allocated to them.

Jobs allow the person who is paying for a section of the bill to have their part isolated from the other items on the bill. This new feature also allows you to invoice/close only part of the invoice. For example the customer wishes to pay for the service they had done today but you haven't yet prepared the warranty part of the bill, so you can now leave that part of the repair order open so you can process it at a later date.

There are 3 job types that you can choose from, they are Customer, Internal and Warranty, with in these types you can have the sale types (rates) that you normally use.

Within Warranty you can have a sale type of warranty

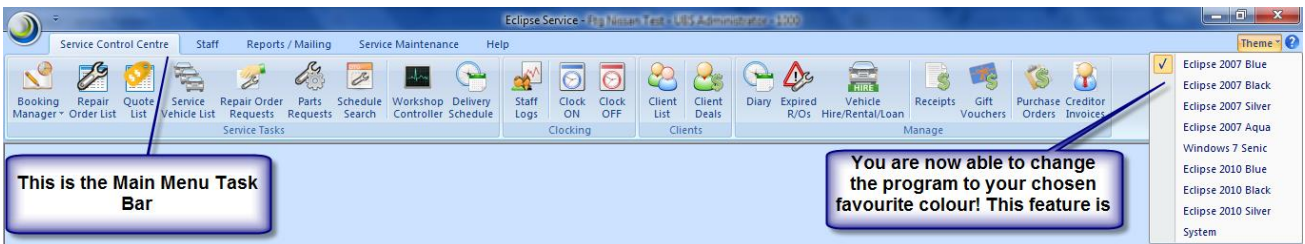
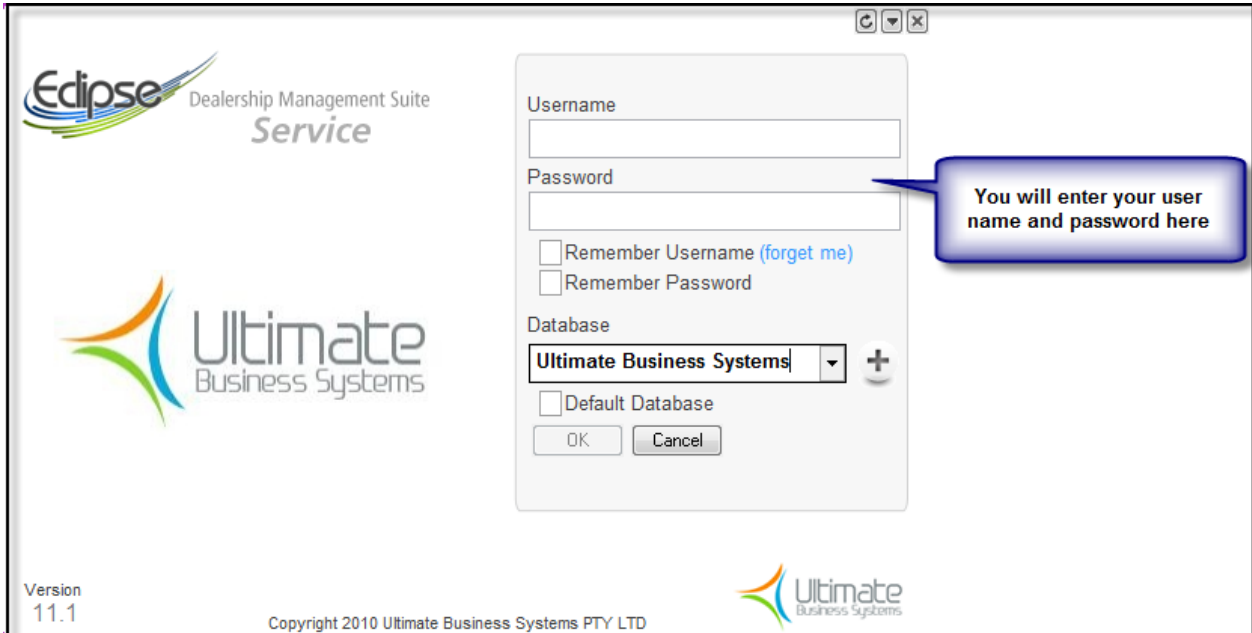
Within Internal you can have a sale type of internal

Within Customer you can have sale types of retail, trade, staff etc

The new jobs feature has been designed to make your life simple. All new jobs that you create will default to be a type of customer. This is the safest option; this means you can't forget to accidentally bill the customer for something. It is very easy to change the type to warranty or internal by a few clicks. If you change the sale type the system will go through all of your parts invoices labour rates and sublets to your desired sale charge type, it will also recalculate the GST according to the new sale type.

The job types are in a different colour, Customer is in yellow, internal is in green, and warranty is purple, so at a glance it is easy for you distinguish between the 3 different sale types.

Getting Started



Searching for a Customer

There are 2 ways to book a customer in to see their vehicle; the first way is to go to the vehicle tab and search for the customer or vehicle by, rego, VIN, client name or any of the unique fields at the top of the screen.

Service Control Centre

Repair Orders | Service Quotes | **Vehicles** | Staff Logs | RO Request

Search Criteria: Rego, Vin, Owner, Auto Search, Clear Filters

Options: Show Free service(s) available, Include vehicles last seen before: 14/06/2011, Load Vehicle List

Add Vehicle... Edit Vehicle... Create R/O... Create Quote... View History... Update Vehicle Delete Vehicle

Veh#	Stock#	Ext#	Client Name	Rego#	Make	Model	Series	Variant	Eng/Chassis	VIN
158870	49477N	2064652	BATRAD CONTRACTIC		NISSAN	NAVARA	D40 S5 M	ST-X	YB002248C	YB002248C
158869	49476N	2075140	FERNTREE GULLY NE		NISSAN	NAVARA	D40 S6 M	STV	YB002248C	YB002248C
158868	-21U		FERNTREE GULLY NE	U4N152	FORD	FALCON	AU	CLASSIC FO	JG5WY4A3E	4FF
158867	49428N	2094570	ENGELBRECHT WAIN		NISSAN	DUALIS	J10W SEI	TIL HATCH	WFR002400F	SJA
158866			DENNIS GREG	W4E086	MAZDA	6				
158865			DENNIS GREG		NISSAN	X-TRAIL				
158864	49374N	2094209	RODWAY DEAN		NISSAN	DUALIS	S4	TS	R0NCD0700	SJA
158863			ATKINSON MICHAEL	20000000	NISSAN	PATROL				
158862	49460N	2069957	FERNTREE GULLY NE	ZT4079	NISSAN	NAVARA	D40 S7 M	RX	YB0548077	WIN
158861	-17U		FERNTREE GULLY NE	RF2110	FORD	ESCAPE	BA	XLT	AU270079	JCC
158860			SALVAGE ANTHONY	W64087	NISSAN	NAVARA				
158859	49471U		FERNTREE GULLY NE		NISSAN	TIIDA			WF1007422	WIN
158858	49457U		FERNTREE GULLY NE		HYUNDAI	ILOAD			04C000340	KW
158857			SHEPPARD BRAD	NA575	NISSAN	370Z				
158856			KELLY PAUL	W55080	NISSAN	PATROL				
158855	-10U		FERNTREE GULLY NE	RL6406	NISSAN	PULSAR LX	N16		05140E 2K	AVI
158854	-7U		FERNTREE GULLY NE	DVCEY	NISSAN	X-TRAIL	T31 MY10	ST	0P0704002	AVI
158853	-9U		FERNTREE GULLY NE	W40200	MITSUBISHI	LANCER	CJ MY08	ES	4B1100072E	JNF
158852	49468U		FERNTREE GULLY NE	W40217	TOYOTA	YARIS		YBS	WAC7781071	JNF

Status: In Progress

Service Control Centre

Repair Orders | Service Quotes | Vehicles | Staff Logs | RO Request

Search Criteria: Rego, Vin, Owner, Auto Search, Clear Filters

Options: Show Free service(s) available, Include vehicles last seen before: 14/06/2011, Load Vehicle List

Stock Vehicle Filters: Service Vehicle, Never had an R/O, Un-Delivered Vehicle, Delivered Vehicles

Add Vehicle... Edit Vehicle... Create R/O... Create Quote... View History... Update Vehicle Delete Vehicle Import Vehicles

Veh#	Stock#	Ext#	Client Name	Rego#	Make	Model	Series	Variant	Eng/Chassis	VIN	Body	Trans	Colour	Odometer	Last Svc	Selling Dealer	Warranty Start	HIN/Char
158870	49477N	2064652	BATRAD CONTRACTIC		NISSAN	NAVARA	D40 S5 M	ST-X	YB002248C	YB002248C	UTILITY	7S	BLACK	1	30/06/2013		30/06/2013	
158869	49476N	2075140	FERNTREE GULLY NE		NISSAN	NAVARA	D40 S6 M	STV	YB002248C	YB002248C	UTILITY	5S	RED					
158868	-21U		FERNTREE GULLY NE	U4N152	FORD	FALCON	AU	CLASSIC FO	JG5WY4A3E	JG5WY4A3E	SEDAN	4A	WHITE	308752				
158867	49428N	2094570	ENGELBRECHT WAIN		NISSAN	DUALIS	J10W SEI	TIL HATCH	WFR002400F	WFR002400F	WAGON	6C	GREY	0			21/06/2013 12:	
158866			DENNIS GREG	W4E086	MAZDA	6												
158865			DENNIS GREG		NISSAN	X-TRAIL												
158864	49374N	2094209	RODWAY DEAN		NISSAN	DUALIS	S4	TS	R0NCD0700	R0NCD0700	WAGON	M	RED	0			14/06/2013	
158863			ATKINSON MICHAEL	20000000	NISSAN	PATROL												

This is the searching tool that gives you a quick and direct way of looking up a customer. Alternatively, you can search in

The second way is to use a new feature called the booking manager. This feature has a button in the service control centre, there are 2 options within this function they are: Add booking and current booking.

* Wildcard searching can be used in any search field of UBS parts, service and Eclipse modules.



If you were to add a new booking you would get a searching tool first. This tool is similar to the tool you use in the vehicle tab. It gives you the option to search 3 unique options (Rego, VIN, and Owner)

Once you have searched for your customer or their vehicle, they will appear in the bottom half of the screen.

 A screenshot of the 'STEP 1. Search for Customers Vehicle' window. The interface is divided into search criteria and search results sections.

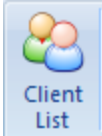
Search Criteria: Includes fields for 'Rego', 'Vin', and 'Owner' (with 'Taylor, Nicholas' entered). There are 'Clear', 'Search', and 'Add New Vehicle' buttons. A 'Quick Vehicle Add' section is also present.

Search Results: A table with columns: Veh#, Stock#, Ext#, Client Name, Address, Home, Business, Mobile, Rego#, Make, Model, Series, Variant, Eng/Chassis, VIN, Body, Trans, Colour. A single result is highlighted in blue: 129506, U17737, TAYLOR, S05 YW2324, NISSAN, X-TRAIL, T31 MY10, ST, QR25087868, JN1TANT31, WAGON, 6M, BRILLIANT.

Callouts:

- A red circle highlights the 'Rego', 'Vin', and 'Owner' fields.
- A blue callout box points to the search results table with the text: "After clicking 'Search' the client will show up in the search results section of this screen."
- A blue callout box points to the 'View Schedule' button with the text: "By clicking here, it will bring up the service template schedule for this particular vehicle."

At the bottom, there is a 'Select Vehicle' button and a 'View Schedule' button. A status bar at the very bottom shows 'Branch: 1000 Ready' and 'Icon Version 13.2 Build: 1096 CAP NUM SCRL'.



Adding New Service Clients

After using the search fields to find your customer or their vehicle you may still be unable to find them, in this case we will need to add them as a new client.

You can now simply add a new client and service vehicle by simply using the quick add function located within the same screen as the booking manager.

STEP 1 . Search for Customers Vehicle

Search Criteria

Rego:

Vin:

Owner: Taylor, Nicholas

U3 17 Brownes Crescent , Eltham, Vic 3095

Search Results

Clear

Enter one of these items

Search

Add New Vehicle

OR

Quick Vehicle Add

Rego:

Make: Model:

Surname: ... X

First Name:

Mobile Ph: Home Ph:

Add Quick Vehicle

Clear

Simply fill in the details, if the client is not in the system, you can add a new client by clicking the '...' located next to 'Surname' field which will take you to the client lookup screen. Below we will provide detail on how to add clients from the client lookup screen and other methods on how to add service vehicles.

To add a new client you will need to add a new vehicle; this is done from the Service Control Centre tab and then the vehicle tab.

Service Control Centre

Staff Reports / Mailing Service Maintenance Help

Booking Manager Order List Quote List Service Vehicle List Repair Order Requests Parts Requests

Service Control Centre

Repair Orders Service Quotes Vehicles Sta

Search Criteria

Rego:

Vin:

Owner:

Search

Add Vehicle... Edit Vehicle... Create R/O...

Vehicle Id: 158875 Stock #:

Class: Vehicle Ext#:

Owner: Add Edit

Service Vehicle Disposed (no longer owned by this client)

Rego:

VIN:

Engine #:

Compliance: Build:

Description

Make: Body:

Model: Std. Colour:

Variant: Engine Cyls: Size (cc):

Series: Radio Cd:

Trans: Fuel: Key Cd:

Roadworthy / Safety Certificate

No Date: Age: Update...

Required Fields (Red)

Make Vehicle Inactive

Save Cancel

Billing Client (E.G Fleet Company - If different from Owner)

Billing Client:

Driver Name:

SMS Mobile: (If Different from the Owner) Do Not Send SMS messages

Vehicle Originally Purchased From (Leave blank if unknown)

Dealership:

Warranty

Start Date: End Date: Recalls:

Extended Warranty

Start Date: End Date: Contract No:

Provider:

Service Reminder

Reminder Interval: month(s) Last Service Kms:

Reminder Interval: km(s) Next Service Kms:

Do Not Contact For Service Follow Up

Free Service

Issued Date: Service Remaining:

Veh#	Stock#	Ext#	Client Name	Make	Model	Body	Colour	Year	Service
158857			SHEPHERD BRAD						
158856			HILLI PAUL						
158855	-10U		FORNITRE BALLANTINE						
158854	-7U		FORNITRE BALLANTINE						
158853	-9U		FORNITRE BALLANTINE						
158852	49468U		FORNITRE BALLANTINE						
158851	-2U		FORNITRE BALLANTINE						
158850			ELCHERTH ANDREW						
158848	49456U		FORNITRE BALLANTINE						
158847	49455U		FORNITRE BALLANTINE						
158846	49454U		FORNITRE BALLANTINE						
158845	49453N	2095494	LEWIS PHILIP						
158844	49333N	2085770	SUNSHINE BUILDERS						
158843	49375N	2091700	ADAMSON BUILDERS						
158842	49451U		FORNITRE BALLANTINE						
158841	49450N	2094244	FORNITRE BALLANTINE	NISSAN	PATROL	MY10	ST		IN1TESY61
158840	49449N	2115896	FORNITRE BALLANTINE	NISSAN	DUALIS	J10W SEI	ST HATCH		WAGON
158839	49448N	2050766	FORNITRE BALLANTINE	NISSAN	PULSAR	B17	SSS		WAGON
158838	49447N	2059487	FORNITRE BALLANTINE	NISSAN	NAVARA	D40 S6 M	ST X KING C		HATCH
158837			BLACKFRIER BARRY	NISSAN	NAVARA	D40 S6 M	ST X KING C		UTILITY
158836	49443N	2104013	FORNITRE BALLANTINE	NISSAN	NAVARA	DX			UTILITY
				NISSAN	DUALIS	J10W SEI	ST HATCH		CAB CHASSI
									WAGON
									6C
									WHITE
									69224
									1
									1
									1
									1
									96268
									8/06/2013
									1

***Press F5 to refresh the list at anytime.

Field Description

Vehicle Id	This is the Stock Number Service allocates a vehicle
Class	Is the type of service vehicle (Caravan, Boat) etc
Owner	Is the Client who owns the Vehicle*
Rego	Registration of the Vehicle
Vin	Vin Number of the Vehicle
Engine #	Engine Number of the vehicle
Compliance/Build	Compliance/Build Date of the Vehicle
Make (Mandatory Field)	Make of the Vehicle
Model (Mandatory Field)	Model of the Vehicle
Variant	E.g. Coromal = PopTop
Series	
Body	Body type of the vehicle = 1 Axle ect.
Fuel	What Fuel type the Vehicle Takes
Std Colour	This is the colour of the Van e.g. Red Not the Factory Name of the colour
Billing Client	The Company/Person Paying the Bill (this is not always the driver)
Driver Name & SMS Mobile	The Name of the driver and their mobile number (used for text messaging)
Dealership	Where the vehicle was first purchased
Warranty	These dates are used to see if the Vehicle is still under warranty either by date or the vehicles odometer
Extended Warranty Dates	This is the same as the Warranty fields
Extended Warranty Provider	Your customers Warranty maybe provided by a third party
Service Reminder (Last Service)	This field is auto filled if you are ticking in a repair order "this is a service"
Reminder Interval	This will then create a reminder according to this date
Free Service	Fill in details if a free service is offered to the client.

*Client who owns the Vehicle, to add a new client you can click the 3 dots in the Add Vehicle screen or go to the Client List button on you tool bar.

Service Vehicle

Vehicle Details

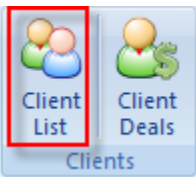
Vehicle Id Stock #

Class Ext Ref. #

Owner

Service Vehicle Disposed (no longer owned by this client)

Rego



Client Lookup - 8,698 items listed

Filters: Type Buyer or Seller Include Inactive Clients
 Show Only Inactive Clients

Refresh Search for: In

Client	Name	Type	Address	Home	Business	Mobile	Fax	Licence
1
2
3
4
5
6
7
8
9
10

This is a search filter tool to help you find your customer

This is where you add a new customer, edit an existing customer

Add Edit View Delete Merge Print Sepd SMS

Once you have selected the correct customer, it will take you to a booking screen. This screen is shown below with captions to explain the features.

Service Bookings -1

STEP 2. Select Day From Calendar & Click 'Add Booking' **BOOK BY HOURS MODE**

Selected Vehicle Details:
 Stock # 40465U Make NISSAN Rego # [REDACTED] Service Vehicle >>
 Ext# U17797 Model X-TRAIL VIN [REDACTED]
 Owner Nicholas Taylor Address [REDACTED] Edit Client Find Booking

Pre-Paid Servicing
 This Vehicle \$0.00
 Other Vehicles + \$0.00
 Customer Total = \$0.00

Scheduled Service Options:
 Last Service: [REDACTED] View
 Select a Service: [REDACTED] View/Select

Calendar
 Branch 760 Department <ALL> Today
 June 2013 July 2013
 Mon Tue Wed Thu Fri Sat Sun Mon Tue Wed Thu Fri Sat Sun
 27 28 29 30 31 1 2 3 4 5 6 7 8 9 10 11 12 13 14
 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28
 29 30 31 1 2 3 4 5 6 7 8 9 10 11
 19/06/2013 - AVAILABLE
 Available for Scheduling Over Scheduled (not enough staff hours) Public Holidays
 Fully Booked No Staff hours entered Show Invoiced Repair Orders
 Hide - Bookings for 19/06/13 <<

Schedule Details (19/06/2013)
 Total Scheduled Time (hours) 1
 Total Available Staff Hours 27
 Remaining Staff Hours 26
 RO Count 1
 Technician Count 8

Scheduled work for this day by Priority

Priority	Count	Est. Time
CUSTOMER NEE...	1	1

Loan Car Details for this day ?
 There are no items to show.
 Total 0 0
 View Hire Schedule

these Dates are shown in green are days with available RO hours to be booked out. If the dates are Red this would indicate that that particular day is overbooked. Color legend provided.

When you are clicked onto a date, the bookings will show here like so.

Date In	Time In	R/O #	Customer	Internal	Warranty	Est. Time	Sch. Time	Vehicle#	Stock#	Client Name	Make	Model	Rego#	RO Description	VIN	Status	Date	Time
19/06/13	11:00	111683	C			1.00 h	1 h	115005 13724N			NISSAN	DUALIS		CARRY OUT 6 MONTH/11	438335	Booked	19/06/13	

Edit RO Edit Inv Preview RO Preview Inv Cancel RO Print Schedule Time Graph Cancel

Once you have chosen the day you wish to book the customer in on click on it in the date screen and then click the button in the middle of the screen "Add Booking" button. This will then take you to create a Repair order screen.

R/O# 5114765 (New) **Service Control Centre**

Repair Order #5114765 1000 Svc ID 129506 Stock # 40465U Compliance 12/2010 Pre-Paid Servicing
 TAYLOR, NICHOLAS VIN [REDACTED] Sold 29/02/2012 This Vehicle \$0.00
 NISSAN X-TRAIL 31 MY10 ST WAGON Engine QR 2500cc Warranty Start 29/02/2012 Other Vehicles + \$0.00
 Rego # [REDACTED] Rego Expiry 13/06/2013 Trans BM Disburse 50000 Customer Total = \$0.00
 Vehicle Origin Purchased From [REDACTED] Last Service 12/05/2013 Ext# U17797

Add Note Send SMS Edit Client Recalls View History Edit Vehicle
 Vehicle Origin Purchased From [REDACTED] Last Service 12/05/2013 Ext# U17797

Add Job Remove Job Go To Invoice General Notes

Click to Change Department
 Booking Details Schedule Job 1 (C) << GENERAL >>

Details:
 RO Type Service General Work OR Pre-Delivery
 Date In 17/06/2013
 Date Promised 17/06/2013 Time Promised [REDACTED]
 Adviser [REDACTED]
 Purch Order # [REDACTED]
 Booked By 17/06/2013 01:53:55 PM RO Already Booked? [REDACTED] Daily Planning Sheet No. [REDACTED]
 Booking Date 17/06/2013 01:53:55 PM Pick Up Time [REDACTED] Pick Up Location [REDACTED]
 Drop Off Time [REDACTED] Checklist [REDACTED] View Checklist

Quick Hire Manage Hire Vehicles Vehicle Hire: 0 Hire Vehicle(s) on this RO
 Add New Hire/Loan Car:
 Quick Hire: NOTOW-0 Quick Hire: TOW-3
 [This is carry over RO] Reason: [REDACTED]

There is 3 main tabs that make up an RO. "Booking Details" "scheduler" & "Job" (there can be multiple jobs in one RO)

This 'Edit Client' button will allow you to edit the client directly from this screen. The same applies with the vehicle.

This Box needs to be ticked if further down the track you wish to send out service reminders.

above is where we can select hired vehicles and also managed hired vehicles for customers that come in for Repairs, or for a service.

Daily Counter (Booked in for 17/06/13)
 Current RO Bookings: 37

Job Type	RO's	Jobs
CUSTOMER	28	48
WARRANTY	4	4
MOETURE	5	10

Print Preview Work Group: [REDACTED] Show Remedy Items on RO
 Print Settings Change Branch (1000) [REDACTED] Preview Save & Print Save Cancel

You can then fill in the relevant fields such as Adviser time in etc. Then you will need to add details as to why you are seeing the vehicle. To do this you need to click on the Job 1 tab, this screen is shown below.

Below the buttons will be listed with the purpose. If there are multiple things you need to do to the Vehicle, you can add multiple jobs.

Add Job	This will add another job to the repair order
Remove Job	This will delete the current job you have selected
Change Job Type	This will change the sale type of the repair order, (Retail Warranty Internal)
Load Service Schedule	This will load a service 'template' to the job e.g. 10 000km Service Template
View Loaded Service Schedule	This will show you the service 'template' that you have selected and added to the current job
Job Description	This field now allows you to save common descriptions you use lots of the time.
Button with 3 dots ...	This button is a Code Maintenance where you can add the descriptions you use all the time
Default sale type	This gives you a list of the sale types for the relevant job type e.g. customer with sale type of trade
Parts sale type	This gives you a list of the sale types for the relevant job type e.g. customer with sale type of trade

Booked

Only Show RO's that are: **Booked** In Progress Held Partial Inv All Invoiced Cancelled

Date In	Time In	R/O #	Purch	Est. Time	Vehicle#	Stock#	Client Name	Make	Model	Rego#	RO Description	VIN	Status	Date	Time	Priority
12/10/11		23719			3337			Coromal	APOLLO POPT		<<GENERAL WORK>>	369345	Booked	12/12/11		
19/10/11		22780			2822	1746N		COROMA	PRINCETON		PD	C38734	Booked	19/10/11	17:00	
19/10/11		22538		0 h	2827	1738U		JAYCO	FREEDOM	1TDL273	<<GENERAL WORK>>	C59972	Booked	19/10/11		
19/10/11		21663			2869	1758U			HERITAGE	1TFL00100	<<GENERAL WORK>>	D70883	Booked	19/10/11	17:00	
19/10/11		21018		0 h	2779	1734N					<<GENERAL WORK>>	C37892	Booked	19/10/11		

These filters can be turned on and off by clicking the buttons. Now only the booked Repair Orders will show.

Status: Booked

Branch: CANTERBURY Ready

Version 11.4 Build: 0556

In Progress

Only Show RO's that are: Booked **In Progress** Held Partial Inv All Invoiced Cancelled

Date In	Time In	R/O #	Purch	Est. Time	Vehicle#	Stock#	Client Name	Make	Model	Rego#	RO Description	VIN	Status
16/01/12		18100		0 h	2813	1744N		COROMA	LIFESTYLE		PREDELIVERY		In Pro
19/09/11		23292		0 h	3292			Coromal	LIFESTYLE		RETAIL WORK AND REP.		In Pro
14/09/11		23416		0 h	2366	1415U		JAYCO	DOVE	8PX735	RETAIL WORK AND REP.	146116	In Pro

Only the 'In Progress' repair orders will be visible when the green filter is on.

Status: In Progress

Branch: BUNBURY Ready

Version 11.4 Build: 0556

Held

Only Show RO's that are: Booked In Progress **Held** Partial Inv All Invoiced Cancelled

Date In	Time In	R/O #	Purch	Est. Time	Vehicle#	Stock#	Client Name	Make	Model	Rego#	RO Description	VIN	Status
17/01/11		5173		0 h	1087	1246U		JAYCO	WESTPORT	8WJ668	PREDELIVERY	596666	ACCFIN
13/01/11		5051		0 h	1179			COROMA	SILHOUETTE	1TLC574	WARRANTY REPAIRS		ACCFIN
13/01/11		5049		0 h	1178			PARAMO	DELTA		WARRANTY REPAIRS		ACCFIN

Only the 'Held' repair orders will be visible when the red filter is on.

Status: Held: Hold Reason: PARTS - WAITING FOR PARTS

Branch: CANTERBURY Ready

Version 11.4 Build: 0556

Partial Inv

The 'Partial Invoice' allows you to have part of the repair order (job) finalised and another part (job) in progress.

Date In	Time In	R/O #	Purch	Est. Time	Vehicle#	Stock#	Client Name	Make	Model	Rego#	R/O Description	VIN	Status	Date	Time	Pri
01/08/11		21025			1986		Don Phillip	COROMA	CORVAIR	1S7205	PREDELIVERY	C27978	In Progress	18/08/11	17:00	
27/07/11		20114		0 h	2931	1013N	Don Phillip	COROMA	MAGNUM		PREDELIVERY	C37829	In Progress	04/08/11		
07/07/11		18849		0 h	2682		Don Phillip	AUSSIEV	BUNDEERRA	1TMD26	RETAIL WORK AND REP		In Progress	12/07/11		

History

R/O #	Vehicle#	Stock#	Client Name	Status	Odometer
21025	1986		Don Phillip	Invoiced	0
21025	1986		Don Phillip	Invoiced	0

Status: In Progress R/O Count: 9

All Invoiced

All invoiced will show the repair orders that are completely finalised

Date In	Time In	R/O #	Purch	Est. Time	Vehicle#	Stock#	Client Name	Make	Model	Rego#	R/O Description	VIN	Status	Date	Time	Pri
01/01/11		5023		0 h	1176		Healy Simon	COROMA	LIFESTYLE	1TKU72C	RETAIL WORK AND REP		Invoiced	13/01/11		RE
04/01/11		5023		4 h	1174		Healy Simon	COROMA	PRINCETON	1TLI423	DOUBLE AXLE SERVICE		Invoiced	21/01/11		RE
08/01/11		5459		0 h	1190	1404U	Healy Simon	WINDSOR	WINDSOR STF	8RN218	PREDELIVERY	W19063	Invoiced	05/01/11		

History

R/O #	Vehicle#	Stock#	Client Name	Status	Odometer
5023	1176		Healy Simon	Invoiced	
5023	1176		Healy Simon	Invoiced	

Priority: RETAIL - RETAIL R/O Count: 2060

Cancelled

Cancelled will display all the repair orders which have been cancelled.

Date In	Time In	R/O #	Purch	Est. Time	Vehicle#	Stock#	Client Name	Make	Model	Rego#	R/O Description	VIN	Status	Date	Time	Pri
14/01/11		5085			1187	1403N	Taylor Rodney	COROMA	F400	1TLQ601	<<GENERAL WORK>>		cancelled			
14/01/11		5082			1132	1048L	Taylor Rodney	COROMA	SEKA 505	8US987	<<GENERAL WORK>>	0C4154	cancelled			
13/01/11		5496		0 h	1209		Taylor Rodney	WINDSOR	ROYALE	1TJL183	RETAIL WORK AND REP		cancelled	17/01/11		

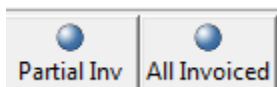
History

R/O #	Vehicle#	Stock#	Client Name	Status	Odometer
11451	1187	1403	Taylor Rodney	Invoiced	540
5084	1187	1403	Taylor Rodney	Invoiced	1470

Status: cancelled R/O Count: 256

Once you save a booking you will see your service repair order list as usual. There is a few new buttons.

These are in the filter fields.



Partial Inv, searches for repair orders that you may have finished and invoiced the customers section but are leaving the warranty jobs for another day.

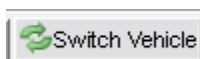
All Invoiced is for repair orders that are completely invoiced.

These are also new fields in the repair order list screen. This lists the status of the job if there is no letter in the field this means there is no job with this type of charge.

The colour also indicated the status of the job:



Customer	Internal	Warranty
<ALL>	<ALL>	<ALL>
C		W
		W
C		W
C		
		W
		W



This button gives you the opportunity to change the repair order to a different vehicle. You may have selected this by mistake if your customer has several Vehicles.

There are also some new columns on the repair list screen, these are to show you what status each section

The Invoicing procedure is now in 4 steps. When you click the invoice button you will be taken to a RO SUMMARY screen. This will show you a breakdown of the charge types and there totals. Now you are able to see a profit table.

Step 1 is to review job charges and ensure you have charge out the correct labour, shop supplies, pars and sublets. This task has not changed a great deal; each item is now in its own tab. This is shown below.

Step 1

There is no charge tab; this is done in a later step. You can change the job type, the below job is 'Customer' but you are able to change it to Warranty or Internal. You can also navigate from job to job by clicking PREV JOB/NEXT JOB. Once you have added the entire labour etc you need to click save in the bottom right hand corner. It will now show the total costs/profits for each job within the job itself instead of having to go back to the RO summary screen.

Repair Order # 5091195 Job 1 : 20 000 KM SERVICE

Job Type: Customer (C) Change Job Type >>

Job Detail: Job Heading: 20 000 KM SERVICE Default Sale Type: Retail << UPDATE SALE TYPES

Default Tech: Parts Sale Type: Retail RE-DATE PARTS >>

IN PROGRESS

Labour Shop Supplies Parts Sublet Factory / 3C's Customer Instr Staff Logs Photos (All Jobs)

Item	Description	Type	Tech	Cost Units	Sale Units	\$Sale Price(Inc)	\$Total(Inc GST)	\$GST
LAB	20 000 KM SERVICE	R		1	1	\$132.00	\$132.00	\$12.00

	Customer Totals (All Jobs)	Job Totals (This Job)
LABOUR	\$132.00	\$132.00
SHOP SUPPLIES	\$66.00	\$66.00
PARTS	\$34.60	\$34.60
SUBLETS	\$0.00	\$0.00
VEHICLE HIRE	\$0.00	\$0.00
less DISCOUNT	(\$0.00)	
TOTAL \$	\$232.60	\$232.60
TOTAL JOBS	1	

Extra description for 20 000 KM SERVICE

***Press F5 to refresh the list at anytime.

Work In Progress Totals (GST inc) Retail 232.60 Warranty 0.00 Internal 0.00 Trade 0.00

Save Cancel

Step 2

This screen is where you select how the customer is paying for the work done. This is the old charge tab.

There are a few mandatory fields within this screen, these are the invoice date and the date completed.

The differences between these fields are:

Completion date = When the technician actually finishes the work

Invoice Date= When you issue the customer with the invoice. (This date is for GST purposes)

New feature added is the discount section – this allows you to add discount & even gift cards to the invoice for customers.

When you fill in completion date, odometer, invoice date etc, it will automatically calculate the estimated date of next service and next service estimated Kms reading.

Inv R/O# 5091195 = 20 000 KM SERVICE

Repair Order # 5091195

Client Id 45090 Stock # 18574N Adviser Kelvin [Name] PROMO CODE

SCOTT, EDWA NISSAN MICRA K13 ST HATCH [Bill to Customer] DRIVER:

Vehicle Originally Purchased From: Booked by Kelvin [Name]

Customer (C) III PROGRESS Show Job Totals >> Invoice Notes

Code	Description	Type	Rate%	\$Amount
*				

Charge Completion Date 26/06/2013 Odometer 20531 Next Service Date 26/12/13

Invoice Date 26/06/2013 Invoiced By 99146 Next Service Kms 215312 Show All Charge Codes

Code	Description	Type	Charge Client	\$Amount	Charge Client's Name	Claim No	Job Heading
EFT	EFT	R	45090	\$232.60	Ed [Name]		
*							

Add Security Deposit Redeem Gift Voucher

Invoice Total: \$232.60 Amount Charged: \$232.60 Amount Outstanding: \$0.00

Work Finished & Invoice Ready Save Cancel

Retail 232.60 Warranty 0.00 Internal 0.00 Trade 0.00

To complete these steps click Work Finished & Invoice Ready.

This will then put the repair order at a status of work finished where you can no longer edit it. It will be in view mode unless you change the status to in progress.

This step can be skipped, and you can go straight to the process payment step.

However the work finished & invoice ready step is a handy tool to ensure no further changes can be made to the repair order and allow the adviser to print the invoice in advance to have it ready for the customer, as they may not be picking up their vehicle for a

few days etc. It also shows that this RO is finished so it allows other advisers not familiar with the customer/vehicle to see that is ready to be picked up (should they answer an enquiry).

If you have clicked work finished but you have made a mistake or you need to change something you can do this by changing RO SUMMARY screen go to step 2-COMPLETED Change Status, and put the repair order back in to progress. This will allow you to now make any changes.

Job 1 (C) : 20 000 KM SERVICE

WORK FINISHED

Job Charge Totals (By Sale Type)

	Retail	Job Totals
Labour \$	\$132.00	\$132.00
Shop Supplies \$	\$66.00	\$66.00
Parts \$	\$34.60	\$34.60
Sublets \$	\$0.00	\$0.00
TOTAL \$	\$232.60	\$232.60

Step 1-COMPLETED
 Review Job Charges
 View Profit
 Manage Hire Vehicles

Step 2-COMPLETED
 Prepare Invoice >>
 Change Status

Step 3
 Print Invoice >>

Step 4
 Process Payment >>

Vehicle Hire: 0

- Change Customer (C) status to IN PROGRESS
- Change Internal (I) status to IN PROGRESS - N/A NO JOBS
- Change Warranty (W) status to IN PROGRESS - N/A NO JOBS

Step 3

Step 3 allows you to print your invoice, and then it is ready for your customer to view when they arrive. However to be able to print the invoice you will have to click work finished and invoice ready.

This function is to protect you from making a mistake. When you change the Repair Order to *Work finished and Invoice ready*, you are deciding that no further charges need to be made against this RO. Once in this status you are unable to change the RO in anyway, No Tech can clock on to the RO no further parts etc can be charged to the RO so if you have forgotten to add parts etc to the RO you will need to Change the status back to in progress. If you are changing the status to *Work finished and Invoice read*, you are probably printing the Invoice in preparation for the customer arrival, if this is the case remember if you make ANY changes to the original invoice to replace it with the amended copy (Printed).

BO SUMMARY Job 1 (C) : <<GEN...

View Job **Job 1 (C) : <<GENERAL WORK>>**

WORK FINISHED

Job Charge Totals (By Sale Type)

	Retail	Job Totals
Labour \$	\$127.50	\$127.50
Shop Supplies \$	\$0.00	\$0.00
Parts \$	\$0.00	\$0.00
Sublets \$	\$0.00	\$0.00
TOTAL \$	\$127.50	\$127.50

Customer (C) | Internal (I) - N/A NO JOBS | Warranty (W) - N/A NO JOBS

Preview Customer (C) Invoice | Print Customer (C) Invoice

Step 1-COMPLETED Review Job Charges | Step 2-COMPLETED Prepare Invoice >> | Step 3 Print Invoice >> | Process Payment >> | Re-Open >>

Printer Set

Step 4

Process Payment, this button on the summary screen take you back to the screen where you selected how the customer client paid for the work if you did step 3.

If you didn't then you will need to fill in the fields shown.

Customer (C) IN PROGRESS Show Job Totals >> Invoice Notes

Discount

Code	Description	Type	Rate%	\$Amount
*				

Charge

Completion Date: 26/06/2013 Odometer: 20531 Next Service Date: 26/12/13

Invoice Date: 26/06/2013 Invoiced By: 99146 Next Service Kms: 215312

Charge Client: KELVIN Show All Charge Codes

Code	Description	Type	Charge Client	\$Amount	Charge Client's Name	Claim No	Job Heading
EFT	EFT	R	45090	\$232.60	Ech...		
*							

Add Security Deposit Redeem Gift Voucher

Invoice Total: \$232.60 Amount Charged: \$232.60 Amount Outstanding: \$0.00

***Press F5 to refresh the list at anytime. Print Invoice after Processing Payment

Automatically Balance Invoice Charge Amounts Print Preview

Work In Progress Totals (GST inc) Retail 232.60 Warranty 0.00 Internal 0.00 Trade 0.00

Discount

At this point you can also apply a discount (if applicable)

To do this you will need to click the down arrow in the code box.

Discount					
	Code	Description	Type	Rate%	\$Amount
	D10	10% SERVICE DISCOUNT	R	10.00%	\$12.75
	*				

You can give a discount of either an amount or a percentage of the RO

Security Deposit

Date: 04/01/11

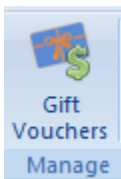
Sale Type: R -Retail
 Payment Type: Cash
 Amount: 50.00

Once you have filled out the fields of payment type ect you will need to click Add Deposit.
 If your customer already has a deposit from a previous purchase etc click Select Deposit

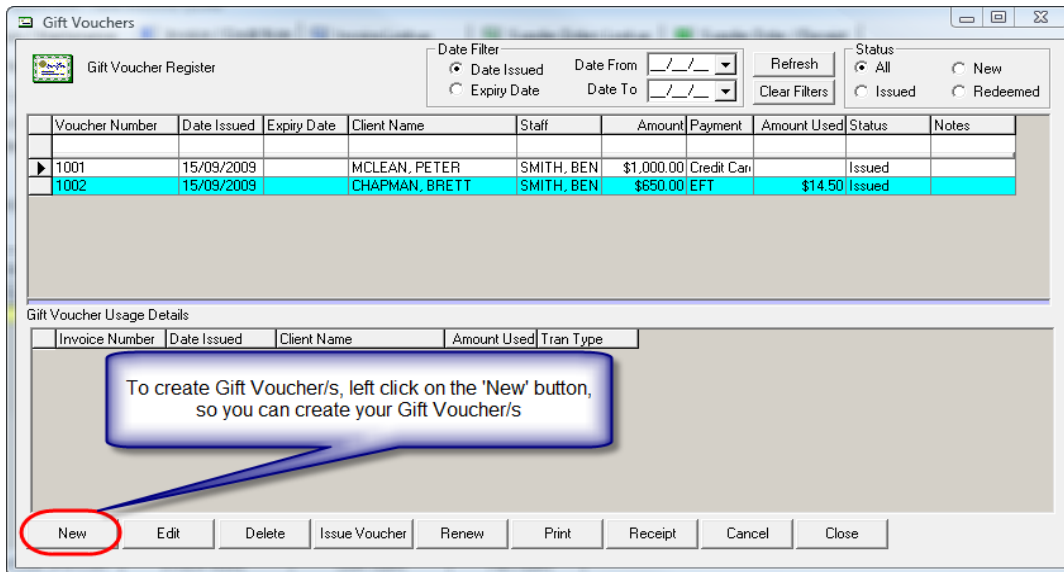
Gift Voucher

In your business you'll no doubt be using Gift Vouchers for customers to buy to give to friends, or for staff members to give to customers as a Thank You for making a significant purchase with your company.

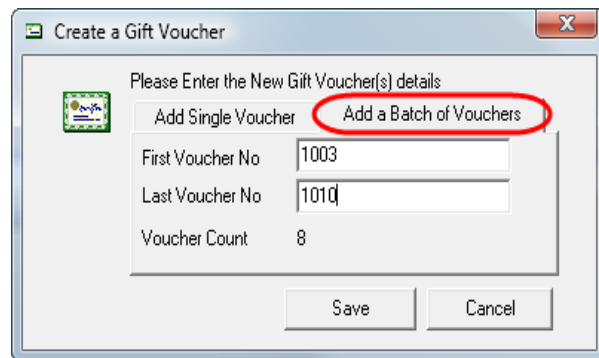
In the Parts or Service program, to start the process of creating gift vouchers, click on the button labelled 'Gift Voucher' this button is shown below



The 'Gift Vouchers' screen will open and here you are able to create a singular gift voucher or a batch of Gift Vouchers that can be issued at a later date.

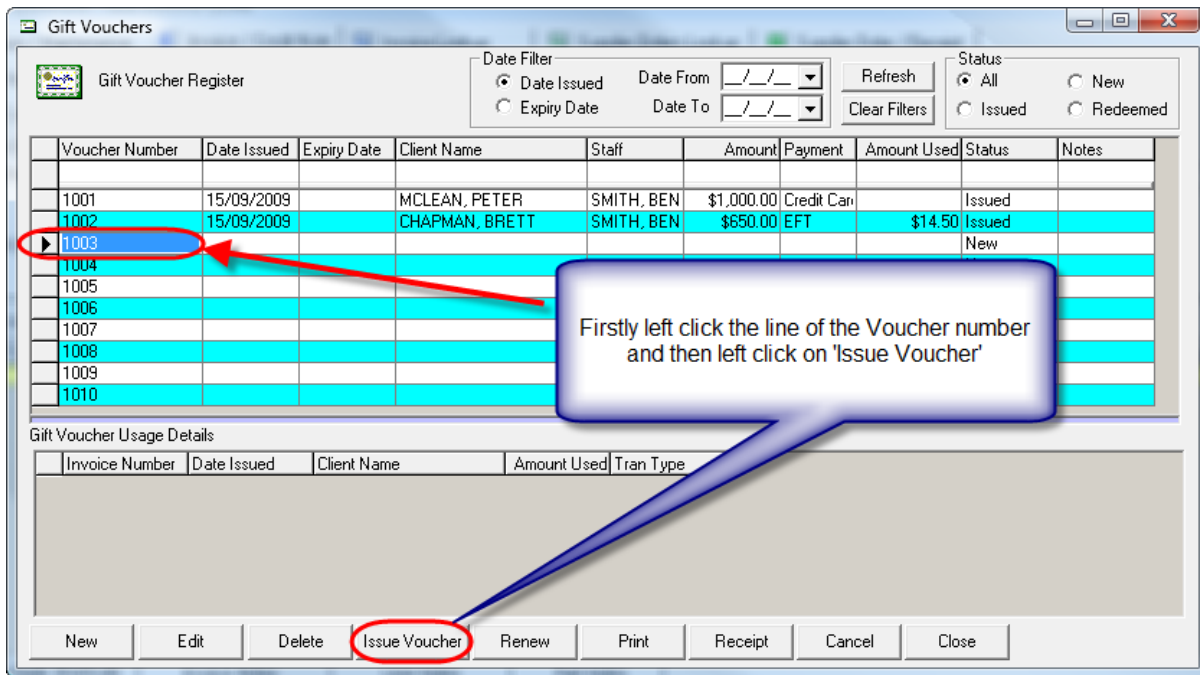


To create a batch of gift vouchers, left click on the 'Add a Batch of Vouchers' tab and enter in the sequence of voucher numbers you want to use. Alternatively if you were wanting to creating a singular gift voucher, use the 'Add Single Voucher' tab and enter in the Voucher number you want to use and then left click on the 'Save' button.

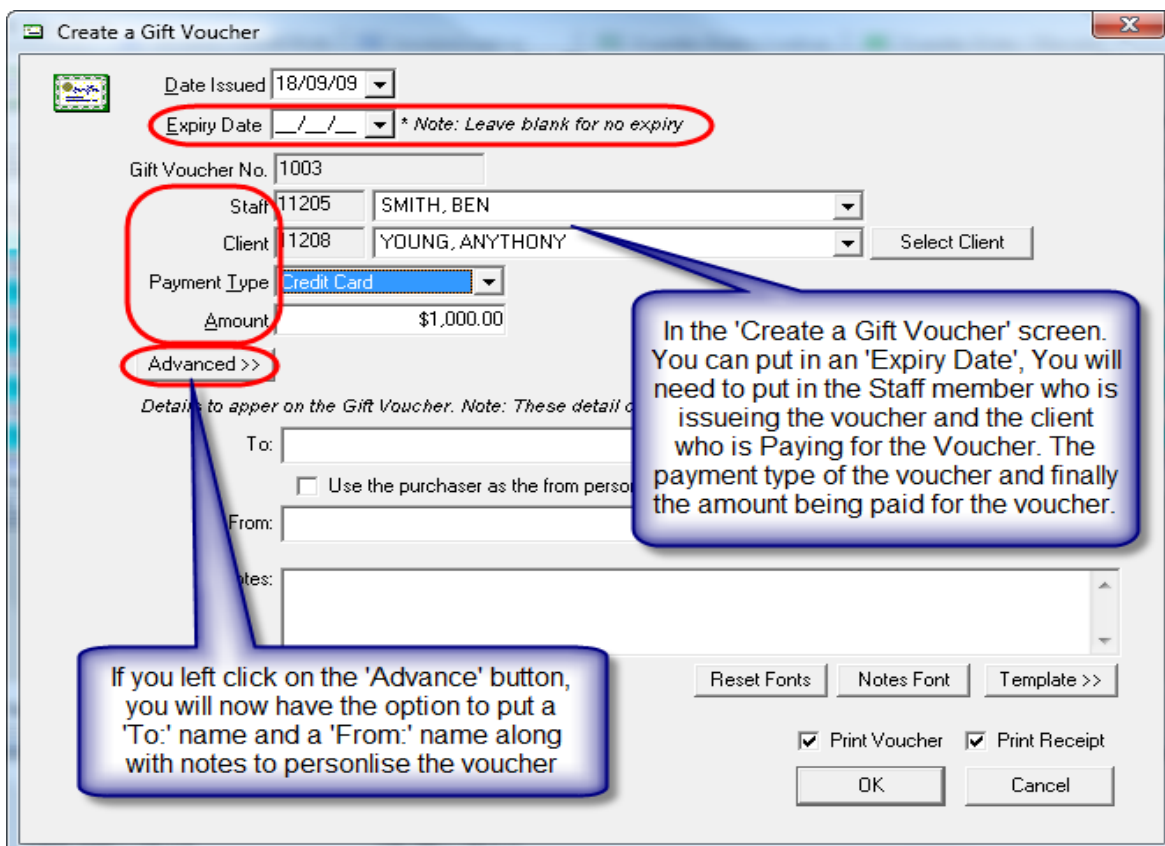


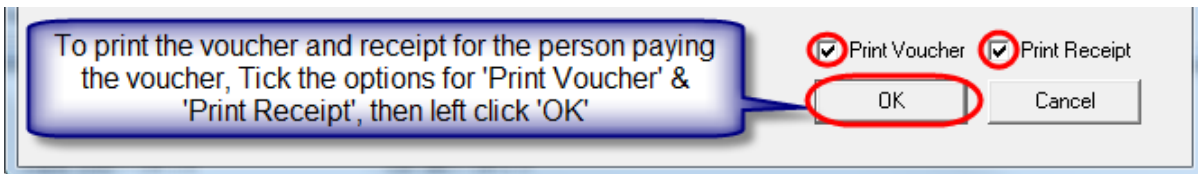
How to Issue a Gift Voucher to a Customer.

To issue a Gift Voucher to a customer, left click on the line of the voucher number you like to issue, and then left click on 'Issue Voucher'

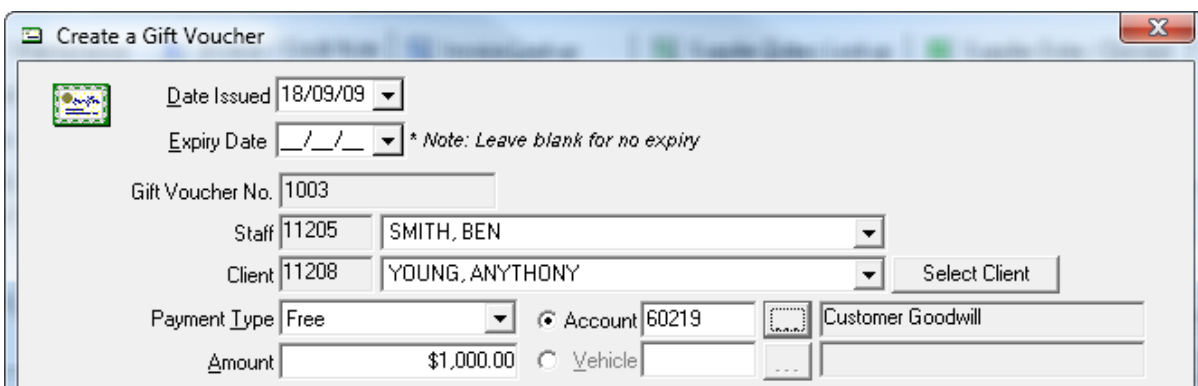


Now you will need to enter in the information for who is purchasing the voucher and the amount of the voucher.

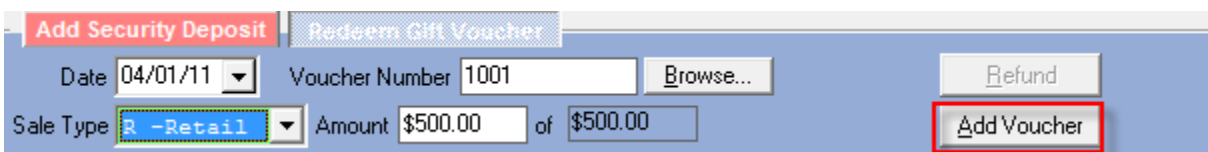




In Payment Type, there are other options to choose from, There's an option to issue a 'Free' voucher to the customer, the figure put into the amount section, can be allocated to an expense account in the system or to the cost of a stock item in your stock, by ticking the either option and then left clicking on the three dots to allocate an account or a stock item. As shown in the example below.



To deduct a gift voucher off a customer's total amount owing you will need to click the process payment button and then *Redeem Gift Voucher*.



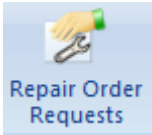
Once you have filled out the above information click add voucher button.

Once you have finished allocating how the customer will be paying, then you need to click the button Process Invoice which will completely finalise the invoice. (Posting to the Ledger)



Reopening an invoice will UN post any accounting from the Ledger, and put the Repair order in to a *Work finished status*, within this status you are able to change the invoice date, invoiced by and the method of payment.

If you wish to make any changes to the work performed or charges to the customer you must change the status back to in progress. This is done in the RO Summary screen by clicking the Change Status button.



Repair Order Requests (RO Requests)

Repair order requests, are a way of the salesman requesting that the service department carry out specific work on the van and request a time to have the vehicle ready. In the service program there is a tab in the Service Control Centre Tab called RO Request.

The screenshot shows the Eclipse Service software interface. The 'RO Request' tab is selected in the 'Service Control Centre' window. A callout box highlights the status filter buttons: Pending, Approved, Confirmed, and Processed. The main window displays a table of repair order requests with columns for Request#, Stock#, Request Description, Date, Requested By, Request Branch, Due Date, Status, R/O #, PD, Sale, Type, Make, Series, Model, Rego, Variant, VIN, Colour, Promo, Sale Date, Delivery, Processed, Processed By, Processed Branch, and Approved By.

Request#	Stock#	Request Description	Date	Requested By	Request Branch	Due Date	Status	R/O #	PD	Sale	Type	Make	Series	Model	Rego	Variant	VIN	Colour	Promo	Sale Date	Delivery	Processed	Processed By	Processed Branch	Approved By
707	20817N	PD - GET READY	15/02/2013 12:53			17/04/2013 17:00	Pending			4045	N							WHITE	IVORY PEAF	10/01/2013	18/04/2013				ECKFELD GR
824	49446N	PD - GET READY	01/03/2013 13:25			28/03/2013 17:00	Pending				N								IVORY PEAF						KOUMAS GEI
1184	48163N	PD - GET READY	10/04/2013 13:24			23/04/2013 17:00	Pending			4138	N					TL		BRONZE	TITANIUM	10/04/2013	24/04/2013				
1206	48916N	PD - GET READY	12/04/2013 09:02			15/05/2013 17:00	Pending			4133	N					RX KING CA		WHITE	POLAR WHI	11/04/2013	15/05/2013				ECKFELD GR
1225	48830N	PD - GET READY	15/04/2013 11:48			15/04/2013 17:00	Pending				N							RED	MAGMA REI						ECKFELD GR

Edit Request	This allows you to Change the request, and process the request
View Request	This allows you to View (look at the request) but you can not edit the RO Request

Service Repair Order Request - Request# 707

Stock # 20817 NISSAN GTR R35 COUPE

VIN JN1 Build Date 03/13 Trans. A

Rego # Engine No. VR Odometer

Ext# 2093147 Model Code GTRPRB5 Colour Code QAB

Remove Approval

APPROVED

By on 15/02 01:13 PM

View Sale/Delivery Details >> The parts have been picked for this request Allow Work to Start?

Request by Branch 1000 Date 15/02/2013 12:53

Request Description PD - GET RRADY

Request Due Date 17/04/2013 Time 05:00 PM Is this a Pre-Delivery Request?

Requests Supply & Fit (0 Selected) Est Time: 0hrs

Freeform Request: **B** *I* U **A** Load Template: Delete

PD

Add Work To Be Done Save as Template: Save

Request Processed

Processed by RAY

Processed Date 26/06/2013 Time 15:29

Repair Order# Edit RO Select RO View Invoice

Save & Create RO

Approval

Maximum Approved \$ Change Approval Current RO Total \$ View Invoice

Send Request to Branch: 1000

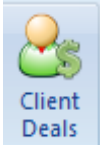
Delete Request Auto create a Repair Order from this Request Print Request Save Request Cancel

The top half of this screen is grey; this is because the fields are auto filled for you, coming from the vehicle or customers details.

The rest of the fields will need to be filled out as required. If you have already made a repair order for a vehicle on a request and you wish to link the request up to the repair order for future reference you can do this by selecting the *Select RO* Button in the *Request Processed* section of the screen.

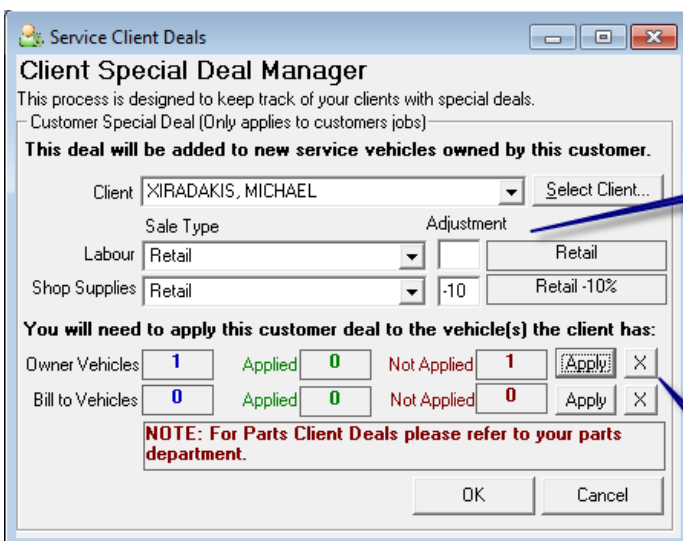
From the request you can create a repair order, to do this you need to click *Save & Create RO*; this is in The **Green Box** within the Screen.

The request provides information from the Sales team, including the date they would like the request by, what they would like done to the Vehicle, if any accessories need to be fitted.



Client Deals

This feature allows you to set up customised deals for your regular customers, so rather than giving them a discount each time they come in and having the confusion of all your staff not remembering the correct discount for them this feature means the discount is stored in the system for you and will automatically apply it against the customers charges.



Here is where you can give your customer a set discount, structured by a %

This option allows you to not only allocate the discount to the customers own vehicle, it also allows you to add the discount to any vehicle/s the client is



Expired RO's

Expired RO's is a feature that will prompt you everyday to check Open RO's that were booked/ into your service department before the current date. You then have the option to rebook these customers at a later date or cancel their bookings. You can also preview/print the repair orders from this screen. The bottom half of the screen is a staff log graph. Whichever Repair order you have highlighted, the below chart will show in the any staff that have clocked on to that repair order. It will also show how long they clocked on for and the time and dates they were working on the Repair Order.

Expired R/Os Manager

Expired Ro Manager

Date From: To: Filter By: Booked In Progress

Branch: 1000

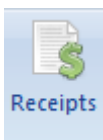
This is the area where you can sort your expired RO's

	R/O #	Date In	Time In	Vehicle#	Client Name	Make	Model	Rego#	Sale Total	Ttl	Branch	Confirm	Rebook	Cancel
▶	50942	02/02/13	09:00	137420		NISSAN	DUALIS		192.05	0.00h	1000	PRINT	REBK	CANCL
▶	096122	01/03/13		155824		NISSAN	TIIDA		0.00	0.00h	1000	PRINT	REBK	CANCL
▶	096273	04/03/13	10:30	157515		NISSAN	TIIDA		0.00	0.00h	1000	PRINT	REBK	CANCL
▶	096436	04/03/13		107121		NISSAN	MURANO		0.00	0.00h	1000	PRINT	REBK	CANCL
▶	097695	13/03/13		126757		NISSAN	NAVARA		0.00	0.00h	1000	PRINT	REBK	CANCL
▶	101254	03/04/13	15:00	18165		NISSAN	X-TRAIL		0.00	0.00h	1000	PRINT	REBK	CANCL
▶	103352	10/04/13	07:30	129506		NISSAN	X-TRAIL		194.05	0.00h	1000	PRINT	REBK	CANCL
▶	103552	12/04/13	12:00	116644		NISSAN	X-TRAIL		0.00	0.00h	1000	PRINT	REBK	CANCL
▶	100603	18/04/13	11:00	138917		NISSAN	X-TRAIL		0.00	0.00h	1000	PRINT	REBK	CANCL
▶	101935	18/04/13	08:30	18711		NISSAN	X-TRAIL		194.05	0.00h	1000	PRINT	REBK	CANCL
▶	102226	18/04/13	08:45	154930		NISSAN	X-TRAIL		350.25	0.00h	1000	PRINT	REBK	CANCL
▶	102254	18/04/13	08:45	127748		NISSAN	MAXIMA		198.00	0.00h	1000	PRINT	REBK	CANCL
▶	102410	18/04/13	08:00	21292		HONDA	ACCORD		0.00	0.00h	1000	PRINT	REBK	CANCL
▶	102438	18/04/13	08:45	113155		NISSAN	PATROL		414.50	0.00h	1000	PRINT	REBK	CANCL
▶	102497	18/04/13	08:30	17300		NISSAN	PULSAR		189.75	0.00h	1000	PRINT	REBK	CANCL
▶	102652	18/04/13	14:00	102568		NISSAN	PULSAR ST 4		229.35	0.00h	1000	PRINT	REBK	CANCL
▶	102662	18/04/13	07:30	108835		NISSAN	NAVARA		262.35	0.00h	1000	PRINT	REBK	CANCL
▶	102771	18/04/13	07:30	108370		NISSAN	X-TRAIL		207.25	0.00h	1000	PRINT	REBK	CANCL
▶	102773	18/04/13	07:30	155056		NISSAN	PATROL		0.00	0.00h	1000	PRINT	REBK	CANCL
▶	102827	18/04/13	07:00	135999		NISSAN	NAVARA		0.00	0.00h	1000	PRINT	REBK	CANCL

Expired RO Count: 302

Log#	Staff ID	Staff Name	R/O#	Vehicle Desc	Date On	Time On	Date Off	Time Off	Total (Hrs)

View RO View Invoice Print RO Print Invoice Close



Receipts

Receipts are a receipt of a customer's Account. When in the Receipts screen you can reprint a customer's receipt or you can create a new one if you are receiving money from your customer.

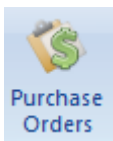
Date	Client Name	Ref	Narration	Amount	Apply

You fill these fields with who is paying their account, who is collecting the money and how the customer is paying

In the graph section of the screen the customers debt amonut will appear, with tick boxes nex to them, click the amount you wish to recieve. If the amount doesnt match what they are paying, you are able to do a part payment

Once you have receipted the money from the customer it will be on your daily banking report for you to pass on to your accounts department for them to bank.

Purchase Orders



Purchase orders is a form that you are giving your supplier, a purchase order is authorisation to your supplier for them to provide you with the requested goods.

Service Purchase Orders

Open Orders | All Orders | Closed Orders

Search By: All Suppliers

Date From: 01/08/11 To: / / Show Service Purchase Orders Only

Purch Ord#: [] Branch: CANTERBURY

Date	Due	Order#	Client#	Name	RO#	Make	Model	Rego	Vin	Amount	GST	Status	Created By

Print Settings... | Print | Preview | Invoice... | Edit... | Cancel PO | **New...** | Exit

These fields allow you to sort only the purchase orders you need to see.

Purchase Order

Order From: 1003 | ULTIMATE BUSINESS SYSTEMS P/L

Date: 01/01/2011 | Date Due: 01/01/2011

Order Number: 1071 | Use System Generated Invoice Number

Amount: \$0.00

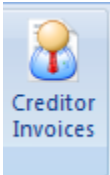
G/L Acct	Narrative	Reference	Type	Client #	Amount	GST
▶ 6270	ULTIMATE BUSINESS SYS	123	OT	1003	\$100.00	\$9.09
*						

Journal >> | Print Order | Preview Order | Post | Cancel

G/L Acct: | Vehicle: | Client: Ultimate Business €

These details are the details you will fill in for your supplier

By ticking this box you will be able to print your purchase order



Creditors Invoices

Sometimes the service department will receive a Tax Invoice off a supplier, which they need to enter into the system.

Most times the accounts department will do this procedure however if you have been given this task this is how you do it. It is much like a purchase order, and within the creditors invoice screen you will click the new button. Then the screen shot below will appear.

G/L Acct	Narrative	Reference	Type	Client #	Amount	GST
	ULTIMATE BUSINESS S	010111	OT	1003	\$200.00	\$18.18

You must select which account you wish the invoice to go to, if you are unsure check with your accounts department



Live Support

This feature allows the Ultimate Support team to connect into your computer port number. and take control of your desktop. With new Builds you can now connect via Teamviewer, to do this simply click on Launch Quick Support and exchange ID number and Password with Ultimate support staff so we are able to connect to your desktop and provide Ultimate Support! Remember to call first!

