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.

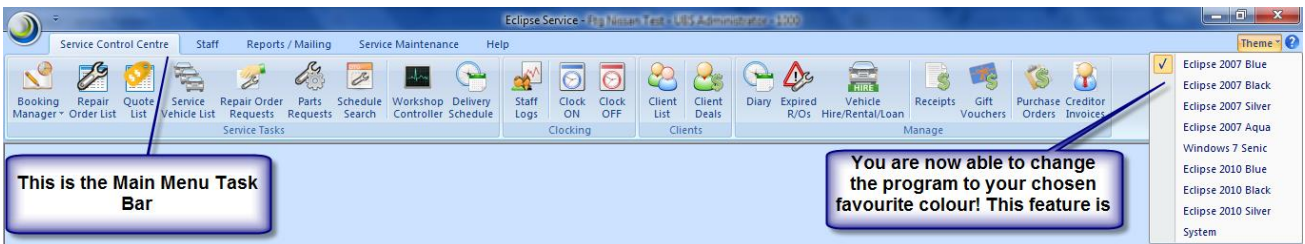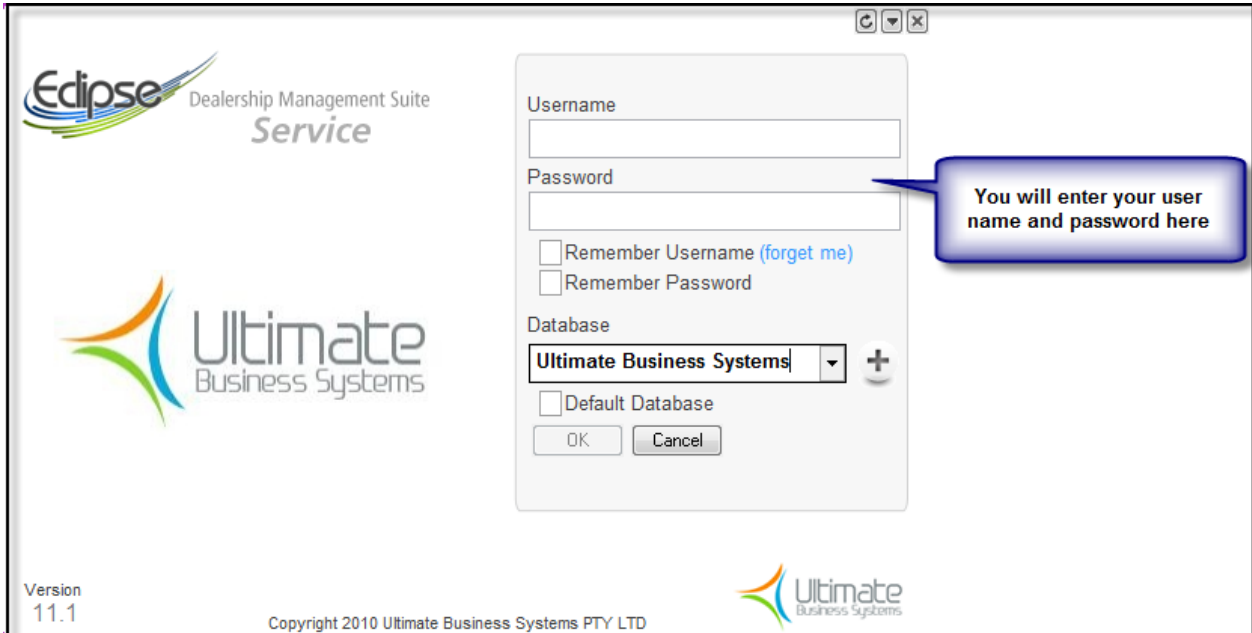*Within Warranty you can have a sale type of warranty*

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 accidently 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

You will enter your user name and password here

This is the Main Menu Task Bar

You are now able to change the program to your chosen favourite colour! This feature is

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.

This is the searching tool that gives you a quick and direct way of looking up a customer. Alternativley, 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.

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.

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.

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.
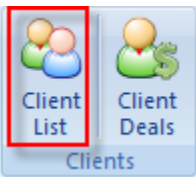
This is a search fitler tool to help you find your customer

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

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.

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.

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

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

In Progress

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

Held

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

Partial Inv

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

All Invoiced

All invoiced will show the repair orders that are completely finalised

Cancelled

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

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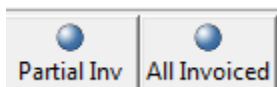
Partial Inv, searches for repair orders that you may have finished and invoiced the customers section but are leaving the warranty jobs for another day.

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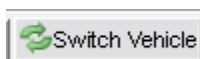
 This button gives you the opportunity to change the repair order to a different vehicle. You may have selected this by mistake if your customer has several Vehicles.

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.

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.

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.

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 clicked 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).

Step 4

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

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

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.

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

Security Deposit

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
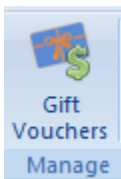
The 'Gift Vouchers' screen will open and here you are able to create a singular gift voucher or a batch of Gift Vouchers that can be issued at a later date.
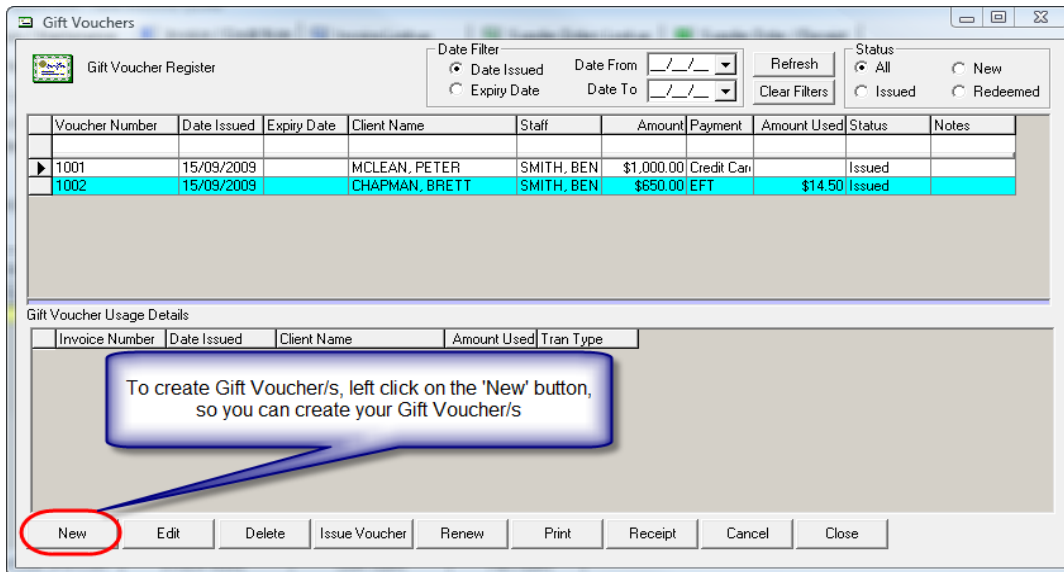
To create a batch of gift vouchers, left click on the 'Add a Batch of Vouchers' tab and enter in the sequence of voucher numbers you want to use. Alternatively if you were wanting to creating a singular gift voucher, use the 'Add Single Voucher' tab and enter in the Voucher number you want to use and then left click on the 'Save' button.
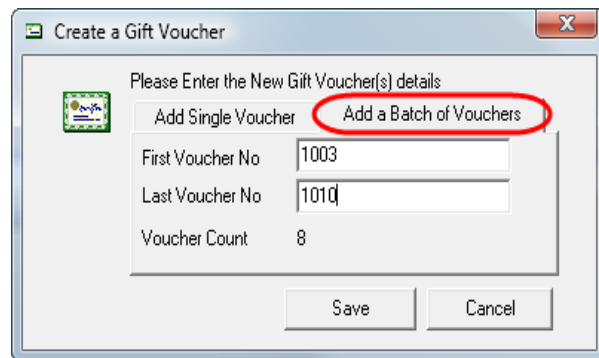
How to Issue a Gift Voucher to a Customer.

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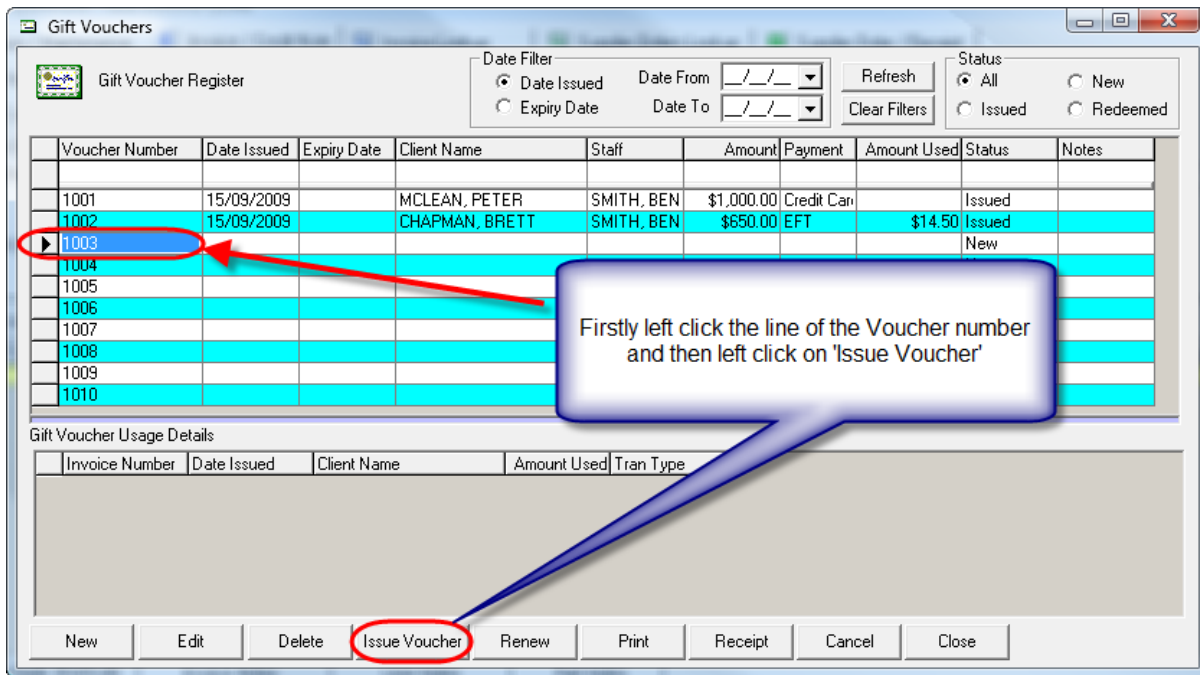
Now you will need to enter in the information for who is purchasing the voucher and the amount of the voucher.

To print the voucher and receipt for the person paying the voucher, Tick the options for 'Print Voucher' & 'Print Receipt', then left click 'OK'

☑ Print Voucher   ☑ Print Receipt

OK   Cancel

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.

Create a Gift Voucher

Date Issued 18/09/09 ▼
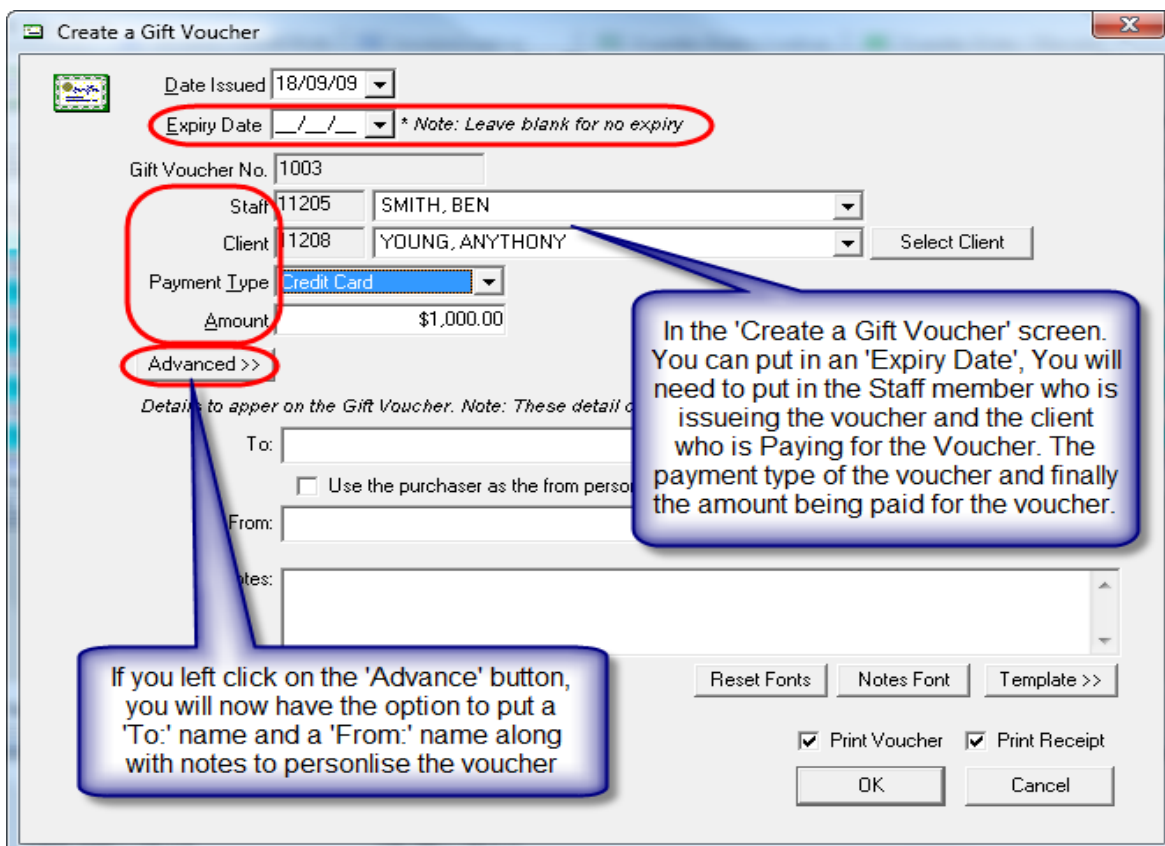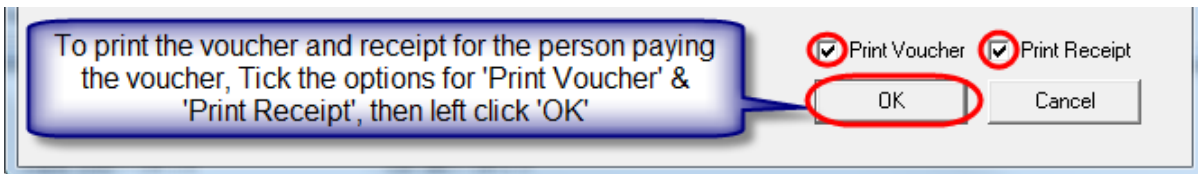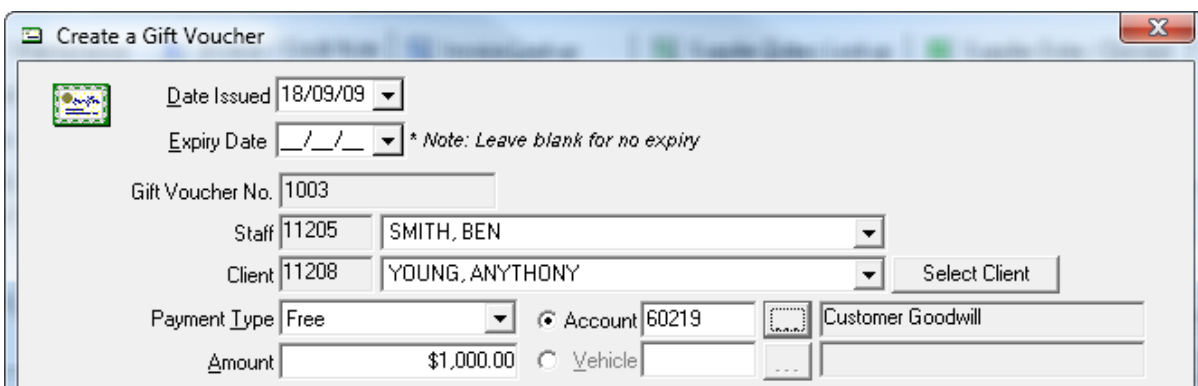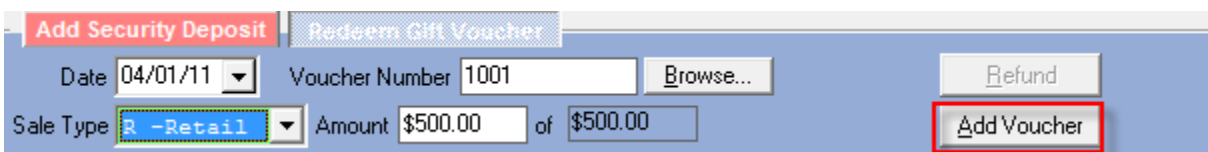Expiry Date __/__/__ ▼ * Note: Leave blank for no expiry
Gift Voucher No. 1003
Staff 11205   SMITH, BEN ▼
Client 11208   YOUNG, ANYTHONY ▼   Select Client
Payment Type Free ▼   ● Account 60219 [...] Customer Goodwill
Amount $1,000.00   ○ Vehicle ___ [...]

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.*

Add Security Deposit | Redeem Gift Voucher
Date 04/01/11 ▼   Voucher Number 1001   Browse...   Refund
Sale Type R -Retail ▼   Amount $500.00 of $500.00   Add 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)

○ Re-Open   **Re Open**

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.
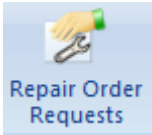
Repair Order Requests (RO Requests)

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.

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

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.
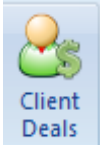
Client Deals

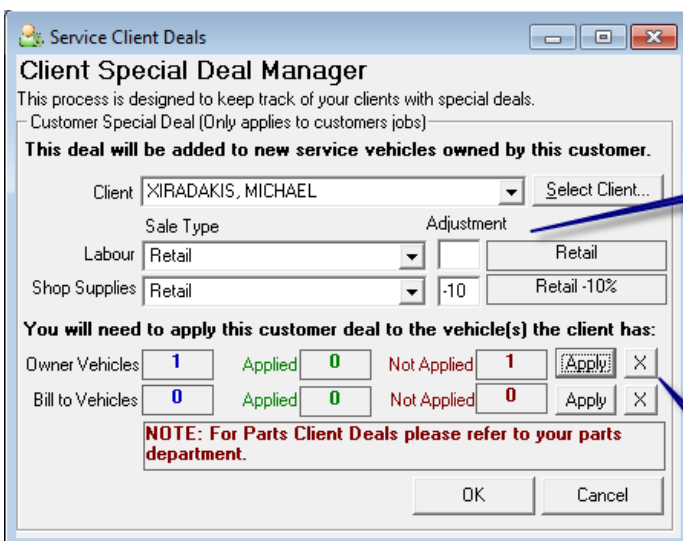This feature allows you to set up customised deals for your regular customers, so rather than giving them a discount each time they come in and having the confusion of all your staff not remembering the correct discount for them this feature means the discount is stored in the system for you and will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

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.

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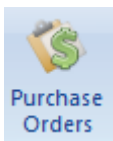
Purchase orders is a form that you are giving your supplier, a purchase order is authorisation to your supplier for them to provide you with the requested goods.

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

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
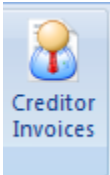
Creditors Invoices

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.

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!

Connect to Ultimate Support

Network Connection

Please call the appropriate support line listed below:
The use of this support feature allows the support personnel to see your desktop.
Please use only when advised by Ultimate support personnel.

Team Viewer Support

Launch Quick Support

VNC Support

- Melbourne Support **Ph: 03 9012 6677** Port No.
- Brisbane Support **Ph: 07 3891 1377**
- Melbourne Development ☐ Development 2
- Other

Connect

Re Install

Exit