

How to Create a Service Template

Introduction

This page is dedicated to showing you how to create a service template within the Eclipse Service module.

On this page:

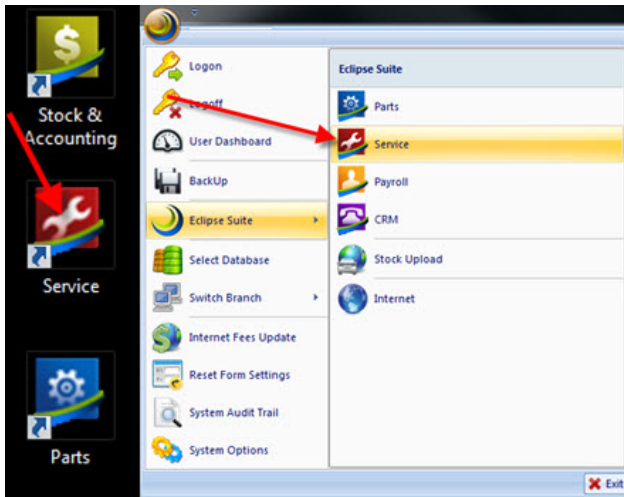
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- Creating Folders For Service Templates
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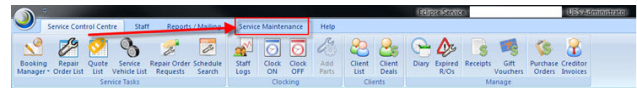
Creating Folders For Service Templates

Within the Service Templates you can set up Folders for each manufacturer and then subfolders for each model, below are the instructions to do this.

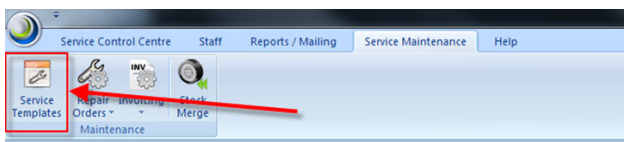
1. Open the Service module either via the desktop icon or via Stock & Accounting or Parts.



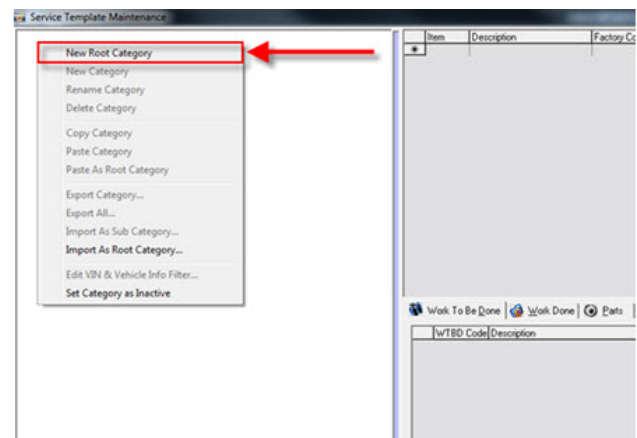
2. Select the "Service Maintenance" tab from the top menu bar.



3. Select "Service Templates".

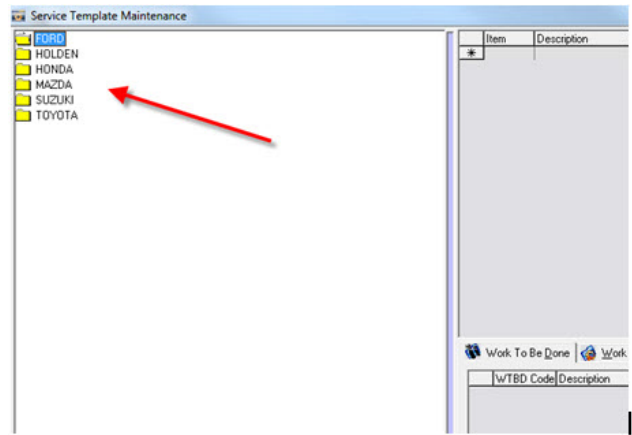
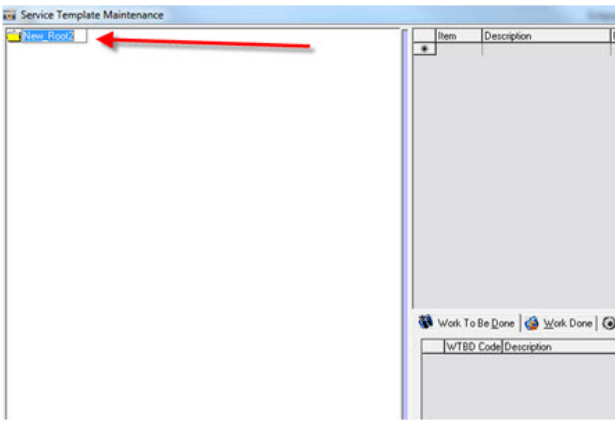


4. Right click on the white space on the left hand side and select "New Root Category".



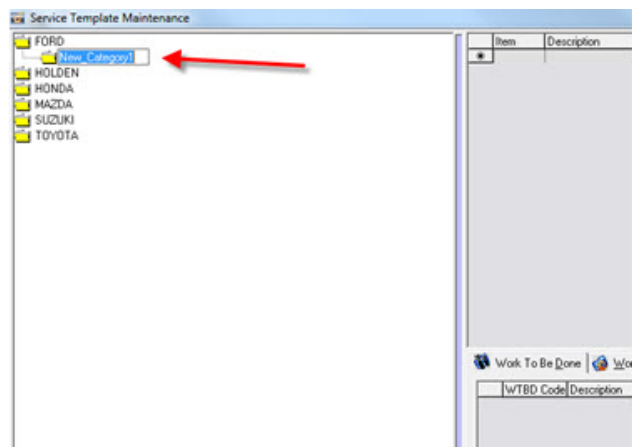
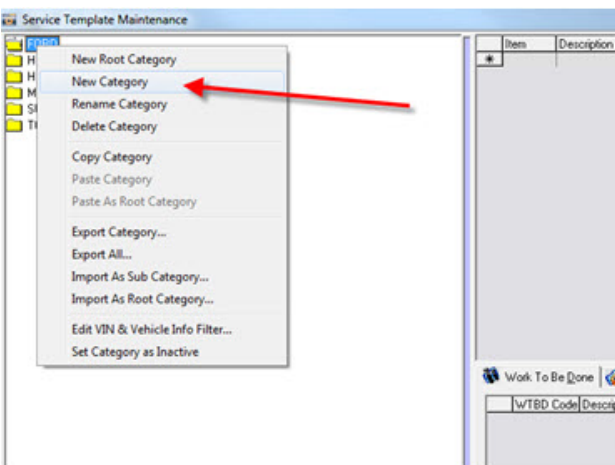
5. Type in a name for your Template Folder.

6. Repeat steps 4 to 6 to add multiple root folders.

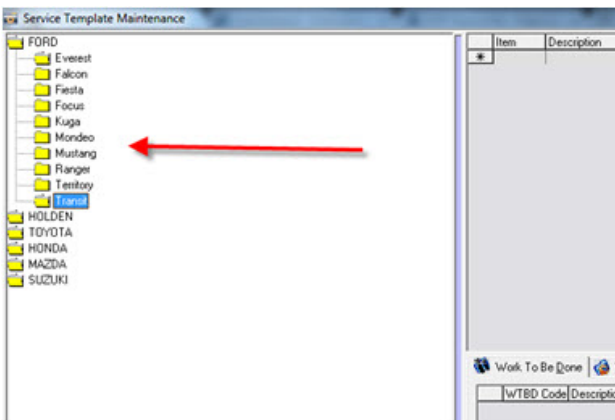


7. To create a sub folder under each Root Folder right click on the Root Folder and select "New Category".

8. Type in a name for your sub folder.



9. Repeat steps 7 and 8 to add multiple sub folders. Note: additional sub folders can be created within these sub folders.

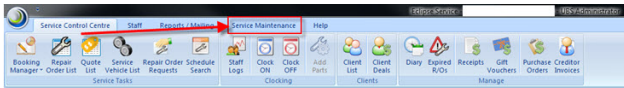


Creating Service Templates

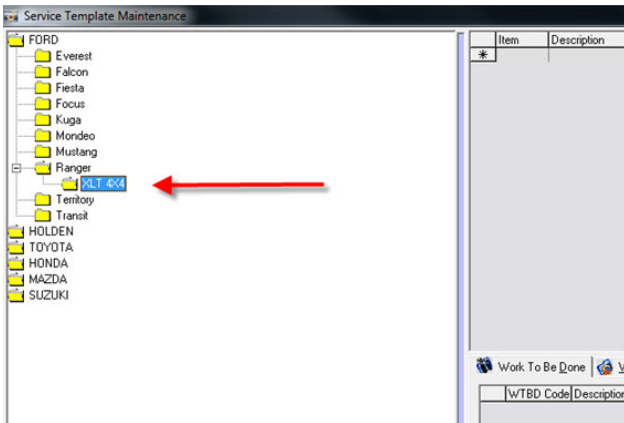
Once the Root folders, category folders and sale item codes are created, the service templates can be created, below are the instructions to do this.

2. Select "Service Templates".

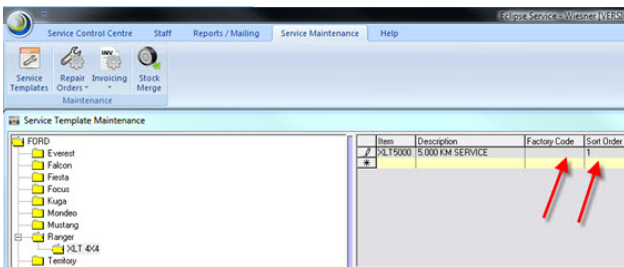
1. Select the "Service Maintenance" tab from the top menu bar.



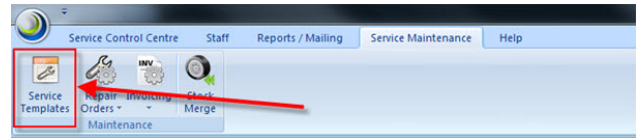
3. Select the folder you wish to create the Service Template within.



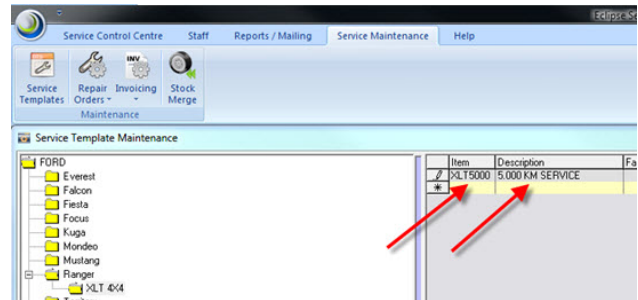
5. Enter a factory code (if applicable) otherwise leave blank, enter a sort order for the template to appear in, leave blank if unsure.



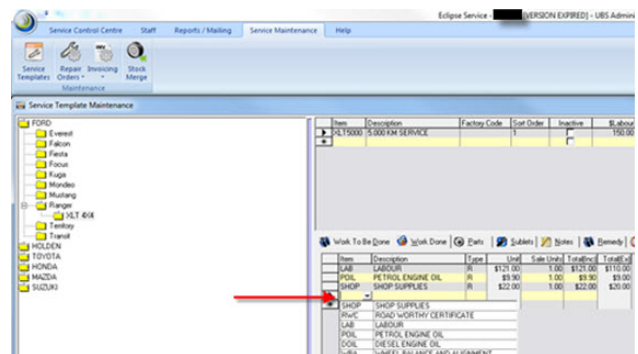
7. Select the "Parts" tab, then click on the drop down arrow, this will bring up the parts lookup screen, select a part from this screen to add to the template, press the tab key once added to the list to bring up the pricing, if no pricing is shown, then select the relevant sale type from the drop down list.



4. Enter a name for the template in the "Item" field then enter a description in the "Description" field.



6. Select the "Work done" tab from the bottom half of the screen, then select a sale item from the drop down list, prices will be applied as they are defined within the sale item. Tab across then enter the number sale units (e.g. 2 hours of labour will be 2 sale units) Continue this step to add more items.



8. Select the "Notes" tab, then under "RO Notes" you can enter any jobs that need to be carried out.

