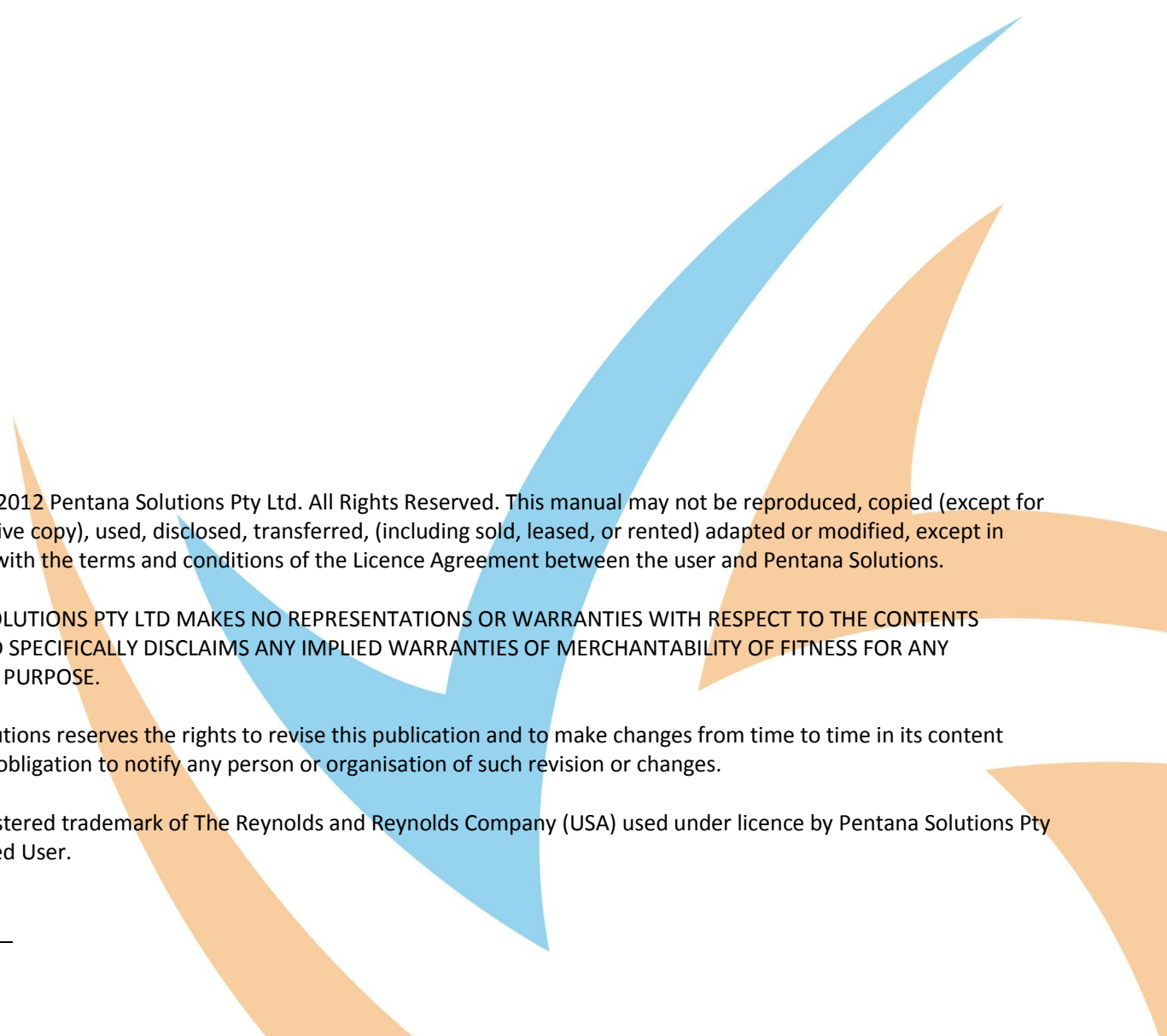




V9 Release Service Manual



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ERAnet – Appointment Entry – Advisor No

Enhancement

Overview

An enhancement has been made to the *Advisor No* field in Appointment Entry and *Job No* and *Op Code* fields in the Job Detail screen. The *Advisor No* field is now a text field and the user is able to enter the advisor number or search for a valid advisor. The *Job No* and the *Op Code* fields is now a select box.

Why

This change was made to improve the core product and to continue to develop and enhance the ERAnet Service product.

Screens



Appointment Entry

The Process

Appointment Entry

Upon logging into ERAnet, select **Service**, **Appointment Entry** and search for a relevant customer as per existing functionality and the following screen will be displayed:

Note: The following example is based on searching by *Registration No* option and creating an appointment.

Serial No	Yr	Make	Rego No	Color	Stock No	Model Description
6PFAAAJGSW6U93489	05	FO	1C1Y570			FA FALCON BF Xtr4 4.0i 6spd Ma

Apt/Quote No	Type	Date	Time	Dept	Cust No	Customer Name	Rego No	Make	Serial No
--------------	------	------	------	------	---------	---------------	---------	------	-----------

Select the **Serial No** hyperlink and the following screen will be displayed:

ERAnet V9

Service Appointment Entry

ERA^{net}

Appointment Entry

Customer No: 2311 Jas & Mary Smith Home: Bus: Mob: (0435) 305 305

Bill To: VIP CUSTOMER

APPOINTMENT mode

Registration No: 1CJY570 Serial No: SEPAAA3GSW6093489 Maint Code: F005695

Make / Year: PO / 05 Stock No: Transmission: Delivery Date:

Model Desc: BF X6t 4.0l 6spd Manual Sedan Engine Type: Warr Exp Date:

Last RO: 19/08/2007 Last Kms: 2500 3 Open RO(s) WOF Exp Date:

Department: S, SERVICE Kilometre(s): PO No: Parts Estimated Cost:

Advisor: Appmt Date: 05/01/2012 14:30 Labor Estimated Cost:

Promised Date: 05/01/2012 17:30 Diary Comments: Total Estimated Cost:

Next Avail Date: 06/01/2012 Loan Car Avail: 06/01/2012

Operation Code	R	Op Code Description	Dept	S/T	CA	Time	Quote	Complaints	Inst
Row 1 of 1									

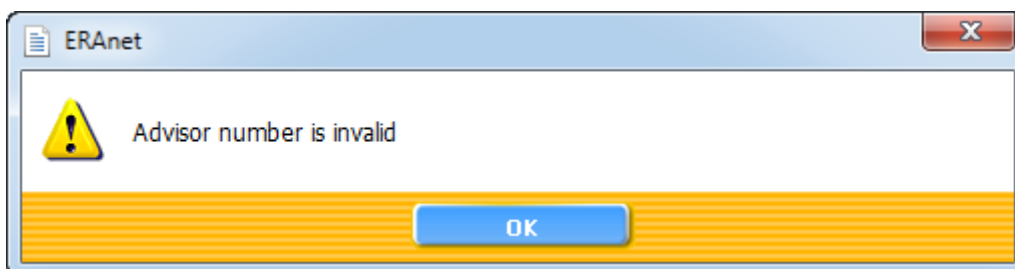
Page 1 of 1

Enter promised date

Ok Exit

The *Advisor* field is now a text box. The user is able to enter a valid **advisor number** or search for a valid advisor by clicking on **Search**.

Entering an **invalid advisor number** will display the following pop up message:



Select the **OK** option to acknowledge the message and enter a valid advisor number.

Selecting the **Search** option or pressing **F3** from the keyboard will display the following *Service Mechanic search* screen:

Tech No	Name
5	A STEVENS
50	BAY
96	CHRIS STEVENS
721	CHRISTOPHER SCOTT
888	DAVID W
332	Graeme Browne
171	JB
182	J SCOTT
17	Joe
7713	Joice

Row 1 of 25 Page 1 of 3

Exit

Note: The *Department* field will be disabled. The department displayed in this field is picked up from the *Appointment Entry* main screen.

Click on the relevant **Tech No** hyperlink to select that advisor.

Job Detail


Select **Job Detail** from the navigation bar and the following screen will be displayed:

Customer No: 7311 Jas & Mary Smith Home: Bus: Mob: (0435) 305 305
Registration No: 1C1Y570 Serial No: 6PPAAA3GSW6U93489 Maint Code: FO05695

Job No: Op Code: Time: Quote: Carry Over: ☐

Description: Department: Sale Type: Complaint: Select: Technician Instructions: Customer Instructions:

Continue Add Job Delete Job Exit

The *Job No* and *Op Code* fields are now a select box. The user is able to select a **job number** or **operation code** from the  drop down box.


Benefits

Changing the input method of the *Advisor* give the user added flexibility in being able to key the *Advisor* number.

ERAnet – Appointment Entry – Diary

Enhancement

Overview

An enhancement has been made to the Diary screen in  Appointment Entry to prevent users from making an appointment on a public holiday.

Why



This change was made to improve the core product and to continue to develop and enhance the ERAnet Service product.

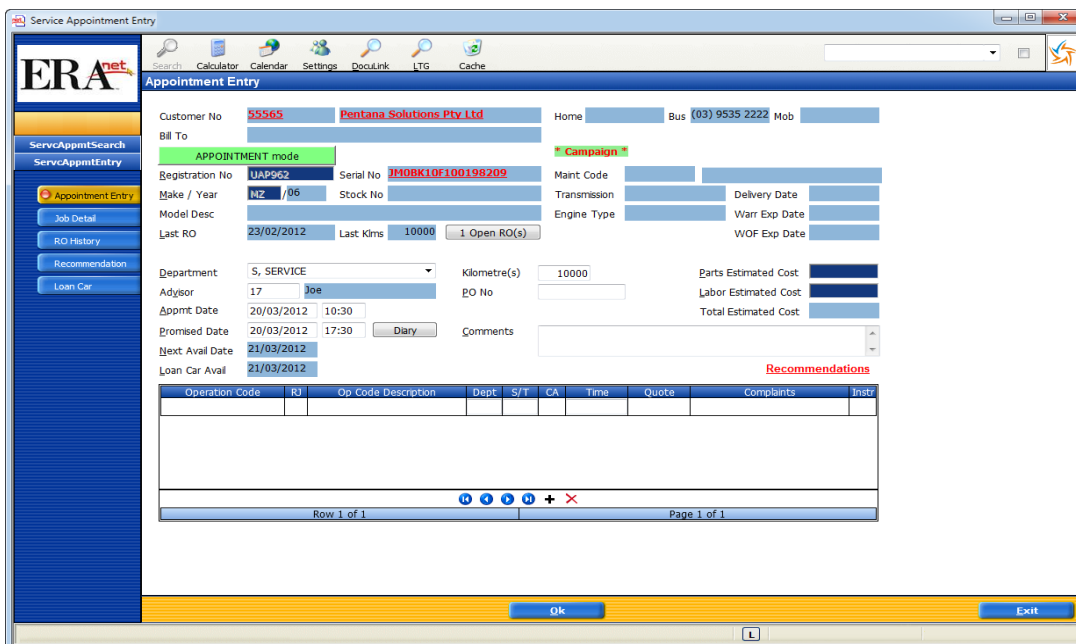
Screens



Appointment Entry

The Process

Upon logging into ERAnet, select  **Service** followed by  **Appointment Entry** and search for a vehicle using any of the search criteria and the following screen will be displayed when a vehicle has been selected:



Service Appointment Entry

Customer No: 55565 Pentana Solutions Pty Ltd Home: (03) 9535 2222 Mob:

Bill To:

APPOINTMENT mode: Campaign *

Registration No: UAP962 Serial No: JM08K10F100198209 Maint Code:

Make / Year: MZ / 06 Stock No: Transmission: Delivery Date:

Model Desc: Engine Type: Warr Exp Date:

Last RO: 23/02/2012 Last Kms: 10000 1 Open RO(s) WOF Exp Date:

Department: S, SERVICE Kilometre(s): 10000 Parts Estimated Cost:

Advisor: 17 Joe PO No: Labor Estimated Cost:

Appt Date: 20/03/2012 10:30 Comments: Total Estimated Cost:

Promised Date: 20/03/2012 17:30 Diary

Next Avail Date: 21/03/2012

Loan Car Avail: 21/03/2012

Recommendations

Operation Code	RJ	Op Code Description	Dept	S/T	CA	Time	Quote	Complaints	Instr
Row 1 of 1									

Page 1 of 1

Ok Exit

Enter the mandatory field data as per existing functionality and select the **Diary** button and the following screen will be displayed:

Appointment Diary for Dept: SERVICE

Graph Type: Department: SERVICE

WorkLoad Dept: SERVICE

Start Date: 20/03/2012

Drop Off Advisor: 17, Joe

Drop Off Date: 20/03/2012

Pick Up Advisor: 17, Joe

Pick Up Date: 20/03/2012

Bay Set: 1/5

March Diary

Hours

Unsold

Sold

Date

To change the Bay Diary display date, click on the required bar on the graph.

Appointment Details

Pentana Solutions Pty Ltd

Drop off: 20/03/2012 10:30 in Bay 1

Pick Up: 20/03/2012 17:30

Make: MAZDA

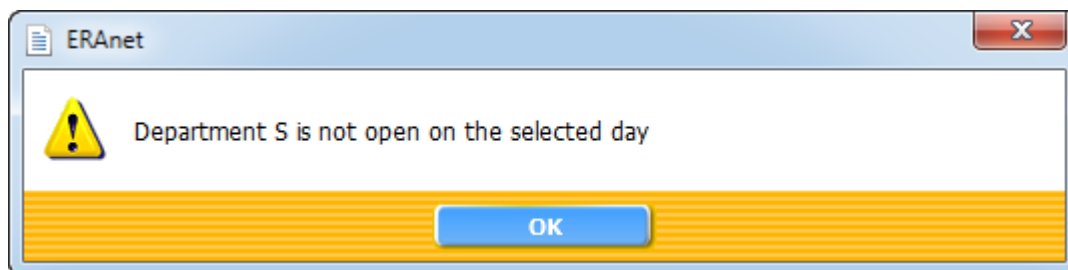
Rego: UAP962

Advisor: 17 Joe

Advisor: 17 Joe

Continue

The following pop up message will now display when the user enters a **public holiday date** in the *Start Date* field:



Select **OK** to acknowledge the message and select another date and continue to create the appointment as per existing functionality.

Note: The user will not be able to select a *Pick Up Time* on a public holiday.

Benefits

Preventing the user from making a booking on a public holiday will enable the Service Department to run more efficiently.

ERAnet – ERO – Display Book/Pay Time

Enhancement

Overview

An enhancement has been made to ERO to display the Book/Pay Time when clocking on to a job. This enhancement has been made in both ERA and ERAnet.

Why

This change was made through a Request For Development submission to enhance existing functionality.

Screens






ERO

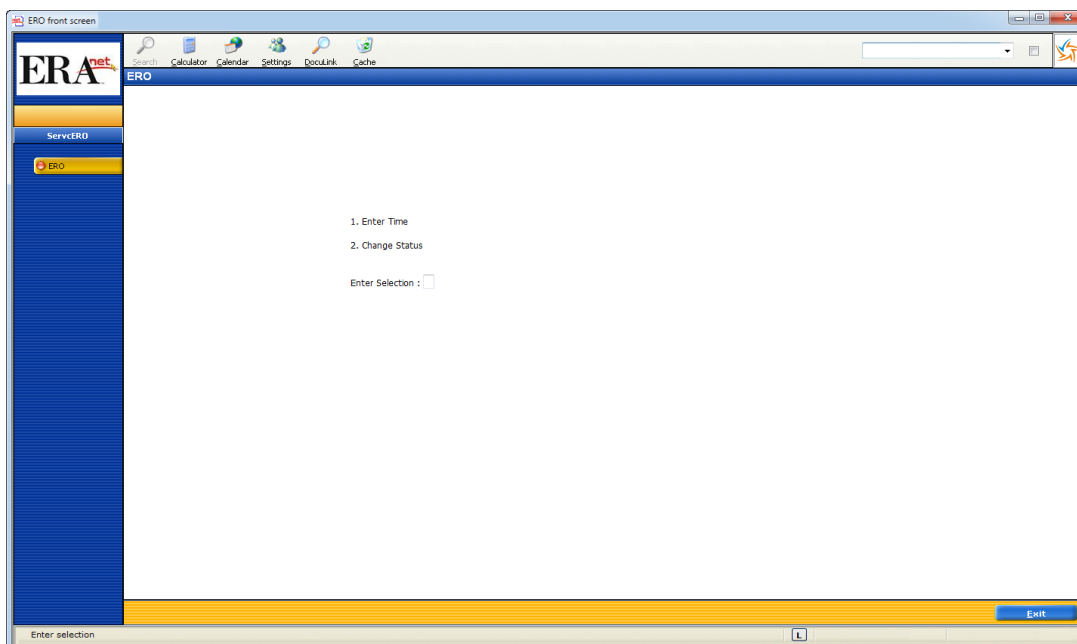
3659 – Electronic Repair Order Time Entry

The Process

ERAnet

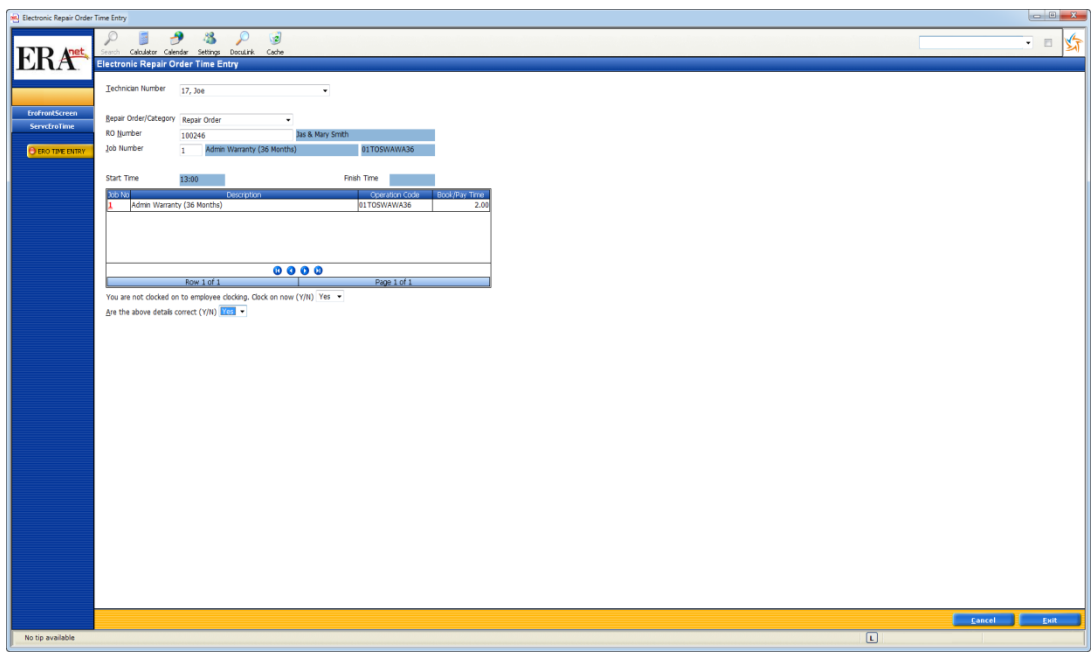
A new *Book/Pay Time* column has been added to display the allowed time for the job.

Upon logging into ERAnet as per existing functionality, select  **Service**,  **Technician Time Menu**, followed by  **ERO** and the following screen will be displayed:



At the *Enter Selection* field enter **1 – Enter Time** to clock the technician to a repair order and the following screen will be displayed:

Note: Option 2 – Change Status will only be displayed if specification question **43 – IS WORKSHOP STATUS USED (Y/N)** in 3685 – Service Spec Maint is set to *Yes*. Selecting *No* to this specification question will take the user to the *Electronic Repair Order Time Entry* screen as per existing functionality.



Book/Pay Time

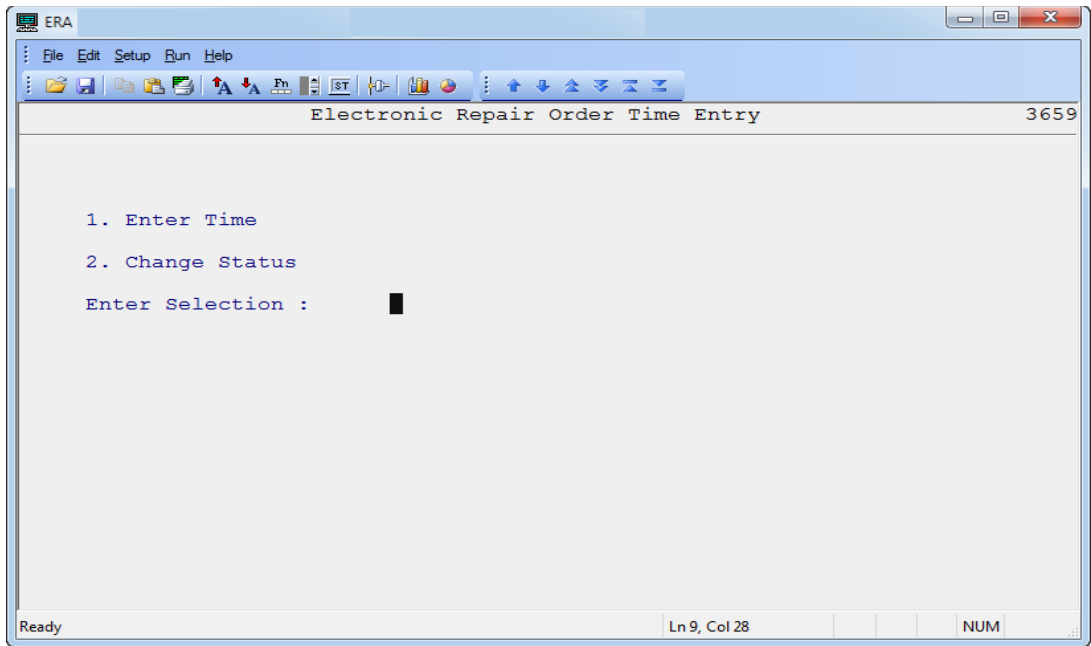
This field will display the book/pay time for the operation code as setup in 3625 - Service Operations. If there is no book/pay time for the relevant operation code, this field will remain blank.

Enter the relevant information as per existing functionality and proceed towards clocking the technician on to a repair order.

ERA

A new *Book/Pay Time* column has been added to display the allowed time for the job.

Select **3659 – Electronic Repair Order Time Entry** and the following screen will be displayed:



At the *Enter Selection* field enter **1 – Enter Time** to clock the technician to a repair order and the following screen will be displayed:

ERAnet V9

Note: Option 2 – Change Status will only be displayed if specification question 43 – *IS WORKSHOP STATUS USED* (Y/N) in 3685 – Service Spec Maint is set to Yes. Selecting *No* to this specification question will take the user to the *Electronic Repair Order Time Entry* screen as per existing functionality.

ERA

File Edit Setup Run Help

Electronic Repair Order Time Entry 3659

Technician Number : 17 Joe

R/O Number/Category/? : 100246 Jas & Mary Smith

Job Number/? :

1. Admin Warranty (36 Months Book/Pay Time : 2.00

(B=Back) (Line#) (N=Next) (U=Up)

Ready Ln 23, Col 30 NUM

Book/Pay Time	This field will display the book/pay time for the operation code as setup in 3625 - <i>Service Operations</i> . If there is no book/pay time for the relevant operation code, this field will remain blank.
----------------------	--

Enter the relevant information as per existing functionality and proceed towards clocking the technician on to a repair order.

Benefits

The additional information will allow the technician to know how much time they have to complete the relevant job.

ERAnet – ERO Time Report – Non Production Category

Enhancement

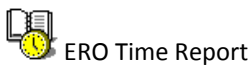
Overview

An enhancement has been made to ERO Time Report to enable users to specifically report on non productive categories.

Why

This change was made through a Request For Development submission to enhance existing functionality.

Screens



The Process

Upon logging into ERAnet, select  **Service**,  **Technician Time Menu**, followed by  **ERO Time Report** and the following screen will be displayed:

A new *Non Productive Only* option has been added to this report to display mechanics that have clocked on to unproductive categories.

To display a report on non productive category enter the **Start** and **End Dates**, select ☒ the **Non Productive Only** option followed by **ShowReport** from the action bar and the following screen will be displayed:

Note: Leaving this option ☐ un-ticked will select all clocking for the selected date range.

ERAnet V9

ERO Time Report

Start Date: 09/11/2011 End Date: 09/11/2011 Non Productive Only ☒

Date	Mech	Mechanic Name	Aud	Start	Finish	Category	Team	Description
09/11/2011	17	Joe		10.55	11.55	R	S	WORKING FROM HOME
09/11/2011	626	BARBARA		12.16	12.51	34		CLEANING FLOOR

Row 1 of 2 Page 1 of 1

*** indicates time added, changed or deleted in Ro Close Out

ShowReport Print Cancel Exit

ERAnet - Transforming Automotive Retailing

Date	This field will display the date the technician has clocked on to the unproductive category.
Mech	This field will display the technician number.
Mechanic Name	This field will display the technician name
Aud	This field will display an asterisk * if the clocking has been manually changed or entered.
Start	This field will display the technician's clock on time.
Finish	This field will display the technician's clock off time.
Category	This field will display the unproductive category code. Note: The column heading will display <i>Category</i> when the <i>Non Productive Only</i> option is <input checked="" type="checkbox"/> ticked.
Team	This field will display the unproductive code team.
Description	This field will display the description of the category. Note: The column heading will display <i>Description</i> when the <i>Non Productive Only</i> option is <input checked="" type="checkbox"/> ticked.

Benefits

The addition of the *Non Productive Only* option will allow the user to specifically view a history of technician's unproductive clocking.

ERAnet – Pre-Delivery System

Optional Software

Overview

The Pre-Delivery System has been enhanced to track the flow of vehicles from the point of ordering by the customer through to the delivery of the vehicle to the customer. Users are also able to generate a report for Fleet Customers to notify them on the status of their vehicle orders and an onscreen report has been created to display the deliveries that have been scheduled for the week.

Why

This change was made through a Request For Development submission to enhance existing functionality.

Screens



Deal Log Report – Sales Manager



Deal Log Report – Stock Control



Delivery Diary



Pre-Delivery



Pre-Delivery Setup



Prospect Maintenance



RO Close Out



Salesperson Maintenance



Service



Showroom



Showroom Analysis



Showroom Setup



Vehicle Advisor



Workshop Control Menu

3045 – User Definable Fields

3685 – Service Specification Maintenance

4084 – Vehicle Entry Formats

4090 – User Define Relate Table

4184 – User Defined Fields Maint

4524 – Sales Department Codes

6973 – Purchase Order Creation/Maint

The Setup

The following ERA2 setup is required to be checked and updated prior to using the Pre-Delivery system.

The user is able to allocate a service store to a Sales Department where the Pre-delivery repair orders will be created in. Select **4524 – Sales Department Codes** and enter a **Sales Department Code** and the following screen will be displayed:

The screenshot shows the ERA application window titled "ERA". The menu bar includes File, Edit, Setup, Run, and Help. The toolbar contains various icons for file operations and navigation. The main window title is "Sales Department Codes" with a code "4524" in the top right corner. The screen displays a list of fields for setup:

- Code : MI
- 1. Vehicle Department : Both
- 2. Location : ALL (with a list box showing 1 / 1)
- 3. Description : MITSUBISHI
- 4. New Vehicle Makes : MI MITSUBISHI, TO TOYOTA (with a list box showing 1 / 1)
- 5. Prospect Contact Schedule : B1 PROSPECT SCHED
- 6. Retain Prospect At Sale Time : Yes
- 7. Retain Prospect In Diary : No
- 8. Default Pre-Delivery Store : STORE320 S320 - Main store

At the bottom, there is a command line with "Enter", "Modify", "field#", and "exit" options. A help message says "Save the current entries". The status bar shows "Ready", "Ln 19, Col 40", and "NUM".

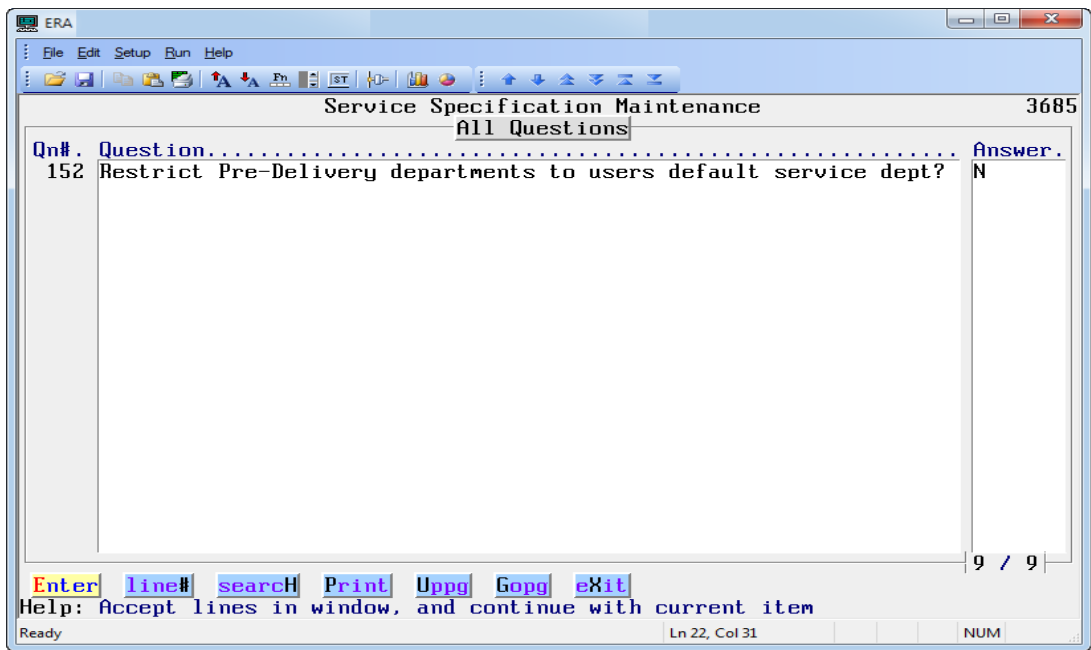
A new field *Default Pre-Delivery Store* has been added.

Select line **8 - Default Pre-Delivery Store** followed by the **/** lookup to select a valid **Service Store** where the Pre-Delivery Repair Orders will be created for this Sales Department.

Note: If nothing is entered on this line, the Pre-Delivery repair order will be created based upon the **4186 – Auto RO Generation Setup**.

Select **Enter** from the command line to save the changes.

The dealership is able to restrict the user to view specific department that the service user belongs to. Select **3685 – Service Specification Maintenance** followed by **1 – All Questions** then scroll through the pages to get to **question 152** and the following screen will be displayed:

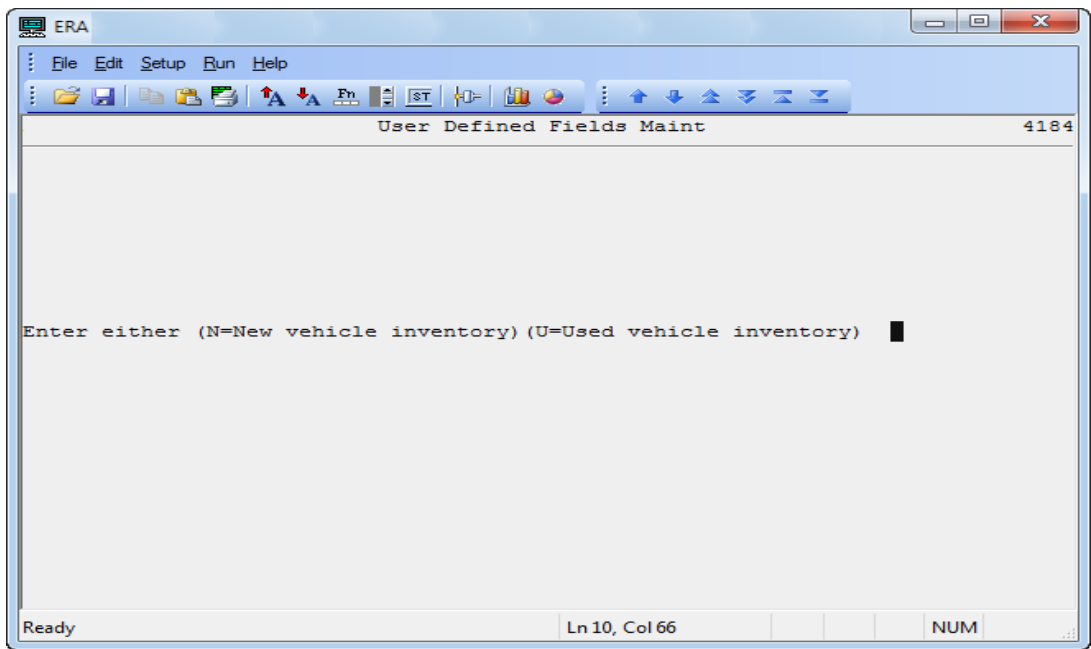


152 – Restrict Pre-Delivery departments to users default service dept?

Enter **Y** to default the view to the specific department that the service user belongs to or **No** to not restrict the user.

Select **Enter** from the command line to save the changes.

The information that appears in the *Loc* field in the Pre-Delivery Control screen will inform the Stock Controller where the vehicle is physically located, for example, Pre Delivery Bay (PD Bay). This is controlled by *User Defined Fields* (UDF) and will need to be set up in **4184 - User Defined Fields Maint** for both New and Used vehicles. Select **4184 - User Defined Fields Maint** and the following screen will be displayed:



Select **N** for New Vehicle Inventory and the following screen will be displayed:

ERAnet V9

The screenshot shows the 'New Vehicles' screen in the ERA application. It displays a table with columns: No., Format screen desc, Data Format, Length, Just., Report Heading, and Short Desc. The table lists 15 fields, including REG EXP DATE, UDF # 1, PD BAY, UDF # 11, DATE REGISTERED, UDF # 13, DEMO DATE, STOCK ID, Expected Delivery D, UDF # 17, UDF # 18, UDF # 19, Delivery Date, UDF # 20, and COMP.DATE. Each field has a specific data format (Date, A/N, or L) and length (8 or 20). The status bar at the bottom indicates 'Ready', 'Ln 22, Col 48', and 'NUM'.

No.	Format screen desc	Data Format	Length	Just.	Report Heading	Short Desc
1	REG EXP DATE	Date	8	R	REG EXP DATE	REG EXP
2	UDF # 1	A/N	20	L	UDF # 1	UDF # 1
3	PD BAY	A/N	20	L	PD BAY	PD BAY
4	UDF # 11	A/N	20	L	comp	UDF # 11
5	DATE REGISTERED	Date	8	R	REGO DATE	REGO DATE
6	UDF # 13	A/N	20	L	UDF # 13	UDF # 13
7	DEMO DATE	Date	8	R	DEMO DATE	DEMO DATE
8	STOCK ID	A/N	20	L	STOCK ID	STOCK ID
9	Expected Delivery D	Date	8	R	Expected Date	Exp Date
10	UDF # 17	A/N	20	L	UDF # 17	UDF # 17
11	UDF # 18	A/N	20	L	UDF # 18	UDF # 18
12	UDF # 19	A/N	20	L	UDF # 19	UDF # 19
13	Delivery Date	Date	8	R	Delivery Date	Del Date
14	UDF # 20	A/N	20	L	UDF # 20	UDF # 20
15	COMP.DATE	A/N	20	L	COMP.DATE	COMP.DATE

(E=Enter) (M=Modify) (Line#) (N=Next) (P=Previous) █

Ready Ln 22, Col 48 NUM

The *User Defined Field* will need to be setup as per existing functionality. The user will need to ensure that the Data Format field is setup as **A/N** for Alpha Numeric.

Note: It is recommended to name the *User Defined Field* as PD Bay, to make it easier to identify.

Select **E=Enter** from the command line to save the changes. Repeat the same process for *Used Vehicle Inventory*.

The user will now need to assign the newly created UDF to the New and Used Vehicle Format in **4084 - Vehicle Entry Formats**. Select **4084 - Vehicle Entry Formats**, enter the **default format number** and the following screen will be displayed:

The screenshot shows the 'Vehicle Entry Formats' screen in the ERA application. It displays a form with fields for Format Number (4006.DEFAULT), Default (Yes), New/Used (NEW), Description (NEW VEHICLE DEFAULT), Make (ALL MITSUBISHI), and Type (M MAINTENANCE). Below this is a table for 'Entry Fields' with columns: Field Name, Description, Attr#, Display, and Mandatory. The table lists two fields: UDF.14 (DEMO DATE) and UDF.10 (PD BAY). The status bar at the bottom indicates 'Ready', 'Ln 22, Col 27', and 'NUM'.

Field Name	Description	Attr#	Display	Mandatory
UDF.14	DEMO DATE	115	No	No
UDF.10	PD BAY	102	No	No

Field 4: Enter Insert Delete line# Uppg Gopg eXit

Help: Accept lines in window, and continue with current item

Ready Ln 22, Col 27 NUM

Select **4 - Entry Fields**, followed by the **Insert** option from the command line and select the UDF created in **4184 - User Defined Fields Maint** from the **/Lookup** as per existing functionality.

Select **Enter** from the command line to save the changes and repeat the same process for the *Used Vehicle Maintenance Template*.

The user will now need to create the UDF in *3045 - User Definable Fields*, option *1 - Maintain User Defined Fields*. Select **3045 - User Definable Fields** followed by option **1 - Maintain User Defined Fields** and the following screen will be displayed:

Field Name	Conversion	L	J	M	Help Message
18 PD BAY	Alpha/Numeric	20	L	N	Pd Bay

Select the **Insert** option from the command line and enter the **UDF name**. Ensure that the **Conversion** field is set to **Alpha/Numeric**.

Note: It is recommended to name the *User Defined Field* as PD BAY, to make it easier to identify.

Select **Enter** from the command line to save the data.

The user will now need to check and ensure that the newly created UDF is displayed in the Default template in *3045 - User Definable Fields*, option *2 - Maintain Service Vehicle Template*. Select **3045 - User Definable Fields** followed by option **2 - Maintain Service Vehicle Template** and the following screen will be displayed:

Name	Length	Mandatory	Display Only	Service Screen Position
------	--------	-----------	--------------	-------------------------

At the **Make** field enter **DEFAULT** and the following screen will be displayed:

ERAnet V9

	Name	Length	Mandatory	Display Only	Service Screen Position
85	Alt model/mai	11	No	No	Page 4 - LEFT
86	PD BAY	20	No	No	Page 4 - LEFT

The newly added UDF will be displayed. The user is able to check this by selecting **1 – Field to be included** and selecting the **Nxtpg** option from the command line to scroll to the last page.

Select the **Enter** option from the command line to save the changes.

The final setup is to link the Vehicle and Service UDF together. Select **4090 – User Define Relate Table** followed by **N** for New or **U** for Used Vehicle and the following screen will be displayed:

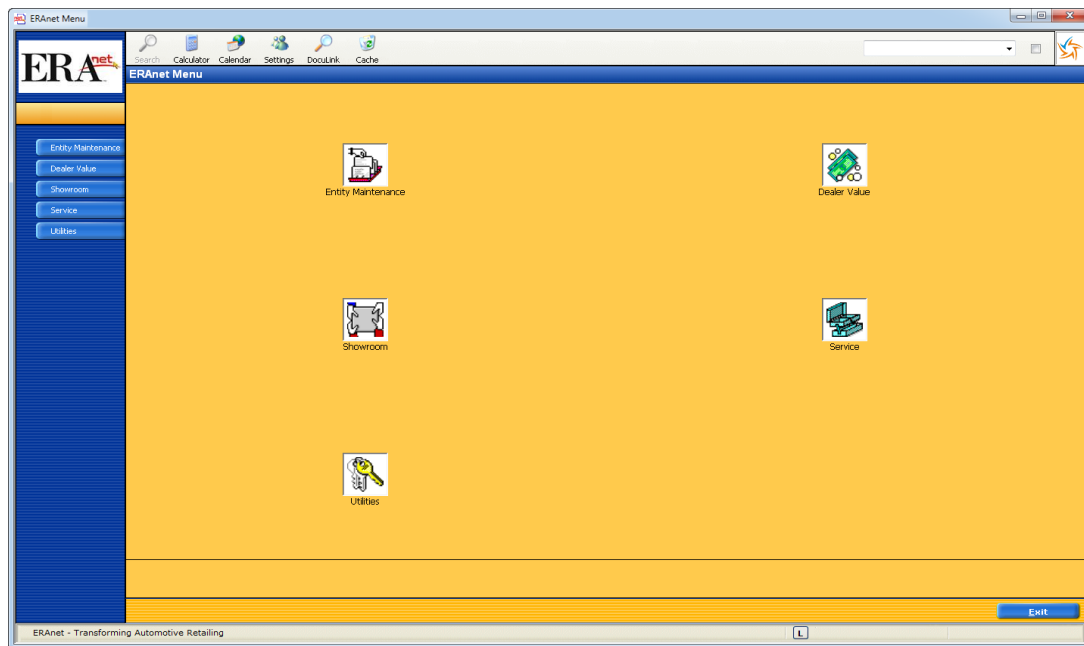
	Service UDF	Type	Len	New inventory fields	Type
18	APPLICATION	Alpha/Numeric	10		
19	PD BAY	Alpha/Numeric	20	PD BAY	Alpha/Numeric

The Service UDF will already be displayed and the user will need to link it to the Vehicle UDF.

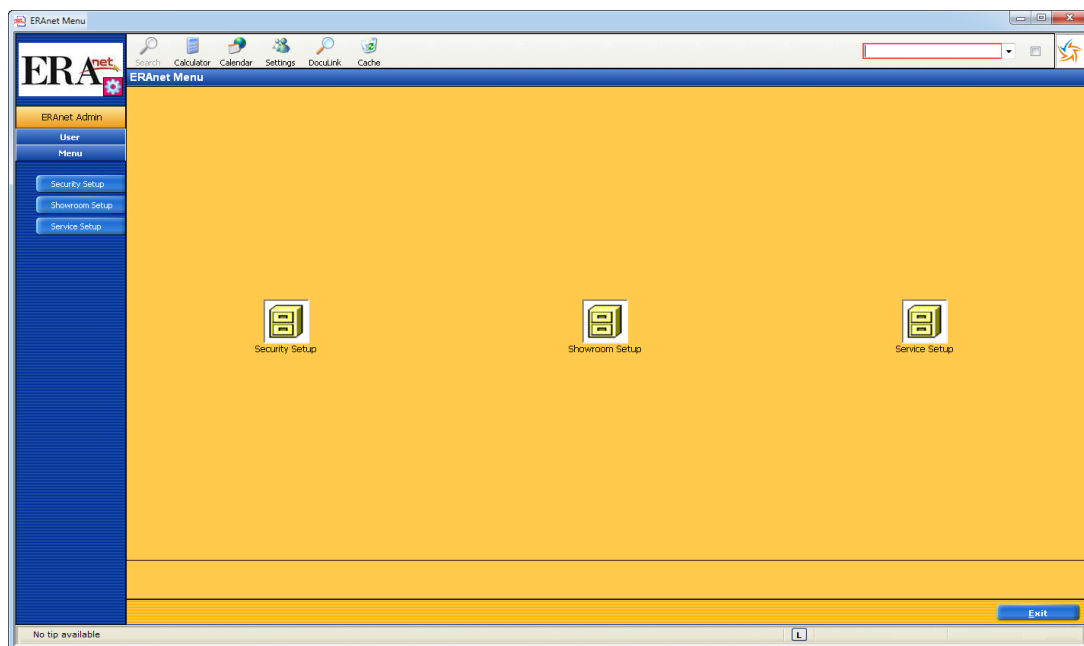
Select the relevant **line number** and the focus will be on the **New inventory fields** section of the relevant line. Enter the **UDF name** or select it from the **/ Lookup**.

Select **Enter** from the command line to save the changes and repeat the same process for **Used Vehicle**.

The following ERAnet setup is required to be checked and updated prior to using the Pre-Delivery system. Log to **ERAnet** as per existing functionality and the following screen will be displayed:



Right click on the **Store Number** link located on the top left corner of the screen and select the **ERA.net Admin** option from the list and the following screen will be displayed:



Select  **Showroom Setup**, followed by  **Salesperson Maintenance** and the following screen will be displayed:



ERAnet V9

The screenshot shows the 'Salesperson Maintenance' window. The 'General' tab is selected. The 'Status' dropdown is set to 'Active'. The 'Sales Manager' checkbox is checked. The 'Fleet' checkbox is checked. The 'Stock Controller' checkbox is unchecked. The 'Discount Percentage Allowed' is set to 25.00. The 'New Format' dropdown is set to 'NEW CAR MAINTENANCE'. The 'Used Format' dropdown is set to 'USED VEHICLE MAINT'. The 'Access' section has several checkboxes, including 'Allowed to access stock card inquiry in Vehicle Advisor?' which is checked. The 'Advanced Floor Traffic' section has two checkboxes, both of which are checked.

Identify each *Stock Controller* and ensure that the  **Stock Controller** check box is selected as displayed in the following example:

This screenshot shows the same 'Salesperson Maintenance' window, but with the 'Stock Controller' checkbox now checked. The 'Status' dropdown is still 'Active'. The 'Sales Manager' checkbox is checked. The 'Fleet' checkbox is checked. The 'Discount Percentage Allowed' is 25.00. The 'New Format' dropdown is 'NEW CAR MAINTENANCE'. The 'Used Format' dropdown is 'USED VEHICLE MAINT'. The 'Access' section has several checkboxes, including 'Allowed to access stock card inquiry in Vehicle Advisor?' which is checked. The 'Advanced Floor Traffic' section has two checkboxes, both of which are checked.

Select **Ok** from the action bar to save the changes and select the **Exit** option to return to the *ERAnet Menu*.

Pre-Delivery Setups will need to be checked and updated. From the  **Showroom Setup** menu, select  **Pre-Delivery Setup** and the following screen will be displayed:

Note: Pay Methods are setup to confirm within Pre-Delivery how a customer is paying for their vehicle and Delivery Methods are setup to determine how a vehicle is to be delivered to a customer.

Pay Methods

Code	Enter the code to be used for the Pay Method. Note: The user is able to add multiple codes by selecting the + option. The user is also able to delete a code by selecting the × option.
Description	Enter the code description for the Pay Method.

Delivery Methods

Code	Enter the code to be used for the Delivery Method. Note: The user is able to add multiple codes by selecting the + option. The user is also able to delete a code by selecting the × option.
Description	Enter the code description for the Delivery Method.

Expected On Site Date field

Code	Enter the code to be used for the Delivery Method. Note: The user is able to add multiple codes by selecting the + option. The user is also able to delete a code by selecting the × option.
UDF Field Name	Use the dropdown box to show the available fields to select from. This will display any field that is used in 4084 – Vehicle Entry Formats that have the word Date . Note: The user is able to add multiple codes by selecting the + option. The user is also able to delete a code by selecting the × option. A different field may be used for each make if required, but not recommended. If nothing is entered in this section then the 4004 – Order Entry field 8 Ext Arrvl Date will be used as the Expected On Site Date .

Allow Delivery Complete Flag when not at Sold status	<input checked="" type="checkbox"/> Tick this option if the <i>Delivery Complete Flag</i> can be updated without the vehicle being at a status 5 - Sold.
Default Delivery Time	Enter the default time to display for each Scheduled Delivery. If no time has been entered, then the user will be prompted to enter a Scheduled Delivery Time when each Scheduled Delivery Date is entered.
Allow Delivery Complete Flag Access By Service Advisor	<input checked="" type="checkbox"/> Tick this option to allow the Service Advisor to set a deal to a <i>Delivery Complete</i> status and removing it from the Pre-Delivery System. The deal status does not have to be 5 – Sold in order for the Service Advisor to

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access the Delivery Complete option in the *Pre-Delivery Status* screen.
Note: By default this option will be un-ticked.

Select the **Status / Misc** option from the navigation bar and the following screen will be displayed:

User Status Codes

The *User Status Codes* will inform the user where the vehicle is at in the Pre Delivery Process. The user can enter dealer specific codes and description.



Note: This is not a mandatory feature for the dealership to use.

Code	Enter the code to be used as the user status codes. Note: There is a limit of three characters. The user is able to add multiple codes by selecting the + option. The user is also able to delete a code by selecting the X option. The following is an example of codes the user can use: IN – In Progress OO – On Order AR – Arrived OS – Out for Sublet AP – Awaiting Parts
Status Description	Enter the code description for the user status codes.

User Vehicle Location


The information that appears in the *Loc* field in the Pre-Delivery Control screen will inform the Stock Controller where the vehicle is physically located, for example PD Bay.

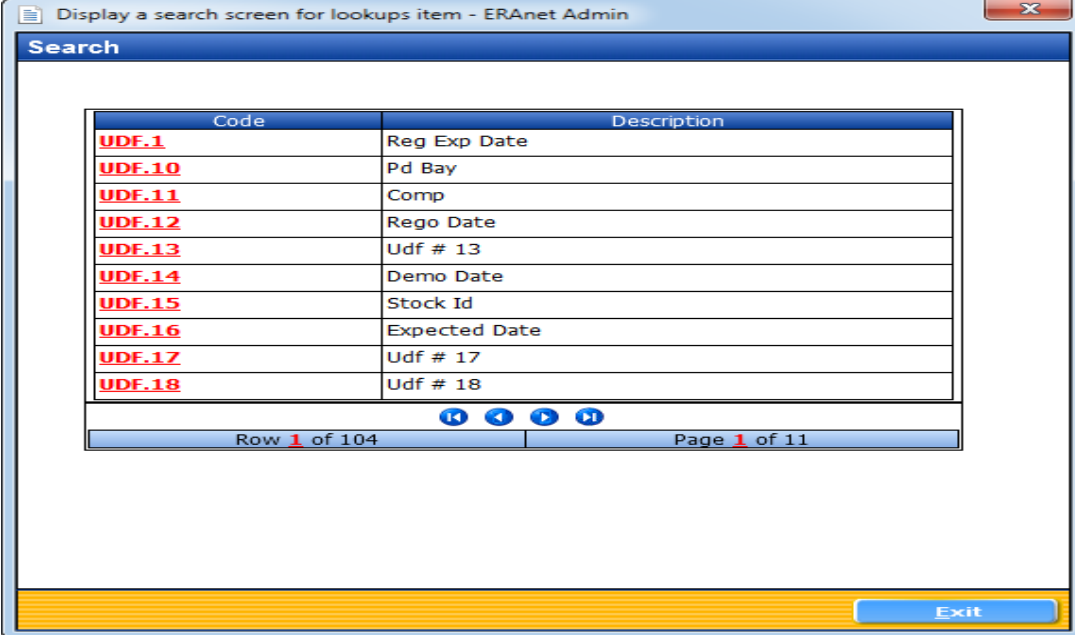
Note: This step is a very important step which will determine how the pre-delivery system works for those dealerships using this *Loc* feature.

New Veh Location Udf	Select the  Search option or F3 from the keyboard to assign the UDF created in 4184 - User Defined Fields Maint for New Vehicle. Note: The user is also able to enter the UDF name. However, the field name will need to be the name that is recognised in the system level. For this reason, searching for the UDF will be a better option.
Used Veh Location Udf	Select the  Search option or F3 from the keyboard to assign the UDF created in

4184 - User Defined Fields Maint for Used Vehicle.

Note: The user is also able to enter the UDF name. However, the field name will need to be the name that is recognised in the system level. For this reason, searching for the UDF will be a better option.

Selecting the  **Search** option or **F3** from the keyboard will display the following pop up screen:



Code	Description
UDF.1	Reg Exp Date
UDF.10	Pd Bay
UDF.11	Comp
UDF.12	Rego Date
UDF.13	Udf # 13
UDF.14	Demo Date
UDF.15	Stock Id
UDF.16	Expected Date
UDF.17	Udf # 17
UDF.18	Udf # 18

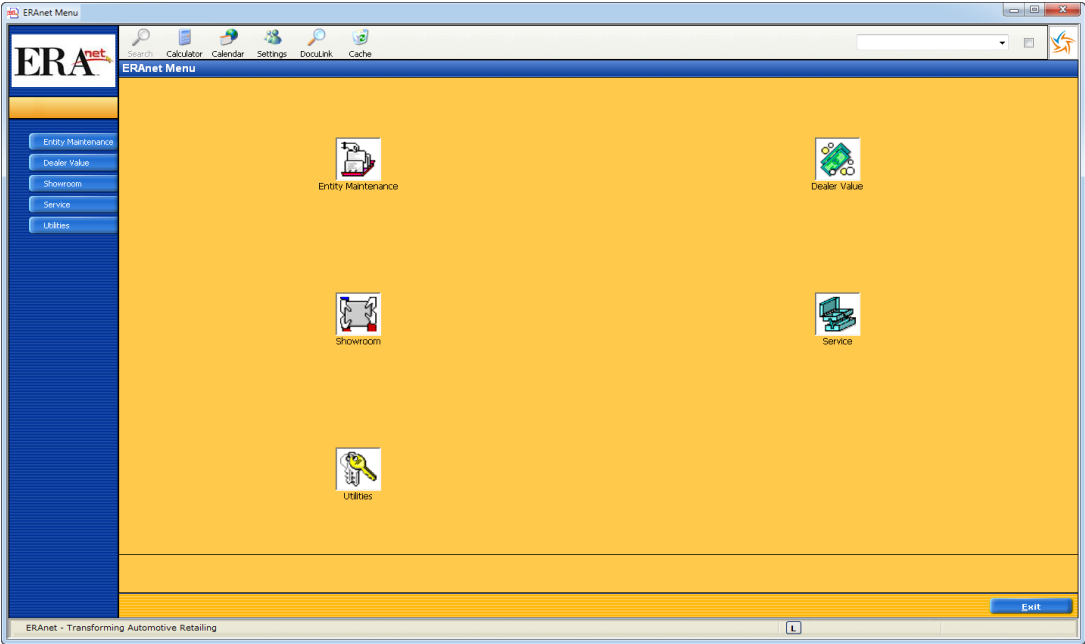
Row 1 of 104 Page 1 of 11

Exit

Select the relevant **UDF code** as per 4184 – User Defined Fields Maint setup and return to the **Status / Misc** screen or **Exit** to return to the **Status / Misc** screen without selecting an UDF.

Select the **Ok** option from the action bar to save the changes or select **Exit** to return to the *Pre-Delivery Setup* screen without saving any changes.

From the **ERAnet Menu (Showroom Setup)** screen **Right click** on the **ERAnet Admin** link located on the top left corner of the screen and select the relevant **Store Number** option from the list and the following screen will be displayed:



ERAnet Menu

Entity Maintenance Dealer Value

Showrooms Service




Utilities

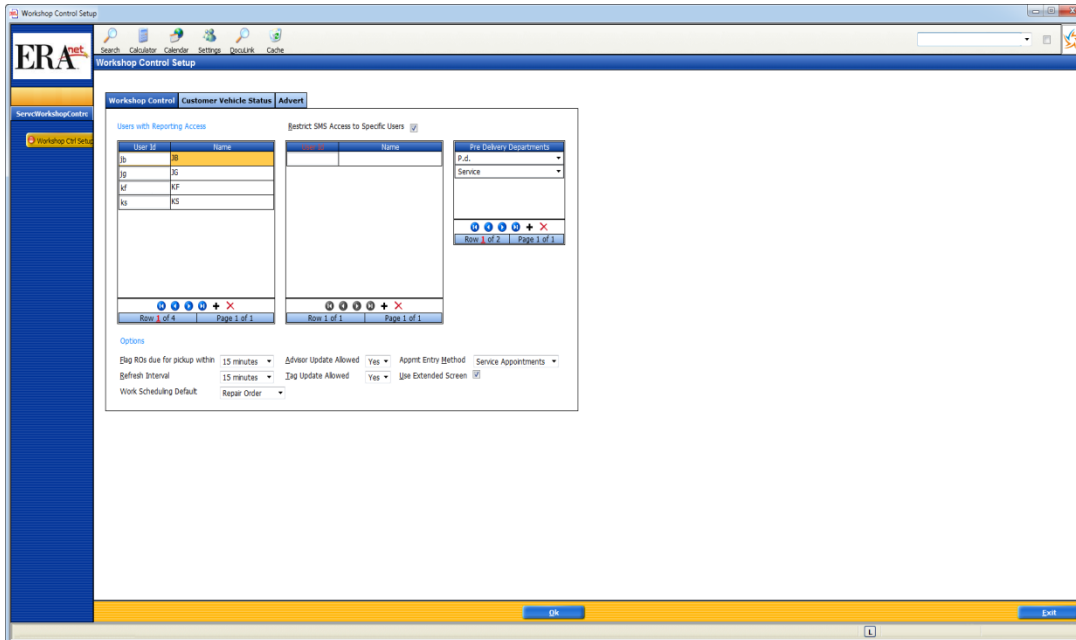
Exit

ERAnet - Transforming Automotive Retailing

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The user will need to ensure that *Service Appointments* is selected as the default entry point when creating appointments, quotes and repair orders.

Select  **Service**,  **Workshop Control Menu** followed by  **Workshop Control Setup** and the following screen will be displayed:

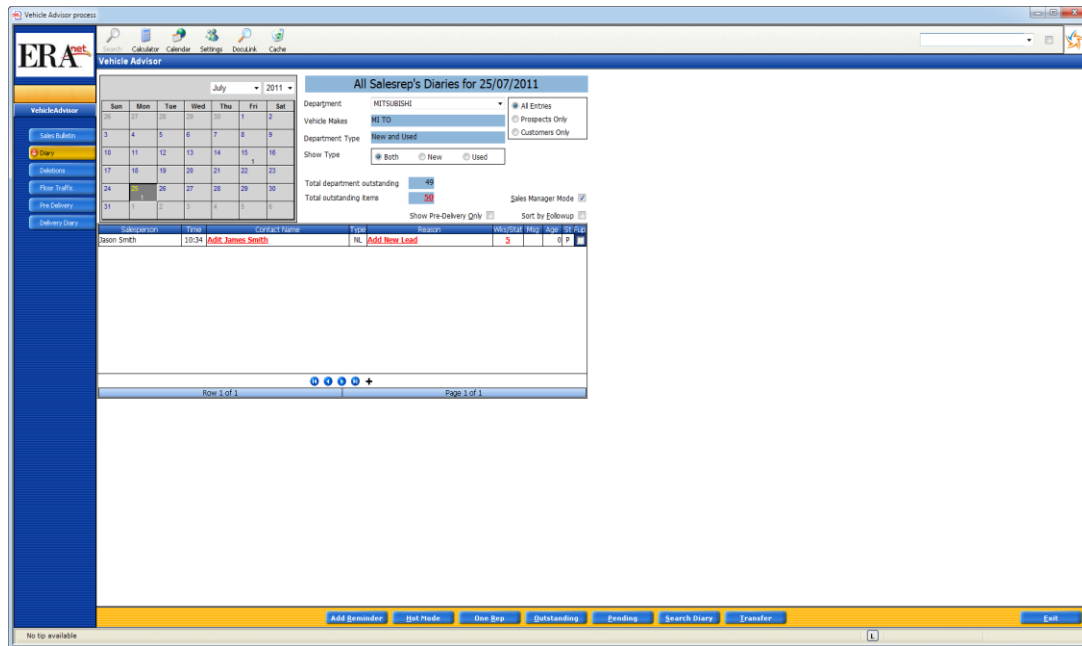


At the *Appt Entry Method* field, select **Service Appointments** from the  dropdown box and save the changes by selecting the **Ok** option from the action bar.

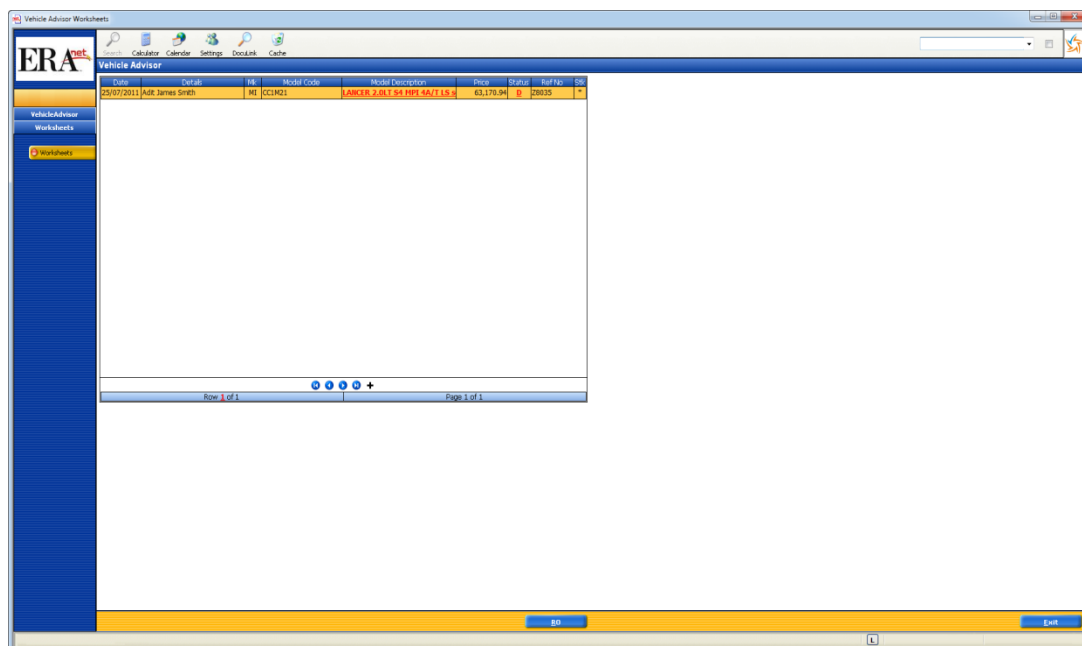
The Process

Within ERAnet  **Vehicle Advisor** a deal is raised as per existing functionality. Once the deal has been created the Sales Manager will then need to approve the deal through Sale Managers Mode in order for it to appear in *Pre-Delivery*.

To approve a deal, log in as a **Sales Manager** as per existing functionality and the following screen will be displayed:



Select the relevant customer by clicking on the [Wks/Stat](#) hyperlink and the following screen will be displayed:



Click on the relevant [Model Description](#) hyperlink and the following screen will be displayed:

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TYPE	Sell Price	Cost Price	Margin Amount	CP Applied	CP Percent
Vehicle Price	55,000.00	46,242.00	8,758.00	8,758.00	15.94
Holdback Amount	0.00	0.00	0.00	937.82	100.00
Dealer Accessory	0.00	0.00	0.00	0.00	0.00
Aftermarket Items	35.00	1.70	33.30	33.30	1,958.82
Other Charges	5,650.00	3,448.82	2,201.18	2,201.00	65.28
Discount	-3,517.00	0.00	-3,517.00	-3,517.00	100.00

Totals	57,168.00	49,690.82	7,477.08	8,402.32
Tax Amount	0.00			
Vehicle Total	57,168.00			

A new option has been added to the action bar to allow the Sales Manager to approve a deal.

Select the **Approve Deal** option from the action bar and the following pop up will be displayed:

Are you sure you want to approve this deal for pre-delivery?

Yes No

Select **Yes** to approve the deal and return to the *Sales Manager Review* screen or **No** to not approve it. Selecting the Yes option will send the deal through to Pre-Delivery.

Select **Ok** from the *Sales Manager Review* screen and exit as per existing functionality.

A new feature has been added to the *Deal Log Report* within *Showroom* to save users time when there are multiple deals that need to be approved for Pre-delivery.

Select *Showroom* followed by *Showroom Analysis* and then *Deal Log Report – Stock Control* or *Deal Log Report – Sales Manager* and the following screen will display as per existing functionality:

Service Manual

Date	Sfr	Deal	Model	Description	Colour / Trim	Customer No	Stock No	PD	Del
01/07/2011	44	28022	CC1M21	LANCER 2.0LT S4 MPI 4A/T LS		9027			
04/07/2011	44	28023	CC1G21	LANCER 2.0LT S4 MPI 4A/T LS 4dr		9027			
07/07/2011	44	28029	CC1M21	LANCER 2.0LT S4 MPI 4A/T LS		9027	A228		
08/07/2011	44	28030	CC1M21	LANCER 2.0LT S4 MPI 4A/T LS		9027	A227		
11/07/2011	1	1100	3008SH111	MAZDA3 HATCH 5 SPEED MANUAL		7311	A228		
12/07/2011	1	1102	3008SH111	MAZDA3 HATCH 5 SPEED MANUAL		7311	A228		
12/07/2011	1	1103	3008SHD	MAZDA3 HATCH 5 SPEED MANUAL		7311	A228		
13/07/2011	1	1104	3008SH15	MAZDA3 5 SPEED MANUAL 1.9 G		7942	A233		
14/07/2011	150	1105	AVMD	2.4P ALTISE SEDAN 5M		8343			
14/07/2011	77	1106	AVMD	2.4P ALTISE SEDAN 5M		8344			
14/07/2011	30	28032	CC1M21	LANCER 2.0LT S4 MPI 4A/T LS		8343			
14/07/2011	30	28033	CC1M21	LANCER 2.0LT S4 MPI 4A/T LS		8344			
25/07/2011	30	28035	CC1M21	LANCER 2.0LT S4 MPI 4A/T LS 4dr		7842	A194		

Two new columns have been added to this report.

PD Apv	<input checked="" type="checkbox"/>	Tick this option to approve a deal for Pre-Delivery instead of going through <i>the Sales Managers Review</i> screen.
Del Comp	<input checked="" type="checkbox"/>	Tick this option to complete the delivery process rather than going through the <i>Pre-Delivery</i> screen.

Once the user has ☒ ticked the deals to be approved, the user is able to view the *Delivery Details* by selecting the **Deal** hyperlink and the following screen will be displayed:

Date	Detail	ID	Model Code	Model Description	Price	PD	Del	Del ID
25/07/2011	Adm James Smith	ME	CC1M21	LANCER 2.0LT S4 MPI 4A/T LS 4	45,175.04	0	28035	

Click on the relevant **Model Description** hyperlink and the following screen will be displayed:

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Sales Manager Review

Customer Name: ABC James Smith

Vehicle Description: LANCER 2.0LT 54 MPI 4A/T LS SEDAN

Item	Sell Price	Cost Price	Margin Amount	GP Amount	GP Percent
Vehicle Price	55,000.00	46,242.00	8,758.00	8,758.00	15.94
Dealer Accessory	0.00	0.00	0.00	0.00	0.00
Aftermarket Items	35.00	1.79	33.30	33.30	1,958.62
Other Charges	5,650.00	3,446.82	2,203.18	2,250.00	85.28
Discount	-3,517.00	0.00	-3,517.00	-3,517.00	100.00

Row 1 of 5

Totals: 57,168.00, 49,688.82, 7,477.18, 7,524.30, 15.34

Tax Amount: 6,002.96

Vehicle Total: 63,170.96

Select the **Summary** option from the navigation bar and the following screen will be displayed:

Vehicle Worksheets

Customer Name: ABC James Smith

Vehicle Description: LANCER 2.0LT 54 MPI 4A/T LS SEDAN

Model Code: CC1M21

Qty: 1

Deal/Qty: 28035

Total: 63,170.96

Pricing:

Vehicle Price	55,000.00
Colour	
Factory Accessory	35.00
Dealer Accessory	35.00
Other Charges	5,650.00
On Road Costs	
Stamp Duty	
Discount	-3,517.00
Account Receivable	
Account Payable	
Trade In	
Tax Amount	6,002.96
Vehicle Total	63,170.96

Select the **Delivery Details** option from the navigation bar and the following screen will be displayed:

Once in this screen the following items can be entered:

Cust requested delivery	Enter the date that the customer has requested delivery. This is an indication for the Pre-Delivery department as to when they are aiming to have the vehicle completed. Note: This is a requested date only and is not the final date as the Pre-Delivery department will set the <i>Scheduled Delivery Date</i> once they have scheduled all the work required.
Status	Select a Status from the dropdown box. Note: The Salesperson will need to enter this information.
Pay Method	Select a Pay Method from the dropdown box. This is the way final payment will be received and is allocated by the Salesperson or the Finance Manager. Note: The pay method is setup in <i>Pre-Delivery Setup</i> within <i>Showroom Setup</i> .
Delivery Method	Select a Delivery Method from the dropdown box. This is how the vehicle will be delivered to the customer and is allocated by the Salesperson. Note: The delivery method is setup in <i>Pre-Delivery Setup</i> in <i>Showroom Setup</i> .




Comments






New	Select the New button to create a new message.
Save	Select the Save button to save the message that has been created.
Msg No	The user is able to select a message to read from the dropdown box.
Unread	This field will display any unread message numbers for the user. For example: 1, 2, 3 to indicate that messages 1, 2, 3 are unread.
Created By	This field will display the user id and name of the user who created the message.
Updated By	This field will display the user id and name of the user that modified that message.
Message	The user is able to enter a detailed message as required.


Purchasing Officer Email Address	The user is able to enter the email address of a purchasing officer. This is the email address that any email can be sent to. Note: Once an email address has been stored within this screen it will be stored
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	against this customer until a new email address is entered.
User Defined Status	This field will display the user status code and description as entered from the <i>Pre-Delivery Control</i> screen.
Updated By	This field will display the username, date and time when the user status code was updated.

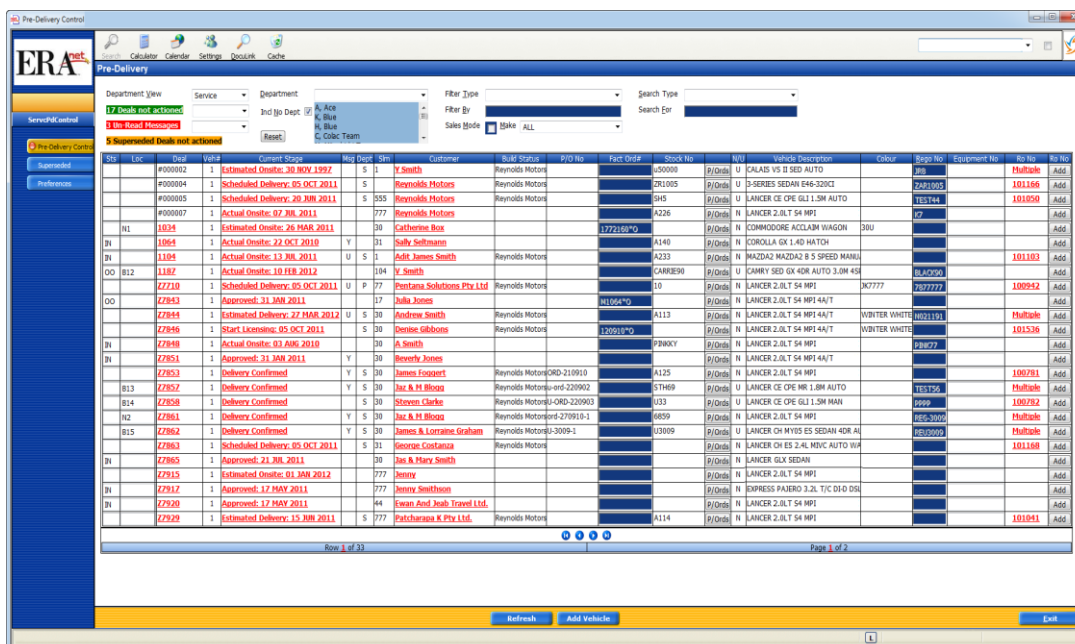
Dependent upon the user security the  *Pre-Delivery* screen can be accessed from both the  *Service* and the  *Showroom* module.

Within the  *Service* module, the Pre-Delivery interface is accessed from  *Workshop Control Menu* and within the  *Showroom* module, the Pre-Delivery interface is accessed from  *Vehicle Inventory*, also from within  *Vehicle Advisor*.

Note: The Pre-Delivery screens mentioned in this document have been accessed from the  *Service* module.

From the  *Service* module, select  *Workshop Control Menu* followed by  *Pre-Delivery* and the following screen will be displayed:






Note: The user may need to scroll across the page to view all the fields by selecting the   arrows.





The *Department View* that is experienced upon the initial entry is dependent on the User Security, Salesperson setup and Service Advisor setup.

Users set up as a salesperson or have been identified as a stock controller will have the Department View field default to Vehicle Sales. Users set up with a default advisor in 6210 - *Maintain User Security*, question 23 – *Service Options* will have the Department View field default to Service.

Department View	This field will either display Service or Vehicle Sales , depending on the user setup. The user is able to select a different department view by selecting from the dropdown box.
Deals not actioned	This field will display the number of deals that don't have any user status code assigned to it. The user is able to select a deal from the dropdown box and the focus will be on that line. When a deal number is selected, the counter will decrease. If the user deletes a status code, the counter will increase.

Un-Read Messages	This field will display any deals that have un-read messages attached to it. The user is able to select a deal from the  dropdown box and a pop up screen will display. When a deal number is selected, the counter will decrease.
Superseded Deals not actioned	This field will highlight the number of superseded deals that need to be reviewed.
Department	A list of service departments will automatically be selected and displayed based on the setup in the Preferences screen. The user is able to remove individual departments from the search by selecting the specific department from the Department  dropdown box. Select the Reset button to deselect all the departments. Note: The departments listed will depend on the Department View selected.
Incl No Dept	<input checked="" type="checkbox"/> Tick this option to display deals that are not allocated to a service department. Note: It is recommended to have this option <input checked="" type="checkbox"/> ticked.
Filter Type	Select a valid Filter Type option from the  dropdown box. Note: The options available to select from are Salesman, Customer No, Fleet Customers which includes Government and Rental, Expected On Site Date, Customer Requested Delivery Date, Scheduled Delivery Date and User Status Code.
Filter By	Enter the filter by criteria based upon the <i>Filter Type</i> selected. Note: This field will be disabled until a Filter Type has been selected.
Sales Mode	This field will automatically be <input checked="" type="checkbox"/> ticked when the user is a Sales Manager accessing the <i>Pre-Delivery Control</i> screen. Note: This is a view only option.
Make	This field will display the default make as selected in the Preferences screen. The user is able to select a different make from the  dropdown box or All for all makes. Selecting a specific make will display deals for that make only.
Search Type	Select a valid Search Type option from the  dropdown box. Note: The options available to select from are Deal, P/O No, Stock No, Rego No, Repair Order No and Equipment No.
Search For	Enter the search for criteria . The first line that matches the criteria will be highlighted. Note: This field will be disabled until a Search Type has been selected.

Sts	Enter the User Status Code or select the  Search option or F3 from the keyboard to select a valid code .
Loc	Enter the physical location of the pre-delivery vehicle. The location will inform the Stock Controller where the vehicle is physically located. For example, Bay 1. Note: This is a free text field and the user is able to enter any alpha numeric character. The data will be saved in <i>New Vehicle Maintenance</i> or <i>Used Vehicle Maintenance</i> as per  <i>Pre-Delivery Setup</i> .
Deal	This field will display the deal number that has been approved by the Sales Manager. Any deal beginning with # indicates that it has been created by selecting the Add Vehicle option from the action bar.
Veh #	Where multiple vehicles have been assigned to the one deal number, this field will display the vehicle number for the deal.
<u>Current Stage</u>	This field will display the current stage of the deal along with the date. Selecting this hyperlink will take the user to the <i>Pre-Delivery Status</i> screen.
Msg	This field will display Y for Yes when a message has been read or a U for any unread messages that have been attached to the deal.
Dept	This field will display the department. Note: This will display the Sales departments for the deal if being viewed in

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	<i>Vehicle Sales</i> mode or it will display the Service departments for any repair orders that have been raised if viewed in <i>Service</i> mode.
Slm	This field will display the salesperson number for the deal.
Customer	This field will display the customer name that is attached to the deal.
Cust Type	This field will display the type of sale and is only available in Sales Mode. For example: Retail, Fleet, Demo.
Build Status	This will display the name of any sublet supplier when the vehicle is out to sublet and is available only in Pre-Delivery Mode.
P/O No	This field will display the customer purchase order number for the deal. Note: This is the customer order number as entered in the <i>Modify Print Specific RBO details</i> screen within the Worksheet screen.
Fact Ord#	This field will display the order number for the vehicle.
Stock No	This field will display the stock number attached to the deal. Note: Deals that have both order numbers and stock numbers allocated will only display the stock number in the <i>Pre-Delivery Control</i> screen. The order number field will then become blank.
P/Ords	Select the P/Ords button to display any Purchase Orders that have been created via <i>6973 Purchase Order Creation/Maint</i> .
N/U	This field will display N for New vehicle deals or U for Used vehicle deals.
Vehicle Description	This field will display the vehicle description.
Colour	This field will display the exterior colour of the vehicle.
Rego No	This field will display the vehicle registration number.
Equipment No	Enter a reference number supplied by the customer who has ordered the vehicle. This data is stored in the service vehicle file against the serial number of the vehicle.
Ro No	This field will either be blank or it will display the Repair Order Number for the work being performed. Deals with multiple open repair orders will display Multiple . Selecting the hyperlink will take the user to the <i>Repair Order Summary</i> screen where they are able to update details about the jobs that are attached to the repair order.
Ro No	Select the Add button to create a new repair order.

Navigation Bar options:

Pre-Delivery Control	Select this option to view the <i>Pre-Delivery Control</i> screen.
Superseded	Select this option to view the <i>Superseded</i> screen.
Preferences	Select this option to view the <i>Preferences</i> screen.

Action Bar options:

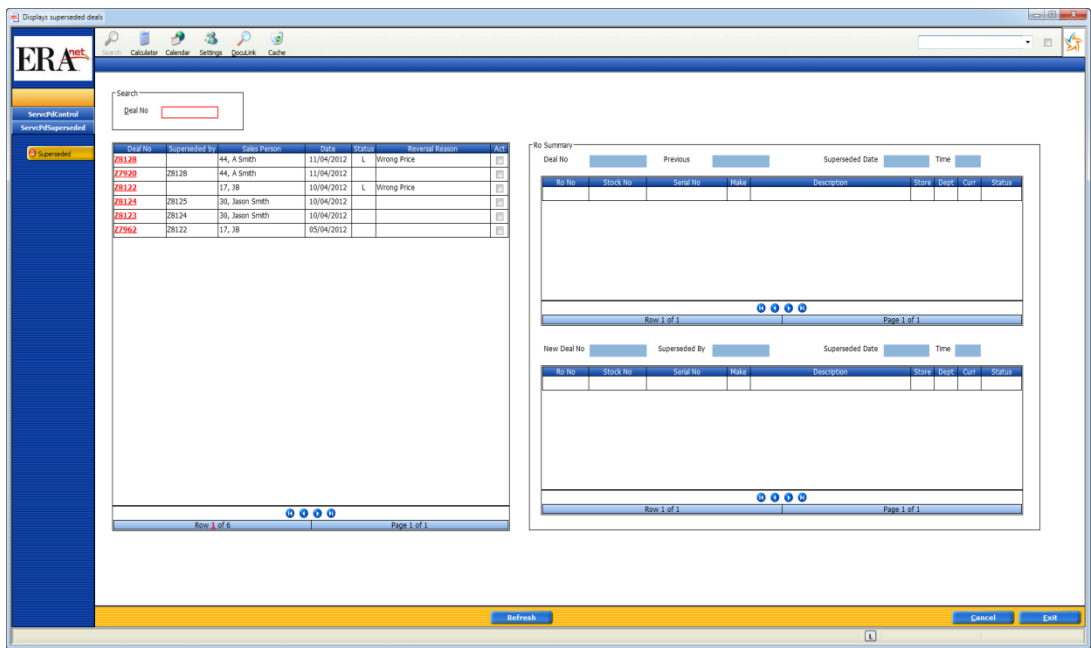
Refresh	Select this option to refresh the <i>Pre-Delivery Control</i> screen.
Add Vehicle	Select this option to add a vehicle that has come back to the dealership after it has been sold from the dealership.
Exit	Select this option to return to the <i>ERAnet Menu (Workshop Control Menu)</i> .

Superseded screen

The *Superseded* screen will allow the Service Advisor to track what has happened to a deal, for example, whether the deal has been superseded by another deal, reversed or cancelled. When a deal has been actioned, it will no longer appear in that screen. The user is also able to view and update repair orders that have been created for a superseded deal.

Note: Showroom users will also benefit from this feature as it will provide them with more information on superseded deals.

Select the **Superseded** option from the navigation bar and the following screen will be displayed:



Search

Deal No	The user is able to search for a specific <i>deal number</i> by entering it in the Deal No field.
Deal No	This field will display the old <u>deal number</u> . Selecting this <u>deal number</u> will display the repair order summary details.
Superseded By	This field will display the superseded deal number. Note: This field will be blank if the deal has been reversed and is no longer attached to the worksheet.
Sales Person	This field will display the salesperson that last updated the deal number.
Date	This field will display the date the superseded deal was updated.
Status	This field will display the superseded deal status. Note: This field can be blank.
Reversal Reason	This field will display the reversal reason of the superseded deal. Note: This field can be blank.
Act	<input checked="" type="checkbox"/> Tick this option once the superseded deal has been actioned by the user.

Selecting a deal number hyperlink will display the repair order summary details as displayed in the following example:

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The screenshot shows the 'Displays superseded deals' window in ERAnet V9. On the left, there's a search bar and a list of superseded deals. The main area on the right displays the 'Ro Summary' for a selected deal. This summary includes fields for 'Deal No', 'Previous', 'Superseded Date', and 'Time'. Below these fields is a table of repair order details with columns: 'Ro No', 'Stock No', 'Serial No', 'Make', 'Description', 'Store', 'Dept', 'Curr', and 'Status'. The table shows three rows of data for different repair orders.

Ro Summary

Deal No	This field will display the deal number.
Previous	This field will display the previous superseded deal number. Note: This field will be blank when the original deal number is selected.
Superseded Date	This field will display the superseded date.
Time	This field will display the superseded time.

Ro No	This field will display the repair order number . The user is able to select the repair order and update repair order details.
Stock No	This field will display the stock number.
Serial No	This field will display the vehicle's serial number.
Make	This field will display the vehicle make.
Description	This field will display the vehicle description.
Store	This field will display the store the repair order was created for.
Dept	This field will display the department the repair order was created for.
Curr	This field will indicate if the vehicle is a current vehicle or not. The options displayed will either be Yes or No.
Status	This field will display the repair order status. For example: Open, Invoiced, Closed.

New Deal No	This field will display the new deal number.
Superseded By	This field will display any other superseded deal number . Note: The user is able to toggle between the superseded deal numbers by selecting the superseded deal number hyperlink.
Superseded Date	This field will display the superseded date. Note: This field will only display the date if there is a deal number in the above <i>Superseded By</i> field.
Time	This field will display the superseded time. Note: This field will only display the date if there is a deal number in the above <i>Superseded By</i> field.

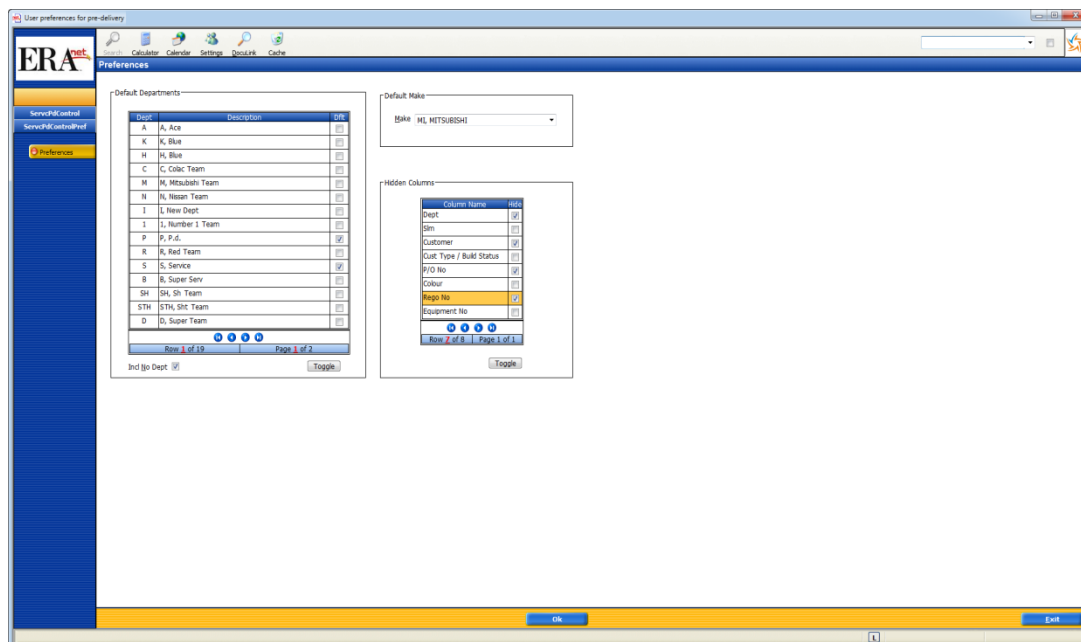
Ro No	This field will display the repair order number associated with the new deal number. The user is able to select the repair order and update repair order details.
Stock No	This field will display the stock number associated with the new deal number.
Serial No	This field will display the vehicle's serial number.
Make	This field will display the vehicle's make.

Description	This field will display the vehicle description.
Store	This field will display the store the repair order was created for.
Dept	This field will display the department the repair order was created for.
Curr	This field will indicate if the vehicle is a current vehicle or not. The options displayed will either be Yes or No.
Status	This field will display the repair order status. For example: Open, Invoiced, Closed.

Refresh	Select this option to refresh the screen.
Cancel	Select this option to reset the screen so that the user is able to select a superseded deal and see the details.
Exit	Select this option to return to the <i>Pre-Delivery Control</i> screen.

Preferences screen

Select the **Preferences** option from the navigation bar and the following screen will be displayed:



Default Departments

Dept	This column will display all the service departments.
Description	This column will display all service department description.
Dflt	<input checked="" type="checkbox"/> Tick this option to select the specific service departments that will display by default in the <i>Pre-Delivery Control</i> screen.
Incl No Dept	Prior to a repair order being created, the deal does not belong to any service department. <input checked="" type="checkbox"/> Ticking this option will allow deals that have not been assigned to a service department to be displayed in the <i>Pre-Delivery Control</i> screen. Note: It is recommended to have this option <input checked="" type="checkbox"/> ticked.
Toggle	Select the Toggle button to quickly change between <input checked="" type="checkbox"/> ticked and <input type="checkbox"/> un-ticked for the default departments.

Default Make

Make	Select a default make from the dropdown box. This make will display in the <i>Pre-Delivery Control</i> screen by default.
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Hidden Columns

Column Name	This field will display the column names of fields that are available to be hidden in the <i>Pre-Delivery Control</i> screen.
Hide	<input checked="" type="checkbox"/> Tick this option to select specific columns to hide in the <i>Pre-Delivery Control</i> screen. Note: Not all fields are available to hide.
Toggle	Select the Toggle button to quickly change between <input checked="" type="checkbox"/> ticked and <input type="checkbox"/> un-ticked for the hidden columns.

Select **Ok** from the action bar to save the changes or **Exit** to return to the *Pre-Delivery Control* screen without saving the changes.

Current Stage

Selecting the **Current Stage** hyperlink will display the following screen:



Note: The Pre-Delivery Status screen can also be accessed from *Vehicle Worksheet*, **Delivery Details** option from the navigation bar.

The screenshot shows the 'Pre-Delivery Status' window. It includes a navigation bar on the left with options like 'SearchPMControl' and 'SearchPMStatus'. The main area is divided into several sections: 'Deal Information' (Deal Number, Approved By, Date, Time), 'Control Dates' (Cust requested delivery, Expected On Site Date, Actual On Site Date, Estimated Delivery Date, Scheduled Delivery Date, Customer Delivery Date), 'Delivery' (Status, Bay Method, Delivery Method, Delivery Confirmed, Delivery Complete), 'Licensing' (Process Date Start, Licensed, License Ref No), and 'Comments' (Msg No, Created By, Updated By, Storage). At the bottom, there are fields for 'Purchasing Officer Email Address' and 'User Defined Status'.










Deal Number	This field will display the Deal Number.
Approved By	This field will display the Number and Name of the Sales Manager who approved the deal.
Date	This field will display the Date the Deal was approved.
Time	This field will display the Time the Deal was approved.

Control Dates

Cust requested delivery	This field will be entered by the Sales Person and is an indication of when the customer would like delivery of the vehicle so that the Pre-Delivery Department is aware of the expectation.
Expected On Site Date	This field will display the Estimated On Site Date. This is the date that is entered at the time the vehicle is ordered through <i>New Vehicle Orders</i> and is the <i>Estimated Arrival</i> date and is entered by the Salesperson. Note: Depending on the user setup, this field can be enabled to enter the estimated on site date manually. This field is also able to be configured to


	use a different date dependent upon the set-up as per previous instructions.
Actual On Site Date	This field will display the Actual On Site Date. This is the date the vehicle arrived at the dealership and is the <i>Received Date</i> from  <i>New Vehicle Maintenance</i> and  <i>Used Vehicle Maintenance</i> Note: Depending on the user setup, this field can be enabled to enter the estimated on site date manually.
Estimated Delivery Date	This field will display the Estimated Delivery Date. This date is calculated by taking the last date from the Jobs screen and adding one to it. This is the date the service department estimates the vehicle will be ready by. This date is set by Pre-Delivery.
Scheduled Delivery Date	Enter the Scheduled Delivery Date . The Pre-Delivery enters this information to indicate when the vehicle is ready for delivery for the salesperson to then confirm with the customer.
Scheduled Delivery Time	Enter the Time the vehicle will be available for delivery. Note: A default time can be determined via the setup in the <i>Pre-Delivery Setup</i> screen.
Customer Delivery Date	Enter the Customer Delivery Date . The Salesperson enters the date to indicate when the vehicle will be delivered to the customer. Note: This field will be disabled until the Scheduled Delivery Date is entered.
Customer Delivery Time	Enter the Customer Delivery Time . The Salesperson enters this time to indicate when the vehicle will be delivered to the customer. Note: The time entered is in twenty four hours.

Delivery

Status	Select a Status from the  dropdown box. Note: The Salesperson will need to enter this information.
Pay Method	Select a Pay Method from the  dropdown box. This is the way final payment will be received and is allocated by the Salesperson or the Finance Manager. Note: The pay method is setup in  <i>Pre-Delivery Setup</i> within  <i>Showroom Setup</i> .
Delivery Method	Select a Delivery Method from the  dropdown box. This is how the vehicle will be delivered to the customer and is allocated by the Salesperson. Note: The delivery method is setup in  <i>Pre-Delivery Setup</i> in  <i>Showroom Setup</i> .
Delivery Confirmed	When the delivery has been confirmed, the Salesperson is required to <input checked="" type="checkbox"/> tick the Delivery Confirmed check box. Note: Selecting this option will allow the Stock Controller to proceed with entering the Licensing information.
Delivery Complete	When the vehicle has been sold to the customer, the Sales Manager or the Stock Controller is required to <input checked="" type="checkbox"/> tick the Delivery Complete check box. This field will remain disabled until the vehicle status is 5 for Sold or setup question <i>Allow Delivery Complete Flag when not at Sold status</i> in  <i>Pre-Delivery Setup</i> is ticked. There is a setup question in  <i>Pre-Delivery Setup</i> which allows the Service Advisor to <input checked="" type="checkbox"/> tick the Delivery Complete check box. The vehicle status in this case does not have to be 5 for Sold.

Licensing


Process Date Start	Enter the date that Licensing has been performed. This function is performed by the Stock Controller or Licensing Clerk.
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Licensed	The Stock Controller is required to  tick the Licensed check box when the vehicle has been licensed. Note: This field will be disabled until the <i>Process Date Start</i> date has been entered.
License Ref No	The Stock Controller is required to enter the document reference number for the registration.

Deal Information

Salesman	This field will display the salesperson number and name.
<u>Customer</u>	This field will display the customer number and the name. Note: Selecting the customer number hyperlink will take the user to the <i>Entity Customer Details Display</i> screen. Within this screen the user will also have the ability to SMS or Email a customer in relation to the status of their Deal.
VehNo	Where multiple vehicles have been assigned to the one deal number, this field will display the vehicle number for the deal.
Make	This field will display the vehicle make.
Stock No	This field will display the factory order number or the stock number of the vehicle.
New/Used	This field will display N for New vehicle or U for Used vehicle.
Carline	This field will display the carline of the vehicle.
Model	This field will display the model of the vehicle.
Status	This field will display the vehicle status. For example, 1 for In Stock, 2 for Deal Pending, 5 for Sold.
Model Desc	This field will display the model description of the vehicle.
Sales Dept	This field will display the sales department for this deal.
Locn	This field will display the vehicle location as per the location field in <i>New Vehicle Maintenance</i> and <i>Used Vehicle Maintenance</i> .
Pre-Delv Store	This field will display the Pre-Delivery store number based upon the sales department setup.

Comments

New	Select the New button to create a new message.
Save	Select the Save button to save the message that has been created.
Msg No	The user is able to select a message to read from the  dropdown box.
Unread	This field will display any unread message numbers for the user. For example: 1, 2, 3 to indicate that messages 1, 2, 3 are unread.
Created By	This will display the user id and name of the user who created the message.
Updated By	This will display the user id and name of the user that modified that message.
Message	The user is able to enter a detailed message as required.

Purchasing Officer Email Address	The user is able to enter the email address of a purchasing officer. This is the email address that any email can be sent to. Note: Once an email address has been stored within this screen it will be stored against this customer until a new email address is entered.
User Defined Status	This field will display the user status code and description as entered from the <i>Pre-Delivery Control</i> screen. The user is also able to update the User Status Code .
Updated By	This field will display the username, date and time when the user status code was updated.

Select **Ok** from the action bar to save the changes or **Exit** to return to the *Pre-Delivery Control* screen without saving any details.

P/Ords

The user is able to update the required date of Purchase Orders that have been raised against this vehicle. Select the **P/Ords** button and the following screen will be displayed:

The screenshot shows the ERA Pre-Delivery screen. On the left is a navigation menu with options: Search, Search by Stock No, Search by Vehicle No, and Purchase Orders (highlighted). The main area displays vehicle details for Deal No 27680, Customer Name Ben Carroette, Stock No 8854, Make JMC, Carline LANCER, Model G20C21, and Description LANCER 2.0LT 54 MPi 4A/T 1.5 sedan. Below this is a table with columns: P/O No, Vendor No, Description, Cost Price, Sell Price, and Date Recd. The table contains one row: 0208053, 100, PRESENT, 150.00, 150.00, 25/07/2011. At the bottom are buttons for OK and Exit.

Deal No	This field will display the <i>deal number</i> .
Customer Name	This field will display the <i>customer name</i> .
Stock No	This field will display the <i>stock number</i> .
New/Used	This field will display the vehicle as a <i>new</i> or <i>used</i> vehicle.
Make	This will display the <i>make</i> of the vehicle.
Carline	This will display the <i>description</i> of the carline for this vehicle.
Model	This will display the <i>model number</i> of the vehicle.
Description	This field will display the <i>description</i> of the vehicle.

P/O No	This field will display the <i>purchase order number</i> allocated to this vehicle.
Vendor No	This field will display the <i>vendor number</i> attached to this Purchase Order.
Description	This field will display the <i>description</i> of the goods required on this Purchase Order.
Cost Price	This field will display the estimated <i>cost price</i> of the goods for this purchase order.
Sell Price	This field will display the estimated <i>sell price</i> of the goods for this purchase order.
Date Required	This field will display the <i>date required</i> as entered on the purchase order and can be modified by entering a new date .

Select **Ok** from the action bar to save the changes or **Exit** to return to the *Pre-Delivery Control* screen without saving any details.

Ro No

The user is able to review or update a repair order attached to the selected deal. Select the **Repair Order** hyperlink and the following screen will be displayed:

Note: Deals with multiple repair orders attached will display **Multiple** in the *Ro No* field.

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Deal No	This field will display the deal number.
Ro No	This field will display the repair order number.
Ro Date	This field will display the repair order date.
Ro Status	This field will display the repair order status.
Dept	This field will display the department the repair order was created for.
Rego No	This field will display the vehicle's registration number. Note: Vehicles that are on order may not have a registration number assigned to it, so this field may be blank.
Stock No	This field will display the stock number.
Serial No	This field will display the vehicle's serial number.
Make	This field will display the vehicle make.
Description	This field will display the vehicle description.
Jobs	Select the Jobs button to display a list of jobs that are assigned to the repair order.

Total Repair Order Count	This field will display the total number of repair orders attached to that deal.
Repair Order for:	This field will display the number of repair orders created for the selected departments. Note: The departments listed in this field are service departments and they will display as per setup in the Preference screen.
Clear Department Filter	<input checked="" type="checkbox"/> Tick this option to remove the departments from appearing and display all repair orders created for that deal.

Deals that have repair orders attached need to have the start and end dates entered in order for the *Estimated Delivery Date* in the *Pre-Delivery Status* screen to automatically calculate. Select the **Jobs** button and the following screen will be displayed:

Note: Deals with single repair order will display the job details automatically.

The screenshot shows the ERA Repair Order Summary interface. At the top, there's a navigation bar with icons for Home, Calculator, Calendar, Settings, and Logout. The main header is 'Repair Order Summary'. Below it, a table lists repair orders with columns: Ro No, Ro Date, Ro Status, Dept, Repair No, Stock No, Serial No, Make, and Description. A summary box on the right shows 'Total Repair Order Count: 2' and '2 Repair Orders for: P.P.S. S. Service'. Below the main table, there's a section for 'Jobs for RoNo' with a 'Copy Job Dates' button. This section contains a table with columns: Job Operation Code, Operation Code Description, Start Date, End Date, # Days, Status, Priority, and Sublet Po's. Two jobs are listed: '770H422222PO PROBLEM' and '770H422222PO PROBLEM'. To the right of this table is a 'Sublet POs for Op Code' table with columns: Po No, Vendor, Description, Cost Price, Sell Price, Status, Date Booked, Date Started, and Date Completed. Below that is a 'Sublet Cost Summary' table with columns: Type, Cost Price, and Selling Price. At the bottom right, there's a 'Sublet Bulk Data Update' section with fields for Po Number, Date Type, and Date, along with 'Reset' and 'Apply Date' buttons.

Jobs for RoNo	This field will display the repair order number . Selecting this option will take the user to the RO Close Out screen. The user is able to update the repair order.
Copy Job Dates	For repair orders with multiple jobs, the Copy Dates button can be used to apply the same dates against each job that do not have any sublet purchase orders attached.
Job Operation Code	This field will display the operation code.
<u>Operation Code Description</u>	This field will display the operation code description . Selecting this hyperlink will display any customer complaints.
Start Date	Enter the start date of when that job is scheduled to begin work. Note: The start date for jobs with sublets attached will be controlled by the sublet date started field. Upon entering a sublet start date, this field will become disabled.
End Date	Enter the end date of when that job is scheduled to finish. Note: The end date for jobs with sublets attached will be controlled by the sublet date completed field. Upon entering a sublet complete date, this field will become disabled.
# Days	This field will automatically display the number of days it will take to complete that job.
Status	Select a valid status from the dropdown box. Valid options include, Not Started, Started and Complete. Note: This field will be disabled for any jobs with sublets attached to it. The sublet purchase order dates will control this status.
Priority	The user is able to enter the priority of the work to be completed.
<u>Sublet Po's</u>	This field will display the number of sublet purchase orders created against each job.

Selecting the **Copy Dates** button will copy the **start** and **end** date from the first job with dates to all other jobs that have no sublet attached to them as displayed in the following example:

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Selecting a job with 0 sublet purchase orders will display the following pop up message:

Selecting a job with 1 or more sublet purchase orders will display the following screen:

Sublet POs Op Code	This field will display the selected operation code.
Po No	This field will display the sublet purchase order number.
Vendor	This field will display the name of the vendor performing the sublet repair.

Description	This field will display the description of the sublet repair.
Cost Price	This field will display the estimated cost price of the sublet repair.
Sell Price	This field will display the estimated sell price of the sublet repair.
Status	This is the status of the sublet purchase order. Note: A sublet status can be Blank, Invoice or Closed.
Date Booked	Enter the date the sublet has been booked with the repairer.
Date Started	Enter the date the sublet work has started at the repairer. Note: The job's start date will automatically be updated based on the sublet start date.
Date Complete	Enter the date the sublet work has been completed by the repairer. Note: The job's end date will automatically be updated based on the sublet complete date.

Sublet Cost Summary

Type	This column will display the sublet sale type.
Cost Price	This column will display the cost price of the sublet for that job.
Selling Price	This column will display the selling price of the sublet for that job.

Sublet Bulk Date Update

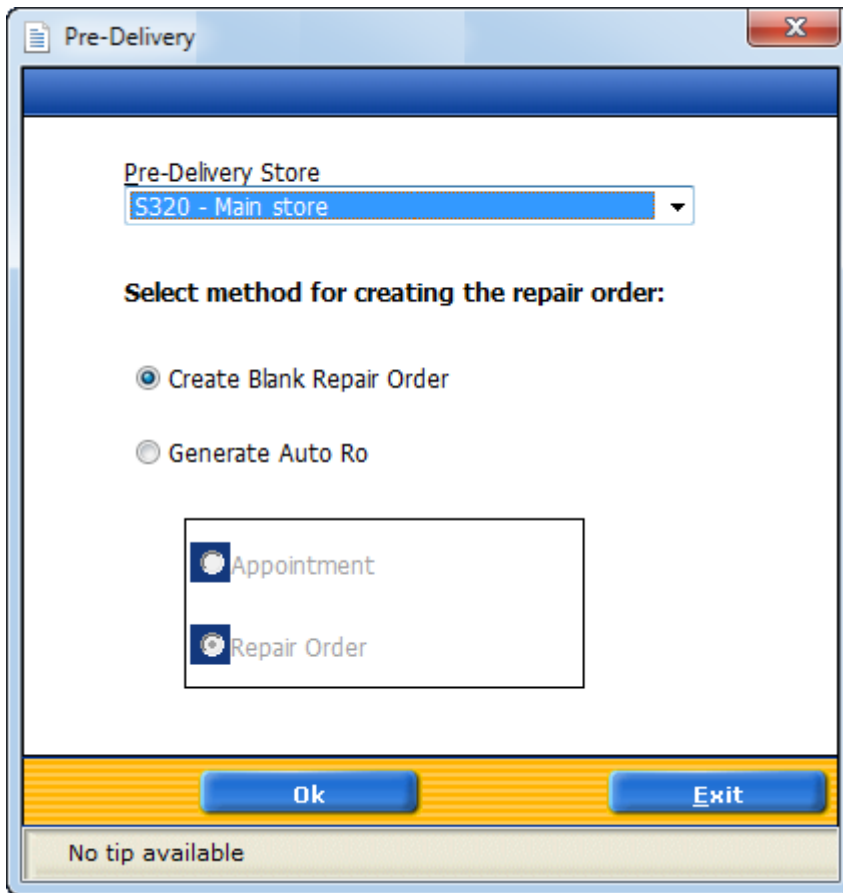
Sublets with multiple items can have their dates entered in bulk.


Po Number	Select the required purchase order number from the ▼ dropdown box to update.
Date Type	Select the date type from the ▼ dropdown box. Valid options include Date Booked, Date Started and Date Complete.
Date	Enter the date to apply to all lines as per date type selection.
Reset	Select the Reset button to clear the fields.
Apply Date	Select the Apply Date button to apply the date to all lines.




Continue	Select the Continue option from the action bar to return to the <i>Pre-Delivery Control</i> screen.
Add RO	Select the Add RO option from the action bar to create another repair order against the deal. Note: The Add RO functionality is the same as the Add functionality from the <i>Pre-Delivery Control</i> screen.


Add button

From the *Pre-Delivery Control* screen, the user is able to create a repair order by selecting the **Add** button and the following screen will be displayed:



Pre-Delivery Store will default to the Pre-Delivery Store as determined by the Sales Department set up in **4524 – Sales Department Codes**. A different store can be selected from the  drop down box.

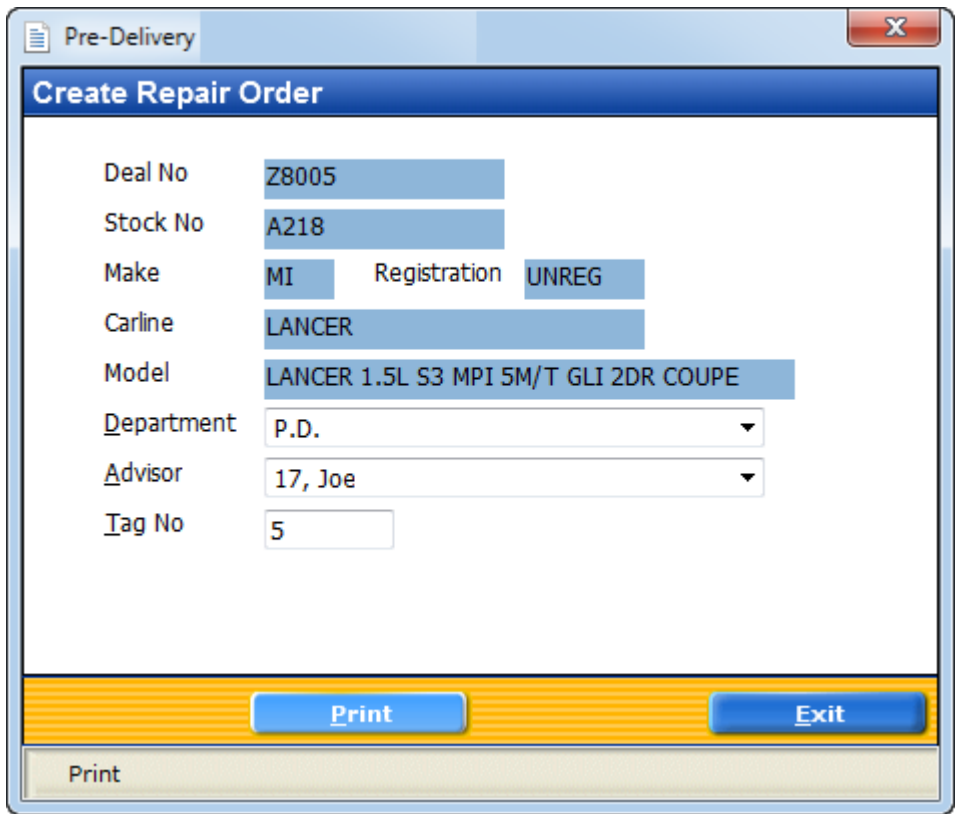
Select the  **Create Blank Repair Order** option for deals that do not have a Factory Order Number or a Stock Number allocated or select  **Generate Auto Ro** to create an appointment, quote or repair order as per existing  *Service Appointments* functionality.

Select **Ok** to proceed with creating the repair order or **Exit** to return to the  *Pre-Delivery Control* screen.

Note: The *Generate Auto Ro* option will be disabled if the deal number does not have Fact Ord # or a Stock No entered.

Create Blank Repair Order

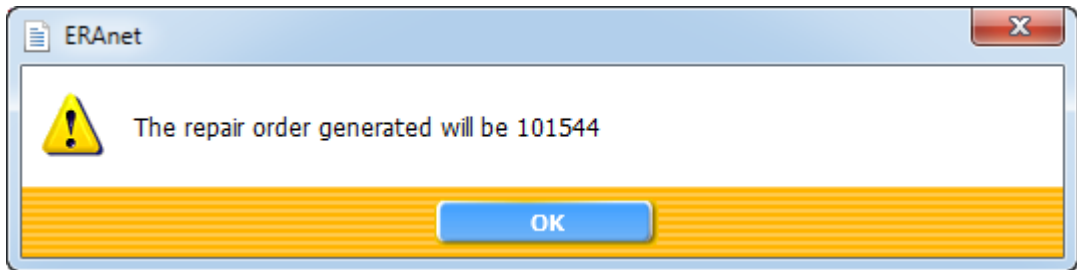
Selecting the  **Create Blank Repair Order** option will display the following screen:



Deal No	This field will display the deal number as displayed in the <i>Pre-Delivery Control</i> screen.
Stock No	This field will display the stock number as displayed in the <i>Pre-Delivery Control</i> screen.
Make	This field will display the make as displayed in the <i>Pre-Delivery Control</i> screen.
Registration	This field will display the vehicle registration number as displayed in the <i>Pre-Delivery Control</i> screen.
Carline	This field will display the vehicle carline as displayed in the <i>Pre-Delivery Control</i> screen.
Model	This field will display the vehicle model as displayed in the <i>Pre-Delivery Control</i> screen.
Department	Select a service department from the ▼ dropdown box.
Advisor	Select a service advisor from the ▼ dropdown box.
Tag No	Enter the required tag number .

Select **Print** to generate a blank repair order or **Exit** to return to the  *Pre-Delivery Control* screen.


The following pop up message will display when the user selects the **Print** option:

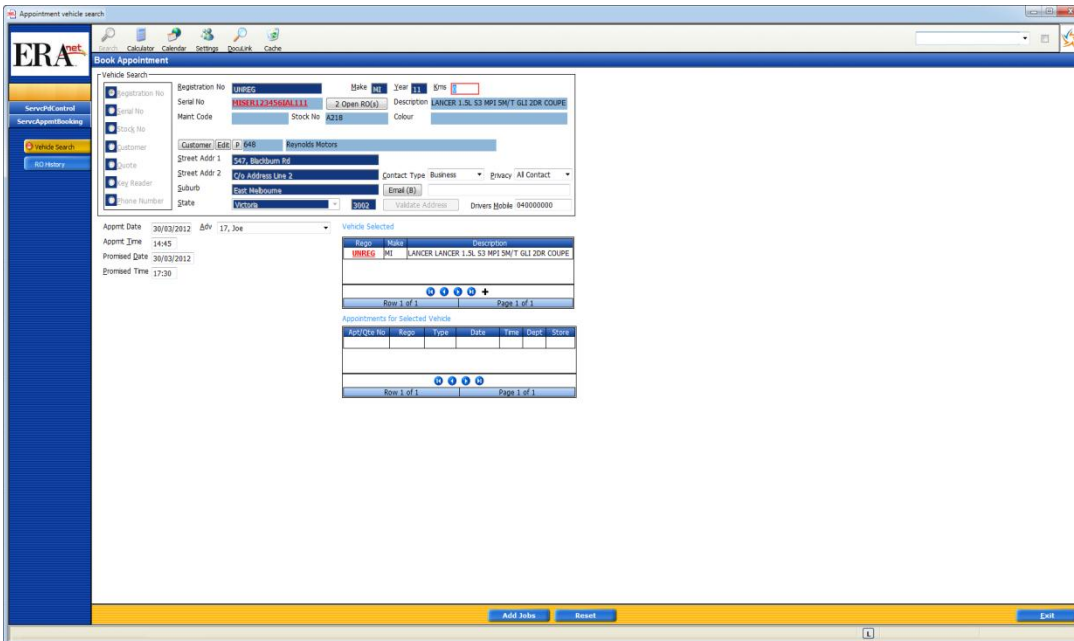


Select **Ok** to print the blank repair order.

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Generate Auto Ro

Selecting the  **Generate Auto Ro** option will enable the Appointment, Quote and Repair Order options. Selecting an **option** followed by **Ok** will display the following screen:



Appointment vehicle search

Book Appointments

Vehicle Search

Registration No: Year: Make: Model: Description:

Serial No: Make Code: Stock No: Colour:

Customer: Street Address 1: Street Address 2: Suburb: State: Postcode:

Appoint Date: 30/03/2012 Appoint Time: 14:45 Promised Date: 30/03/2012 Promised Time: 17:30

Vehicle Selected

Reg No	Make	Model
WJDEG	LANCER	LANCER LANCER 1.5L 53 HP 5MT GLI 2DR COUPE


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Appointments for Selected Vehicle

Appoint No	Reg No	Type	Date	Time	Dept	Status
Row 1 of 1						

Page 1 of 1

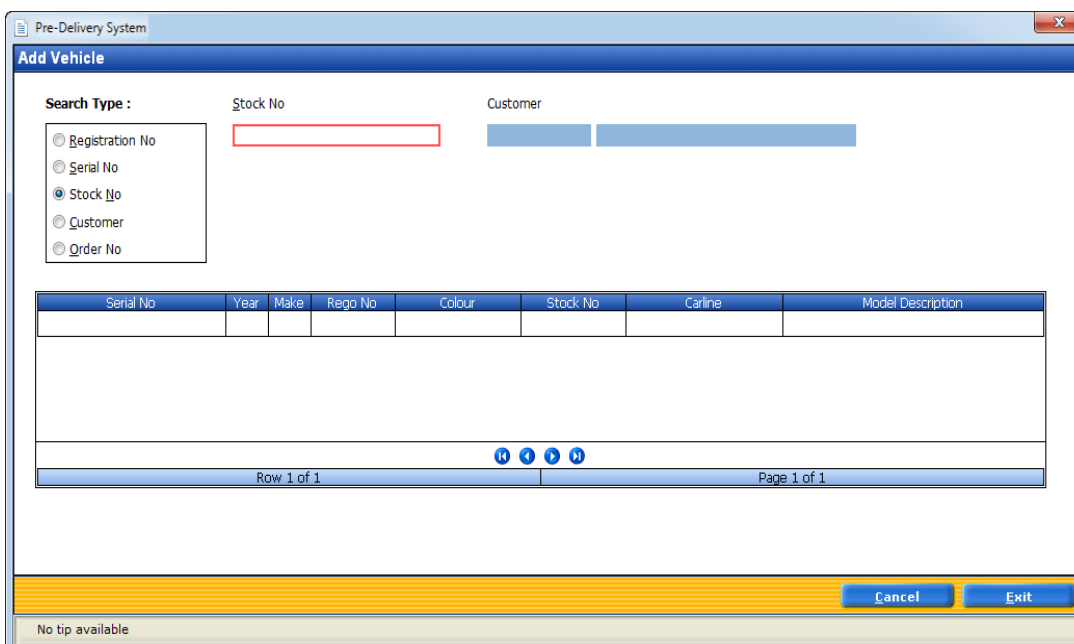
Add Jobs Insert Exit

Proceed towards creating the repair order as per existing  **Service Appointments** functionality.

Add Vehicle

The user is able to add vehicles that have come back to the dealership for pre-delivery service. These are vehicles that are currently not attached to a deal.

Select the **Add Vehicle** option from the action bar and the following screen will be displayed:



Pre-Delivery System

Add Vehicle

Search Type: ☐ Registration No ☐ Serial No ☒ Stock No ☐ Customer ☐ Order No

Stock No: Customer:

Serial No	Year	Make	Rego No	Colour	Stock No	Carline	Model Description
Row 1 of 1							

Page 1 of 1

Cancel Exit

No tip available

Search for a vehicle from any of the **Search Type** and the following screen will be displayed:

Pre-Delivery System

Add Vehicle

Search Type : ☐ Registration No ☐ Serial No ☒ Stock No ☐ Customer ☐ Order No

Stock No: A226 Customer: 648 Reyn Motors

Serial No	Year	Make	Rego No	Colour	Stock No	Carline	Model Description
SWERIASDFKQWEEC	09	MI	K7		A226	LANCER	LANCER 2.0LT S4 MPI 4A/T LS sedan

Row 1 of 1 Page 1 of 1

Cancel Exit

To add the vehicle to the Pre-Delivery system, select the **Serial No** hyperlink and the following screen will be displayed:

Pre-Delivery Control

Department View: Service Department: Filter Type: Search Type: Filter By: Sales Mode: BSA ALL

Deal	Loc	Deal	Val	Current Stage	Reg	Dept	Tm	Customer	Build Status	BVO No	Part Order	Stock No	MV	Vehicle Description	Colour	Rego No	Equipment No	No No	No No
#000002	1	Estimated Onsite: 20 NOV 1997	S	1	Yellow			Reynolds Motors	Reynolds Motors			A50000	P/Onsite	CHALIS VS II SED AUTO		289		Multitask	Add
#000004	1	Scheduled Delivery: 05 OCT 2011	S					Reynolds Motors	Reynolds Motors			CR1195	P/Onsite	3 SEPIES SEDAN 1945 20V		2241105		101168	Add
#000005	1	Scheduled Delivery: 20 MAR 2011	S					Reynolds Motors	Reynolds Motors			D45	P/Onsite	LANCER CE CPE GLI 1.5M AUTO		101168		101050	Add
#000007	1	Actual Onsite: 07 JUL 2011	777					Reynolds Motors	Reynolds Motors			A226	P/Onsite	LANCER 2.0LT S4 MPI		123			Add
#000008	1	Approved: 20 MAR 2012						Reynolds Motors	Reynolds Motors			A1112	P/Onsite	FALCON AU III SED FORTÉ 4DR AUT		050555			Add
BAY 1	1024	1	Estimated Onsite: 26 MAR 2011	S	30			Catherine Box	Reynolds Motors			1772109	P/Onsite	COMMODORE ACCLAIM WAGON 300i				101543	Add
IN	1064	1	Actual Onsite: 22 OCT 2010	Y	31			Sally Softmann	Reynolds Motors			A140	P/Onsite	COROLLA COROLLA GX 1.4D HATCH					Add
IN	1104	1	Actual Onsite: 13 JUL 2011	U	1			Adit James Smith	Reynolds Motors			A233	P/Onsite	MAZDA2 MAZDA2 S 5 SPEED MANU				101103	Add
DO	B12	1	Actual Onsite: 10 FEB 2012		104			A Smith	Reynolds Motors			CHAMBER	P/Onsite	DAVRY SED GX 4DR AUTO 3.0M 45		042504			Add
	Z7679	1	Actual Onsite: 06 JAN 2009	S	777			David & Jane Connery	Reynolds Motors			0855	P/Onsite	LANCER 2.0LT S4 MPI					Add
	Z7680	1	Actual Onsite: 06 JAN 2009	S	777			Joe Concrete	Reynolds Motors			0854	P/Onsite	LANCER 2.0LT S4 MPI				Multitask	Add
	Z7710	1	Scheduled Delivery: 05 OCT 2011	Y	P	77		Pentana Solutions Pty Ltd	Reynolds Motors			10	P/Onsite	LANCER 2.0LT S4 MPI		9C7777		100912	Add
DO	Z7843	1	Approved: 31 JAN 2011		17			Bula Jones	Reynolds Motors			N1054	P/Onsite	LANCER 2.0LT S4 MPI					Add
	Z7844	1	Estimated Delivery: 27 MAR 2012	U	30			Andrew Smith	Reynolds Motors			A113	P/Onsite	LANCER 2.0LT S4 MPI		WINTER WHITE		Multitask	Add
	Z7846	1	Start Location: 05 OCT 2011	S	30			Bennie Gibbons	Reynolds Motors			120918	P/Onsite	LANCER MODEL DESCRIPTION		WINTER WHITE		101536	Add
IN	Z7948	1	Actual Onsite: 03 MAR 2010		30			A Smith	Reynolds Motors			78907	P/Onsite	LANCER 2.0LT S4 MPI					Add
IN	Z7951	1	Approved: 31 MAR 2011	Y	30			Beverly Jones	Reynolds Motors			A125	P/Onsite	LANCER 2.0LT S4 MPI				100791	Add
	Z7952	1	Delivery Confirmed	Y	30			James Egan	Reynolds Motors			0859	P/Onsite	LANCER CE CPE MR 1.5M AUTO		TEST75		Multitask	Add
B13	Z7957	1	Delivery Confirmed	Y	30			Jac & H Bloss	Reynolds Motors			0859	P/Onsite	LANCER CE CPE GLI 1.5M MAN		9999		100792	Add
B14	Z7958	1	Delivery Confirmed	Y	30			Steven Clarke	Reynolds Motors			0859	P/Onsite	LANCER 2.0LT S4 MPI		4802009		Multitask	Add
B15	Z7961	1	Delivery Confirmed	Y	30			Jac & H Bloss	Reynolds Motors			0859	P/Onsite	LANCER 2.0LT S4 MPI		4802009		Multitask	Add
IN	Z7962	1	Scheduled Delivery: 05 OCT 2011	Y	31			James & Lorraine Graham	Reynolds Motors			0859	P/Onsite	LANCER OH HYVIS ES SEDAN 4DR AJ				101168	Add
IN	Z7963	1	Scheduled Delivery: 05 OCT 2011	Y	31			James & Lorraine Graham	Reynolds Motors			0859	P/Onsite	LANCER OH ES 2.4L V6C AUTO 4DR					Add
IN	Z7965	1	Approved: 21 JUL 2011		30			Jac & H Bloss	Reynolds Motors			0859	P/Onsite	LANCER LANCER GLX SEDAN					Add
IN	Z7915	1	Estimated Onsite: 01 MAR 2012		777			Jenny	Reynolds Motors			0859	P/Onsite	LANCER 2.0LT S4 MPI					Add

Row 8 of 37 Page 1 of 2

Refresh Add Vehicle Exit

Note: The deal number has # in front of it to indicate that the vehicle has been added from the *Pre-Delivery Control* screen.

The user is now able to carry on the pre-delivery work as per functionality mentioned in this user documentation.

Any dates that are entered in the *Pre-Delivery* screens will automatically be updated in the salesperson's diary though *Vehicle Advisor* as per following example:

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Note: A new type **PD** has been created to indicate messages that have come from the *Pre-Delivery* screen. The Reason field will display the **current stage** of the vehicle. This information is valuable to the salesperson as it will enable them to schedule the delivery of the vehicle to the customer.



The user is able to filter through and show Pre-Delivery items only by ☒ ticking the **Show Pre-Delivery Only** check box.

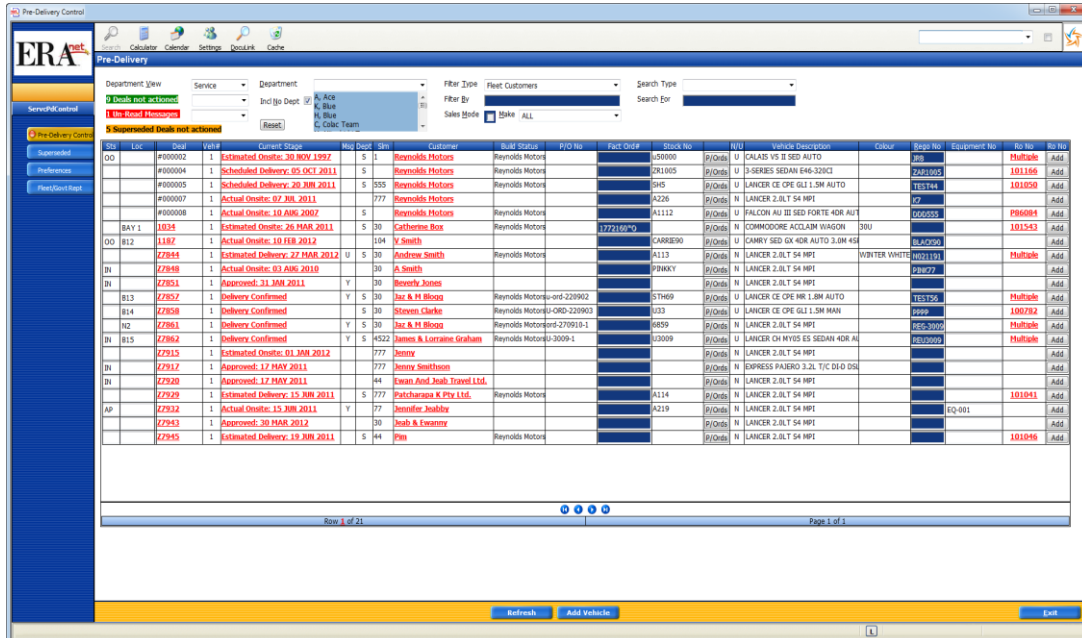
The salesperson is able to schedule the **Customer Delivery Date** and **Time** by selecting the **Wks/Stat** hyperlink, **Model Description** hyperlink, followed by the **Delivery Details** option from the navigation bar within **Vehicle Advisor** as displayed in the following example:

Select **Ok** from the action bar to save the changes and return to the *Vehicle Worksheets* screen as per existing functionality.

Fleet/Govt Report

The user is able to generate a report for Fleet Customers to notify them on the status of their vehicle orders.

From the  **Pre-Delivery Control** screen, select Filter Type as **Fleet Customers** from the  dropdown box and a list of all Fleet, Rental and Government type Customers will display as shown in the following example:



Order No	Status	Date	Customer	Model	Stock No	Vehicle Description	Order No	Equipment No	Is Note
#000002	1	Estimated Onsite: 30 NOV 2012	Reynolds Motors	Reynolds Motors	U30000	U CALAIS V5 B SED AUTO	288		Multitask
#000004	1	Scheduled Delivery: 05 OCT 2011	Reynolds Motors	Reynolds Motors	2R1005	U 3-SERIES SEDAN 646-320C3	2421005		101166
#000005	1	Scheduled Delivery: 28 JUN 2011	Reynolds Motors	Reynolds Motors	2H5	U LANCER CE OPE GLI 1.5M AUTO	1E1144		101050
#000007	1	Actual Onsite: 07 JUN 2011	Reynolds Motors	Reynolds Motors	A226	N LANCER 2.0LT 54 MPI	47		Add
#000008	1	Actual Onsite: 10 AUG 2007	Reynolds Motors	Reynolds Motors	A1112	U PALCON AU 30 SED FORTY 40R AUT	025535		P80084
BA11	1054	1	Estimated Onsite: 26 MAR 2011	S Catherine Box		N COMARQUE ACCLAM WAGON	380		101543
DO B12	1182	1	Actual Onsite: 10 FEB 2012	Y Smith	17721000	U CARRY SED 6X 40R AUTO 3.0M 456	8AC250		Add
	Z7845	1	Estimated Delivery: 27 MAR 2012	U Andrew Smith	A113	N LANCER 2.0LT 54 MPI	WINTER WHITE	W001193	Multitask
DI	Z7848	1	Actual Onsite: 03 AUG 2010	A Smith	P80084	N LANCER 2.0LT 54 MPI	P80084		Add
DI	Z7851	1	Approved: 31 JAN 2011	Y Beverly Jones		N LANCER 2.0LT 54 MPI			Add
B13	Z7852	1	Delivery Confirmed	Y Jaz & H Blogg	Reynolds Motors-ord-228902	U LANCER CE OPE HR 1.5M AUTO	1E1356		Multitask
B14	Z7858	1	Delivery Confirmed	Y Steven Clarke	Reynolds Motors-ORD-228902	U LANCER CE OPE GLI 1.5M MAN	4449		100792
N2	Z7861	1	Delivery Confirmed	Y Jaz & H Blogg	Reynolds Motors-ord-270910-1	N LANCER CE OPE GLI 1.5M MAN	25P-2002		Multitask
DI B15	Z7862	1	Delivery Confirmed	Y Jaz & H Blogg	Reynolds Motors-2009-1	U LANCER CE OPE GLI 1.5M MAN	25P-2002		Multitask
	Z7915	1	Estimated Onsite: 01 JAN 2012	777 Jenny		N LANCER 2.0LT 54 MPI			Add
DI	Z7917	1	Approved: 17 MAY 2011	777 Jenny Smithson		N LANCER 2.0LT 54 MPI			Add
DI	Z7920	1	Approved: 17 MAY 2011	44 Ewan And Joab Travel Ltd.		N LANCER 2.0LT 54 MPI			Add
	Z7925	1	Estimated Delivery: 15 JUN 2011	S Patcharapa K Ptx Ltd.	Reynolds Motors	N LANCER 2.0LT 54 MPI			101041
AP	Z7932	1	Actual Onsite: 15 JUN 2011	777 Jennifer Jealby		N LANCER 2.0LT 54 MPI			Add
	Z7943	1	Approved: 30 MAR 2012	30 Jaz & Ewan		N LANCER 2.0LT 54 MPI			Add
	Z7945	1	Estimated Delivery: 19 JUN 2011	S Jaz	Reynolds Motors	N LANCER 2.0LT 54 MPI			101046

Select **Fleet/Govt Report** option from the navigation bar and the following screen will be displayed:

Fleet / Government report

ERA

ServiceHub central

ServiceHub Request

Report/Count Report

Search

Calculator

Calendar

Settings

DocLink

Cache

Filter

Customer

Make

Location

Online

Delivery Date From

Model

Delivery Date To

Order No	SN	Customer Name	Stock No	Make	Model Description	Current Stage	Po Officer Email
Z78515	44	Jazb & Jeanny Jenny		MG	LANCER 2.0LT 54 MPI 4A/T LS sedan	Estimated Onsite: 27 OCT 2010	
Z78515	44	Jazb & Jeanny Jenny		MG	LANCER 2.0LT 54 MPI 4A/T LS sedan	Estimated Onsite: 27 OCT 2010	
Z7844	30	Andrew Smith	A113	MG	LANCER 2.0LT 54 MPI 4A/T LS sedan	Estimated Delivery: 27 MAR 2012	
Z7848	30	A Smith	P80084	MG	LANCER 2.0LT 54 MPI 4A/T LS sedan	Actual Onsite: 03 AUG 2010	
Z7849	30	Denise T	G008	MG	GRANDES 2.4LT 54 MVEV 4A/T WAGON	Delivery Confirmed	joh.citren@pentasolutions.com
Z7851	30	Beverly Jones		MG	LANCER 2.0LT 54 MPI 4A/T LS sedan	Approved: 31 JAN 2011	
Z7861	30	Jaz & H Blogg	6859	MG	LANCER 2.0LT 54 MPI 4A/T LS sedan	Delivery Confirmed	
Z7915	777	Jenny		MG	LANCER 2.0LT 54 MPI 4A/T LS sedan	Estimated Onsite: 01 JAN 2012	
Z7917	777	Jenny Smithson		MG	PAJERO 3.2L T/C D1-D DSL SH/T GLX	Approved: 17 MAY 2011	
Z7920	44	Ewan And Jazb Travel Ltd.		MG	LANCER 2.0LT 54 MPI 4A/T LS sedan	Approved: 17 MAY 2011	

Row 5 of 15

Page 1 of 2

Refresh

Send Email

Exit

Filter

Customer	The user is able to filter by selecting a specific <i>customer</i> from the dropdown box.
Location	The user is able to filter by selecting a specific <i>location</i> from the dropdown box.
Delivery Date From	The user is able to filter by entering a <i>scheduled delivery from</i> date.
Delivery Date To	The user is able to filter by entering a <i>scheduled delivery to</i> date.

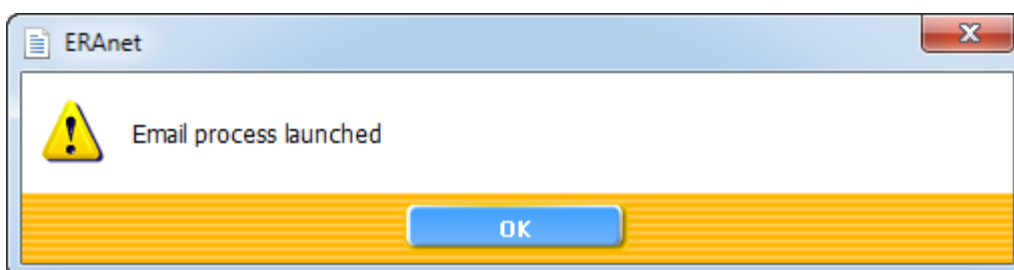
ERAnet V9

Make	The user is able to filter by selecting a specific make from the dropdown box.
Carline	The user is able to filter by selecting a specific carline from the dropdown box. Note: This field will be disabled until the <i>Make</i> field has been selected.
Model	The user is able to filter by selecting a specific vehicle model from the dropdown box. Note: This field will be disabled until the <i>Carline</i> field has been selected.

Deal No	This field will display the deal number as displayed in the <i>Pre-Delivery Control</i> screen.
Slm	This field will display the salesperson number as displayed in the <i>Pre-Delivery Control</i> screen.
Customer Name	This field will display the fleet customer name as displayed in the <i>Pre-Delivery Control</i> screen.
Stock No	This field will display the vehicle stock number as displayed in the <i>Pre-Delivery Control</i> screen.
Make	This field will display the vehicle make as displayed in the <i>Pre-Delivery Control</i> screen.
Model Description	This field will display the vehicle model description as displayed in the <i>Pre-Delivery Control</i> screen.
Current Stage	This field will display the current stage the deal is at as displayed in the <i>Pre-Delivery Control</i> screen.
Po Officer Email	This field will display the Purchase Officer Email address from the <i>Pre-Delivery Status</i> screen. The user is able to enter a different email address in this field. The report will be sent to the email recipient entered in this field. Note: This is not a mandatory field.
Incl	<input checked="" type="checkbox"/> Tick this option to send the report for that specific deal to the email address entered in the PO Officer Email field. Note: All deals will be <input checked="" type="checkbox"/> ticked by default and the user will need to check this field prior to emailing the report. Any deals that have been selected will need to have an email address entered, otherwise an error message will display telling the user which row is missing an email address.

The user is able to select the **Refresh** option from the action bar to remove the existing information and start a new search, or select the **Exit** option from the action bar to return to the *Pre-Delivery Control* screen without sending the report.

Once the relevant deals have been selected, the user will need to select the **Send Emails** option from the action bar to send the report to the required Purchasing Officers and the following pop up will be displayed:



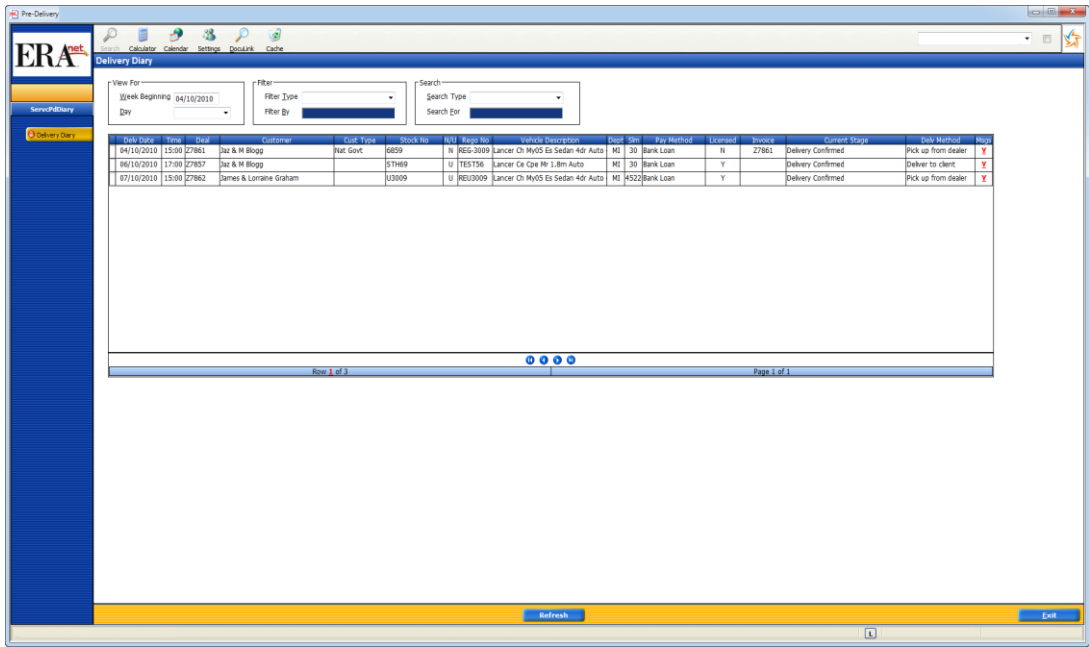
Select the **Ok** option to return to the *Fleet/Govt Report* screen.

Following is an example of the emailed report:

01 AUG 11:37		Delivery Advice for Denise T				Enet Page 1
Order Date	Purchase Order #	Est Delivery	Sched Delivery	Stock Number	Vehicle Type	
-----	-----	-----	-----	-----	-----	
15 SEP 2010		21 SEP 2010	21 SEP 2010	GH98	GRANDIS 2.4LT S4 MIVEC 4A/T WAGON	


Users are able to view an onscreen report which displays the deliveries that have been scheduled for the week.

Select  **Showroom**, followed by  **Delivery Diary** and the following screen will be displayed:




Note: The above screen will display a list of the deliveries for the week beginning date that is entered. The list will appear in date and time order.

View For


Week Beginning	Enter the date for the week to view the delivery details for. Note: The week beginning date will always be the Monday date for that week. Entering a date in the middle of the week will automatically change it to the Monday's date.
Day	Select a day from the  dropdown box to view a specific day's deliveries.


Filter

Filter Type	Select a valid Filter Type option from the  dropdown box. Note: The options available to select from are <i>Salesman, Customer, New Vehicles, Used Vehicles and Fleet Customers</i> which includes <i>Government and Rental</i> .
Filter By	Enter the filter by criteria based upon the Filter Type selected. Note: This field will be disabled until a Filter Type has been selected.

ERAnet V9

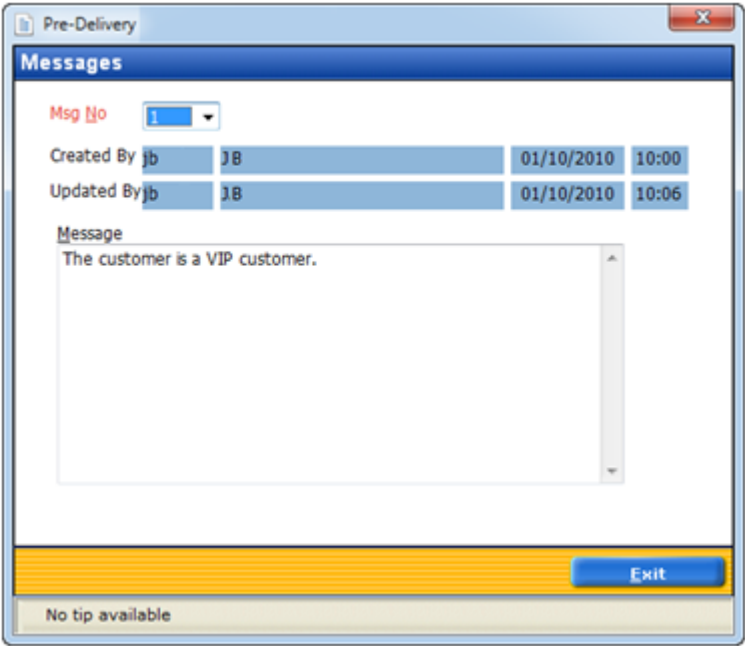
Search


Search Type	Select a valid Search Type option from the  dropdown box. Note: The options available to select from are <i>Deal, Stock No, Rego No</i> .
Search For	Enter the search for criteria . The first line that matches the criteria will be highlighted. Note: This field will be disabled until a <i>Search Type</i> has been selected.


Delv Date	This field displays the <i>customer delivery date</i> as entered by the salesperson in the <i>Pre-Delivery Status</i> screen.
Time	This field displays the <i>customer delivery time</i> as entered by the salesperson in the <i>Pre-Delivery Status</i> screen.
Deal	This field displays the <i>deal number</i> .
Customer	This field displays the <i>name</i> of the customer.
Cust Type	This field displays the <i>sale type</i> for the deal.
Stock No	This field displays the <i>stock number</i> attached to the deal.
N/U	This field displays the <i>N</i> for <i>New Vehicle</i> or <i>U</i> for <i>Used Vehicle</i> to be delivered.
Rego No	This field displays the <i>vehicle registration number</i> .
Vehicle Description	This field displays the <i>description</i> of the vehicle to be delivered.
Dept	This field displays the <i>department</i> the deal was created for.
Slm	This field displays the <i>salesperson number</i> .
Pay Method	This field displays the <i>pay method</i> as entered by the Salesperson or the Finance Manager.
Licensed	This field displays <i>Y</i> for Yes to indicate that <i>licensing</i> has been completed for this delivery or <i>N</i> for No to indicate that licensing is yet to be completed.
Invoice	This field displays the <i>invoice number</i> that has been generated for this deal. The invoice number will be generated when the vehicle has been sold through  <i>Vehicle Sales Process</i> .
Current Stage	This field displays the current <i>status</i> of the delivery as per <i>Pre-Delivery Control</i> screen.
Delv Method	This field displays how the vehicle is to be <i>delivered</i> as entered by the salesperson.
Msgs	This field displays any <i>messages</i> that exist for this deal. Y for read messages or U for unread messages will be displayed.

Selecting a message with **Y** or **U** will display the following screen:

Note: This screen is display only.



Msg No	Select a <i>message</i> to read from the  dropdown box.
Created By	This field displays the <i>user id</i> and <i>name</i> of the user who <i>created</i> the message as well as the date and time.
Updated By	This field displays the <i>user id</i> and <i>name</i> of the user that <i>modified</i> that message as well as the date and time.
Message	The <i>message</i> will be displayed in this field.

Select **Exit** from the action bar to return to the  *Delivery Diary* screen.

Benefits

Dealerships are now able to track the flow of vehicles from purchase through to the delivery of the vehicle. As well as generate a report for Fleet Customers to notify them on the status of their vehicle orders. The Delivery Diary screen will offer the dealership a simple screen to review what deliveries are scheduled for a specific date.

Activation Key

ERANET-PREDEL

ERAnet – RO Close Out – Advisor No

Enhancement

Overview

An enhancement has been made to the *Advisor No* field in RO Close Out as well as the *Pick Up Advisor* field in Appointment Diary. The *Advisor No* field is now a text field and the user is able to perform a search on valid advisors. The *Pick Up Advisor* field is now a select box.

Why

This change was made to improve the core product and to continue to develop and enhance the ERAnet Service product.

Screens



Appointment Diary




RO Close Out

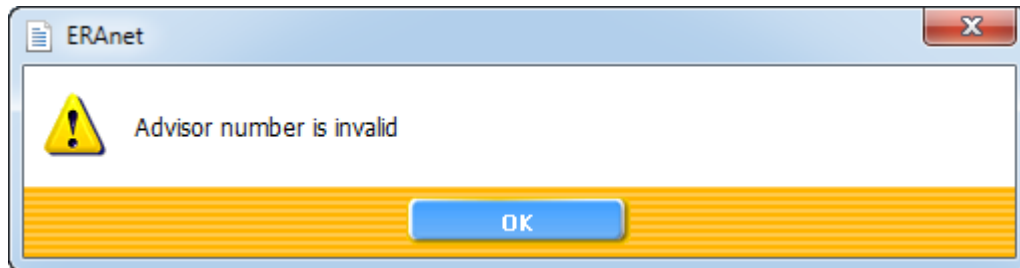
The Process

Ro Summary


Upon logging into ERAnet, select  **Service**,  **RO Close Out**, enter the **repair order number** and the following screen will be displayed:

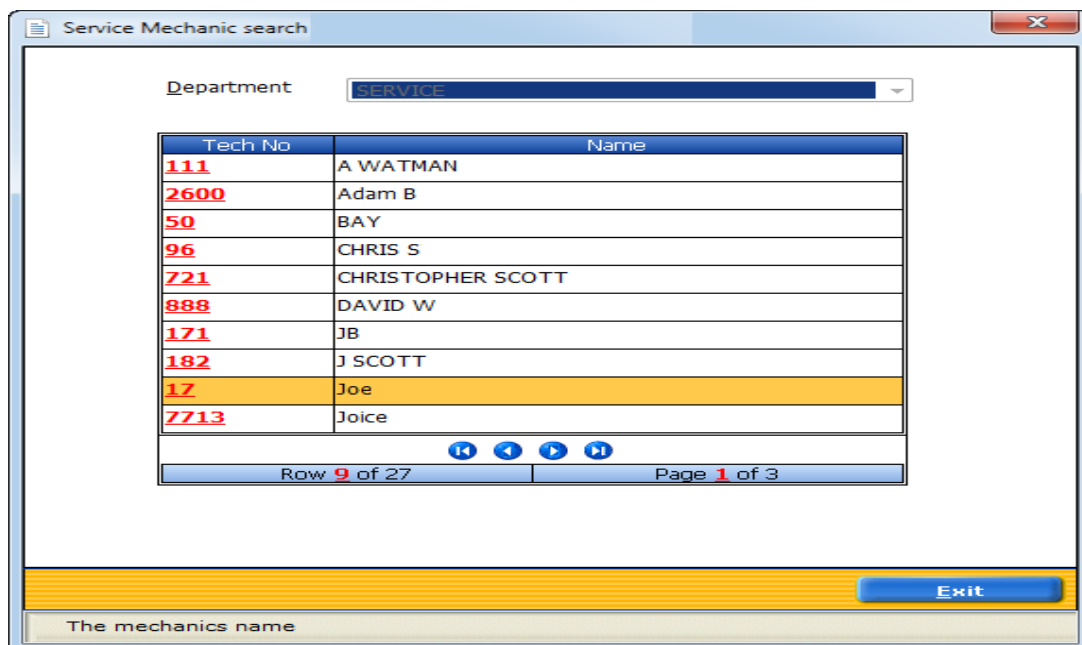
Advisor No field is now a text field. The user is able to enter a valid **advisor number** or search for a valid advisor by clicking on  **Search** or press **F3** from the keyboard.

Entering an **invalid advisor number** will display the following pop up message:



Select the **OK** option to acknowledge the message and enter a valid advisor number.

Selecting the  **Search** option or pressing **F3** from the keyboard will display the following *Service Mechanic search* screen:



Tech No	Name
111	A WATMAN
2600	Adam B
50	BAY
96	CHRIS S
721	CHRISTOPHER SCOTT
888	DAVID W
171	JB
182	J SCOTT
17	Joe
7713	Joice

Row 9 of 27 Page 1 of 3



Exit


The mechanics name

Note: The *Department* field will be disabled. The department displayed in this field is picked up from the *Ro Summary* main screen.

To change the Advisor for the selected repair order, click on the relevant **Tech No** hyperlink.

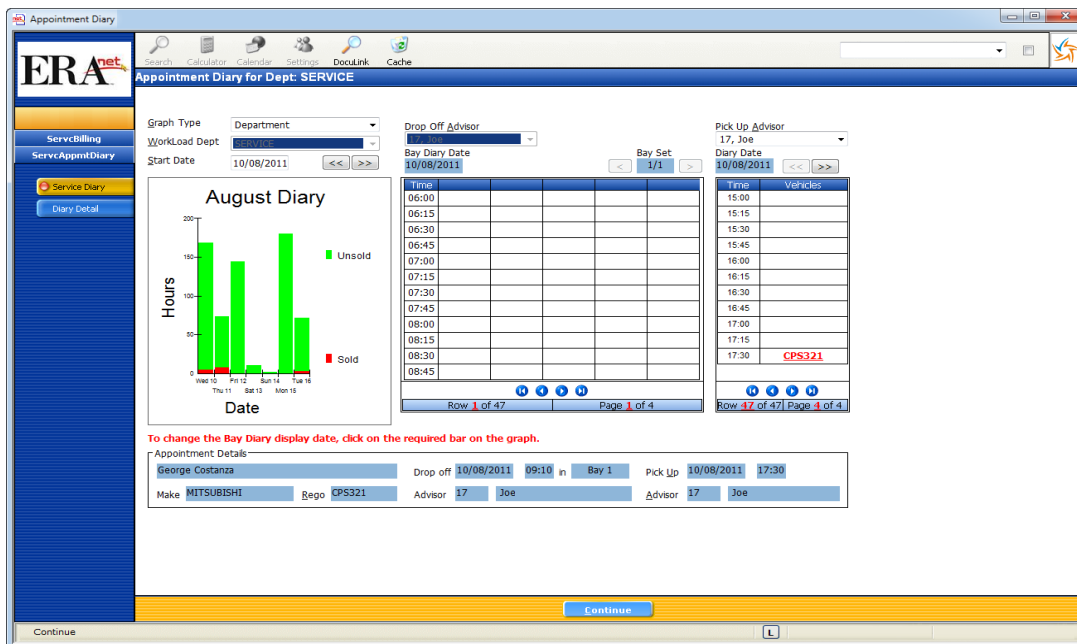
Appointment Diary

The user is able to access the *Appointment Diary* screen from  *RO Close Out* and  *Appointments Menu*.

Note: The following screenshot is accessed from the  *RO Close Out* screen.

From the *Ro Summary* screen, select the **Diary** button and the following screen will be displayed:

ERAnet V9



The *Pick Up Advisor* field is now a select box. The user is able to select a valid **Advisor** from the drop down box.

Once the advisor is selected, click on a **pick up time** slot as per existing functionality and continue to process the repair order.

Benefits

Changing the input method of the *Advisor* give the user added flexibility in being able to key the *Advisor* number.

ERAnet – Service Appointments

Enhancement

Overview

Enhancements have been made to Service Appointment bookings to provide users added features. The Estimate Details screen now has the ability to allow users to enter Manual Estimates for Parts and Labor. Users are also able to manually enter Technician Instructions. In addition, the Loan Cars option on the navigation bar has been enhanced to display customers that have requested Courtesy Bus.

Why

This change was made through a Request For Development submission to enhance existing functionality.

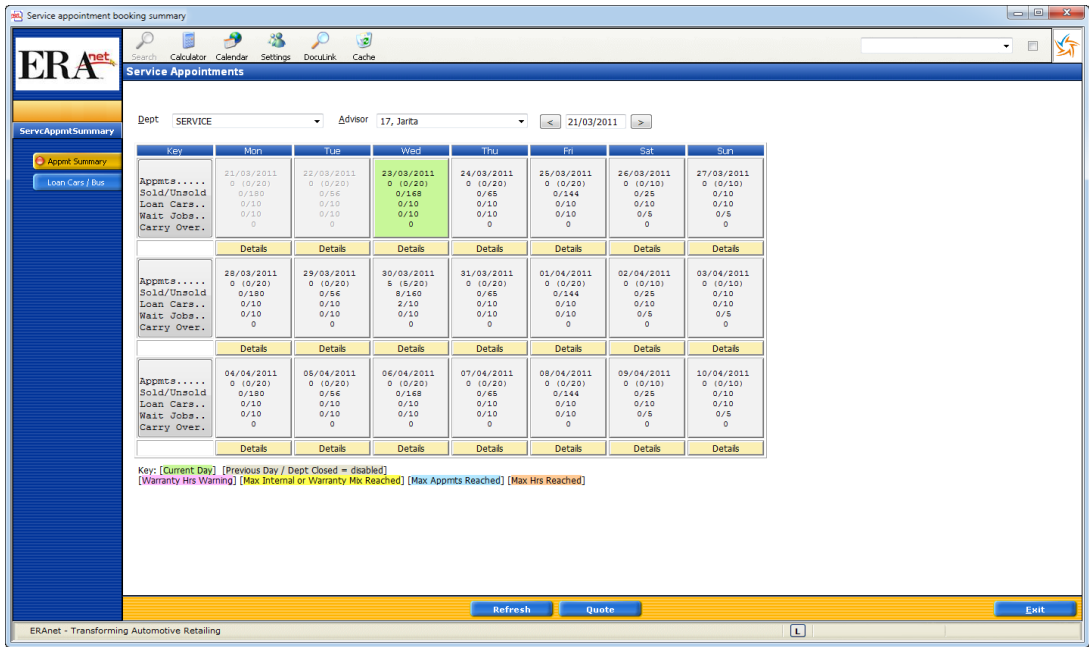
Screens



The Change

Estimate Details

Within ERAnet, select **Service**, **Appointments Menu**, followed by **Service Appointments** and the following screen will be displayed:



Select the relevant **date**, enter the relevant search **criteria** and proceed towards adding a job as per existing functionality and the following screen will be displayed once a job is selected:

ERAnet V9

Appointment vehicle search

ERA net

Book Appointment: SERVICE

Vehicle Search

Registration No: UAL745
Serial No: JHKM784365378456
Make: JMC Year: 07 \$ms: 1000
Description: LANCER 2.0LY S4 MPI 4A/T LS sedan
22 Open RO(s)
Maint Code: M01788 Stock No: 6615 Colour:
Customer: Edit P 7311 Jas Smith
Street Addr 1: 13 Orc Road
Street Addr 2:
Suburb: Baywater
State: 3153
Contact Type: Business Privacy: All Contact
Email (B): jarta@pentanasolutions.com
Drivers Mobile (0400) 123 456

Appt Date: 30/03/2011 Adv: 17, Jarita
Advisor Diary
Diary Date: 30/03/2011

Time	Bay 1	Bay 2	Bay 3	Bay 4	Bay 5
06:00					
06:15					
06:30					
06:45					
07:00					
07:15					
07:30					
07:45					
08:00	JAN	WP680	PETER8		
08:15	SSE174	UAL745			

Row 10 of 47 Page 1 of 5

Est Lib Time: 0.70
Est Price: 145.50
Pickup Time:
Wait Job:
Loan Car:
Courtesy Bus:
Po No:
Bill To PO No:
Comments:
Add Jobs Exit

Select the **Est Price** hyperlink and the following screen will be displayed:

Appointment Booking

Estimate Details

Estimate details for: 01MI01788010NAA Reset

Price Type	Tax Ex	Tax	Tax Inc
Labor	59.50	5.95	65.45
Parts	64.42	6.44	70.86
POL & Supplies	8.35	0.84	9.19
Sublet	0.00	0.00	0.00
Miscellaneous	0.00	0.00	0.00
	132.27	13.23	145.50

Manual Estimates

Parts Estimated Cost: 150.00
Labor Estimated Cost: 200.00
Total Estimated Cost: 350.00

Operation Code	RJ	Description	Dept	S/T	Estimate	Quote	Delete
01MI01788010NAA		10,000km service	S	C	0.70	145.50	

Row 1 of 1 Page 1 of 1

Technician Instructions for: 01MI01788010NAA
Carry out 10,000km service as per handbook.
Includes:- Replace engine oil & oil filter.
Check air filter & all fluid levels, top up as required.
Check coolant level & concentration.
Check battery terminals for cleanliness & security.
Check under body lines for damage & fluid leaks.
Check drive belts & adjust tension as required.

Ok Exit

ERAnet - Transforming Automotive Retailing

Following are changes made to the Estimate Details screen:

Manual Estimates

Parts Estimated Cost	Enter the estimated parts cost.
Labor Estimated Cost	Enter the estimated labor cost.
Total Estimated Cost	This field will display the total cost for Parts and Labor.

Note: The Estimated Amount will display in RO Close Out, Estimated Amount field. Selecting this hyperlink will show the breakdown of the estimated amount.

Selecting the **Quote** hyperlink will allow the user to now manually modify technician instructions for the selected job. Once the additional instructions are written, select the **TAB** option to display the **OK** option at the action bar as per following example:

Appointment Booking

Estimate Details

Estimate details for: 01MI01788010NAA Reset

Price Type	Tax Ex	Tax	Tax Inc
Labor	59.50	5.95	65.45
Parts	65.68	6.56	72.24
POL & Supplies	8.35	0.84	9.19
Sublet	0.00	0.00	0.00
Miscellaneous	0.00	0.00	0.00
	133.53	13.35	146.88

Manual Estimates

Parts Estimated Cost

Labor Estimated Cost

Total Estimated Cost

Operation Code	R/J	Description	Dept	S/T	Estimate	Quote	Delete
01MI01788010NAA		10,000km service	S	C	0.70	146.88	<input type="checkbox"/>

Row 1 of 1 ⏪ ⏴ ⏵ ⏩ Page 1 of 1

Technician Instructions for: 01MI01788010NAA
 Additional instructions given for this job.
 Carry out 10,000km service as per handbook.
 Includes:- Replace engine oil & oil filter.
 Check air filter & all fluid levels, top up as required.
 Check coolant level & concentration.
 Check battery terminals for cleanliness & security.
 Check under body lines for damage & fluid leaks.

Ok Exit

ERAnet - Transforming Automotive Retailing

Select **Ok** from the action bar to save the changes and return to the *Book Appointment* screen to continue creating the appointment or repair order as per existing functionality.

Note: The manually added technician instruction will be displayed in *RO Close Out*, under *Instructions*.

Loan Car/Bus

The *Loan Car/Bus* report has been enhanced to display appointments that have requested a Courtesy Bus.

Select the **Loan Car/Bus** option from the navigation bar in **Service Appointments** and the following screen will be displayed:

Appointments

ERA

Search Calculator Calendar Settings DocuLink Cache

Appointments with Loan Car and/or Courtesy Bus

Search Type

☒ Appointment Date Search For

☐ Customer No

☐ Registration

Loan Car (LC) status key

N = No loan car required

R = Loan car Required but not allocated

A = Loan car Allocated

Filter

☒ Exclude Courtesy Bus

☐ Exclude Loan Cars (R/A)

☐ All Appointments

Adv	T	Rego	Customer Name	Date In	In	Date Out	Out	Op Code Description	S/T	Est	LC	Bus

Row 1 of 1 ⏪ ⏴ ⏵ ⏩ Page 1 of 1

Reset Exit

No tip available

The user now has the option to view appointments that require a courtesy bus. A new *Filter* section has been added along with an additional column where the user is able to allocate a courtesy bus.

Note: Upon entry to this screen, the default option would be *Exclude Courtesy Bus*.



Exclude Courtesy Bus

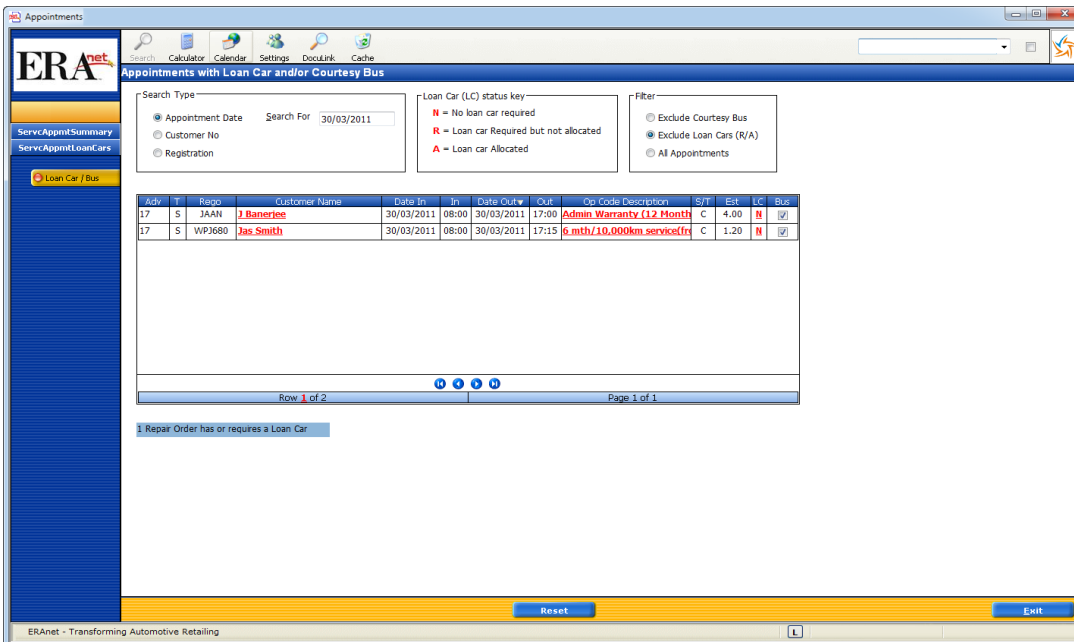
Select this option to exclude any appointments where courtesy bus is required.

ERAnet V9

Exclude Loan Cars (R/A)	Select this option to exclude any appointments where loan car is either required or has already been allocated.
All Appointments	Select this option to view all appointments that meet the criteria.

View Courtesy Bus

To view appointments that require a Courtesy Bus, select **Search Type** criteria as per existing functionality followed by either  **Exclude Loan Cars (R/A)** or  **All Appointments** and the following screen will be displayed:





The screenshot shows the ERAnet Appointments window. The 'Search Type' section has 'Appointment Date' selected with a search for '30/03/2011'. The 'Filter' section has 'Exclude Loan Cars (R/A)' selected. The table below shows two appointments:

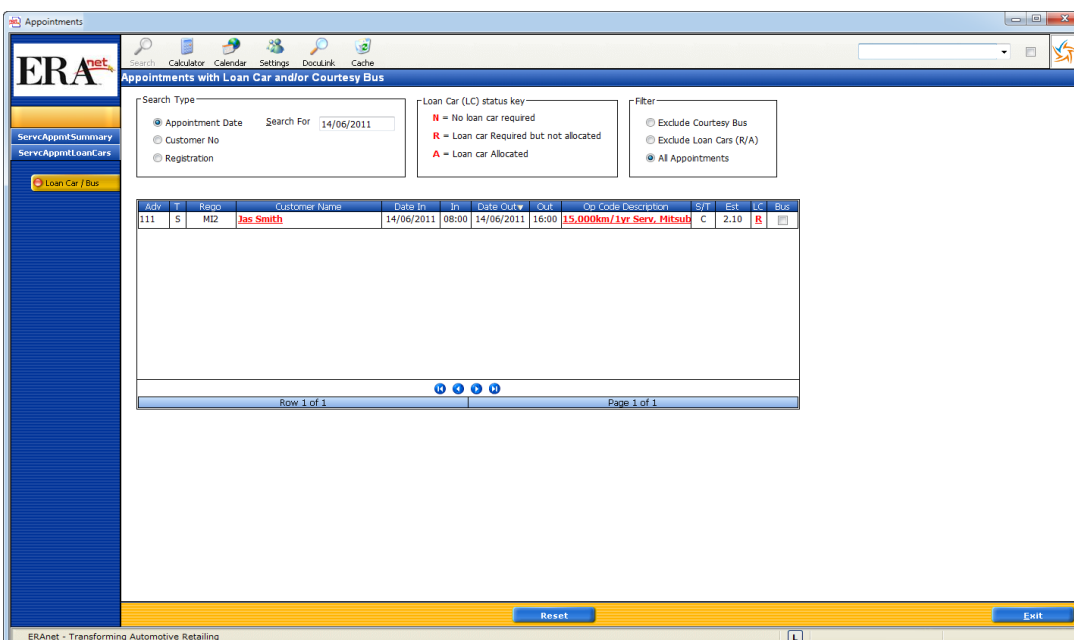
Adv	T	Rgno	Customer Name	Date In	In	Date Out	Out	Op Code Description	S/T	Est	LC	Bus
17	S	JAAAN	J. Banerjee	30/03/2011	08:00	30/03/2011	17:00	Admin Warranty (12 Month)	C	4.00	N	<input checked="" type="checkbox"/>
17	S	WP3680	Jas Smith	30/03/2011	08:00	30/03/2011	17:15	6 mth/10,000km service(fri	C	1.20	N	<input checked="" type="checkbox"/>

At the bottom, there is a message: '1 Repair Order has or requires a Loan Car'.

Note: The **Bus** option is already ☒ ticked.


Allocate Courtesy Bus

To allocate a courtesy bus, select **Search Type** criteria as per existing functionality followed by either  **Exclude Loan Cars (R/A)** or  **All Appointments** option and the following screen will be displayed:



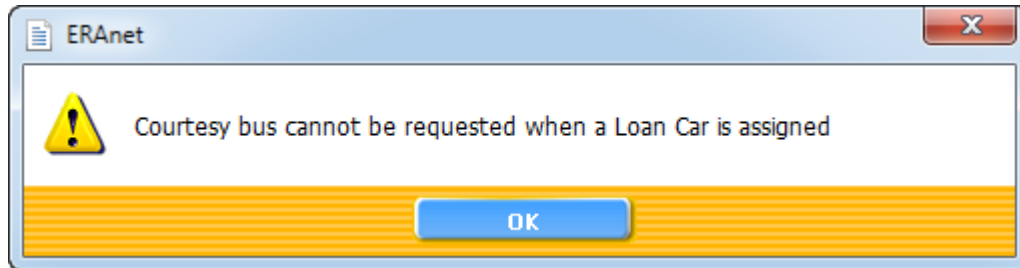
The screenshot shows the ERAnet Appointments window. The 'Search Type' section has 'Appointment Date' selected with a search for '14/06/2011'. The 'Filter' section has 'All Appointments' selected. The table below shows one appointment:

Adv	T	Rgno	Customer Name	Date In	In	Date Out	Out	Op Code Description	S/T	Est	LC	Bus
111	S	M2	Jas Smith	14/06/2011	08:00	14/06/2011	16:00	15,000km/1yr Serv. Mitsub	C	2.10	R	<input checked="" type="checkbox"/>

 Tick the **Bus** option for the relevant appointment.

Note: If the selected appointment previously required a loan car and the status was **R**, it will change that status to **N**.

If the selected appointment has an **A** status in the Loan Car column, the user will not be able to allocate a courtesy bus. The following pop up message will display when the user tries to allocate a courtesy bus:




Benefits

The added functionality streamlines the *Service Appointments* interface allowing the user added flexibility.

ERAnet – RO Close Out – GP Summary

Enhancement

Overview

A new option GP Summary has been added on the navigation bar in  **RO Close Out** to provides a summary of gross profit by customer, warranty and internal.

Why

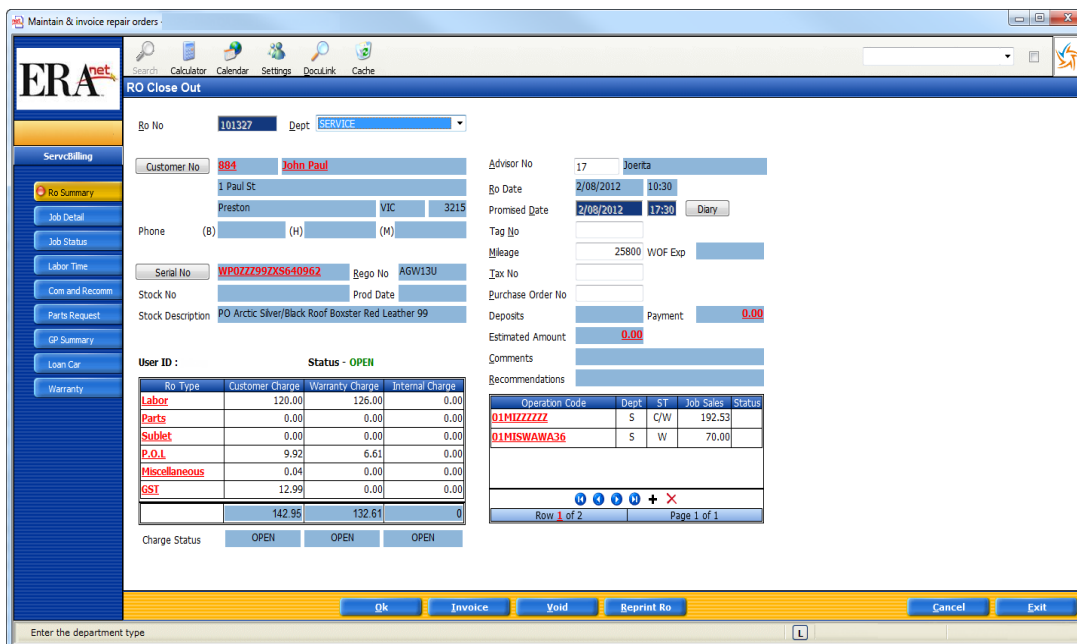
This change was made through a Request for Development submission to enhance existing functionality.

Screens

 **RO Close Out**

The Process

Upon logging into ERAnet, select  **Service**,  **RO Close Out**, enter the **repair order number** and the following screen will be displayed:



The screenshot displays the 'RO Close Out' screen in the ERAnet application. The interface includes a navigation bar on the left with options like 'Servicing', 'Ro Summary', 'Job Detail', 'Job Status', 'Labor Time', 'Com and Recomm', 'Parts Request', 'GP Summary', 'Loan Car', and 'Warranty'. The main area shows details for a repair order with 'Bo No' 101327 and 'Dept' SERVICE. Customer information includes 'Customer No' 884, 'John Paul', and '1 Paul St'. A table lists charges: Labor (120.00), Parts (0.00), Sublet (0.00), P.O.L (9.92), Miscellaneous (0.04), and GST (12.99). A summary table at the bottom shows 'Ro Type', 'Customer Charge', 'Warranty Charge', and 'Internal Charge'. The status is 'OPEN'.

Ro Type	Customer Charge	Warranty Charge	Internal Charge
Labor	120.00	126.00	0.00
Parts	0.00	0.00	0.00
Sublet	0.00	0.00	0.00
P.O.L	9.92	6.61	0.00
Miscellaneous	0.04	0.00	0.00
GST	12.99	0.00	0.00
	142.95	132.61	0

GP Summary is a new option from the navigation bar. Select the **GP Summary** option from the navigation bar and the following screen will be displayed:

Maintain & invoice repair orders

ERA.net

RO Close Out

RO No: 101327

Summary

Job Type	Sales \$	Cost \$	GP \$	GP %
Customer	129.92	9.92	120.00	92.4
Warranty	132.61	6.61	126.00	95.0
Internal				0.0
Totals	262.53	16.53	246.00	93.7

Detail for

Job	Op Code	Op Code Description	Sale Type	Sales \$	Cost \$	GP \$	GP %	Spk
-----	---------	---------------------	-----------	----------	---------	-------	------	-----

Row 1 of 1 Page 1 of 1

Continue

Summary:

Job Type	This column will display the <i>job type</i> .
Sales \$	This column will display <i>jobs sales amount</i> .
Cost \$	This column will display the <i>jobs cost amount</i> .
GP \$	This column will display the <i>gross profit</i> .
GP %	This column will display the <i>gross profit percentage</i> .

Select the required **job type** hyperlink and the job details will be displayed in the *Details for* section as per following example:

Maintain & invoice repair orders

ERA.net

RO Close Out

RO No: 101327

Summary

Job Type	Sales \$	Cost \$	GP \$	GP %
Customer	129.92	9.92	120.00	92.4
Warranty	132.61	6.61	126.00	95.0
Internal				0.0
Totals	262.53	16.53	246.00	93.7

Detail for Customer

Job	Op Code	Op Code Description	Sale Type	Sales \$	Cost \$	GP \$	GP %	Spk
1	01M1ZZZZZZ	10K SERVICE	C, CUSTOMER	129.92	9.92	120.00	92.3	W

Row 1 of 1 Page 1 of 1

Continue

No tip available

Detail for:

Job	This column will display the <i>job number</i> .
Op Code	This column will display the <i>operation code</i> .
Op Code Description	This column will display the <i>operation code description</i> .
Sale Type	This column will display the <i>sale type</i> .
Sales \$	This column will display the <i>job sales amount</i> .
Cost \$	This column will display the <i>job cost amount</i> .

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GP \$	This column will display the <i>job gross profit amount</i> .
GP %	This column will display the <i>job gross profit percentage</i> .
Split	This column will display the <i>split job</i> .

User is able to select the required **Op Code** hyperlink to view the job detail screen as displayed in the following example:

Select the required option from the above screen to continue the process.

The user is also able to click on the *Op Code Description* hyperlink to view the *Operation Code Long Description*. Select **Op Code Description** hyperlink from the detail screen and the following screen will be displayed:

Select **Exit** option and to return to the *GP Summary* screen.

If the job has a split sale, when the user selects that job it will display the other sale type which has got the split. Following is an example:

RO Close Out
RO No: 101327

Summary

Job Type	Sales \$	Cost \$	GP \$	GP %
Customer	129.92	9.92	120.00	92.4
Warranty	132.61	6.61	126.00	95.0
Internal				0.0
Totals	262.53	16.53	246.00	93.7

Detail for [Blank]

Job	Op Code	Op Code Description	Sale Type	Sales \$	Cost \$	GP \$	GP %	Split
Row 1 of 1								

Page 1 of 1

[Continue](#)

Click on the **Warranty** hyperlink and the following screen will be displayed:

RO Close Out
RO No: 101327

Summary

Job Type	Sales \$	Cost \$	GP \$	GP %
Customer	129.92	9.92	120.00	92.4
Warranty	132.61	6.61	126.00	95.0
Internal				0.0
Totals	262.53	16.53	246.00	93.7

Detail for Warranty

Job	Op Code	Op Code Description	Sale Type	Sales \$	Cost \$	GP \$	GP %	Split
1	01M1ZZZZZZ	10k SERVICE	W, WARRANTY	62.61	6.61	56.00	0.0	C
2	01MISAWA36	Admin Warranty (36 Months)	W, WARRANTY	70.00	0.00	70.00	100.0	

Row 1 of 2

Page 1 of 1

[Continue](#)

No tip available

This screen shows the both jobs which has got the split sale. Select **Continue** to return to the *RO Summary* screen

Benefits

This enhancement will allow the user to view all jobs gross profit in one screen.

ERAnet – Service Model Search screen

Enhancement

Overview

An enhancement has been made to the Service Model Search screen to increase the column width for the Description field. The search fields have also been re-sequenced to match the process flow. The functionality remains the same.

Why

This change was made to improve the core product and to continue to develop and enhance the ERAnet Service product.

The Changes

Note: The *Service Model Search* screen can be accessed from multiple screens in ERAnet.

The following changes have been made to the *Service Model Search* screen as displayed in the following example:

1. The *Search* fields have been re-sequenced to match the process flow.
2. The *Make* field has been removed to cater for the increased width of the Description field.

Model Maint Code	Description
MICCL	CC LANCER
MIEXP	ALL EXPRESS MODELS
MIGAL	ALL GALANTS
MILAN	ALL LANCER MODELS
MINFA	NF PAJERO AUTO
MINFM	NF PAJERO MANUAL
MINGA	NG PAJERO AUTO
MINGM	NG PAJERO MANUAL
MINHA	NH PAJERO AUTO
MINHM	NH PAJERO MANUAL
MINIM	ALL NIMBUS MODELS
MIPAJ	ALL PAJERO SUPPLEMENTARY
MISTR	ALL STAR WAGON MODELS
MITMA	TM MAGNA AUTO
MITMM	TM MAGNA MANUAL AR

Note: The functionality of the search has not changed.

Benefits

Increasing the *Description* field width will allow the user to view the full description of the model maintenance code before selecting the relevant model maintenance code.

ERAnet – Service Reception Enhancement

Enhancement

Overview

Various enhancements have been made to Service Reception to improve the product. Following are the changes made:

- Repair orders will now be available to select from the Rego drop down box. A specification question will control whether the repair order will display or not
- Able to add jobs to a repair order
- Repair orders can be reprinted
- Appointment search screen to include *RO* in the Type column
- A new appointment date field will appear on the Reception screen
- Able to toggle between technician instructions and customer complaints
- A new pop up message will display when the user selects an appointment that is raised for a future date
- A new comment field has been added to display the appointment comment

Why

This change was made through a Request For Development submission to enhance existing functionality.

Screens



Appointment Menu



Reception



Service

The Setup

A specification question has been created to control whether repair orders are visible in the *Reception* screen.

Select **3685 – Service Specification Maintenance** followed by **1 – All Questions** then scroll through the pages to get to **question 154** and the following screen will be displayed:

Qn#	Question	Answer
152	Restrict Pre-Delivery departments to users default service dept?	N
153	Service Application Format Setup	Y
154	Show repair orders in ERAnet Service Reception page?	Y

154 – Show repair orders in ERAnet Service Reception page?

Enter **Y** to display repair orders in the Reception screen or **N** to not display it.

Note: Selecting the Y option will only display repair orders that have been batch printed through **Batch RO Printing** or **3012 – Batch Ro Printing**.

Select **Enter** from the command line to save the changes.

The Changes

Upon logging into ERAnet, select **Service**, **Appointments Menu** and **Reception** and the following screen will be displayed:

Repair Orders

Repair orders that have been batch printed will now be available to select from the *Rego* drop down box.

Note: 3685 – *Service Specification Maintenance* specification question 154 – *Show repair orders in ERAnet Service Reception page* will determine if repair orders are available.

Select the **registration number** of the repair order from the **Rego** drop down box and the following screen will be displayed:

Service Appointment Reception

Appt Date: 10/05/2012

Dept: SERVICE

Appt Cnt: 4

Customer: JAS & MARY SMITH

Rego: 101649

Maint Code: GM01741

Estimate: 41.14

Tot Quote: 107.95

Operation Code: 01GM01741001NAA

Description: First Service

Estimate details for: 01GM01741001NAA

Price Type	Tax Ex	Tax	Tax Inc
Labor	34.00	3.40	37.40
Parts	0.00	0.00	0.00
POL & Supplies	15.00	1.50	16.50
Sublet	0.00	0.00	0.00
Miscellaneous	3.40	0.34	3.74
	52.40	5.24	57.64

Comment: Check the Breaks

Buttons: Ok, Print RO, Add Jobs, Cancel, Exit

If the repair order has any comments it will be displayed in the comment field and the user is able to update the comments and save it by selecting the **Print RO** option from the action bar.

Note: RoNo is highlighted in green.

The user is able to add jobs to a repair order. Select the **Add Jobs** option from the action bar and the *Operation Code Search* screen will be displayed:

Operation Code Search

Search By: Relevant Maint Code

Search For: Relv Maint Code

Maintenance Code: GM01741

Current Jobs

Job	Selected OpCodes	Description	Type	Emp
1	01GM01741001NAA	First Service		Y
	77GM01741STR1AA	S/F Safety Triangle		N

Sel	Operation Code	Operation Code Description	Maint Code	Dept	Sale Type	Quote (Incl. GST)	Pay Time	Bill Type	Bill Hours / Bill Amt.
	77GM01741REMHA	S/F Remote Holder	GM01741		C	50.49	0.20	H	0.20
	77GM01741SINSA	S/F Seat Inserts(Anthracite - Interior Trim)	GM01741		C	413.77	0.40	H	0.40
	77GM01741SINSA	S/F Seat Inserts(Shale - Interior Trim)	GM01741		C	51.52	0.40	H	0.40
	77GM01741STR1A	S/F Safety Triangle	GM01741		C	0.00	0.00	H	0.00
	77GM01741SVFRA	S/F Sunvisor, Frt	GM01741		C	90.16	0.70	H	0.70
	77GM01741T001A	S/F T/Bar, 1200Kg	GM01741		C	625.95	0.90	H	0.90
	77GM01741T006A	S/F T/Bar, 1600Kg	GM01741		C	140.65	0.90	H	0.90
	77GM01741T011A	S/F T/Bar, 2100Kg	GM01741		C	217.93	1.50	H	1.50
	77GM01741WS01A	S/F w/shield, Lft Frt	GM01741		C	38.64	0.30	H	0.30
	77GM01741WS02A	S/F W/Shield, Rht Frt	GM01741		C	38.64	0.30	H	0.30
	77GM01741WS04A	S/F W/Shields S/Line, Frt Both Sides	GM01741		C	64.40	0.50	H	0.50
	77GM01741WS07A	S/F W/Shields, Frt Both Sides	GM01741		C	64.40	0.50	H	0.50
	77GM01741WSREA	S/F Wind Sunshade, Rear	GM01741		C	38.64	0.30	H	0.30
	02GM01741BDFTA	Rplc Brake Discs, Front	GM01741		C	243.00	0.40	H	0.40

Buttons: Continue, Reset, Exit

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Select the required **operation code** as per existing functionality and the following screen will be displayed once **Continue** option is selected from the action bar:

Service Appointment Reception

ERA

Appt Date: 10/05/2012

Dept: SERVICE

Bego: KFC4000X

Serial No: 81PAAAIGSW8787311

Maint Code: GM01741

31 Open Rds

Mobile: (0435) 305 180

Customer: 7311 Jas & Mary Smith

Promise Date: 10/05/2012

Time: 17:30

Advisor: 17, Joerita

Operation Code: RJ

Description: First Service

Dept: S

S/T: C

Estimate: 0.50

Quote: 41.14

Delete

Operation Code: 77GM01741STR1AA

Description: S/F Safety Triangle

Dept: S

S/T: C

Estimate: 0.00

Quote: 50.31

Delete

Tot Quote: 107.95

Row 2 of 2

Page 1 of 1

Estimate details

Price Type	Tax Ex	Tax	Tax Inc
Labor	34.00	3.40	37.40
Parts	43.75	6.56	50.31
POL & Supplies	15.00	1.50	16.50
Sublet	0.00	0.00	0.00
Miscellaneous	3.40	0.34	3.74
	96.15	11.80	107.95

Comment: Check the Breaks

Ok Print RO Add Jobs Cancel Exit

Note: The user will not be able to delete jobs for repair orders through Reception. RO Close Out is used to delete jobs.

The user now has the ability to toggle between the technician instructions and customer complaints. Select the **quote amount** hyperlink for a specific job followed by the Tech or Customer options to view the details as displayed in the following example:

Service Appointment Reception

ERA

Appt Date: 10/05/2012

Dept: SERVICE

Bego: KFC4000X

Serial No: 81PAAAIGSW8787311

Maint Code: GM01741

31 Open Rds

Mobile: (0435) 305 180

Customer: 7311 Jas & Mary Smith

Promise Date: 10/05/2012

Time: 17:30

Advisor: 17, Joerita

Operation Code: RJ

Description: First Service

Dept: S

S/T: C

Estimate: 0.50

Quote: 41.14

Delete

Operation Code: 77GM01741STR1AA

Description: S/F Safety Triangle

Dept: S

S/T: C

Estimate: 0.00

Quote: 50.31

Delete

Tot Quote: 107.95

Row 1 of 2

Page 1 of 1

Estimate details

Price Type	Tax Ex	Tax	Tax Inc
Labor	34.00	3.40	37.40
Parts	43.75	6.56	50.31
POL & Supplies	15.00	1.50	16.50
Sublet	0.00	0.00	0.00
Miscellaneous	3.40	0.34	3.74
	96.15	11.80	107.95

Comment: Check the Breaks

Ok Print RO Add Jobs Cancel Exit

The user will need to either save the repair order or reprint the repair order in order for the newly added jobs to be saved against that repair order.

Select **OK** from the action bar to save the repair order or select **Print RO** from the action bar and enter a **printer name** as per existing functionality to reprint the repair order.

Note: Selecting the **Cancel** or **Exit** options from the action bar at this stage will not save the newly added job to the repair order. If the *Appt Date* is in the past and a registration number for a repair order is selected, the **OK** option from the action bar will not be displayed.

Search button

RO type has been included in the *Appointment Search* screen to differentiate between quotes, appointments and repair orders.

Select the **Search** button and the *Appointment Search* screen will be displayed:

Apt/Quote No	Type	Date	Time	Dept	Store	Rego	Vehicle	Cust No	Name
2255	APT	04/07/2011	09:00	S	320	SLQ582	PAJERO LWB GLX 3.0 V6 AUTO	1249	Rowland Jones
101071	RO	28/06/2011	08:00	S	320	SLQ582	PAJERO LWB GLX 3.0 V6 AUTO	1249	Rowland Jones

Row 1 of 2 Page 1 of 1

Customer Details

Customer: [1249](#) Rowland Jones Street Addr 1: [16 Sabugal Road](#)


Phone (H): [5482197](#) (B): [5171233](#) (M): [\(0400\) 000 000](#) Street Addr 2:


Bus Email: Suburb: [Engadine](#) PostCode: [2233](#)

Enter the customer name or number you wish to search for

Cancel Exit

Enter the relevant **search criteria** as per existing functionality and a list of quotes, appointments and repair orders will display.

Select the required **[repair order number](#)** hyperlink and the repair order details will be displayed in the  *Reception* screen.

Select the required **[Appointment number](#)** hyperlink and the appointment details will be displayed in the  *Reception* screen as follows

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Service Appointment Reception

Appt Date: 10/05/2012

Dept: SERVICE Appt Cnt: 4

Rego: SLQ582 Name: Search Customer: 1249 Rowland Jones

Serial No: JMFH6W45N010591 Maint Code: M0IH62 1 Open ROs Mobile: (0400) 000 000

UWB GLX 3.0 V6 AUTO Bill To: 4070 Artronic Productions P/L

Kms: 50127 Tag No: Wait Job: ☐ Courtesy Bus: ☐ Loan Car: ☐ Promise Date: 10/05/2012 Time: 13:00

Advisor: 17, Joetta Appt Date: 10/05/2012 Time: 09:00

Operation Code	Description	Dept	S/T	Estimate	Quota	Delete
01MISWAWA24	Default Opcode	S	C	1.00	0.00	<input type="checkbox"/>

Row 1 of 1 Tot Quote: 0.00

Estimate details:

Price Type	Tax Ex	Tax	Tax Inc
Labor	0.00	0.00	0.00
Parts	0.00	0.00	0.00
POL & Supplies	0.00	0.00	0.00
Sublet	0.00	0.00	0.00
Miscellaneous	0.00	0.00	0.00
	0	0	0

Comment: check the window screen

Print RO Add Jobs Cancel Exit

If the appointment has any comments it will be displayed in the comment field and the user is able to update the comments and save it by selecting the **Print RO** option from the action bar.

Appt Date field

The **Appt Date** field allows the user to enter a future date and modify the appointment or repair order in the event something was left out at the time the appointment or repair order was created.

For example, a repair order is created without the customer indicating that a **Courtesy Bus** is required. The user is able to bring up that repair order by entering the scheduled appointment date in the **Appt Date** field followed by the vehicle registration number from the **Rego** dropdown box and the repair order details will display as per following example:

Service Appointment Reception

Appt Date: 10/05/2012

Dept: SERVICE Appt Cnt: 4

Rego: KFC4000X Name: Search Customer: 2311 Jas & Mary Smith

Serial No: MFAAAJGSW8767311 Maint Code: GM01741 31 Open ROs Mobile: (0435) 305 180 RoNo: 101649

Caprice V6

Kms: 1000 Tag No: Wait Job: ☐ Courtesy Bus: ☒ Loan Car: ☐ Promise Date: 10/05/2012 Time: 17:30

Advisor: 17, Joetta Appt Date: 10/05/2012 Time: 07:30

Operation Code	Description	Dept	S/T	Estimate	Quota	Delete
01GM01741001NAA	First Service	S	C	0.50	41.14	<input type="checkbox"/>
77GM01741STR1AA	S/F Safety Triangle	S	C	0.00	50.31	<input type="checkbox"/>

Row 2 of 2 Tot Quote: 107.99

Estimate details:

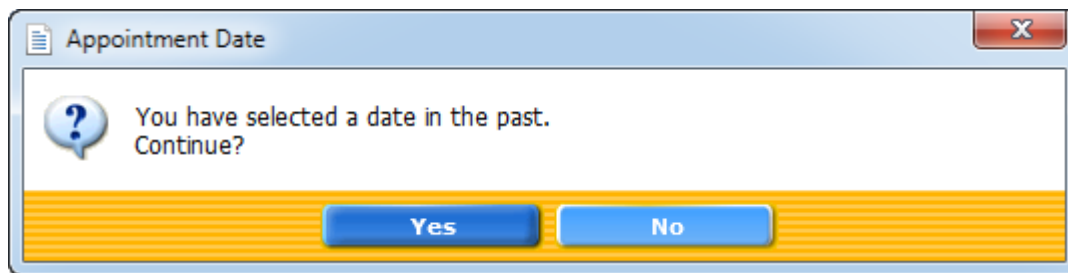
Price Type	Tax Ex	Tax	Tax Inc
Labor	34.00	3.40	37.40
Parts	43.75	6.56	50.31
POL & Supplies	15.00	1.50	16.50
Sublet	0.00	0.00	0.00
Miscellaneous	3.40	0.34	3.74
	96.15	11.80	107.95

Comment: Check the Breaks

OK Print RO Add Jobs Cancel Exit

The user is now able to update the repair order by ☒ ticking the **Courtesy Bus** option or making any other modifications and reprinting it.

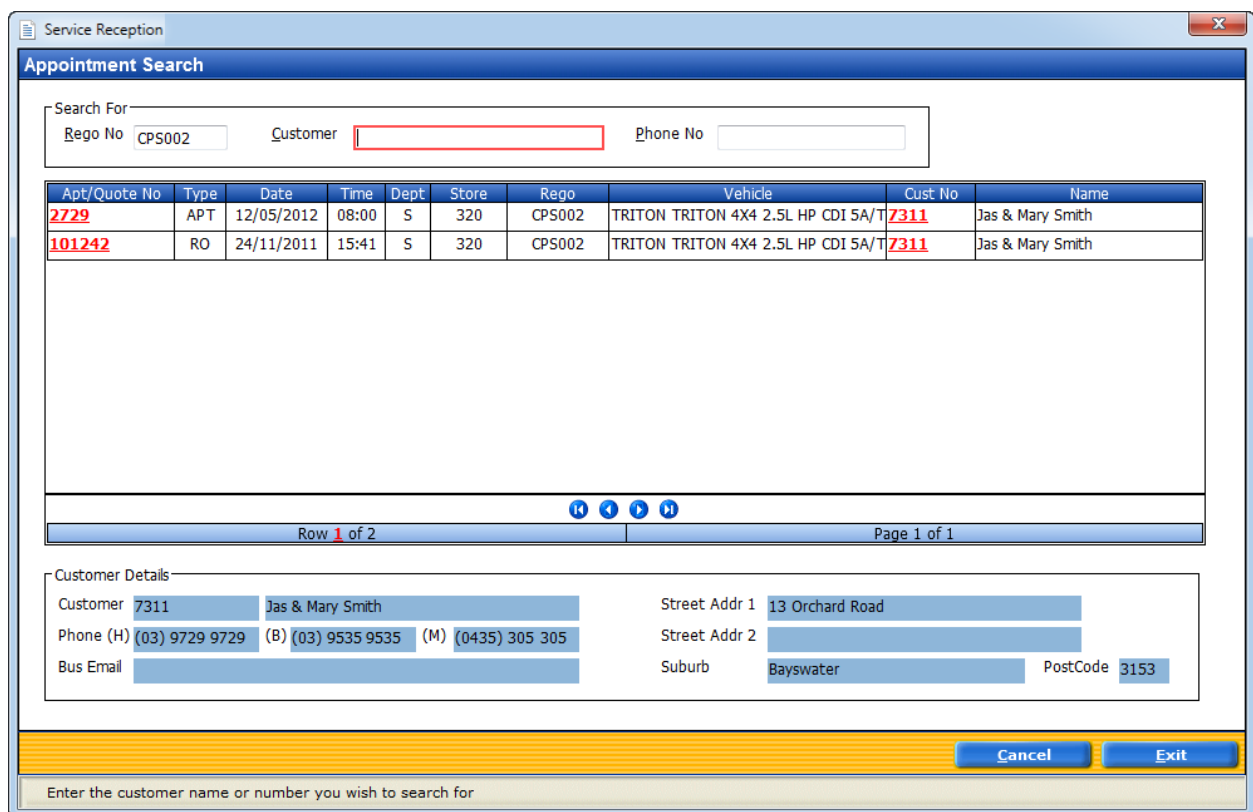
Note: The user is also able to enter a date in the past. Entering a **past date** in the *Appt Date* field will display the following pop up message:



Select **Yes** to update the *Appt Date* field with the past date or **No** to retain the current date.

Future Appointments

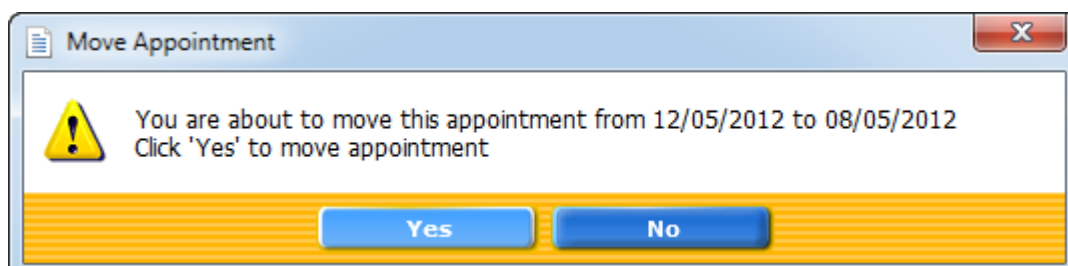
Users are able to move future appointments to the current date. From the **Reception** screen, select the **Search** button and the following screen will display:

A screenshot of the "Service Reception" window. The "Appointment Search" section is active, showing search criteria: Rego No (CPS002), Customer (empty), and Phone No (empty). Below is a table of search results. The table has columns: Apt/Quote No, Type, Date, Time, Dept, Store, Rego, Vehicle, Cust No, and Name. Two rows are displayed. Below the table is a pagination bar showing "Row 1 of 2" and "Page 1 of 1". At the bottom, there is a "Customer Details" section with fields for Customer (7311), Name (Jas & Mary Smith), Phone (H) (03) 9729 9729, (B) (03) 9535 9535, (M) (0435) 305 305, Bus Email, Street Addr 1 (13 Orchard Road), Street Addr 2, Suburb (Bayswater), and PostCode (3153). At the bottom right are "Cancel" and "Exit" buttons. A footer bar contains the text "Enter the customer name or number you wish to search for".

Apt/Quote No	Type	Date	Time	Dept	Store	Rego	Vehicle	Cust No	Name
2729	APT	12/05/2012	08:00	S	320	CPS002	TRITON TRITON 4X4 2.5L HP CDI 5A/T	7311	Jas & Mary Smith
101242	RO	24/11/2011	15:41	S	320	CPS002	TRITON TRITON 4X4 2.5L HP CDI 5A/T	7311	Jas & Mary Smith

Enter the relevant **search criteria** as per existing functionality and a list of quotes, appointments and repair orders will display:

When an **appointment** with a future date is selected, the following pop up message will display:



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Select **Yes** to move the future appointment booking to the current date or **No** to leave the original appointment dates.

Benefits

These enhancements will further streamline the driveway check-in process allowing the advisor to perform more functionality from the *Reception* interface.

ERAnet – Service Scheduling

Optional Software

Overview

Service scheduling will cater for multiple mechanics and departments and drill down to individual jobs (Repair Orders). The workshop controller can quickly identify what Jobs mechanics are currently working on and how much work they have scheduled against them.

Why

A Visual solution for workshop controllers to see what work is yet to be allocated.

Screens



Workshop Control



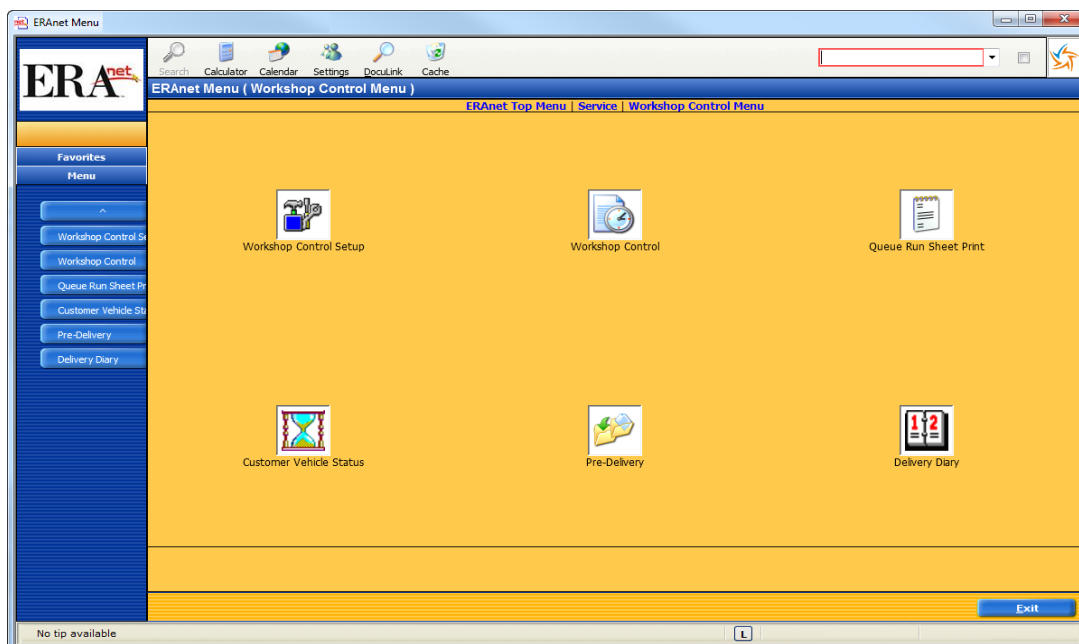
Workshop Control Menu




Workshop Control Setup

The Setup

In the  **Service** menu, select  **Workshop Control Menu** and the following screen will be displayed:



Select  **Workshop Control Setup** and the following screen will be displayed:

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Workshop Control Setup

Workshop Control | Customer Vehicle Status | Advert

Users with Reporting Access

Restrict SMS Access to Specific Users ☐

Options

Tag ROs due for pickup within 15 minutes

Refresh Interval 15 minutes

Work Scheduling Default Repair Order Job

Advisor Update Allowed Yes

Appt Entry Method Service Appointments

Tag Update Allowed Yes

Use Extended Screen ☐

Ok Exit

A new field **Work Scheduling Default** has been added to allow the user to choose from two workshop levels. 1: Repair Order & 2: Repair Job.

Option 1: Work Scheduling Default	Repair Order Job will drill down to Repair Order Job Level.
Option 2: Work Scheduling Default	Repair Job will drill down to Repair Order Level.

Select **OK** from the action bar to save the changes and return to the **Workshop Control Menu**.

The Process

Once the setup has been completed, select **Workshop Control**, from the **Workshop Control Menu** and the following screen will be displayed:

Workshop Control Description

Parameters

Team Service

Date 11/04/2012 As at

Search

Filter



Colour Codes

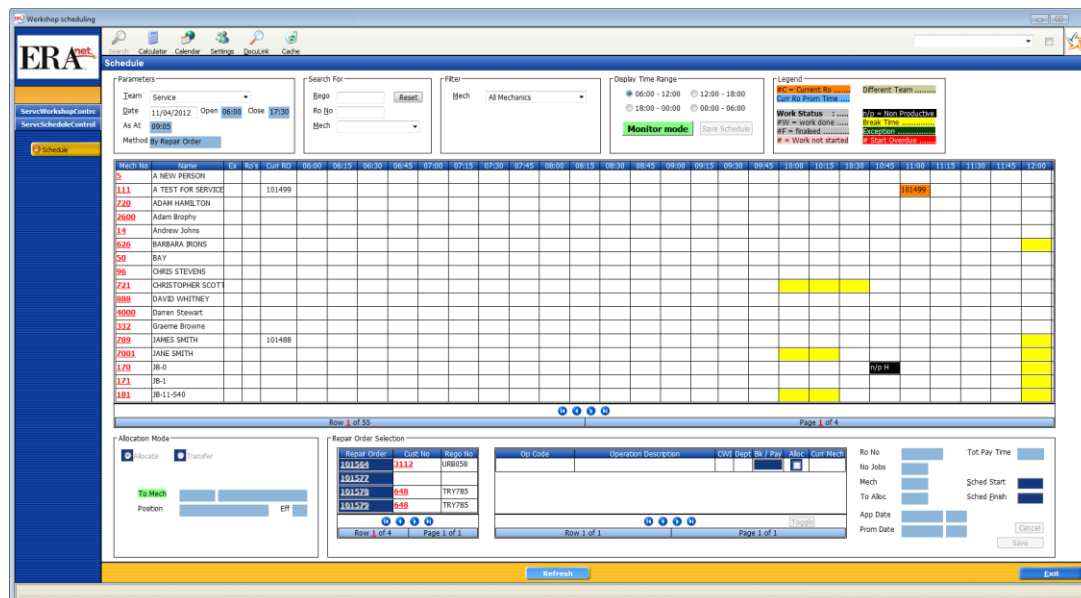
In Progress | Invoiced | Express Bays

Opt	Adv	Ro No	Tag	Job Clock On	Mech	Jobs	Due Date	Ram	St	Status Description	Mag	Customer Name	Rego	Vehicle Description	Exp
Row 1 of 1															


Run Sheet Refresh Reset Import RO Exit

The following new item has been added in to the  **Workshop Control** screen. **Scheduling** has been added to the current workshop control function for the user to allocate work.






Scheduling	Select Scheduling  from the navigation bar.
Mech #	This is the mechanics number. Note: This will display technicians in alphabetical order showing 15 minute time slots to indicate work.
Name	This is the name of the mechanic.
Ex	Technician exceptions.
Ro's	Will display Repair Orders waiting to start work.
Curr RO	Will display the current Repair Order clocked on by the Mech# Note: Technicians can use either 3659 in ERA or ERO Clocking in ERAnet. 
Time slots	Time slots will be in 15 minute increments and will be coloured based upon the status of the work.



The screenshot displays the 'Workshop scheduling' window. On the left, a list of technicians is shown with their names and IDs. The main area is a grid where work can be scheduled for each technician across different time slots. On the right, there are several panels: 'Parameters' for setting team, date, and time; 'Search For' for finding specific repair orders or mechanics; 'Display Time Range' for selecting time intervals; and 'Legend' for understanding the color-coding of the time slots. At the bottom, there are controls for 'Allocation Mode' (Allocate or Transfer) and a 'Repair Order Selection' table.


The following fields below have been added to  **Workshop Control Schedule:**

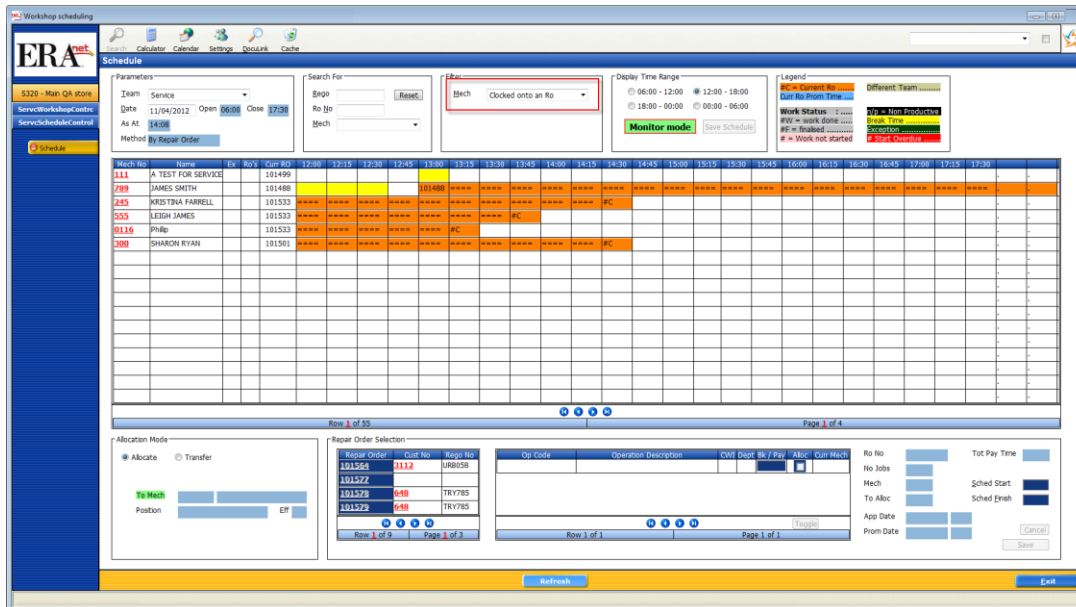
Parameters

Team	This will show the default team for the user in workshop control  Note: To change this team select from the drop down menu. 
Date	This will be the current system date.
Time	This will be the current system time.
Rego	Search for a specific registration number. Note: The Repair Order needs to be clocked on using either 3659 in ERA or ERO Clocking in ERAnet. 
RO No	Search for a specific repair order. Note: The Repair Order needs to be clocked on using either 3659 in ERA or ERO Clocking in ERAnet. 
Mech	Search for a specific technician. Note: The drop down box  will display the name of the technician in alphabetical order.

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Filter

<p>Mech</p>	<p>The user can filter from a drop down box  selection between Technicians clocked onto a Repair Order Or Not clocked onto a Repair Order.</p> <p>Note: This can only be viewed in Monitor Mode</p>
--------------------	--



Select **Refresh** from the action bar to update any changes to the schedule and return to **Monitor Mode**.

Display Time Range – This will automatically refresh at intervals set up in  Workshop Control Setup

	All work will appear in the schedule between 6am and 12pm when this item is manually selected.
	All work will appear in the schedule between 12pm and 6pm when this item is manually selected.
	All work will appear in the schedule between 6pm and 12am when this item is manually selected.
	All work will appear in the schedule between 12am and 6am when this item is manually selected.

Schedule Mode

Select **Schedule Mode** from the **Display Time Range** to open **Allocation Mode** in Service Scheduling.

<p><input checked="" type="radio"/> Allocate</p> <p>hyperlink</p>	<p>Select the radio button <input checked="" type="radio"/> to Allocate</p> <p>Select the hyperlink Mech No relevant to the Mechanic in the column to Allocate work.</p> <p>Note: The Mechanic selected will be highlighted in Green. <i>Multiple selections will also be highlighted</i></p>
--	--

<p>To Mech</p> <p>Repair Order Selection</p>	<p>This will display the Mechanic selected in Allocation Mode.</p> <p>Select the hyperlink Repair Order for this allocation</p> <p>Note: This will populate the Repair Oder details in the below screen example.</p>
--	--

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Parameters
Team: Service
Date: 12/04/2012 Open: 06:00 Close: 17:30
As At: 12:35
Method: By Repair Order

Search For:
Rgn: [] Reset
Rt: []
Mech: []

Filter:
Mech: All Mechanics

Display Time Range:
06:00 - 12:00 12:00 - 18:00
18:00 - 06:00 00:00 - 06:00
Schedule mode Save Schedule

Legend:
Work Status: [] Constant Rate [] Non Productive [] Break Time [] Stop Overlap
Can Be From Time: []
Work Status: [] Work done [] Break Time [] Stop Overlap
Work Status: [] Work done [] Break Time [] Stop Overlap

Allocation Mode:
☒ Allocate ☐ Transfer

Repair Order Selection:

Repair Order	Curr No	Page No
101586	14	1
101587	14	1

Op Code **Operation Description** **CHG Dept** **BL / Pst** **Alloc** **Curr Mech**

01412222222222	HYNDAL TEST OPCODE	C	14	0.00	14
01412222222222	7.500km/5th Serv	C	14	0.00	14

Ro No **Tot Pay Time**
101586 0.50
No Jobs 2
Mech 14 2
To Alloc 0
App Date 12/04/2012 17:30
From Date
Cancel Save

Select **Save** to save the changes and return to *Schedule Mode*.

Repair Order Selection Repair Order **101586** is now allocated to Mech No **14**

Parameters
Team: Service
Date: 12/04/2012 Open: 06:00 Close: 17:30
As At: 12:35
Method: By Repair Order

Search For:
Rgn: [] Reset
Rt: []
Mech: []

Filter:
Mech: All Mechanics

Display Time Range:
06:00 - 12:00 12:00 - 18:00
18:00 - 06:00 00:00 - 06:00
Schedule mode Save Schedule

Legend:
Work Status: [] Constant Rate [] Non Productive [] Break Time [] Stop Overlap
Can Be From Time: []
Work Status: [] Work done [] Break Time [] Stop Overlap
Work Status: [] Work done [] Break Time [] Stop Overlap

Allocation Mode:
☒ Allocate ☐ Transfer

Repair Order Selection:

Repair Order	Curr No	Page No
101586	14	1
101587	14	1

Op Code **Operation Description** **CHG Dept** **BL / Pst** **Alloc** **Curr Mech**

01412222222222	HYNDAL TEST OPCODE	C	14	0.00	14
01412222222222	7.500km/5th Serv	C	14	0.00	14

Ro No **Tot Pay Time**
101586 0.50
No Jobs 2
Mech 14 2
To Alloc 0
App Date 12/04/2012 17:30
From Date
Cancel Save

Transfer

To **Transfer** the Repair Order *from* a Mechanic, select the Mech No **hyperlink** that currently has a Repair Order allocated to them.

Note: The Mechanic will be highlighted in **Blue**.

[hyperlink](#)

Select the [hyperlink](#) Mech No that you wish to Transfer the Repair Order **to**.

Note: The Mechanic selected to receive the Repair Order will be highlighted in **Green**.

If you select the Repair Order hyperlink before selecting the Mech No you will receive the below message. Select **OK** to continue.

[hyperlink](#)

Select the Repair Order [hyperlink](#) you wish to transfer.

Note: This will bring up the Repair Order details in the **Repair Order Selection** box.

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	Select Save to apply your changes to the Service Schedule. Note: The Repair Order will now be allocated to a new Mechanic.
	Note: You can Cancel your selection in Transfer Mode at any time. This will return your Schedule to the original table.
	Note: Users have the ability to switch Mechanics already selected in Transfer Mode using this button.

Select **Save Schedule** to apply changes.

	Note: You can Cancel your selection in Transfer Mode at any time. This will return your Schedule to the original table.
	Note: Users have the ability to switch Mechanics already selected in Transfer Mode using this button.

Legend

Status	Colour	Description
# = Work not started		Jobs allocated to the tech that he has yet to clock onto
#W = work done		Job previously clocked onto. Where there is an * it indicates the job has a final clocking flag has been entered in RO Closeout.
#C = Current Ro		Currently clocked and working
Break Time		Break time as defined in 3072.
Curr Ro Prom Time		Promise time as per WIPROCESS for current job being worked on
n/p = Non Productive		Technician has been scheduled for an exception or has clocked a NON Productive category
Exception		Technician has an exception set up in 0983

Benefits

Service Scheduling offers the workshop controller a *clear* snapshot of the work scheduled in their selected department.

At any given time selected by the workshop controller, Service Scheduling will show unallocated Repair Orders and unallocated time for each Mechanic/Technician; further assisting in the creation of efficiencies in the service department.

Service Scheduling is designed to be a visual representation of ALL activities in the dealership service departments and refresh at intervals making the data represented a real time environment.

Activation Key

ERANET-SERV-SCHED

ERAnet – Technician Performance Report – Print Technician Rate

Enhancement

Overview

A new *Print Technician Rate* field has been added to Technician Performance Report to provide users the flexibility of displaying technician's rate on the report. The remaining functionality of the report is the same. This enhancement is applicable for both ERA and ERAnet.

Why

This change was made through a Request For Development submission to enhance existing functionality.

Screens




Technician Performance Report

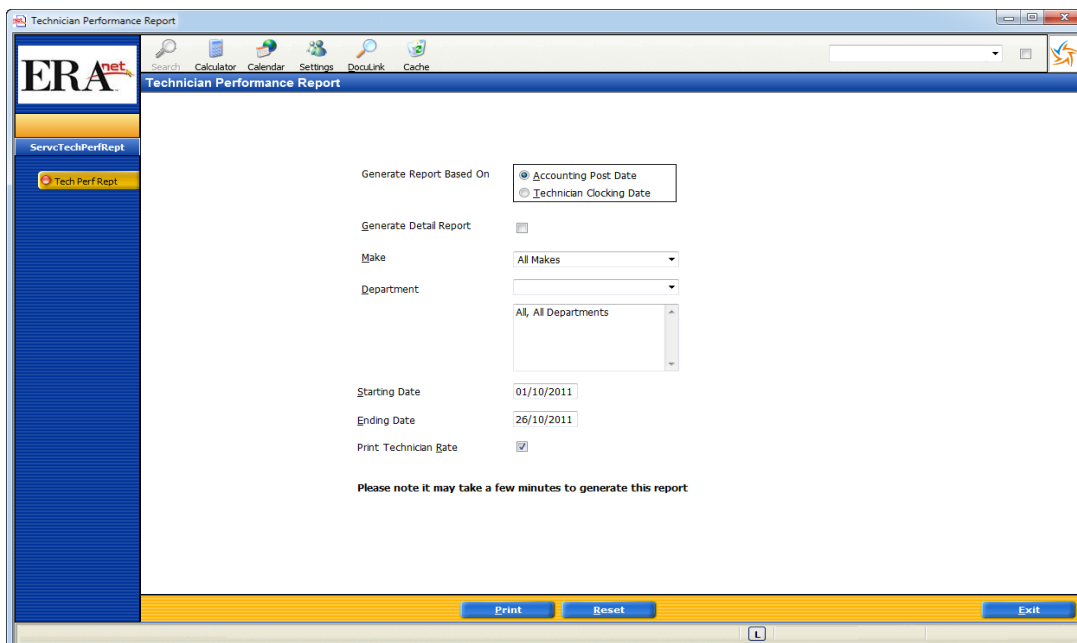
3612 – Technician Performance Rpt

The Process

ERAnet

A new *Print Technician Rate* option has been added to  *Technician Performance Report*.

Upon logging into ERAnet, select  **Service**,  **Reports Menu** followed by  **Technician Performance Report** and the following screen will be displayed:



The following field is new to this screen:

Print Technician Rate	<input checked="" type="checkbox"/> Tick this option to display the technician's rate on the report, or leave this option un-ticked to not display the technician's rate on the report.
------------------------------	--

Select the **Print** option from the action bar to print the report as per existing functionality.

ERA

A new *Print Technician Rate* field has been added to 3612 – *Technician Performance Rpt*.
Select **3612 – Technician Performance Rpt** and the following screen will be displayed:

ERA

File Edit Setup Run Help

Technician Performance Rpt 3612

1. Generate report based on (A)ccounting post date
or (T)echnician clocking date T

2. Make ALL All Makes

3. Department ALL All Departments

4. Starting Date 01 OCT 2011

5. Ending Date 26 OCT 2011

6. Generate Detail Report No

7. Print Technician Rate Yes

Command: Enter Modify field# eXit

Help: Save the current entries

Ready Ln 16, Col 36 NUM

The following field is new to this screen:

Print Technician Rate	Enter Y for Yes to display the technician's rate on the report, N for No to not display the technician's rate on the report. Note: Leaving this field blank is equivalent to <i>No</i> .
------------------------------	--

Select the **Enter** option from the command line to print the report as per existing functionality.

Report

The new *Rate* field is displayed next to the *Technician Name* field on the report as displayed in the following example:

ERAnet V9

26/10/11		Technicians Performance Report										
14:27:53		Make All Makes	Dept All Departments	Technician Clocking		From 01/10/11 To 26/10/11		Page 0001				
Tech#	Technician Name.....	Rate...	CWI	Charge Amt.	Cost Amt...	Gross Amt..	Hours.....	Av.Chg/Hr	Av.Cst/Hr	Av.Grs/Hr	Ublld/Hrs	Eff

17	JG	15.000	C	650.00	56.92	593.08	3.42	190.06	16.64	173.42		263
			I	68.00	10.05	57.95	0.67	101.49	15.00	86.49		299
			W	80.00	11.25	68.75	0.75	106.67	15.00	91.67		267
						798.00	78.22	719.78	4.84	164.88	16.16	148.71

1	Kerry	10.000	C	158.40	5.00	153.40	0.50	316.80	10.00	306.80		660
						158.40	5.00	153.40	0.50	316.80	10.00	306.80

14	Andrew Johns	35.000	C	242.50	49.70	192.80	1.42	170.77	35.00	135.77		387
						242.50	49.70	192.80	1.42	170.77	35.00	135.77

16	JT	10.000	W	0.00	6.70	-6.70	0.67	0.00	10.00	-10.00	0.67	0
						0.00	6.70	-6.70	0.67	0.00	10.00	-10.00

* Overall Mechanic Total *		17.500	C	1,050.90	111.62	939.28	5.34	196.80	20.90	175.90		0.00
			I	68.00	10.05	57.95	0.67	101.49	15.00	86.49		0.00
			W	80.00	17.95	62.05	1.42	56.34	12.64	43.70		0.67

***** Overall Grand Total *****				1,198.90	139.62	1,059.28	7.43	161.36	18.79	142.57		0.67

Note: The *Rate* displayed for the technician is the default rate as setup in 3073 – *Technicians / Advisors*.

The following is an example of the Technician Performance Report not displaying the *Rate* details:

26/10/11		Technicians Performance Report									
14:41:13		Make All Makes	Dept All Departments	Technician Clocking		From 01/10/11 To 26/10/11		Page 0001			
Tech#	Technician Name.....	CWI	Charge Amt.	Cost Amt...	Gross Amt..	Hours.....	Av.Chg/Hr	Av.Cst/Hr	Av.Grs/Hr	Ublld/Hrs	Eff

17	JG	C	650.00	56.92	593.08	3.42	190.06	16.64	173.42		263
		I	68.00	10.05	57.95	0.67	101.49	15.00	86.49		299
		W	80.00	11.25	68.75	0.75	106.67	15.00	91.67		267
				798.00	78.22	719.78	4.84	164.88	16.16	148.71	0.00

1	Kerry	C	158.40	5.00	153.40	0.50	316.80	10.00	306.80		660
				158.40	5.00	153.40	0.50	316.80	10.00	306.80	0.00

14	Andrew Johns	C	242.50	49.70	192.80	1.42	170.77	35.00	135.77		387
				242.50	49.70	192.80	1.42	170.77	35.00	135.77	0.00

16	JT	W	0.00	6.70	-6.70	0.67	0.00	10.00	-10.00	0.67	0
				0.00	6.70	-6.70	0.67	0.00	10.00	-10.00	0.67

* Overall Mechanic Total *			C	1,050.90	111.62	939.28	5.34	196.80	20.90	175.90	0.00
			I	68.00	10.05	57.95	0.67	101.49	15.00	86.49	0.00
			W	80.00	17.95	62.05	1.42	56.34	12.64	43.70	0.67

***** Overall Grand Total *****				1,198.90	139.62	1,059.28	7.43	161.36	18.79	142.57	0.67
=====											

Benefits

This enhancement will give Service Managers the ability to execute technician performance report without having to filter out rates.

ERAnet – Technician Work Hours Maint

Core Product

Overview

3072 – Tech Work Hours has been written in ERAnet to allow the Service Manager to maintain their technicians' normal attendance hours and exceptions through ERAnet.

Why

This change was made through a Request For Development submission to enhance existing functionality.

Screens



Service



Technician Time Menu

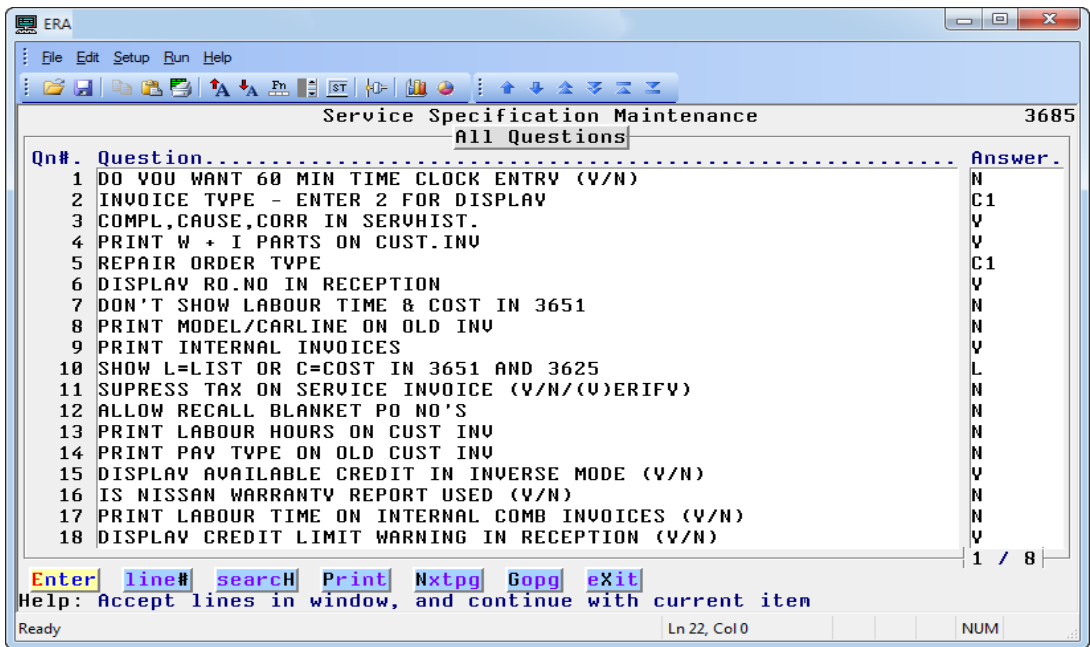


Tech Work Hours Maint

3685 – Service Spec Maint

The Setup


Users will need to check and update specification question in 3685 – Service Spec Maint as per Dealership's business process rules. Select **3685 – Service Spec Maint**, followed by **1 – All Questions** and the following screen will be displayed:



The user will need to select the **Nxtpg** option from the command line to go to the relevant pages:

49 – ADD AVAILABLE HOURS BY TEAM	Enter Y for Yes to add available hours by team or N for No to not add available hours by team. Note: If this question was previously set to N for No and is changed
---	---

ERAnet V9

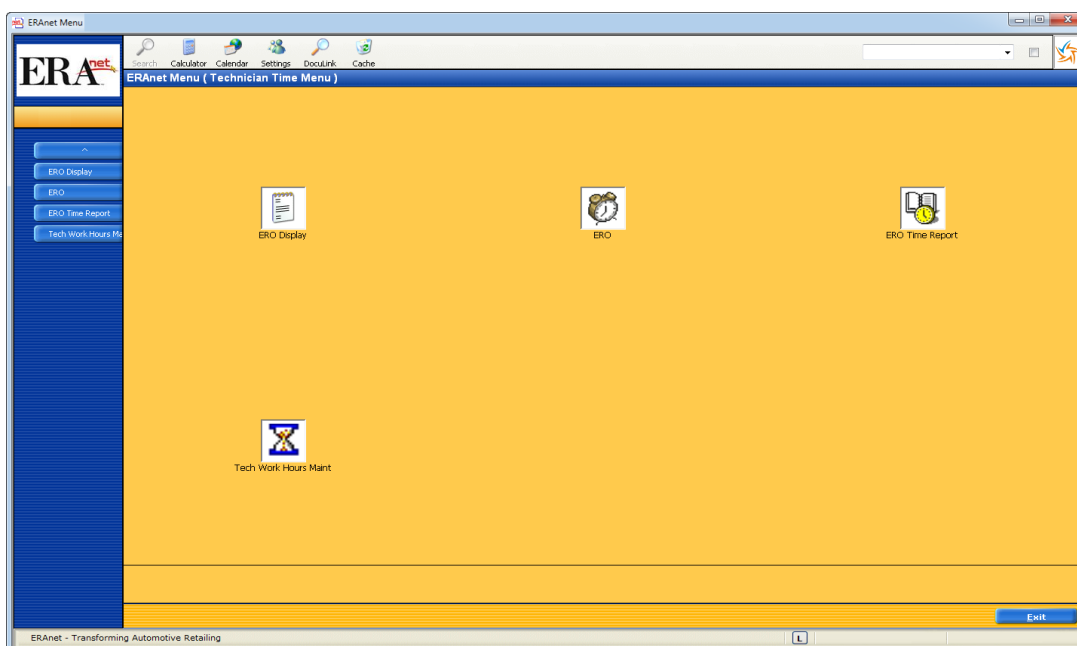
to Y for Yes, then the user must to go through  *Tech Work Hours Maint* and for those technician with multiple teams allocated, the normal attendance hours and exceptions other than public holidays will need to be distributed between all the departments.


If the user doesn't enter the exceptions across all teams, the system will distribute the hours equally amongst all the teams for that technician.

Select **Enter** from the command line to save the changes.

The Process

From within ERAnet, select  **Service**, followed by  **Technician Time Menu** and the following screen will be displayed:



Select  **Tech Work Hours Maint** and the following screen will be displayed:

ERA net
Tech Work Hours Maint

Employee Number: 7000, Jon
Position: Technician
Shift Code: NOR
Start Work Dt: 30/03/2011
Inactive date:
Efficiency: 100

Normal Attendance Hours

Day	Hours	Edit
Monday	7.60	Edit
Tuesday	7.60	Edit
Wednesday	7.60	Edit
Thursday	7.60	Edit
Friday	7.60	Edit
Saturday		Edit
Sunday		Edit

Current Exceptions

Date	Hours	Code	Reason
27/12/2011	0.00	PH	PUBLIC HOLIDAY
26/12/2011	0.00	PH	PUBLIC HOLIDAY
01/11/2011	0.00	PH	PUBLIC HOLIDAY
13/06/2011	0.00	PH	PUBLIC HOLIDAY
27/04/2011	5.00	SL	SICK LEAVE
26/04/2011	0.00	PH	PUBLIC HOLIDAY
25/04/2011	0.00	PH	PUBLIC HOLIDAY
23/04/2011	0.00	PH	PUBLIC HOLIDAY
22/04/2011	0.00	PH	PUBLIC HOLIDAY
01/04/2011	1.00	FU	FUNERAL

Row 1 of 3 Page 1 of 3

Ok Exceptions Cancel Exit

Employee Number	Enter the <i>employee number</i> or select an employee from the <i>dropdown box</i> .
Position	This field will automatically display the position as entered in 0920 - Personnel File Maintenance.
Shift Code	This field will automatically display the shift code as entered in 3073 – Technicians / Advisors.
Start Work Dt	This field will automatically display the start work date as entered in 3073 – Technicians / Advisors.
Inactive date	This field will display the employee’s termination date as entered in 0920 - Personnel File Maintenance.
Efficiency	Enter the employee’s <i>efficiency</i> rating.

Normal Attendance Hours

Enter the employee’s *normal attendance hours* against the relevant days. The *hours* field is not mandatory and can be left blank to indicate that the employee does not work on that day.

Dealerships have the option to distribute available hours by teams. This is controlled by specification question 49 – *ADD AVAILABLE HOURS BY TEAM* in 3685 - *Service Spec Maint*. Setting this question to *Yes* means that the user will need to ensure that all employees who work for multiple teams for that store have their normal attendance hours distributed between the different teams.

To enter the available hours for each team, select the **Edit** button for a relevant day and the following pop up screen will be displayed:

ERAnet V9

Teams	Description	Hours
S	SERVICE	7.60
P	P.D.	0.00

Row 1 of 2 Page 1 of 1

Ok **Exit**

Enter the required data


Note: The *Hours per team* pop screen will not appear for employees who work in only one team.

Hours Available For Allocation	This field will display the total number of hours that is available to allocate for that employee for that day.
Teams	This field will display a list of all the teams the employee is setup for.
Description	This field will display the team description.
Hours	Distribute the available hours into the relevant teams by entering the hours against the relevant teams.

Select **Ok** from the action bar to save the changes, or **Exit** to return to the  *Tech Work Hours Maint* screen without saving the distributed hours.

Note: The system will not allow the user to exit the *Hours per team* screen until all *Hours Available For Allocation* have been allocated. The following pop up message will display as an indication that hours need to be allocated:

ERAnet

 Breakdown total does not match hours to allocate

OK

Select **OK** to return to the *Hours per team* screen to allocate the hours.


Break Time

Enter the **Break Start** and **Break Finish** times. To add multiple break times, select the **+** option and enter the **start** and **finish** times. To remove a break time, select the relevant line followed by the **x** option.

Current Exceptions

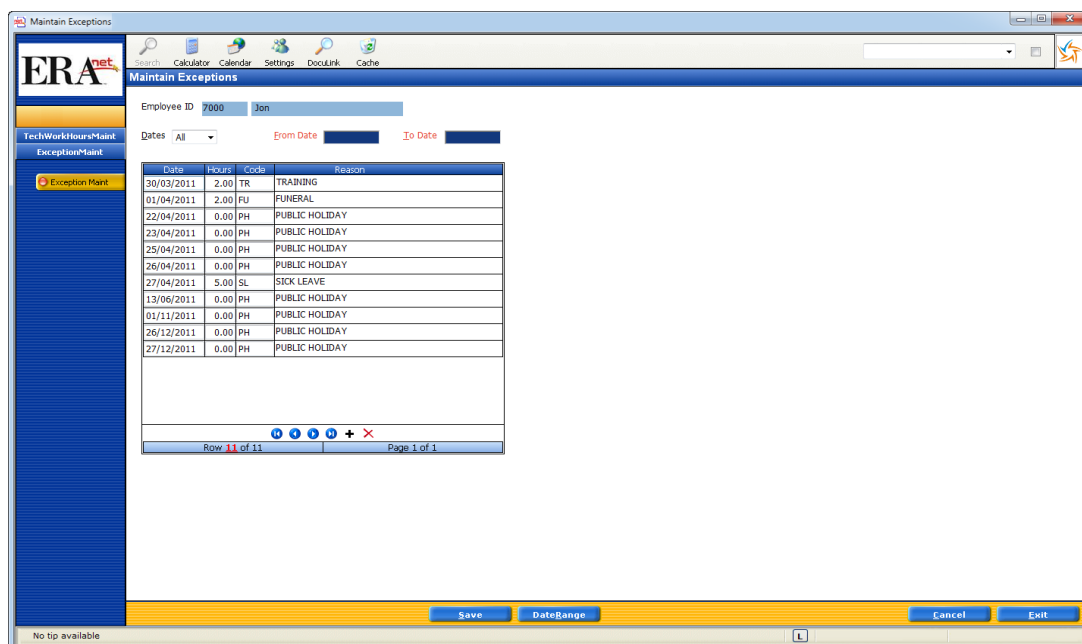
This table will display the last ten exceptions. The table will display the exception date, available hours and the exception code and reason.

Action bar options:

Ok	Select the Ok option from the action bar to save the changes.
Exceptions	Select the Exceptions option from the action bar to modify exceptions.
Cancel	Select the Cancel option from the action bar to return to the <i>Employee Number</i> field to enter another employee number.
Exit	Select the Exit option from the action bar to return to the  <i>Technician Time Menu</i> screen.


Exceptions

Selecting the **Exceptions** option from the action bar will display the following screen:






The screenshot shows the 'Maintain Exceptions' window in the ERA.net application. The window has a sidebar with navigation options like 'TechWorkHours*Maint' and 'Exception*Maint'. The main area displays a table of exceptions for Employee ID 7000 (Jon). The table has columns for Date, Hours, Code, and Reason. The data includes various public holidays and sick leave. At the bottom, there are buttons for 'Save', 'DateRange', 'Cancel', and 'Exit'.

Note: The above fields will be disabled for any Dealerships using ERO Integration and has specification question 109 – *Integrate ERO timeclock to Employee Clocking* is set to Yes in 3685 – *Service Spec Maint*.


Employee ID	This field will display the employee number and name.
Dates	Select All to view all exceptions entered or Range to view exceptions for a selected date range from the  dropdown box. Note: Selecting the <i>Range</i> option will enable the <i>From Date</i> and the <i>To Date</i> fields.
From Date	Enter the start date . Note: This field will only be available if the user selects the <i>Range</i> option at the <i>Date</i> field.
To Date	Enter the end date . Note: This field will only be available if the user selects the <i>Range</i> option at the <i>Date</i> field.
Date	This field will display any existing exceptions. Note: The user is able to update the exception date by overriding it with a new date.
Hours	Enter the available hours in this field. Note: The <i>Hours per team</i> pop up screen will display for Dealerships who

ERAnet V9

	are distributing the exception hours amongst multiple teams. This is controlled by specification question 49 – <i>ADD AVAILABLE HOURS BY TEAM</i> in 3685 - <i>Service Spec Maint</i> . Note: The <i>Hours per team</i> pop screen will not appear for employees who work in only one team.
Code	Enter the exception code or select a valid code from the  Search option.
Reason	This field will display the exception code description.

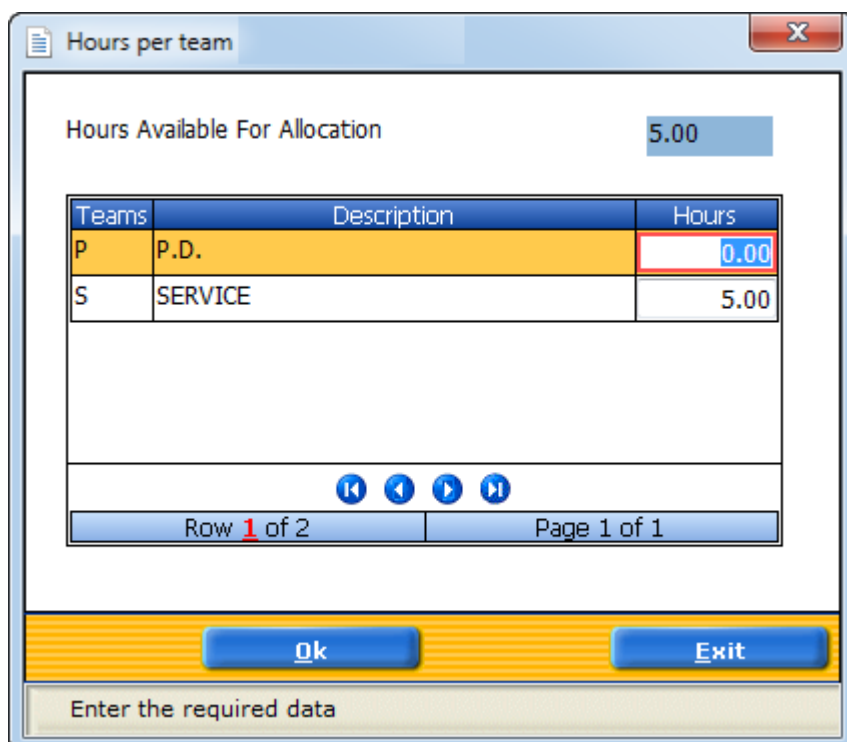
To add a new exception, select the  option and enter the **exception details**. To remove an existing exception, select the relevant **line** followed by the  option.

Action bar options:


Save	Select the Save option from the action bar to save the changes.
DateRange	Select the DateRange option from the action bar to <i>Insert</i> or <i>Delete</i> multiple exceptions.
Cancel	Select the Cancel option from the action bar to return to the <i>Employee Number</i> field to enter another employee number.
Exit	Select the Exit option from the action bar to return to the  <i>Technician Time Menu</i> screen.

Dealerships distributing exception hours by teams will need to ensure that specification question 49 – *ADD AVAILABLE HOURS BY TEAM* in 3685 - *Service Spec Maint* is set to **Y** for Yes.

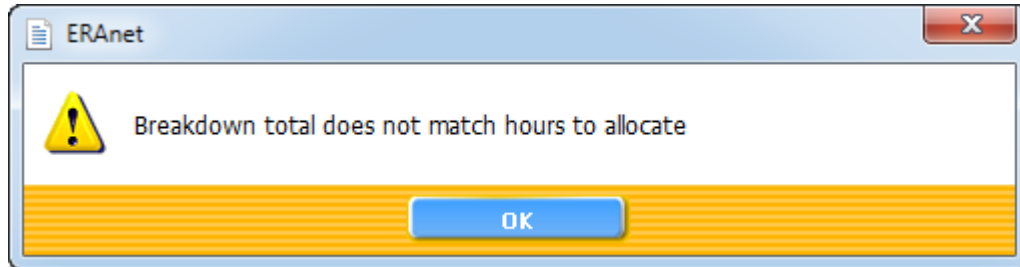
To distribute the exception hours by team, enter the technician's **available hours** in the Hours field and the following pop up screen will display when the user **ENTER** or **TAB** to the next field:



Hours Available For Allocation	This field will display the total number of hours that is available to allocate for that employee for that day.
Teams	This field will display a list of all the teams the employee is setup for.
Description	This field will display the team description.
Hours	Distribute the available hours into the relevant teams by entering the hours against the relevant teams.

Select **Ok** from the action bar to save the changes, or **Exit** to return to the  *Tech Work Hours Maint* screen without saving the distributed hours.

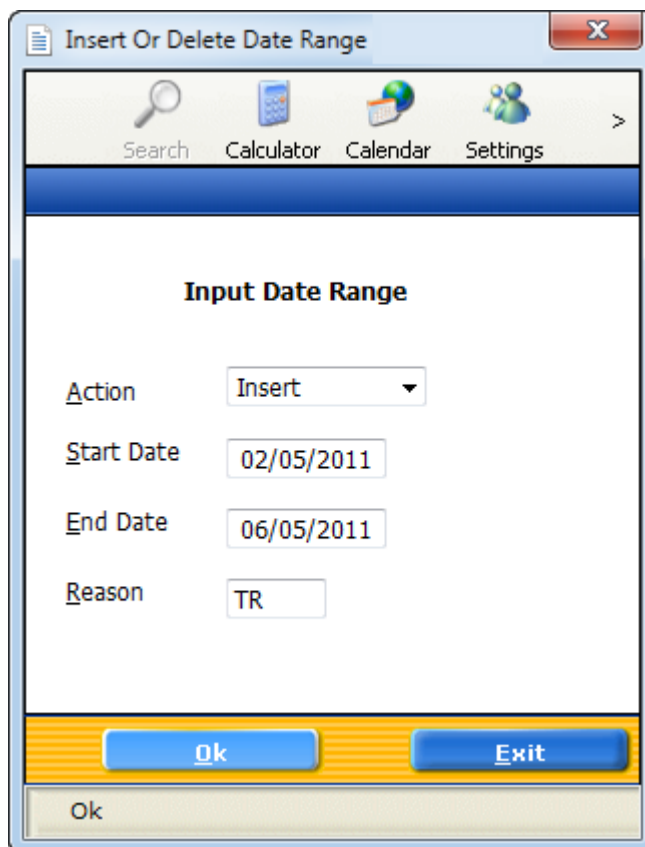
Note: The system will not allow the user to exit the *Hours per team* screen until all *Hours Available For Allocation* have been allocated. The following pop up message will display as an indication that hours need to be allocated:





Select **OK** to return to the Hours per team screen to allocate the hours.

Exceptions – DateRange option

To *Insert* or *Delete* multiple exceptions, select **DateRange** option from the action bar and the following pop up screen will be displayed:



Action	Select Insert or Delete from the  dropdown box .
Start Date	Enter the start date .
End Date	Enter the end date .
Reason	<p>Enter the exception reason or select a valid reason from the  Search option.</p> <p>Note: This field can be left blank, which will allow the user to enter different reason codes for each exception. The user will also need to enter the available hours and distribute the exception hours for employees allocated to multiple teams.</p>

Select **Ok** from the action bar to save the changes, or **Exit** to return to the *Maintain Exceptions* screen without modifying the multiple exceptions.

Benefits

This feature will enable Service Managers to maintain their service department's normal attendance hours and exceptions through ERAnet instead of using ERALink.

ERAnet – Vehicle Information Re-write

Enhancement

Overview

Vehicle Information in ERAnet has been re-written to provide the user with the flexibility to control whether all users in the service department uses the new *Vehicle Information* interface or specific service users. The interface has also been split into several categories making it easier to locate a field.

Why

This enhancement was developed to improve the ERAnet Service product.

Screens



Vehicle Information

3045 – User Definable Fields

3685 – Service Spec Maint

6210 – Maintain User Security

The Setup

The following setup will need to be checked and updated prior to using the new *Vehicle Information* interface.

To allow access to the new *Vehicle Information* interface for all users, the following setup will need to be updated.

Select **3685 – Service Spec Maint, 1 – All Questions** and select the **Nxtpg** option from the command line to scroll through the pages to **question 151** and the following screen will be displayed:

Qn#.	Question.....	Answer.
133	Default No of Days to Display in Loan Cars Available (7/14/28)	28
134	Manufacturer Service Program Sale Type	Y
135	Auto Generate Sublet (Y/N)	Y
136	Use auto email defaults for service invoices & quotes Y/N	N
137	Round service invoices down Y/N	N
138	Date to apply as RO Document Date (A=Appointment, P=Print)	P
139	Dealer Code for Lexus warranty claims	000000
140	User Group for ERAnet Appointments Call Centre Mode	ccservi
141	Suppress dialog when sending Appointments confirmation SMS Y/N	N
142	Adjust List price for Other Charges (Y/N/0)	N
143	Mfr Service Program Setup	Y
144	Default Operation Code search method (B,F,P,D,M)	P
145	Auto select Recommendations in Operation code search	Y
146	Sort new jobs by base code when adding them to a new appointment	Y
147	Dealer Code for Volvo service history	3003
149	Add jobs from main page of RO Close Out?	Y
150	Use Entity Maintenance Lite from RO Close Out?	Y
151	Use new Vehicle Information page in ERAnet?	Y

Enter line# search Print Uppg Nxtpg Gopp eXit
 Help: Accept lines in window, and continue with current item
 Ready Ln 22, Col 0 NUM


151 – Use new Vehicle Information page in ERAnet?

Enter **Y** for Yes to use the new *Vehicle Information* interface or **N** for No to use the old *Vehicle Information* interface.

Note: Selecting the Yes option will display the new *Vehicle Information* interface for all users.

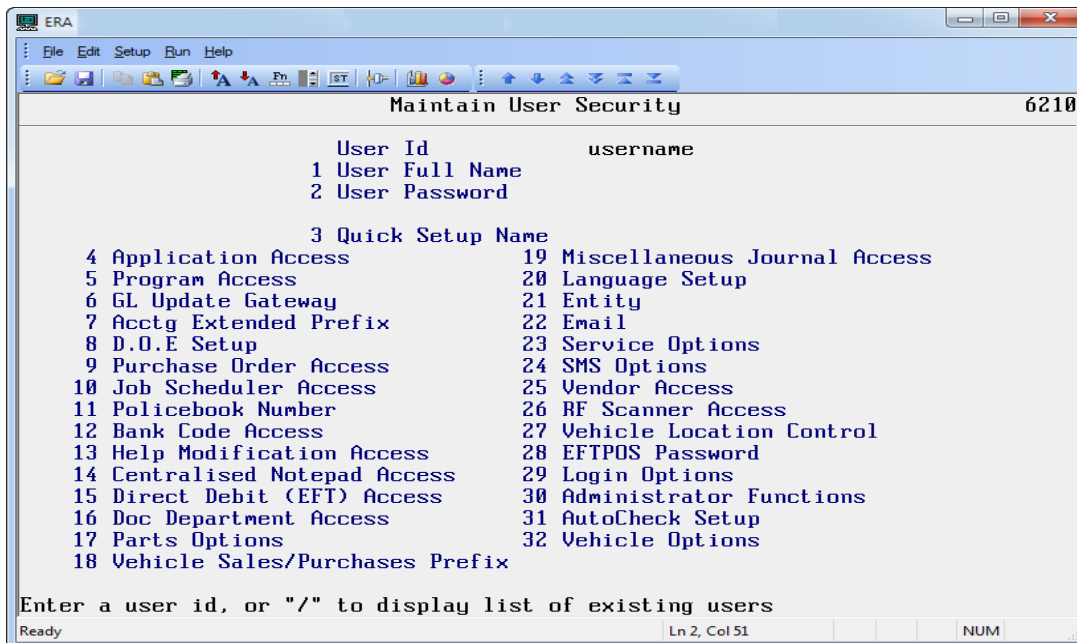
ERAnet V9

Select the **Enter** option from the command line to save the changes.

To control specific user access to the new  *Vehicle Information* interface, the user will need to set this up in 6210 – *Maintain User Security* for the relevant users.

Note: The System Administrator is the person who sets this up.

Select **6210 – Maintain User Security**, enter the log on user's **password** and the following screen will be displayed:



ERA

File Edit Setup Run Help

Maintain User Security 6210

User Id username

1 User Full Name

2 User Password

3 Quick Setup Name

4 Application Access 19 Miscellaneous Journal Access

5 Program Access 20 Language Setup

6 GL Update Gateway 21 Entity

7 Acctg Extended Prefix 22 Email

8 D.O.E Setup 23 Service Options

9 Purchase Order Access 24 SMS Options

10 Job Scheduler Access 25 Vendor Access

11 Policebook Number 26 RF Scanner Access

12 Bank Code Access 27 Vehicle Location Control

13 Help Modification Access 28 EFTPOS Password

14 Centralised Notepad Access 29 Login Options

15 Direct Debit (EFT) Access 30 Administrator Functions

16 Doc Department Access 31 AutoCheck Setup

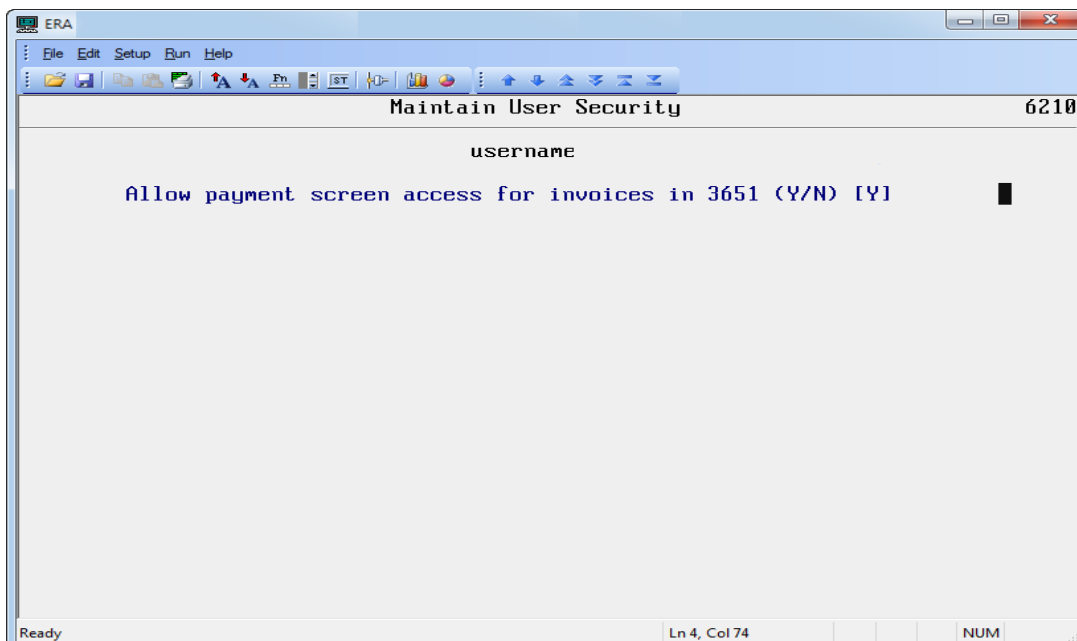
17 Parts Options 32 Vehicle Options

18 Vehicle Sales/Purchases Prefix

Enter a user id, or "/" to display list of existing users

Ready Ln 2, Col 51 NUM

Enter the relevant **username** in the *User Id* field and select **23 – Service Options** and the following screen will be displayed:



ERA

File Edit Setup Run Help

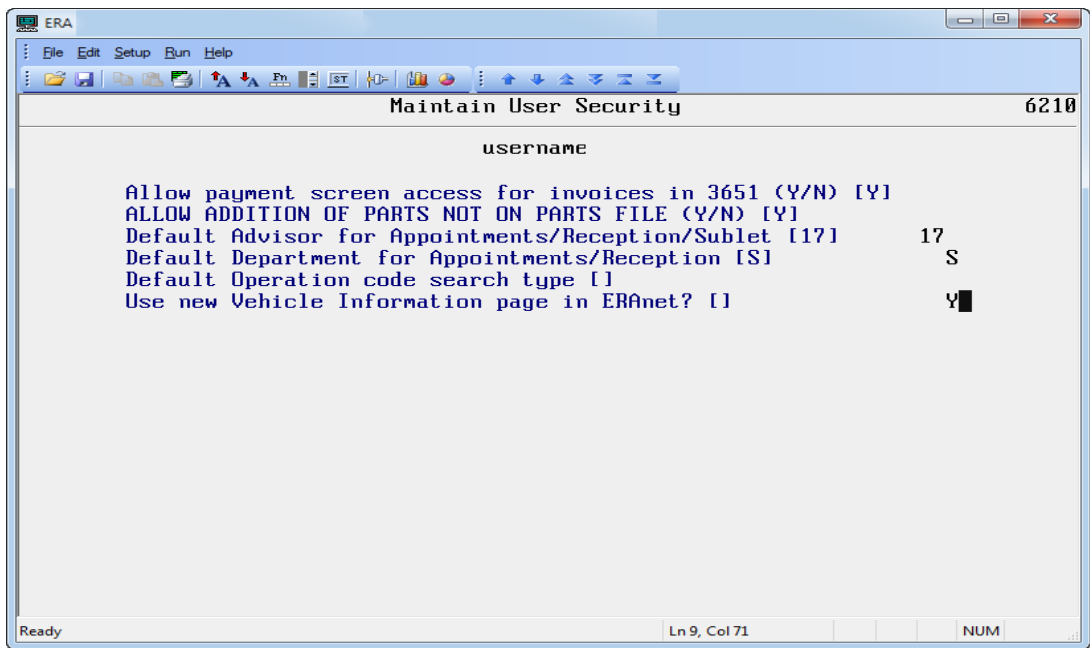
Maintain User Security 6210

username


Allow payment screen access for invoices in 3651 (Y/N) [Y]

Ready Ln 4, Col 74 NUM


Enter through to question *Use new Vehicle Information page in ERAnet?*



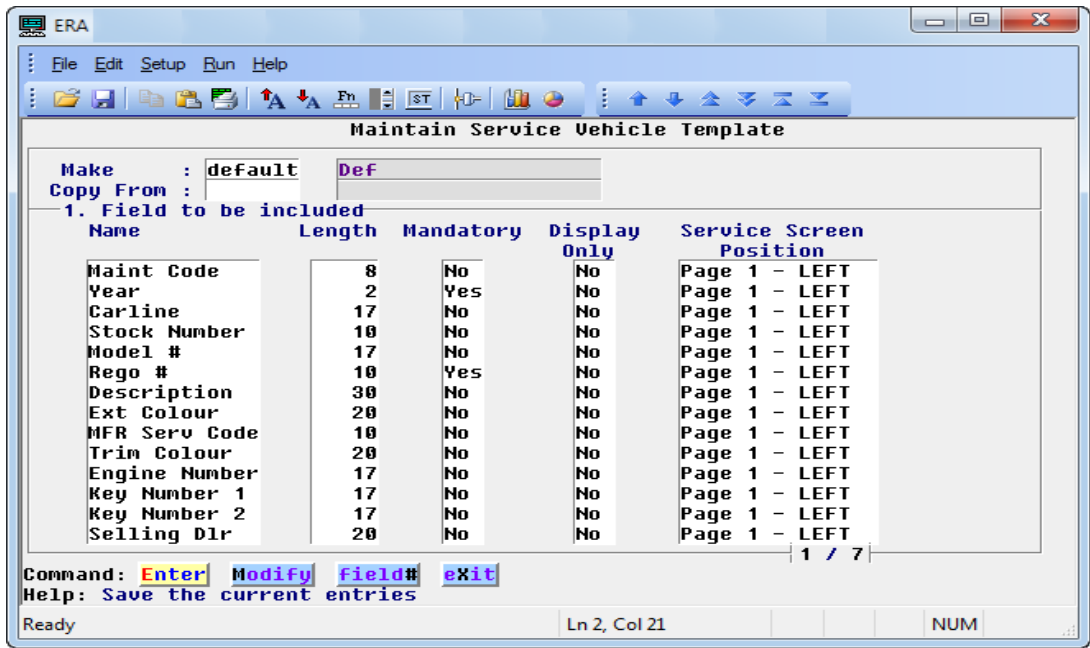
Use new Vehicle Information page in ERAnet?

Enter **Y** for Yes to use the new *Vehicle Information* interface or **N** for No to use the old *Vehicle Information* interface.
Note: Selecting the Yes option will only allow this specific user to access the new  *Vehicle Information* interface.


Select **Enter** to return to the 6210 – *Maintain User Security* main menu. Select **S=Save** from the command line to save the changes, followed by **END** to return to the main menu.


The user will need to ensure that the template in 3045 – *User Definable Fields*, is displaying the fields that are relevant as per existing functionality. The main difference with the new  *Vehicle Information* screen is that the fields are all static and grouped into several categories. The template will determine which of those fields will have their input box available for the user.

Select **3045 - User Definable Fields**, followed by option **2 – Maintain Service Vehicle Template** and the following screen will be displayed:




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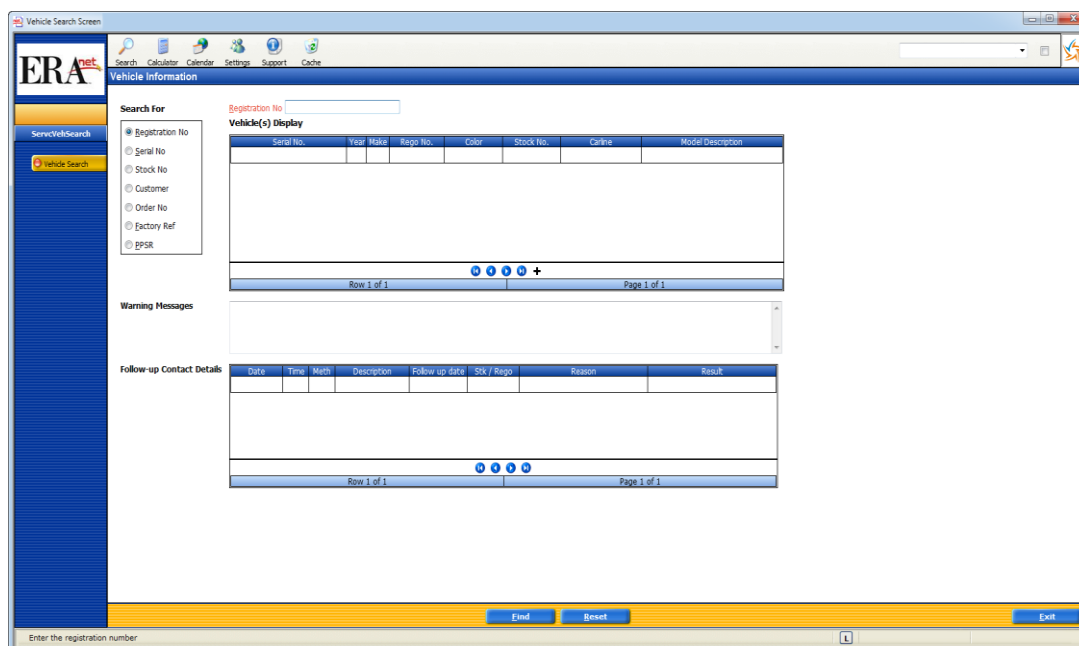
Note: Fields not setup in 3045 – *User Definable Fields* will not have the input box displayed in the  *Vehicle Information* screen.

There are several combinations which determine the version of the  *Vehicle Information* screen that is displayed. At the moment, both versions will be available to the user. However in due time, the old system will be phased out.







Specification question in 3685	User security question in 6210	Output
Y	Y	New Vehicle Information interface
Y	N	Old Vehicle Information interface
N	Y	New Vehicle Information interface
N	N	Old Vehicle Information interface



The Process


Upon logging in to *ERAnet*, select  **Service**, followed by  **Vehicle Information** and the following screen will be displayed:



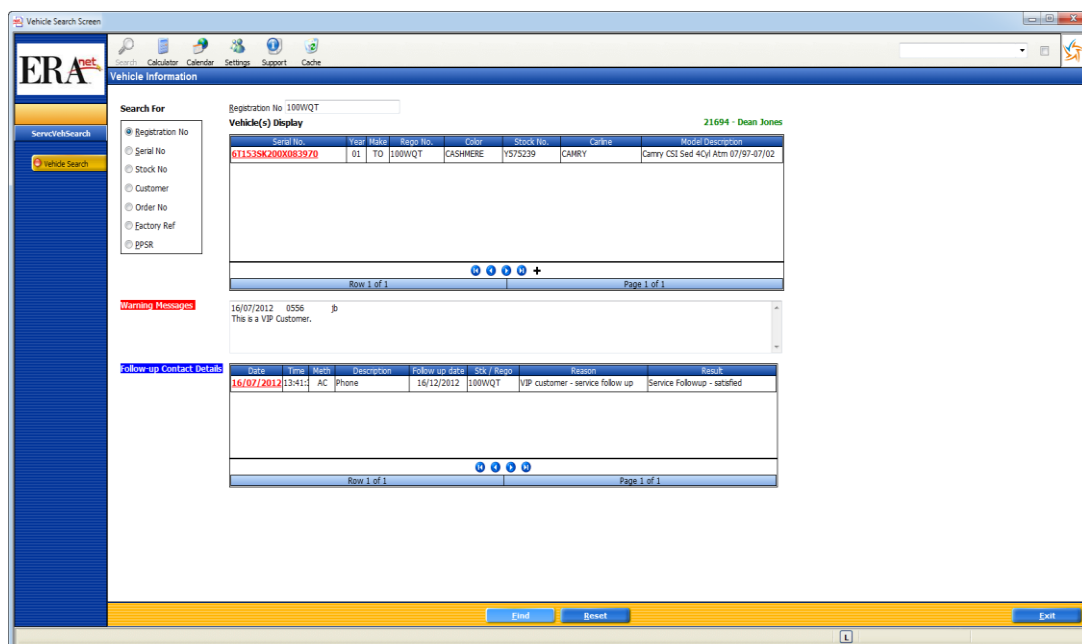
Search For  radio button options:

Registration No	Select the  Registration No radio button and enter the vehicle's registration number to search for.
Serial No	Select the  Serial No radio button and enter the vehicle's serial number to search for.
Stock No	Select the  Stock No radio button and enter the vehicle's stock number to search for. Note: This can be a <i>Used</i> or <i>New</i> stock number.
Customer	Select the  Customer radio button and enter the customer name or number to search for. The user is able to search for a customer by selecting  Search or F3 from the keyboard.
Order No	Select the  Order No radio button and enter the vehicle's order number to search for.

	Note: This will be the <i>On Order Number</i> from the Vehicles Application. The <i>stock controller</i> will have this <i>Order No</i> if required.
Factory Ref	Select the  Factory Ref radio button and enter the vehicle's Factory Reference number to search for. Note: The <i>stock controller</i> will have this information if required. It will be different for each OEM.
PPSR	Select the  PPSR radio button and enter the vehicle's Personal Property Security Register Number to search for. Note: This is an optional number. If the dealership uses PPSR then this option can be used.


Select a  **Search For** option and enter the **criteria** and select **Find** from the action bar and the results will be displayed as per following example:

Note: The following example is based on a *Registration No* search.



Vehicles(s) Display:

Serial No.	This field will display the vehicle serial number . Selecting this hyperlink will display the <i>Service Vehicle Maintenance</i> screen.
Year	This field will display the <i>production year</i> of the vehicle.
Make	This field will display the vehicle <i>make</i> .
Rego No.	This field will display the vehicle <i>registration number</i> .
Color	This field will display the <i>colour description</i> of the Vehicle. Note: This information is maintained in <i>0626 - New Vehicle Model Maintenance</i> .
Stock No.	This field will display the vehicle's <i>stock number</i> . Note: This information is maintained in <i>4006 - New Vehicle Maintenance</i> or <i>4008 - Used Vehicle Maintenance</i> .
Carline	This field will display the carline of the vehicle. Note: This information is maintained in <i>0626 - New Vehicle Model Maintenance</i> .
Model Description	This field will display the <i>model description</i> of the vehicle. Note: This information is maintained in <i>0626 - New Vehicle Model Maintenance</i> .

Warning Messages will now appear for customers who have internal notes in  *Entity Maintenance*.

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Follow-up Contact Details:

Date	This field will display the date the contact details was created. Selecting this hyperlink will display the <i>Contact Details</i> screen.
Time	This field will display the <i>time</i> the contact detail was created.
Meth	This field will display the <i>method</i> used to make the contact.
Description	This field will display the preferred contact method <i>description</i> .
Follow up date	This field will display the <i>follow up date</i> .
Stk / Rego	This field will display the vehicle <i>stock number</i> or the <i>registration number</i> .
Reason	This field will display the <i>reason</i> for the contact.
Result	This field will display the <i>result</i> of the contact.

Find	Select the Find option from the action bar to search for the results as per <i>Search For</i> criteria.
Reset	Select the Reset option from the action bar to clear the selection criteria and start a new search.
Exit	Select the Exit option from the action bar to return to the main menu.

Selecting the **Serial No** hyperlink will display the *Service Vehicle Maintenance* screen as per following example:

Note: Pop up messages has not been altered in the new *Vehicle Information* interface.





Navigation Bar options:

Vehicle Details	Select the Vehicle Details option from the navigation bar to view the <i>Service Vehicle Maintenance</i> screen.
Preferences	Select the Preferences option from the navigation bar to view the <i>Preferences</i> screen. The user is able to select which tab will display by default by selecting an option from the <i>Preferences</i> screen.
RO History	Select the RO History option from the navigation bar to view the <i>Repair Order History</i> screen.

Entity Id	This field will display the customer number as entered in <i>Entity Master</i> .
Name	This field will display the customer name as entered in <i>Entity Master</i> .
Home	This field will display the customer's home phone number as entered in <i>Entity Master</i> .
Entity Type	This field will display the entity type as entered in <i>Entity Master</i> .
Preferred	This field will display the preferred name for the customer as entered in <i>Entity Master</i> .
Salutation	This field will display the customer's salutation as entered in <i>Entity Master</i> .







Service Manual

Business	This field will display the customer's business phone number as entered in <i>Entity Master</i> .
Customer Type	This field will display the customer type.
Title	This field will display the title of the customer as entered in <i>Entity Master</i> .
Attention	This field will display the name to appear after the Dear in all letters as entered in <i>Entity Master</i> .
Mobile	This field will display the customer's mobile number as entered in <i>Entity Master</i> .








Sale Type	Select a sale type from the  dropdown box. Note: This is not a mandatory field.
Lbr Code	Select a labour code from the  dropdown box. Note: This is not a mandatory field.
Last RO	This field will display the last repair order number and date.
Kms	This field will display the last repair order kilometres.
Serial Number	This field will display the vehicle's serial number. Note: The <i>VIN Validation</i> icon next to the <i>serial number</i> field will indicate if the serial number is valid or not. A valid serial number will display the  option; an invalid serial number will display the  option. Hovering over the invalid icon will display the reason the serial number is considered to be invalid. <i>VIN Validation</i> is optional software. Contact the Pentana Solutions Helpdesk (03) 9535 2222 to make enquiries on <i>Vin Validation</i> .
Make	This field will display the vehicle <i>make</i> for an existing vehicle, the user is able to enter the make for any new vehicle.
Stock No	The <i>stock number</i> will display in this field. The user is able to enter a stock number .

The **Vehicle Details** tab will display the following fields:

Note: The fields displayed in *Service Vehicle Maintenance* are dependent on the template setup in 3045 – *User Definable Fields*, option 2 – *Maintain Service Vehicle Template*. Any field not setup in the relevant template will be hidden and only the field label will be displayed.





Rego#	Enter the vehicle registration number in this field.
Year	Enter the year the vehicle was manufactured in. Note: The year is in YY format
Model No	Enter the vehicle model number or select a valid code from the  search .
Alt Model	This field will display the alternate model number associated with the vehicle. Note: For vehicles with no alternate model number, this field will remain blank.
Carline	Enter the vehicle carline or select a valid carline from the  search .
Description	The vehicle description will automatically display in this field. The user is able to enter a description in this field.
Ext Colour	Enter the external colour code or description . The user is able to  search for a colour.
Paint Code	Entering a valid paint code in the <i>Ext Colour</i> field will automatically display the <i>paint code</i> in this field.
Trim Desc	Enter the trim code or description . The user is able to  search for a trim.
Trim Code	Entering a valid trim code in the <i>Trim Desc</i> field will automatically display the <i>trim code</i> in this field.
Maint Code	Enter the model maintenance code or select a valid code from the  search .
Engine Type	Enter the engine type .
No Cylinders	Enter the number of cylinders .
Engine No	Enter the vehicle engine number .
Fuel Type	Select fuel type from the  dropdown box.
Chassis No	Enter the vehicle chassis number .
Body Type	Enter the vehicle body type .
Factory Id	Enter the manufacturer's factory identification number .

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Bill To	Enter the customer bill to number or select a valid <i>customer</i> from the  search . The bill to customer name will display upon entering the number.
Driver	Enter the driver's name .
Drivers Mobile	Enter the driver's mobile phone number .
Transmission	Select a transmission from the  dropdown box.
Transmission Code	Enter the transmission code .
Transmission No	Enter the transmission number .
Air Conditioned	Select a Yes or No from the  dropdown box.
Turbo	Select a Yes or No from the  dropdown box.
Pwr Steering	Select a Yes or No from the  dropdown box.
Reg Expiry Date	Enter the vehicle registration expiry date .
Key 1	Enter the number for vehicle key 1 .
Key 2	Enter the number for vehicle key 2 .
Radio Sec Code	Enter the radio security code .
Radio Serial No	Enter the radio serial number .
Equipment No	Enter the customer's equipment number .
Immobiliser Code	Enter the immobiliser code . Note: This feature is applicable for <i>Isuzu dealers</i> and will display the <i>immobiliser code</i> when a <i>VIN Validation</i> process is run. This is not a mandatory field.
Production Date	Enter the vehicle production date .
Complnc Date	Enter the compliance date for the vehicle.
Delivery Date	Enter the delivery date for the vehicle.
Delivery Mileage	Enter the odometer mileage when the vehicle was delivered.
Demo Date	Enter the date the vehicle was demonstrated.
Demo Mileage	Enter the mileage when the vehicle was demonstrated.
Orig Del Date	Enter the original delivery date for the vehicle.
Orig Del Klms	Enter the odometer mileage reading when the vehicle was originally delivered.
First Reg Date	Enter the date of first registration .
Follow Up Date	Enter the follow up date .
WOF Exp Date	Enter the WOF expiry date . Note: This field will be hidden if it has not been setup in the <i>3045 – User Definable Fields</i> template.
Veh Labor Code	Enter the vehicle labour code or select a valid code from the  search .
Team Code	Enter the team code or select a valid code from the  search .
CC Rating	Enter the CC Rating .

Select the [Service / Warranty](#) tab and the following screen will be displayed:

Note: The [Preferences](#) option from the navigation bar will allow user to select the tab to display by default.

Warr Exp Date	Enter the warranty expiry date .
Warr Exp Mileage	Enter the warranty expiry mileage .
Warranty Co	Enter the warranty company name .
Ext Warr Code	Select the extended warranty code from the  dropdown box.
Ext Warr Type	Select the extended warranty type from the  dropdown box. Note: This field will only be enabled if the user has selected an extended warranty code.
Ext Warr Cost	Enter the extended warranty cost . Note: This field will only be enabled if the user has selected an extended warranty code.
Svc Contract No	Enter the service contract number .
Svc Contract Name	Enter the service contract name . Note: This field will only be enabled if the user has entered a service contract number.
S/C Commence Date	Enter the service contract commencement date . Note: This field will only be enabled if the user has entered a service contract number.
S/C Start Kms	Enter the kilometres at the commencement of the service contract. Note: This field will only be enabled if the user has entered a service contract number.
S/C Expire Date	Enter the service contract expiry date . Note: This field will only be enabled if the user has entered a service contract number.
S/C Expire Kms	Enter the service contract expiry kilometres . Note: This field will only be enabled if the user has entered a service contract number.
Svc Contract Stat	Select the status of the service contract from the  dropdown box. Note: This field will only be enabled if the user has entered a service contract number.
Reason	Select an extended warranty reason from the  dropdown box. Note: This field will only be enabled if the user has entered a service contract number.
VIP Club	Enter the VIP club description .
VIP Member No	Enter the VIP club membership number .
VIP Exp Date	Enter the VIP club membership expiry date .
Rewards No	Enter the rewards number .

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Mfr Service Prog	Select a Yes or No from the  dropdown box.
Mfr Serv Code	Enter the manufacturer's service program code .
Contact Schedule	Enter the contact schedule .
Tot Service Days	Enter the total service days .
Void Level	Enter the void level .
Data Dot Appl	Select a Yes or No from the  dropdown box.
Rsa Contract Id	For dealerships not running <i>Volvo Road Side Assistance Program</i> , this field will remain disabled. Dealerships running <i>Volvo Road Side Assistance Program</i> will need to enter the Manufacturer Road Side Assist Contract ID .
Rsa Prog Code	For dealerships not running <i>Volvo Road Side Assistance Program</i> , this field will remain disabled. Dealerships running <i>Volvo Road Side Assistance Program</i> will need to enter the Manufacturer Road Side Assist Program Code . Note: This field will only be enabled if the user has entered an <i>Rsa Contract Id</i> .
Rsa Plan Code	For dealerships not running <i>Volvo Road Side Assistance Program</i> , this field will remain disabled. Dealerships running <i>Volvo Road Side Assistance Program</i> will need to enter the Manufacturer Road Side Assist Plan Code . This field must contain data in order for the 3703 – <i>Manufacturer Reports</i> extract to process without an error. Note: This field will only be enabled if the user has entered an <i>Rsa Contract Id</i> .
Rsa Plan Name	For dealerships not running <i>Volvo Road Side Assistance Program</i> , this field will remain disabled. Dealerships running <i>Volvo Road Side Assistance Program</i> will need to enter the Manufacturer Road Side Assist Plan Name . Note: This field will only be enabled if the user has entered an <i>Rsa Contract Id</i> .
Rsa Nom. Date	For dealerships not running <i>Volvo Road Side Assistance Program</i> , this field will remain disabled. Dealerships running <i>Volvo Road Side Assistance Program</i> will need to enter the Manufacturer Road Side Assist Nomination Date . This field must contain data in order for the 3703 – <i>Manufacturer Reports</i> extract to process without an error. Note: This field will only be enabled if the user has entered an <i>Rsa Contract Id</i> .
Rsa Expiry Date	For dealerships not running <i>Volvo Road Side Assistance Program</i> , this field will remain disabled. Dealerships running <i>Volvo Road Side Assistance Program</i> will need to enter the Manufacturer Road Side Assist Expiration Date . This field must contain data in order for the 3703 – <i>Manufacturer Reports</i> extract to process without an error. Note: This field will only be enabled if the user has entered an <i>Rsa Contract Id</i> .
Ro Comments	Enter any repair order comments .
Comments1	Enter any comments .
Comments2	Enter any comments .

Select the **Sales** tab and the following screen will be displayed:

Note: The **Preferences** option from the navigation bar will allow user to select the tab to display by default.

Selling Dlr	Enter the <i>selling dealer's code number</i> .
Salesman	Enter the <i>salesman number</i> .
Sale Price	Enter the <i>vehicle sale price</i> .
Finance Co	Enter the <i>finance company name</i> .
Finance Type	Enter the <i>finance type</i> . Note: This field will only be enabled if the user has entered a finance company name.
Finance Exp Date	Enter the <i>finance expiry date</i> . Note: This field will only be enabled if the user has entered a finance company name.
Finance Amt	Enter the <i>amount</i> financed. Note: This field will only be enabled if the user has entered a finance company name.
Residual Amt	Enter the <i>residual amount</i> . Note: This field will only be enabled if the user has entered a finance company name.
Period Months	Enter the finance period in <i>months</i> . Note: This field will only be enabled if the user has entered a finance company name.
Veh Sale Type	Enter the vehicle <i>sale type</i> .
Insurance Co	Enter the <i>insurance company name</i> .
Insurance Type	Enter the <i>insurance type</i> . Note: This field will only be enabled if the user has entered an insurance company name.
Tax Exempt No	Enter the <i>tax exemption number</i> .
Wsale Cus Code	Enter the <i>wholesale customer code</i> .
Options	Enter other <i>options</i> .

Select the **User Defined** tab and the following screen will be displayed:

Note: The fields displayed in the *User Defined* tab will appear as per template setup in 3045 – *User Definable Fields* option 2 – *Maintain Service Vehicle Template* for the relevant *make*.

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Service Vehicle Maintenance

Entity Id: 22694 Name: Dean Jones Home: [blank]
 Entity Type: C Preferred: Dean Salutation: Business
 Customer Type: XXXXXX Title: Attention: Mobile: [0400] 000 000
 Sale Type: CUSTOMER Ltr Code: Last RO: 102783 Date: 26/07/2012 Kms: 8
 Serial Number: 6115522660983979 Make: TOYOTA Stock No: Y575239

Description	Value
2D BAY (LOP)	

Row 1 of 1 Page 1 of 1

OK Serial No Exit

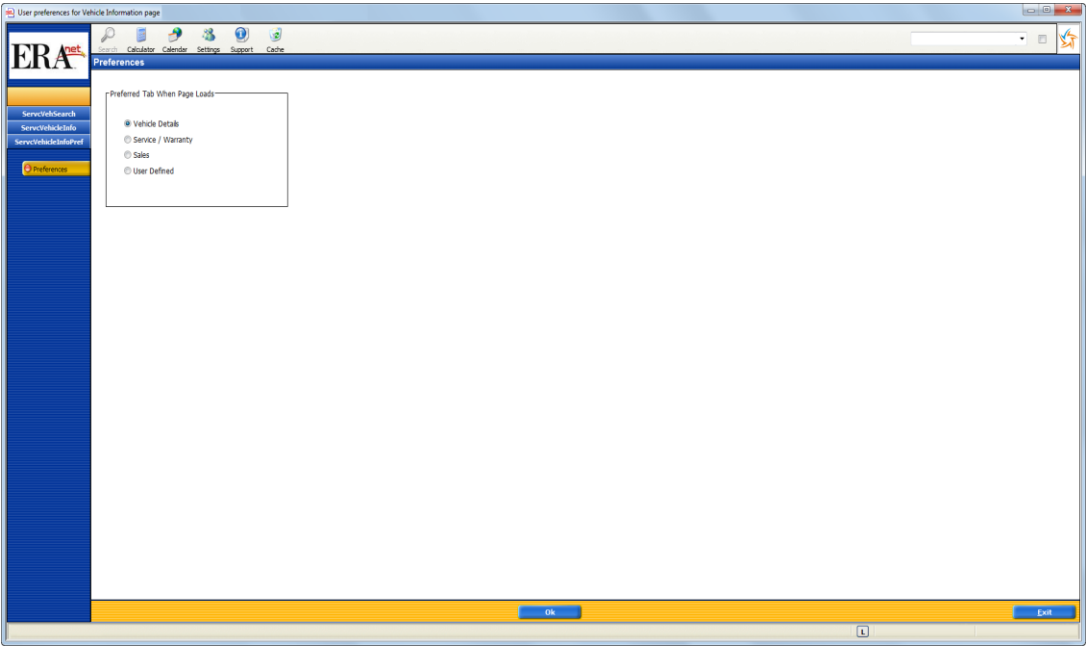
Description	This field will display the user defined fields as per template setup in 3045 – <i>User Definable Fields</i> option 2 – <i>Maintain Service Vehicle Template</i> .
Value	Enter the relevant details for the relevant user defined field.


Action Bar options:

Ok	Select the Ok option from the action bar to save the changes and return to the <i>Vehicle Search</i> screen.
Serial No	Select the Serial No option from the action bar to allocate a new serial number.
Exit	Select the Exit option from the action bar to return to the <i>Vehicle Search</i> screen without saving the changes.

Preferences screen

Select the **Preferences** option from the navigation bar and the following screen will be displayed:

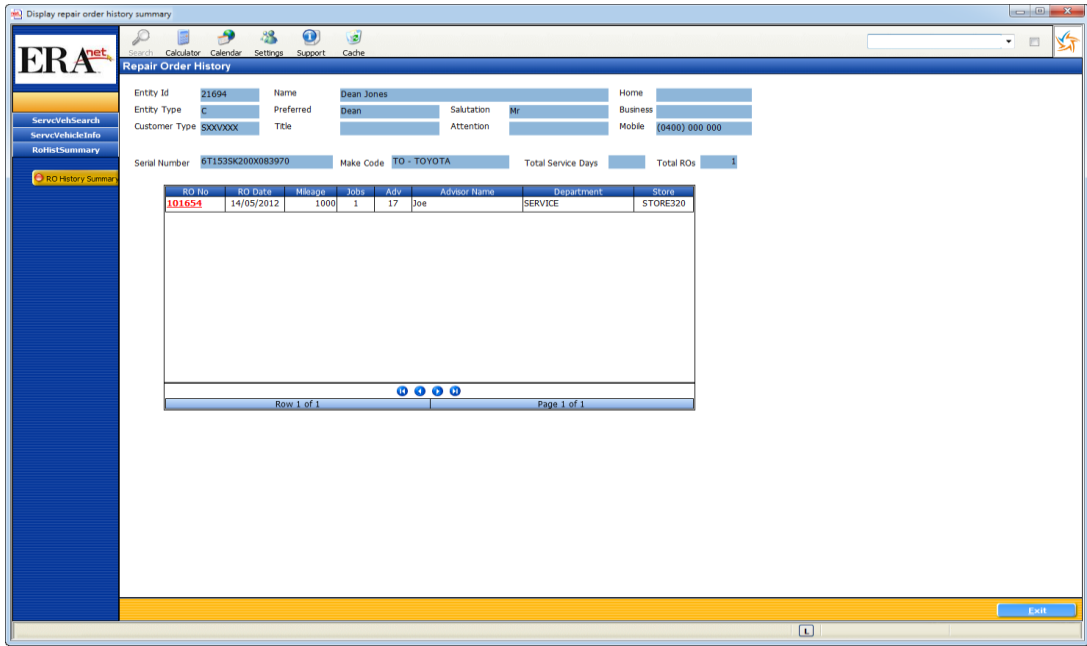


The user is able to select a **default tab** by selecting a  radio button option. Select the **Ok** option from the action bar to save the changes or **Exit** to return to the *Service Vehicle Maintenance* screen without saving any changes.

Note: The changes will take effect the next time the user enters the *Service Vehicle Maintenance* screen.

RO History screen

Select the **RO History** option from the navigation bar and the following screen will be displayed:



Entity Id	This field will display the customer number as entered in <i>Entity Master</i> .
Name	This field will display the customer name as entered in <i>Entity Master</i> .
Home	This field will display the customer's home phone number as entered in <i>Entity Master</i> .

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Entity Type	This field will display the entity type as entered in <i>Entity Master</i> .
Preferred	This field will display the preferred name for the customer as entered in <i>Entity Master</i> .
Salutation	This field will display the customer's salutation as entered in <i>Entity Master</i> .
Business	This field will display the customer's business phone number as entered in <i>Entity Master</i> .
Customer Type	This field will display the customer type.
Title	This field will display the title of the customer as entered in <i>Entity Master</i> .
Attention	This field will display the name to appear after the Dear in all letters as entered in <i>Entity Master</i> .
Mobile	This field will display the customer's mobile number as entered in <i>Entity Master</i> .

Serial Number	This field will display the <i>serial number</i> of the vehicle.
Make Code	This field will display the <i>make</i> of the vehicle.
Total Service Days	This field will display the total service days. This is the total number of days the vehicle has had work done at the dealership.
Total ROs	This field will display the <i>total number</i> of repair orders.

RO No	This field will display the <u>repair order</u> number. Selecting the <u>repair order</u> hyperlink will take the user to the <i>RO History Display</i> screen where the user is able to drill down and view detailed components of the repair order.
RO Date	This field will display the <i>date</i> the repair order was created.
Mileage	This field will display the service <i>kilometres</i> .
Jobs	This field will display the number of <i>jobs</i> on the repair order.
Adv	This field will display the <i>advisor number</i> .
Advisor Name	This field will display the <i>advisor name</i> .
Department	This field will display the <i>department name</i> .
Store	This field will display the <i>store number</i> .

Select the [Exit](#) option from the action bar to return to the *Service Vehicle Maintenance* screen.

Serial No option

To change the vehicle *serial number*, select the [Serial No](#) option from the action bar and the following pop up screen will be displayed:

Vehicle Information

Old Serial No 6T153SK200X083970


New Serial No 99001AK200X083970

Ok Exit

Enter the **new serial number** and select the **Ok** option from the action bar to allocate the new serial number or **Exit** to return to the *Service Vehicle Maintenance* screen without allocating a new serial number.

Selecting the **Ok** option will update the *Service Vehicle Maintenance* screen with the new serial number as displayed in the following example:

The screenshot shows the 'Service Vehicle Maintenance' window. The top section contains fields for Entity Id (21994), Name (Brian Jones), Entity Type (E), Preferred (Brian), Customer Type (XXXXXX), Title, and Attention. Below this is a section for Sale Type (CUSTOMER), Uir Code, Last RO (801793), Date (26/07/2012), Kms (0), and Serial Number (99901AP20000033970). The main area is divided into tabs: Vehicle Details, Service / Warranty, Sales, and User Defined. The 'Vehicle Details' tab is active, showing a grid of fields for vehicle specifications such as Make (TOYOTA), Model (CAMRY), Year (2001), and various codes and dates. At the bottom of the window, there is a yellow action bar with three buttons: 'Ok', 'Serial No', and 'Exit'.

Select the **Ok** option from the action bar to save these changes or **Exit** to return to the  *Vehicle Information* screen without saving the changes.


Benefits

The new layout of the *Vehicle Information* interface will make it easier for the user to locate a field alleviating the need to scroll through several pages. Providing the user with an option to default a particular tab will provide additional flexibility within the interface.

ERAnet – Workshop Control

Enhancement

Overview

Enhancements have been made to  Workshop Control, increasing functionality to streamline the business process within the dealership.

Why

This change was made through a Request For Development submission to enhance existing functionality.

Screens



Workshop Control





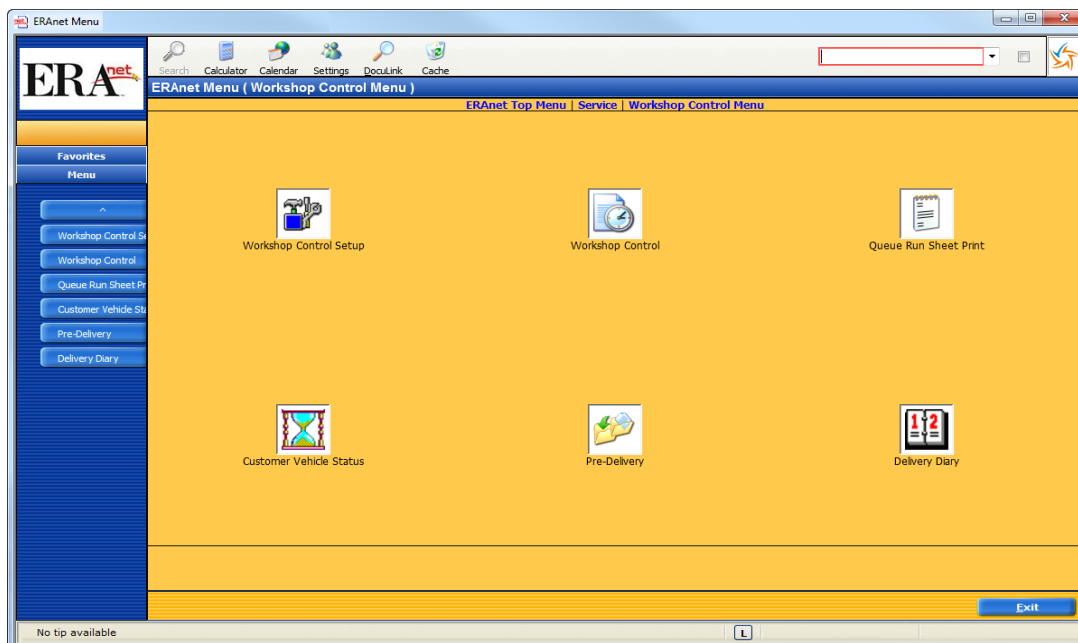
Workshop Control Menu




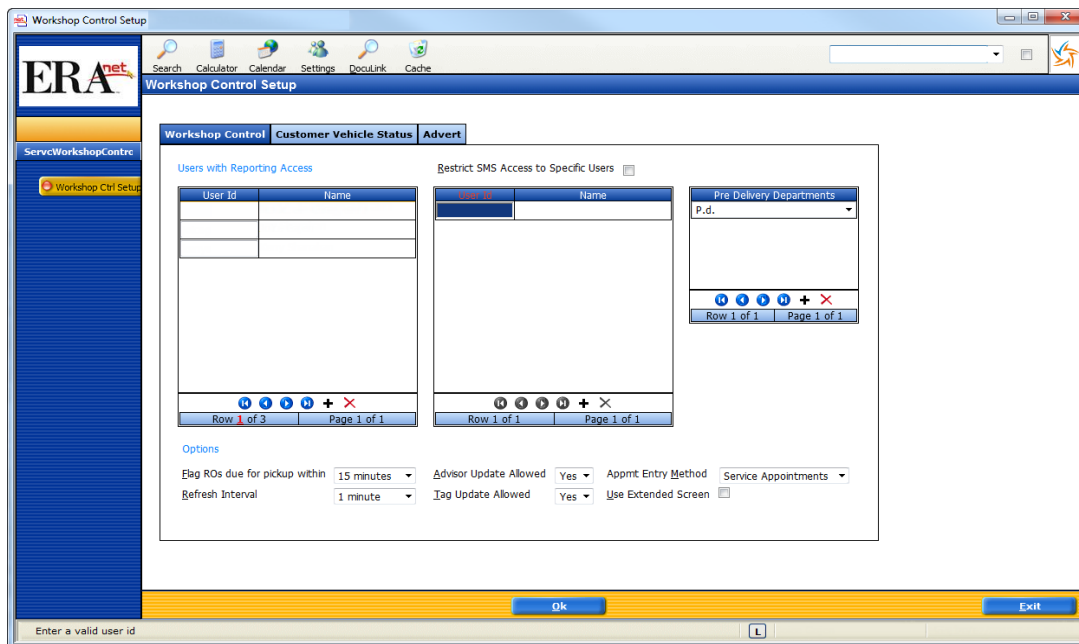
Workshop Control Setup

The Setup

Upon logging into ERAnet, select  **Service** followed by  **Workshop Control Menu** and the following screen will be displayed:



Select  **Workshop Control Setup** and the following screen will be displayed:

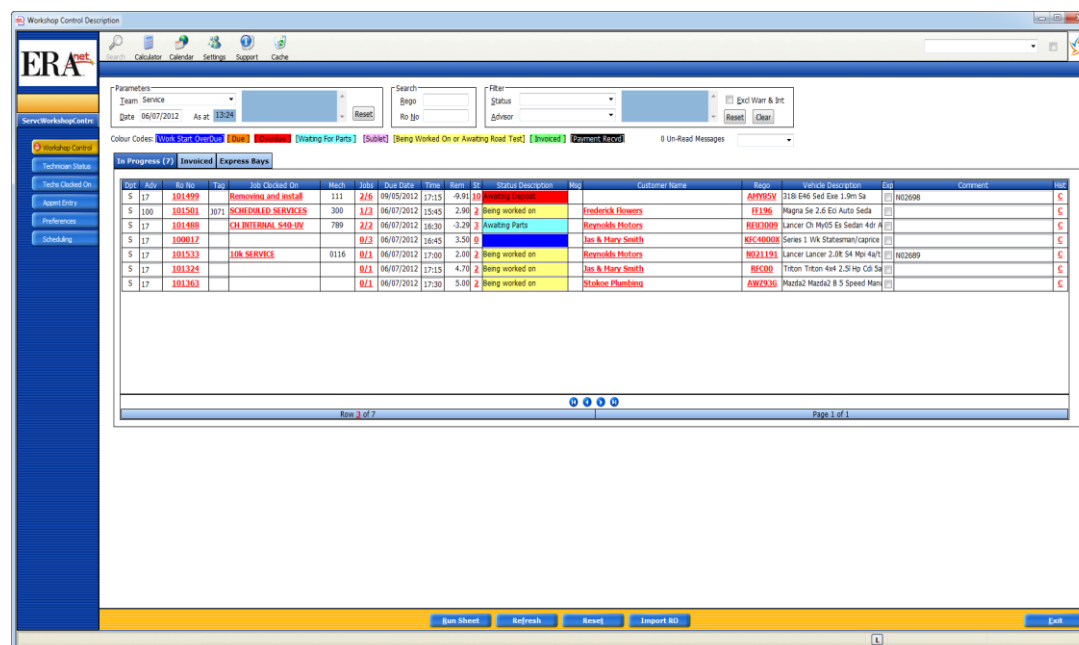


A new field **Use Extended Screen** has been added to allow the user to choose the standard or extended page. If the user selects this option it will allow them to view more records in *Workshop Control* screen.

Select **Ok** from the action bar to save the changes and return to the *Workshop Control Menu*.

The Process

Once the setup has been completed, select **Workshop Control**, from the *Workshop Control Menu* and the following screen will be displayed:



The following new items have been added to the *Workshop Control* screen:

Preferences option on navigation bar

Import RO option on active bar

Clear button in filter option

Exp column from In Progress tab

Inp column from Express Bays tab

ERAnet V9

Work Start Overdue option has been added to the colour code section
Comment field in the In Progress tab
Hist field in the In Progress tab

Preferences

A new **Preferences** option has been added in to navigation bar. Select **Preferences** from the navigation bar and the following screen will be displayed:

Team	Description	Dfr
A	Ace	
K	Blue	
H	Blue	
C	Colac Team	
M	Mitsubishi Team	
N	Nissan Team	
I	New Dept	
1	Number 1 Team	
P	P.d.	
R	Red Team	
S	Service	
B	Super Serv	
SH	Shtest	
STH	Stest	
D	Super Dat'o	

Status	Description	Dfr
8	Awaiting Approval	
6	Awaiting Costing	
10	Awaiting Deposit	
3	Awaiting Parts	
5	Awaiting road test	
2	Being worked on	
13	Car Wash	
9	In Dispute	
7	Invoiced	
4	Out for sublet	
11	Released w/o payment	
1	Vehicle Arrived	
12	Waiting on overseas parts	

The above screen allows the user to define the default *Advisor*, *Teams*, *Status* and *Exclude Warranty and Internal* jobs. Once the user has selected the required details select **Ok** from the action bar to save the changes and the following screen will be displayed:

Spt	Adj	To No	Tag	Job Closed On	Mch	Job	Due Date	Time	Rate	St	Status	Description	Rep	Customer Name	Vehicle Description	Est	Comment	Hist
S	17	101499			111	216	09/05/2012	17:15	-9.91	10	Awaiting Deposit		AMW35V	210B E46 Sed Ede 1.9m Sa		NE2098		C
S	100	101501	1071	SCHEDULED SERVICES	300	1/3	06/07/2012	15:45	2.90	2	Being worked on	Frederick Flowers	FE336	Magna Se 2.6 Eco Auto Seda				C
S	17	101488		SH INTERNAL S40-1W	789	2/2	06/07/2012	16:30	-3.29	2	Awaiting Parts	Renolds Motors	RE30009	Lancer Gt M405 ES Sedan 4dr A				C
S	17	100012			0/3	06/07/2012	16:45	3.50	2			Joe & Mary Smith	MEC-00005	Service 1 Wk Statewarr/Lopra				C
S	17	101533		10K SERVICE	0116	0/1	06/07/2012	17:00	2.00	2	Being worked on	Renolds Motors	RE21191	Lancer/Lancer 2.0R 54 Hpi 4dr		NE2889		C
S	17	101324			0/1	06/07/2012	17:15	4.70	2	Being worked on	Joe & Mary Smith	MEC000	Trizon Trizon 4x4 2.5i Hpi C8 5dr				C	
S	17	101363			0/1	06/07/2012	17:30	5.00	2	Being worked on	Stokoe Plumbing	AMW3536	Mazda2 Mazda2 B 5 Speed Man				C	

The above screen will display the default *Team*, default *Status* and default *Advisor* as per setup in *Preferences* screen.

Clear

A new **Clear** button has been added to *Workshop Control* screen. Click on the **Clear** button to remove the default statuses from the screen. When the user clicks on the **Reset** button the default statuses will be reappear in the *Workshop Control* screen.

Exp

This is a new column in the *In Progress* tab. When the user clicks on this check box it will move the repair order to *Express Bays* tab.

InP

This is a new column in *Express Bays* tab. When the user clicks on this check box it will move the repair order to the *In Progress* tab.

Import RO

This is a new option from the action bar. This option will allow the user to move a repair order from a different date and into the current workshop control date. Select the **Import RO** option from the action bar and the following screen will be displayed:

Search and transfer ro to current workshop date

Move repair order to current Workshop Control date : 15/02/2012

Parameters

Search Type ☒ Advisor Number ☐ Customer Name ☐ Rego Number ☐ Stock Number ☐ Ro Number

Search For

Ro Number	Dept	Rego	Make	Model	Customer Name	Advisor	Ro Date	Prom Date	Prom Time
-----------	------	------	------	-------	---------------	---------	---------	-----------	-----------

Row 1 of 1 Page 1 of 1

Cancel Exit

No tip available

The user is able to search for a repair order from the above screen and when the user selects the required **Ro Number** hyperlink it will move the repair order to the current workshop control date.

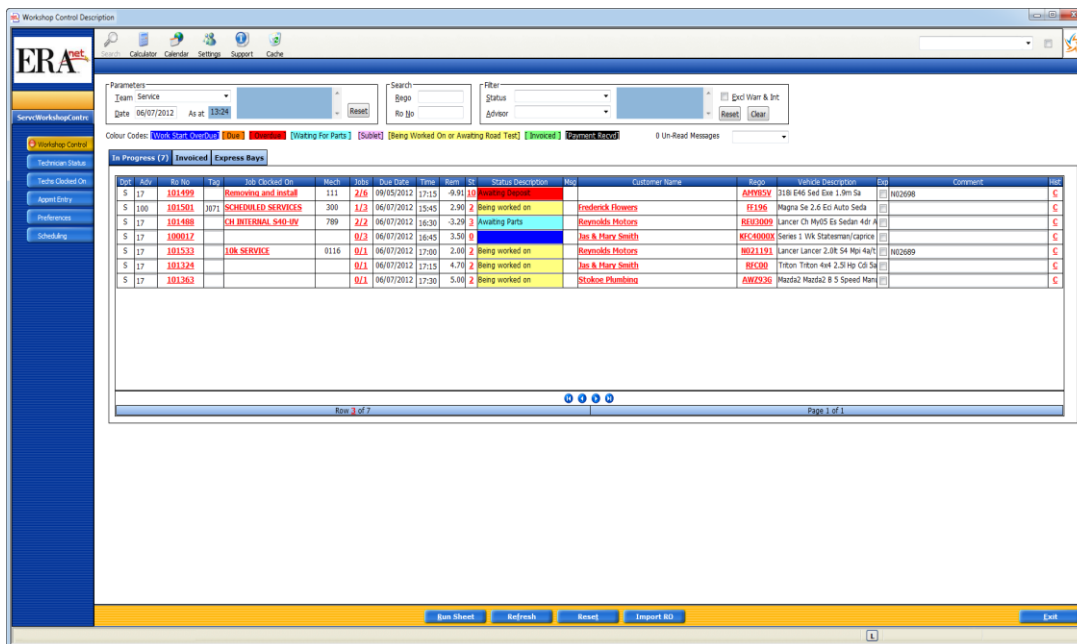
The promise time column from *Workshop Control* sheet can now be modifiable.

Work Start Overdue

Work Start Overdue is a new code which indicates that work on a vehicle has not commenced and there may be insufficient time to complete it. This status is calculated as per following:

Total Estimated Time – Current Time = Remaining Time

ERAnet V9

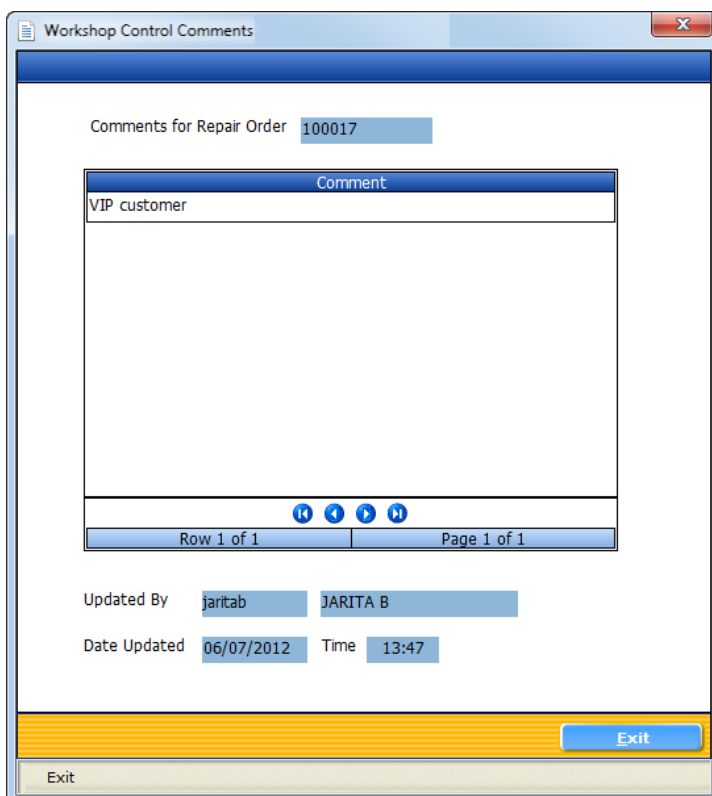



Comment

This is a new column in the *In Progress* tab. A **comment** can be entered into the new field and once the user **TAB** or **ENTER** from the field it is saved. If a new **comment** is then entered over the top, it will store this in a history file that can then be viewed.

Hist

Select the **c** hyperlink under the **Hist** column to display the comment history on the selected row as displayed in the following example:



Select **Exit** from the action bar to save the changes and return to the  *Workshop Control* screen.

Benefits

These new features will enable the dealer to filter the repair orders details quickly and efficiently and also save them time.

Activation Key

SERV-CONT

3025 – Appointments Display – Carry-over appointments

Enhancement

Overview

A new field has been added to *3025 – Appointments Display* to allow users to include or exclude carry-over appointments when preparing to send SMS reminders to customers.

Why

This change was made through a Request For Development submission to enhance existing functionality.

Screens

3025 – Appointments Display

The Change

Appointments or *Repair Orders* with carry-over hours will now display in *3025 – Appointments Display*. Select **3025 – Appointments Display** and the following screen will be displayed:

ERA

File Edit Setup Run Help

Appointments Display 3025

1. Starting Date : 24 JUL 12

2. Ending Date : 26 JUL 12

3. Team : S Service

4. Include appointments without jobs : No
with carry-over : Yes

5. Detail or Summary : Detail

6. Sort Sequence : 1 Time In

7. Output Mode : SMS

Command: Enter Modify Field# exit

Help: Save the current entries

Ready Ln 18, Col 46 NUM

The new field is 4 – Include appointments with carry-over.

4 – Include appointments with carry-over	Enter Yes to include carry-over appointments or No to exclude carry-over appointments. Note: The default option is Yes.
---	---

Selecting the **Yes** option followed by the **Enter** option from the command line will display the following screen:

The screenshot shows the ERA Appointments Display window. The title bar is 'ERA'. The menu bar includes File, Edit, Setup, Run, and Help. The toolbar contains various icons for file operations and navigation. The main window is titled 'Appointments Display' with a status bar showing '3025'. Below the title bar, there is a section for 'SMS Message' with a table of appointments. The table has columns for Mobile Number, Description, and Status. The first row shows a mobile number (0435) 305 305 * and a description 'Jas & Mary Smith' with a status of 'MI22'. The second row shows the same mobile number and description, but with a status of 'MI22' and a date of '24/07/12 08:31'. The third row shows the same mobile number and description, but with a status of 'MI22' and a date of '25/07/12'. Below the table, there is a section for '2. Message' with a text area containing the message: 'Hi [1], your car [2] is due for service on [3], [4]. Please don't forget to come and drop by. Thanks.' To the right of the message is a section for '3. Template Keys' with a list of keys: [1] Customer Name, [2] Licence Number, [3] Appointment Date, and [4] Appointment Time. At the bottom of the window, there is a command bar with buttons for Send, Modify, Field#, Preview, and Exit. The status bar at the bottom shows 'Ready', 'Ln 22, Col 27', and 'NUM'.

Mobile Number	Description	Status
(0435) 305 305 *	Jas & Mary Smith	MI22
(0435) 305 305 *	Jas & Mary Smith	MI22
(0435) 305 305 *	Jas & Mary Smith	MI22

2. Message
Hi [1], your car [2] is due for service on [3], [4]. Please don't forget to come and drop by. Thanks.

3. Template Keys
[1] Customer Name
[2] Licence Number
[3] Appointment Date
[4] Appointment Time

Command: Send Modify Field# Preview Exit
Help: Send SMS to tagged numbers

Ready Ln 22, Col 27 NUM

The original appointment date and time will display along with the carry-over dates.

The user is able to proceed with sending the SMS as per existing functionality.

Selecting **No** for 4 – Include appointments with carry-over option will not include carry-over appointments as displayed in the following example:

The screenshot shows the ERA Appointments Display window. The title bar is 'ERA'. The menu bar includes File, Edit, Setup, Run, and Help. The toolbar contains various icons for file operations and navigation. The main window is titled 'Appointments Display' with a status bar showing '3025'. Below the title bar, there is a section for 'SMS Message' with a table of appointments. The table has columns for Mobile Number, Description, and Status. The first row shows a mobile number (0435) 305 305 * and a description 'Jas & Mary Smith' with a status of 'MI22'. The second row shows the same mobile number and description, but with a status of 'MI22' and a date of '24/07/12 08:31'. The third row shows the same mobile number and description, but with a status of 'MI22'. Below the table, there is a section for '2. Message' with a text area containing the message: 'Hi [1], your car [2] is due for service on [3], [4]. Please don't forget to come and drop by. Thanks.' To the right of the message is a section for '3. Template Keys' with a list of keys: [1] Customer Name, [2] Licence Number, [3] Appointment Date, and [4] Appointment Time. At the bottom of the window, there is a command bar with buttons for Send, Modify, Field#, Preview, and Exit. The status bar at the bottom shows 'Ready', 'Ln 22, Col 0', and 'NUM'.

Mobile Number	Description	Status
(0435) 305 305 *	Jas & Mary Smith	MI22
(0435) 305 305 *	Jas & Mary Smith	MI22
(0435) 305 305 *	Jas & Mary Smith	MI22

2. Message
Hi [1], your car [2] is due for service on [3], [4]. Please don't forget to come and drop by. Thanks.

3. Template Keys
[1] Customer Name
[2] Licence Number
[3] Appointment Date
[4] Appointment Time

Command: Send Modify Field# Preview Exit
Help: Send SMS to tagged numbers

Ready Ln 22, Col 0 NUM

Note: The carry-over dates are not included.

The user is able to proceed with sending the SMS as per existing functionality.

Benefits

The introduction of the new field will provide users with added flexibility when sending out reminders to customers with carry-overs.

3658 – Reprinting Closed Invoices – specific customer

Enhancement

Overview

An enhancement has been made to allow the user to reprint service invoices for a specific customer.

Why

This change was made through a Request For Development submission to enhance existing functionality.

Screens

3658 – Reprinting Closed Invoices

The Process

Select **3658 – Reprinting Closed Invoices** and the following screen will be displayed:

ERA

File Edit Setup Run Help

Reprinting Closed Invoices 3658

Reprint Service Invoices

1. Repair Order# :

2. Repair Order# From :

3. Repair Order# To :

4. Customer# :

5. Date From :

6. Date To :

7. Category :

8. Invoice :

9. Payment Type :

10. Sort By :

11. Reason :

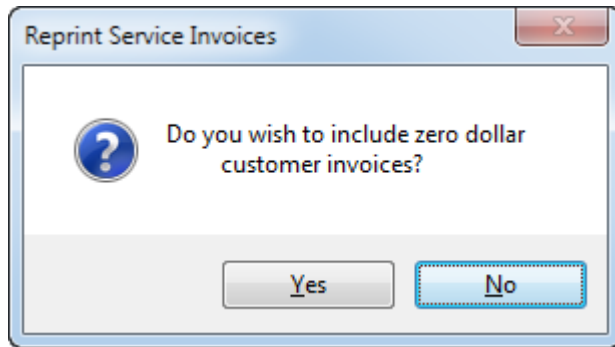
Help: Enter a specific RO number or return for range selections

Ready Ln 4, Col 33 NUM

The new field added to this screen is *Customer #*.

4 – Customer #	Enter the specific customer number to reprint the service invoices for. Note: The user is only able to enter one customer number in this field.
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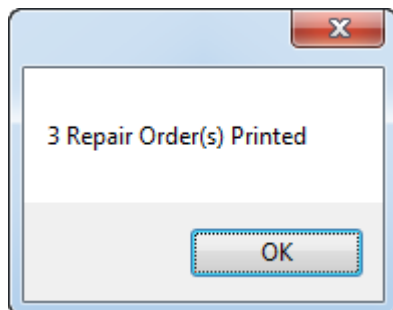
The following pop up message will display when the customer number is entered:



Select **Yes** to include zero dollar customer invoices or **No** to exclude zero dollar customer invoices.

Selecting either option will take the user to the *Date From* field. Enter the remaining criteria as per existing functionality and proceed towards reprinting the service invoices.

The following pop up message will display indicating the number of Repair Orders reprinted:



Select **OK** to acknowledge the message and return to the top of the *3658 – Reprinting Closed Invoices* screen.

Benefits

The ability to reprint service invoices for a specific customer will alleviate the hassle of finding individual invoices and reprinting them separately.