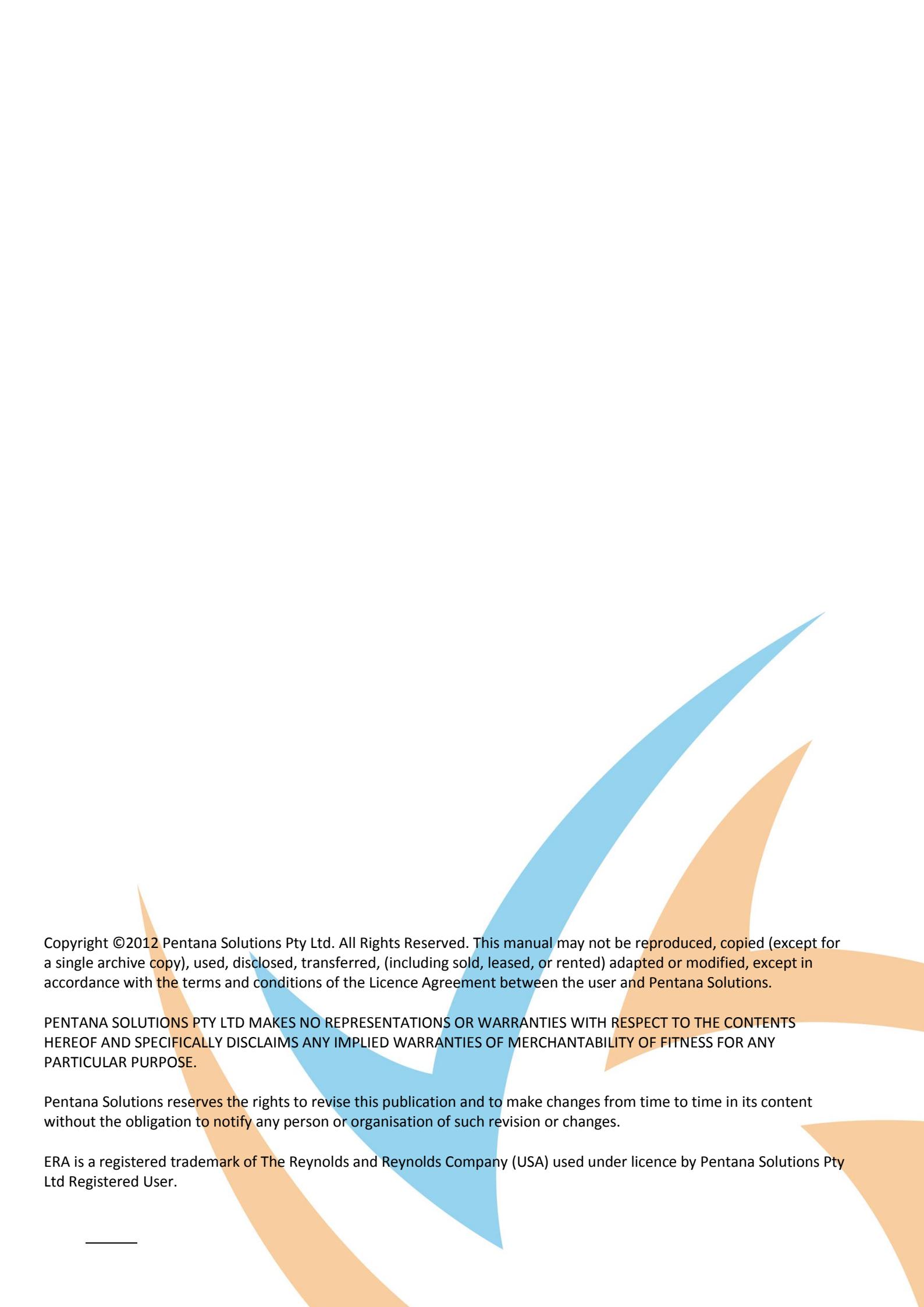




# **v9 Release**

# **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



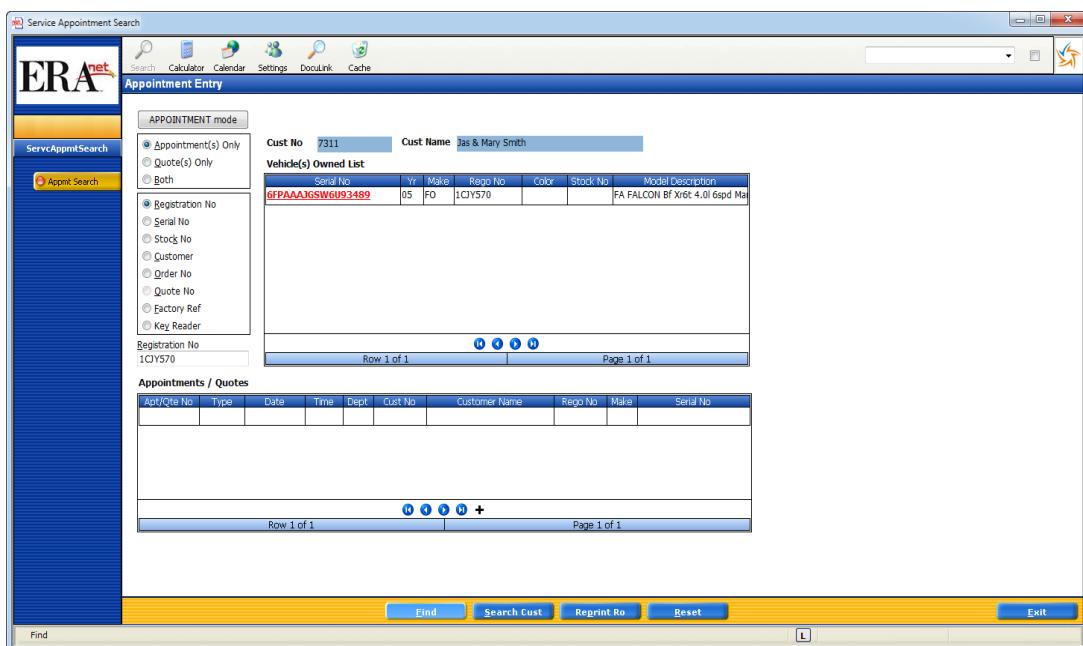
Appointment Entry

#### The Process

##### Appointment Entry

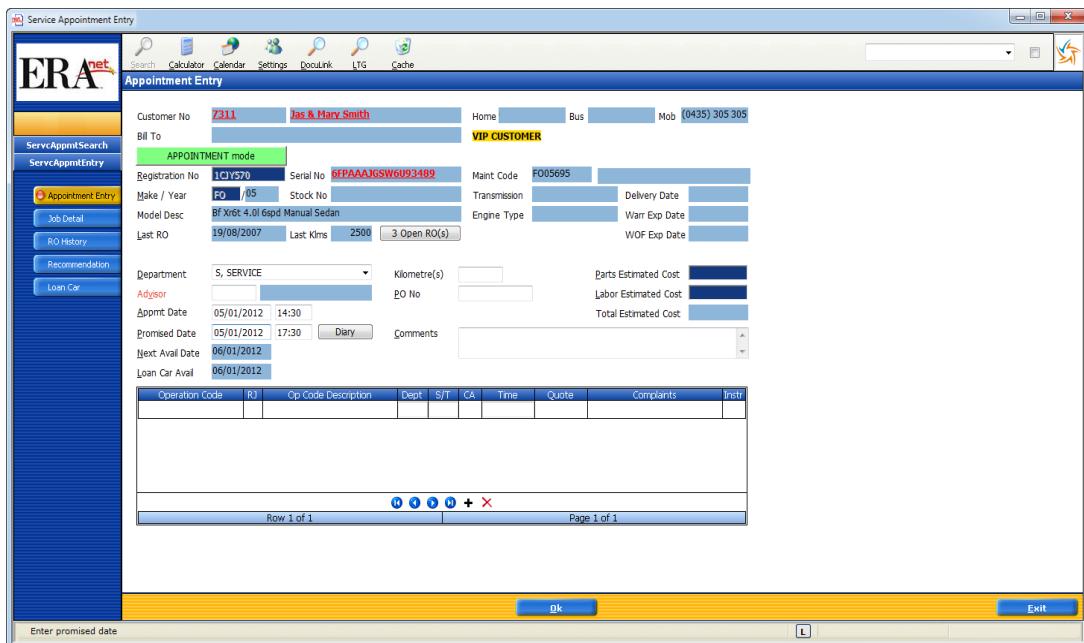
Upon logging into ERAnet, select  **Service**,  **Appointment Entry** and search for a relevant customer as per existing functionality and the following screen will be displayed:

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



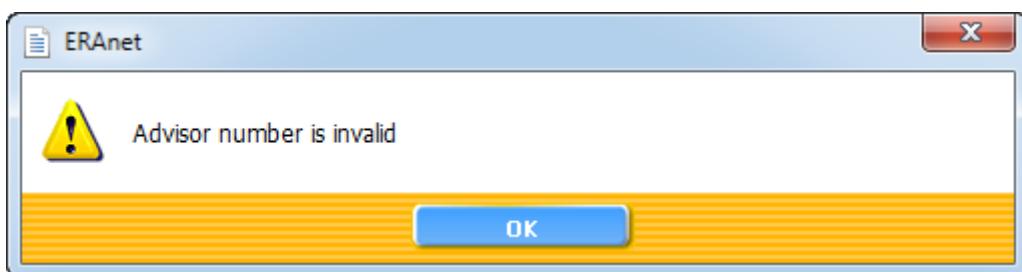
Select the Serial No hyperlink and the following screen will be displayed:

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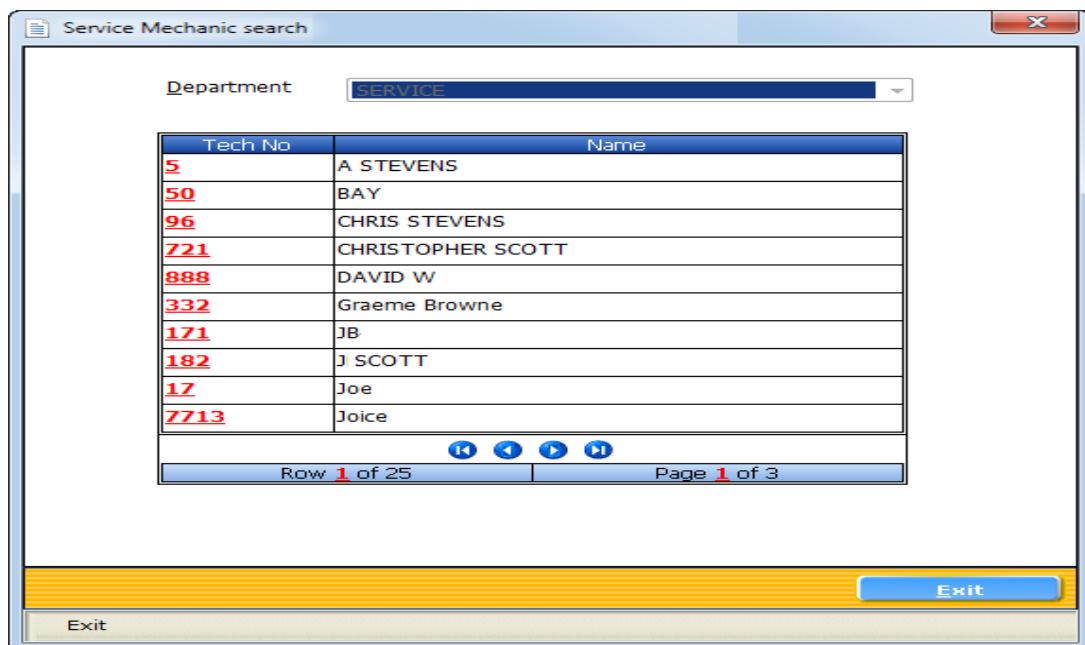
The *Advisor* field is now a text box. The user is able to enter a valid **advisor number** or search for a valid advisor by clicking on  **Search**.

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:

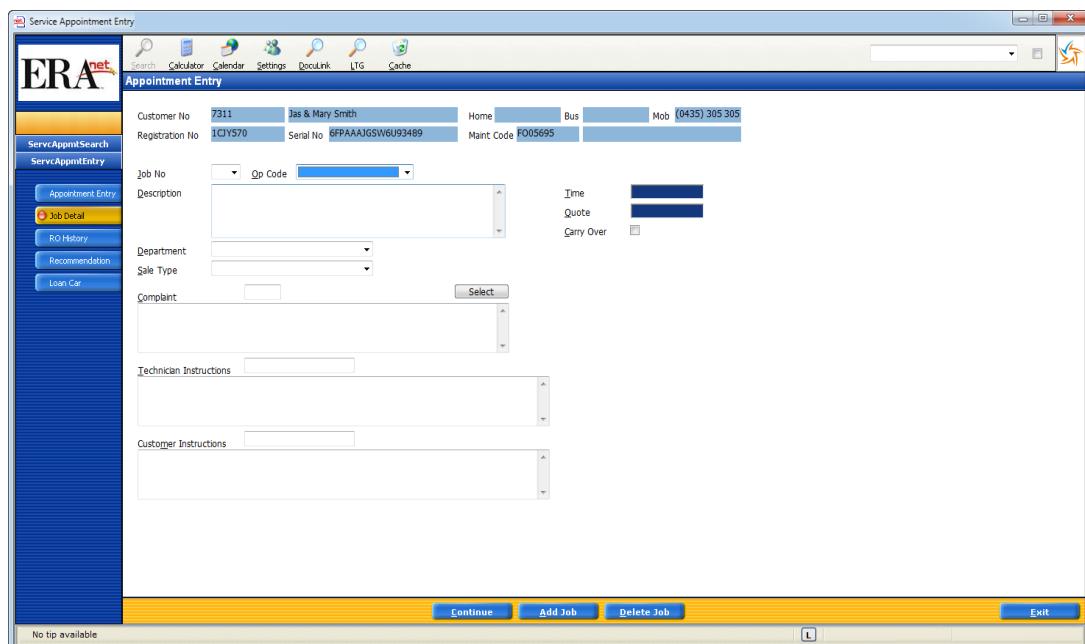


**Note:** The *Department* field will be disabled. The department displayed in this field is picked up from the *Appointment Entry* main screen.

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:



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.

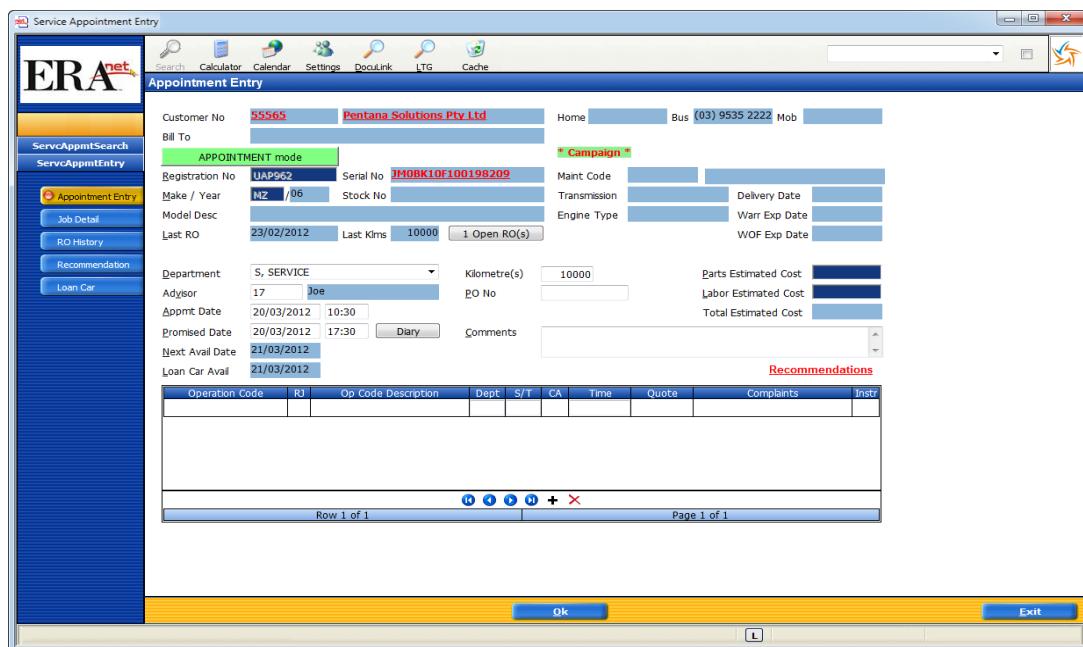
#### Screens



#### Appointment Entry

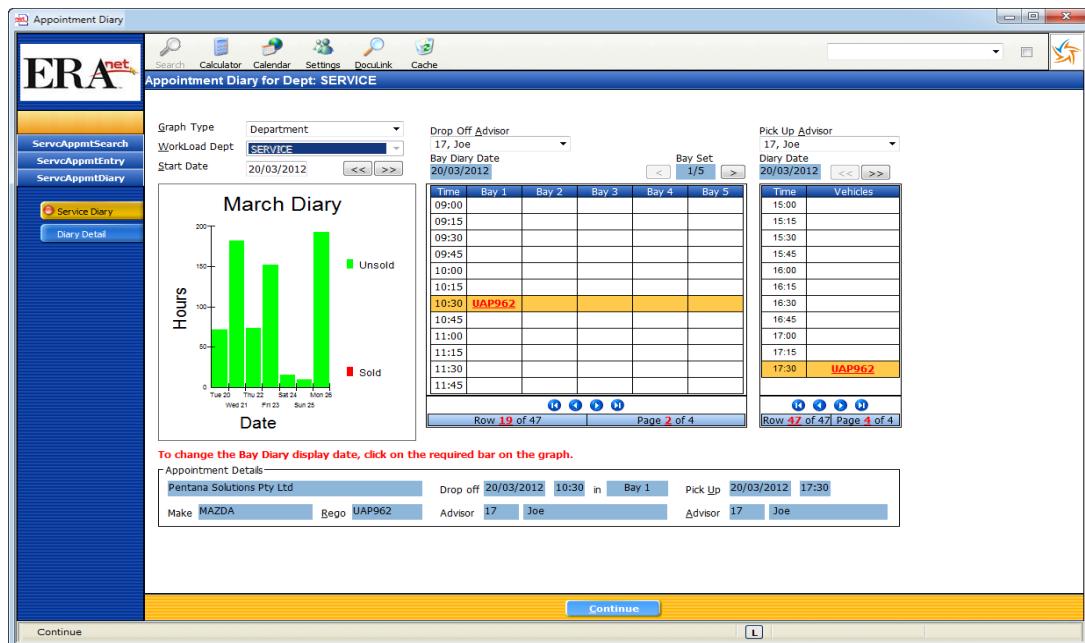
#### The Process

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:

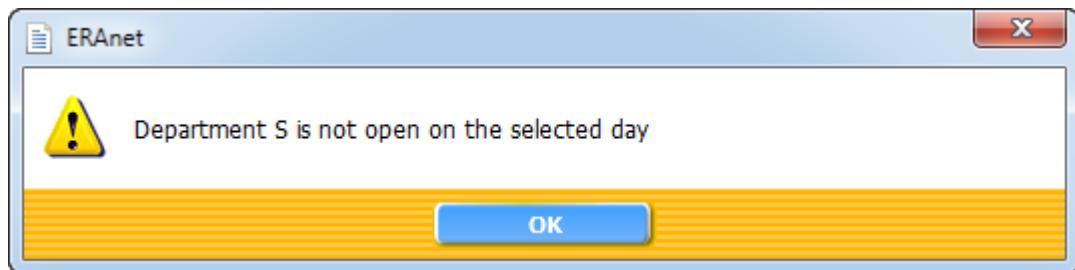


The screenshot shows the 'Appointment Entry' screen in the ERAnet software. The left sidebar has buttons for 'ServAppntSearch', 'ServAppntEntry', 'Appointment Entry' (which is highlighted in yellow), 'Job Detail', 'RO History', 'Recommendation', and 'Loan Car'. The main area has fields for 'Customer No' (55565), 'Bill To' (Pentana Solutions Pty Ltd), 'Registration No' (UAP962), 'Make / Year' (NZ /06), 'Model Desc', 'Last RO' (23/02/2012), 'Department' (S. SERVICE), 'Adyisor' (17 Joe), 'Apptn Date' (20/03/2012 10:30), 'Promised Date' (20/03/2012 17:30), 'Next Avail Date' (21/03/2012), and 'Loan Car Avail' (21/03/2012). There are buttons for 'OK', 'Cancel', and 'Exit'. At the bottom, there is a table titled 'Recommendations' with columns for 'Operation Code', 'RJ', 'Op Code Description', 'Dept', 'S/T', 'CA', 'Time', 'Quote', 'Complaints', and 'Instr'. The 'OK' button is highlighted in blue.

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



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

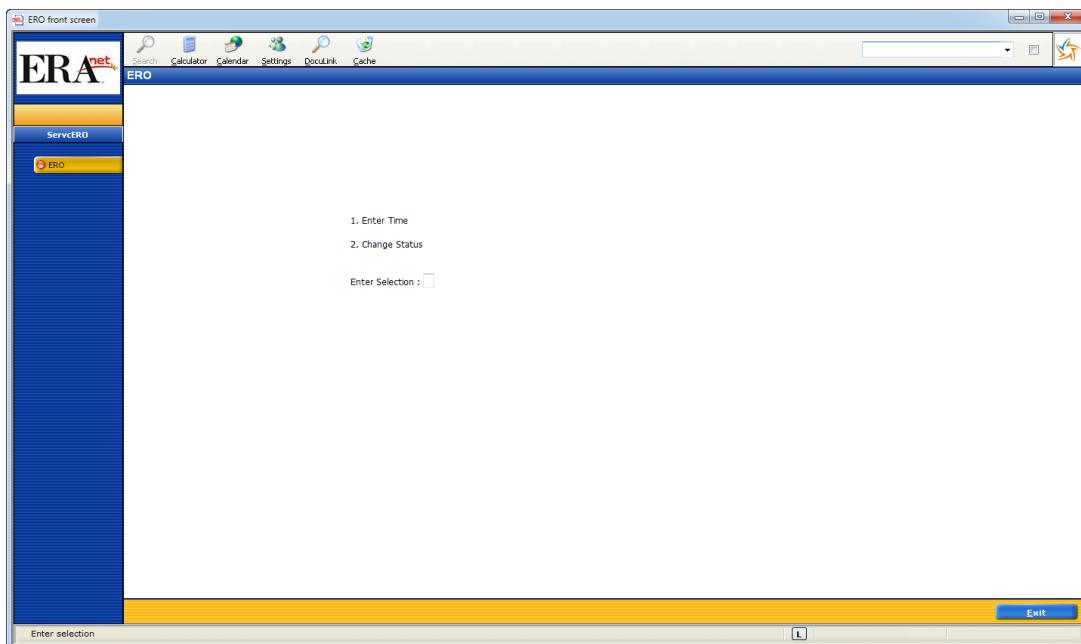
3659 – Electronic Repair Order Time Entry

#### The Process

##### ERAnet

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

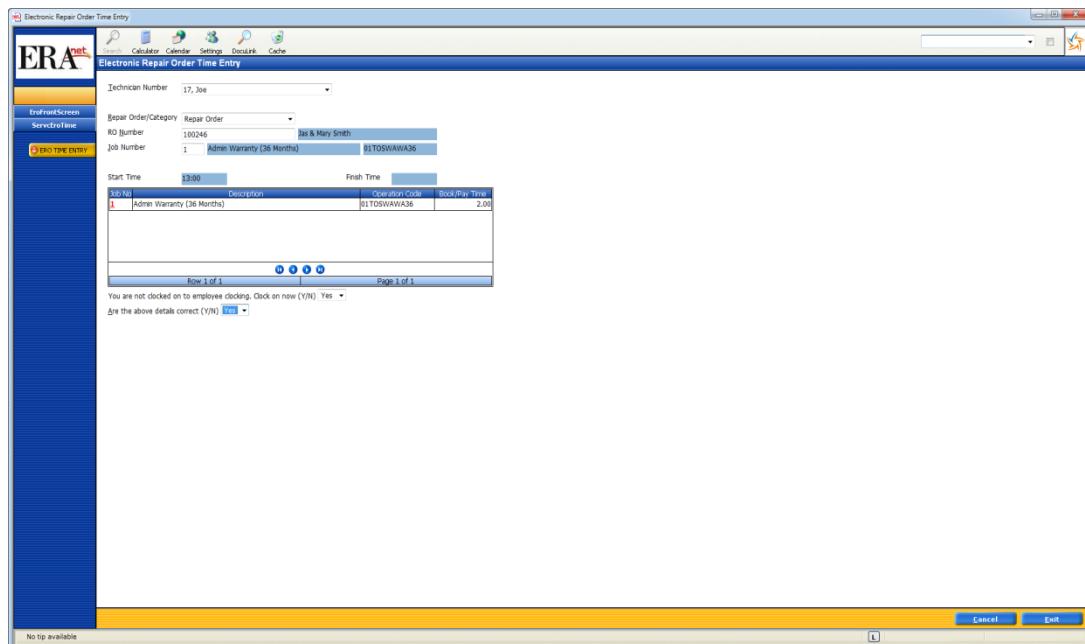
Upon logging into ERAnet as per existing functionality, select **Service**, **Technician Time Menu**, followed by **ERO** and the following screen will be displayed:



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.

# Service Manual



## Book/Pay Time

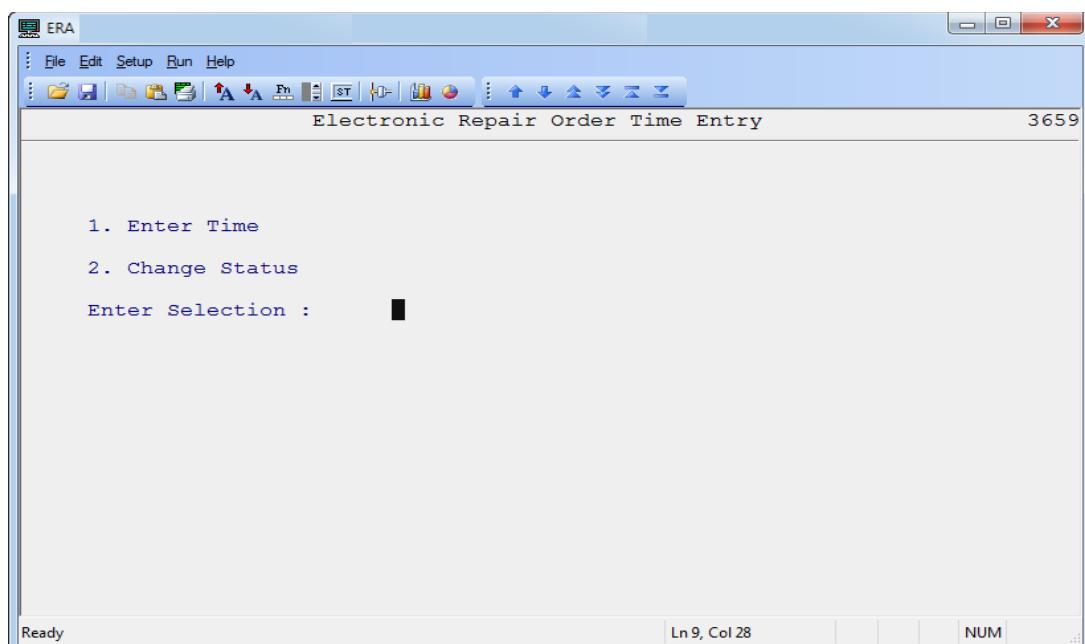
This field will display the book/pay time for the operation code as setup in 3625 - *Service Operations*. If there is no book/pay time for the relevant operation code, this field will remain blank.

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.

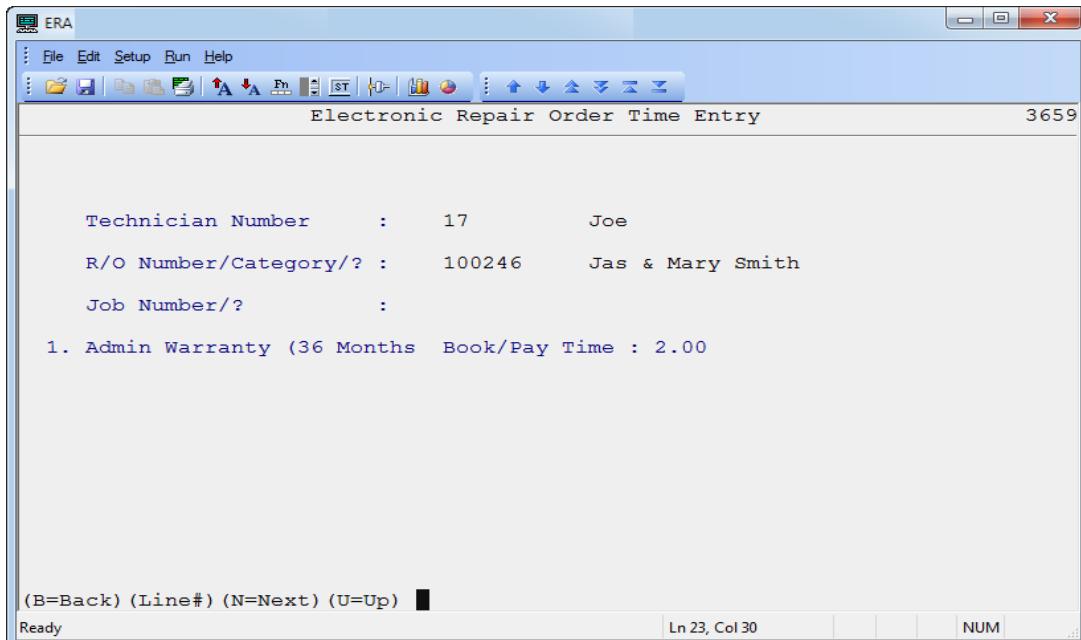
Select **3659 – Electronic Repair Order Time Entry** and the following screen will be displayed:



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.



## 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.

## 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

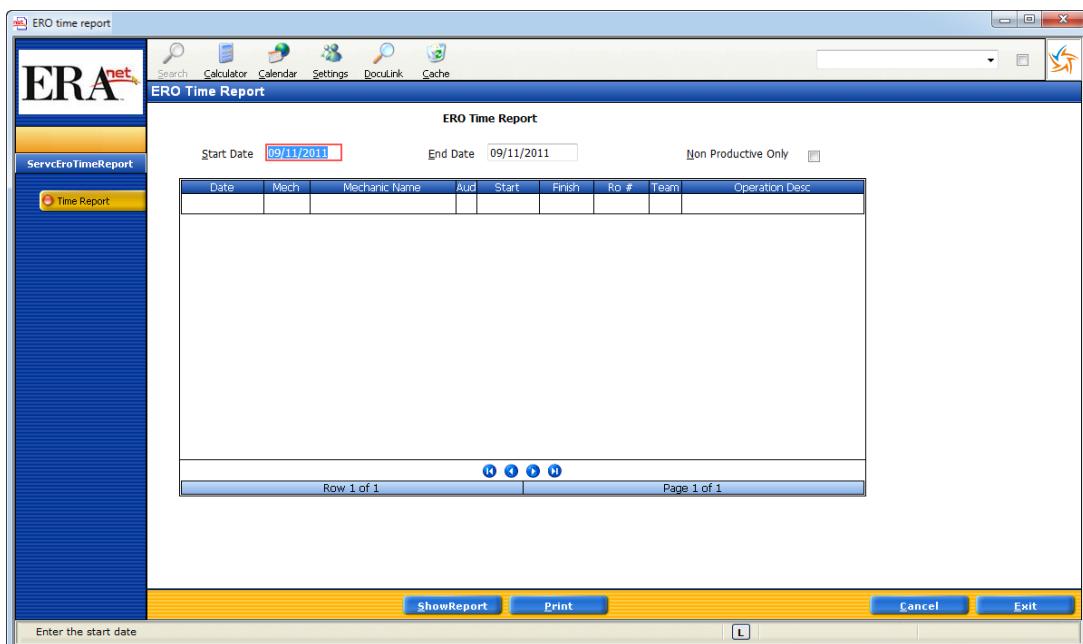
This change was made through a Request For Development submission to enhance existing functionality.

#### Screens



#### The Process

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

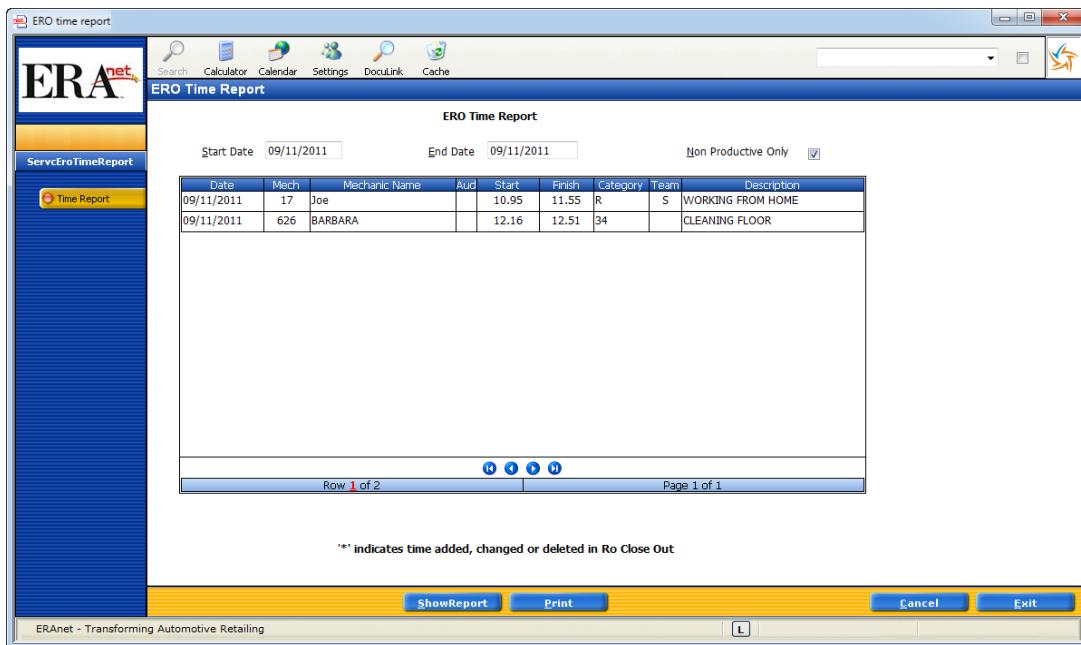


A new *Non Productive Only* option has been added to this report to display mechanics that have clocked on to unproductive categories.

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



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

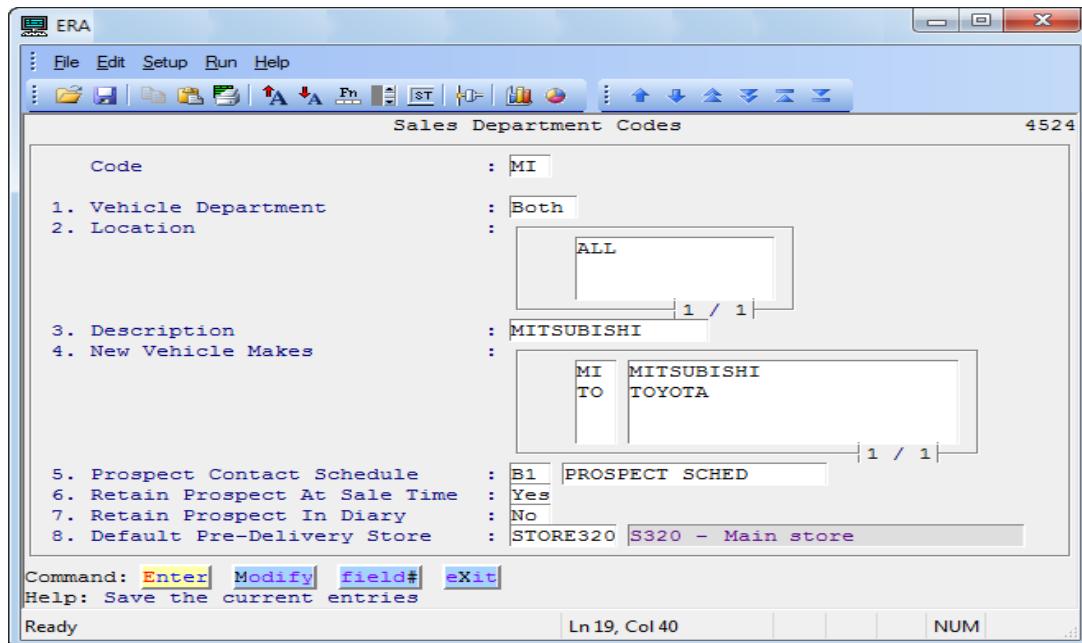
-  Deal Log Report – Sales Manager
-  Deal Log Report – Stock Control
-  Delivery Diary
-  Pre-Delivery
-  Pre-Delivery Setup
-  Prospect Maintenance
-  RO Close Out
-  Salesperson Maintenance
-  Service
-  Showroom
-  Showroom Analysis
-  Showroom Setup
-  Vehicle Advisor
-  Workshop Control Menu
- 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

# ERAnet V9

## 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:



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

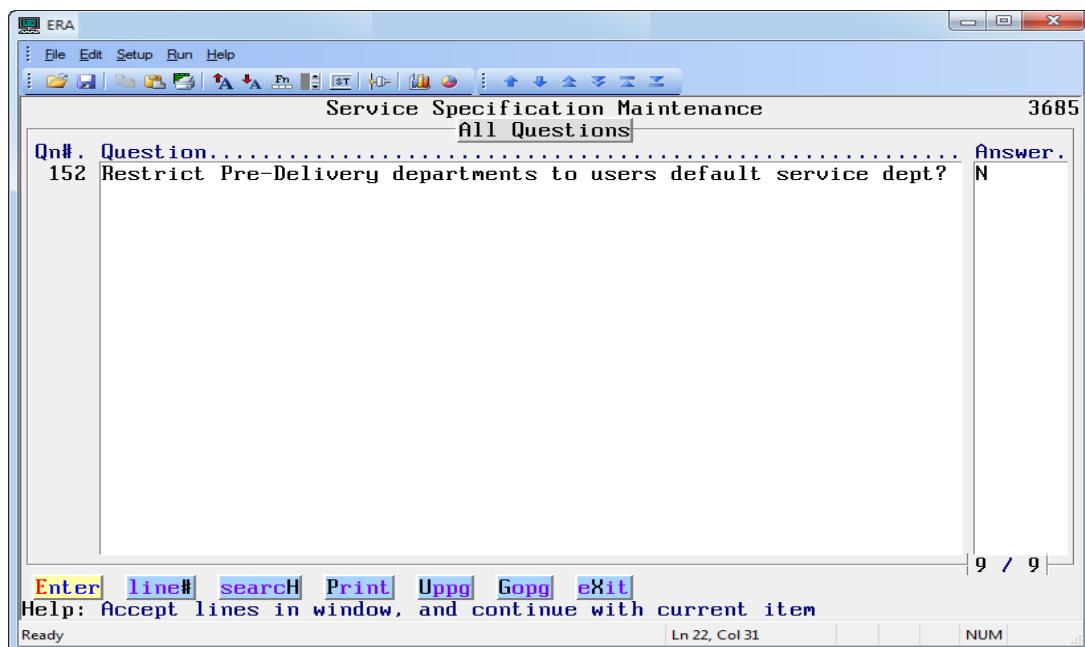
Select line **8 - Default Pre-Delivery Store** followed by the / lookup to select a valid **Service Store** where the Pre-Delivery Repair Orders will be created for this Sales Department.

**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:

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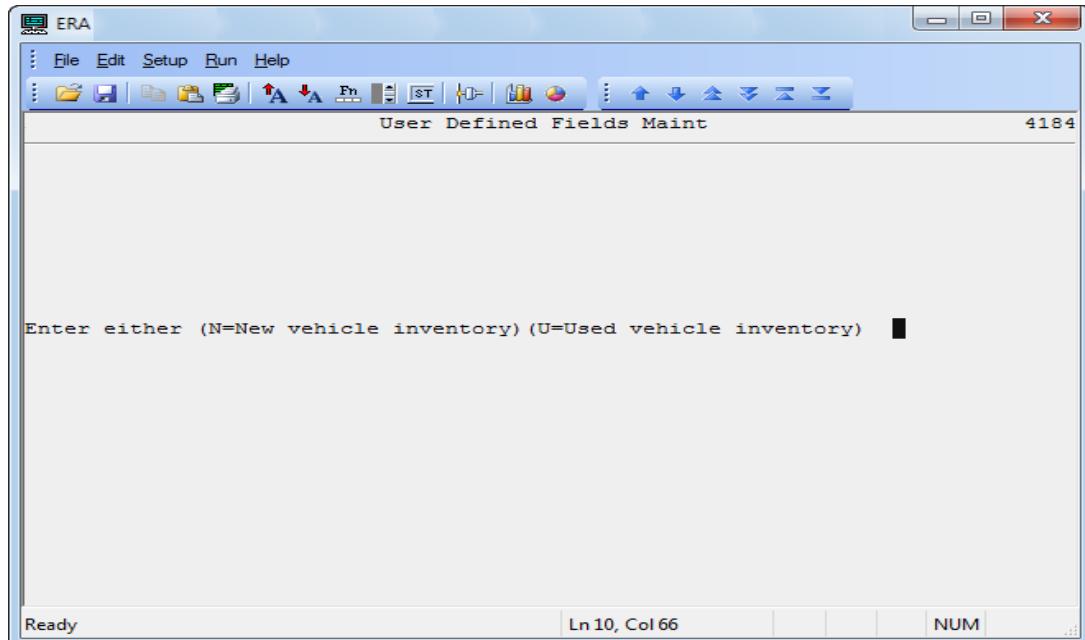
**152 – Restrict Pre-Delivery departments to users default service dept?**

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.

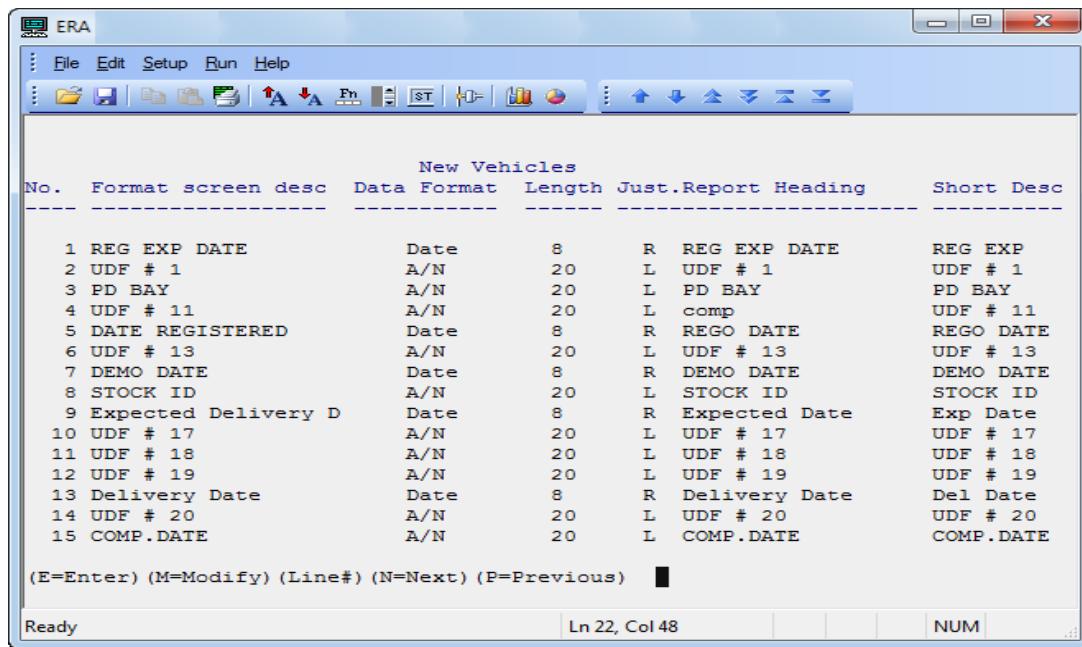
The information that appears in the *Loc* field in the Pre-Delivery Control screen will inform the Stock Controller where the vehicle is physically located, for example, Pre Delivery Bay (PD Bay).

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

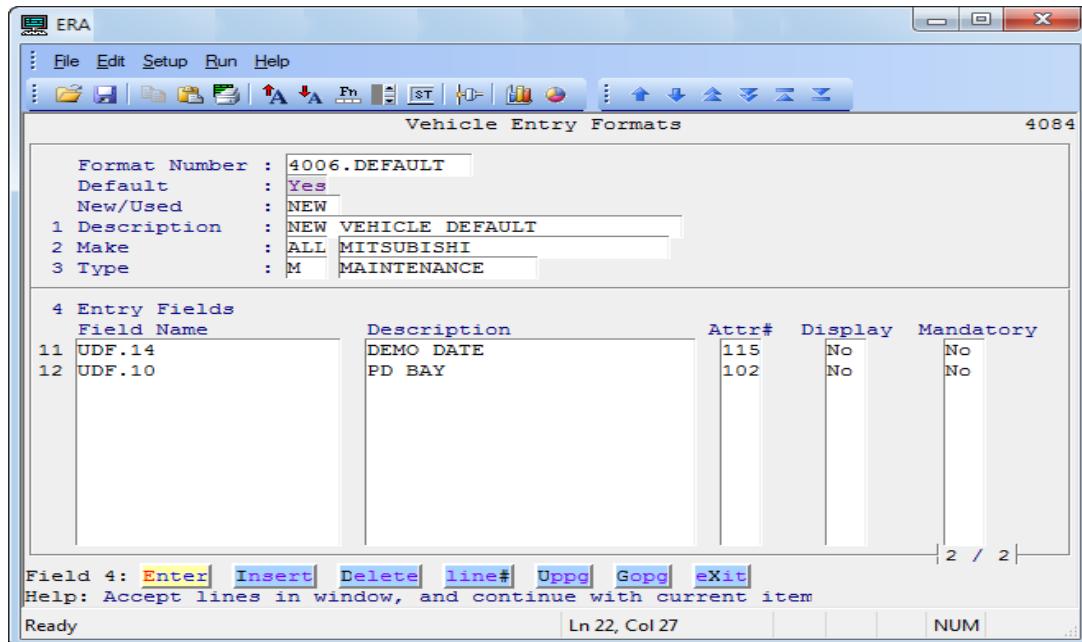


The *User Defined Field* will need to be setup as per existing functionality. The user will need to ensure that the Data Format field is setup as **A/N** for Alpha Numeric.

**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:

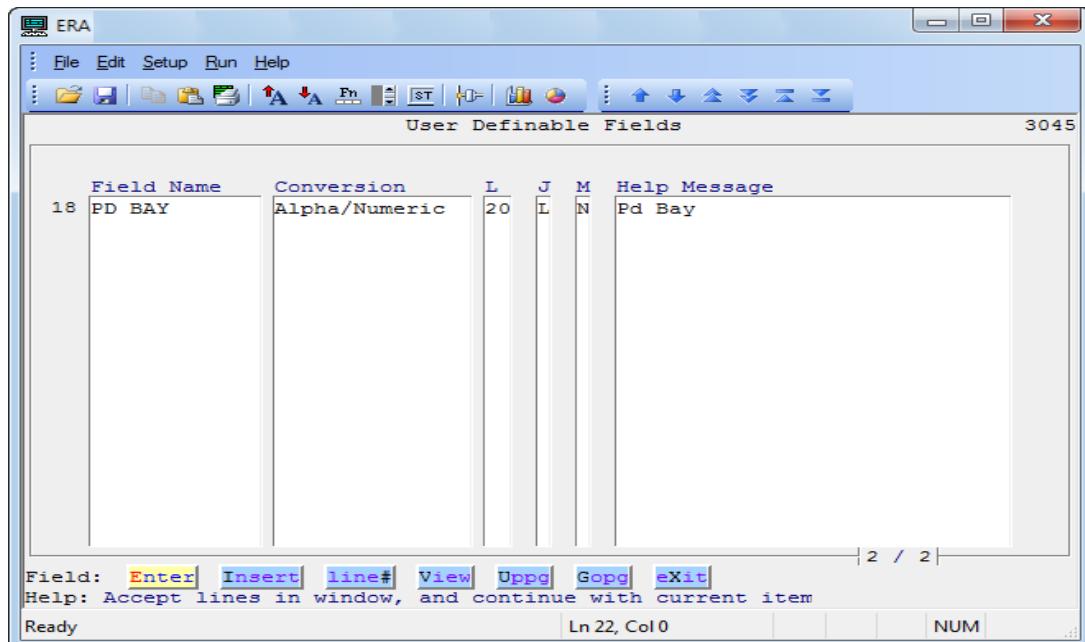


Select **4 – Entry Fields**, followed by the **Insert** option from the command line and select the UDF created in **4184 – User Defined Fields Maint** from the **/Lookup** as per existing functionality.

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

# Service Manual

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:

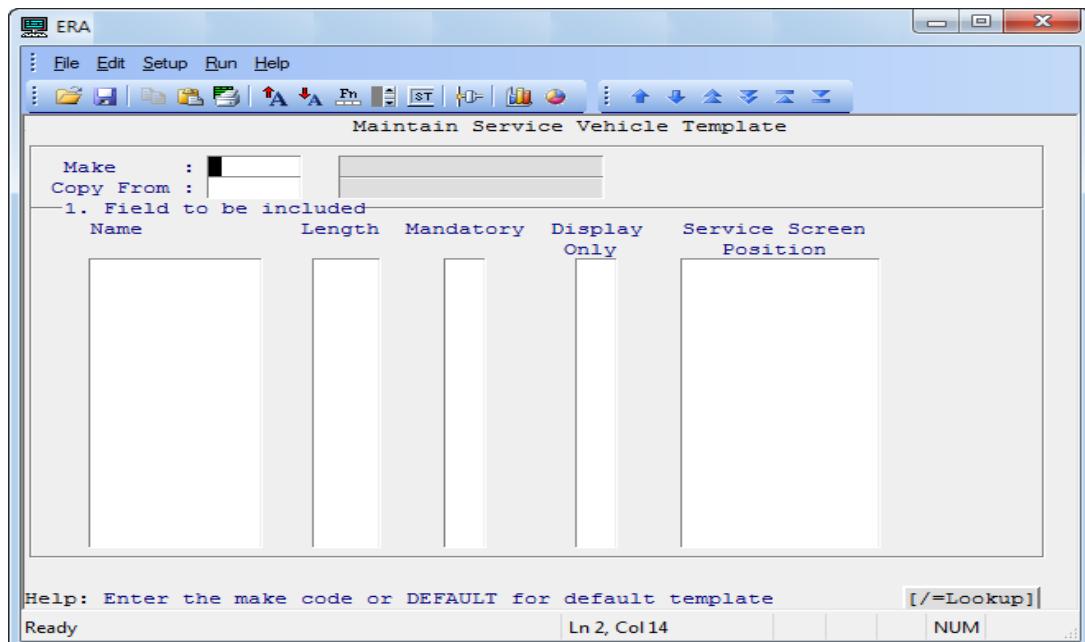


Select the **Insert** option from the command line and enter the **UDF name**. Ensure that the **Conversion** field is set to **Alpha/Numeric**.

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

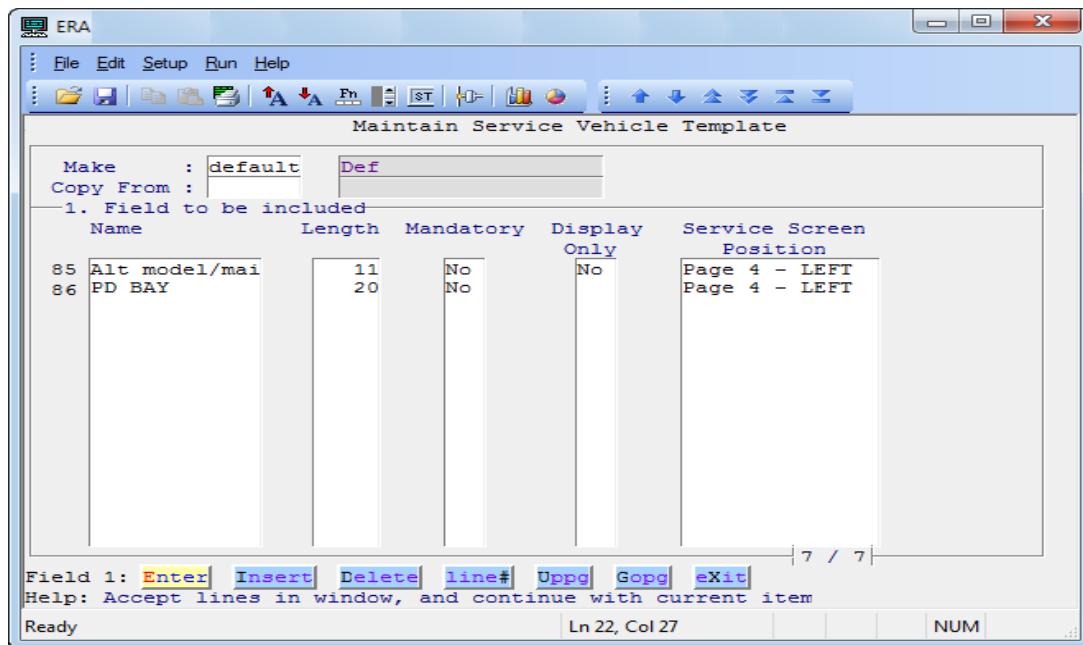
Select **Enter** from the command line to save the data.

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:



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

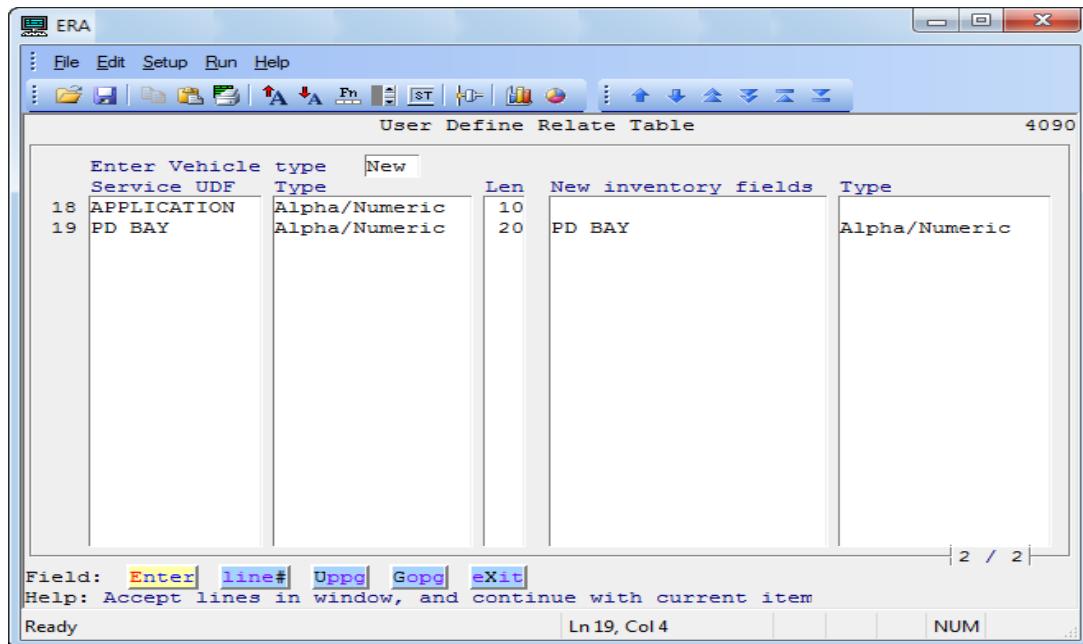
# ERAnet V9



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:



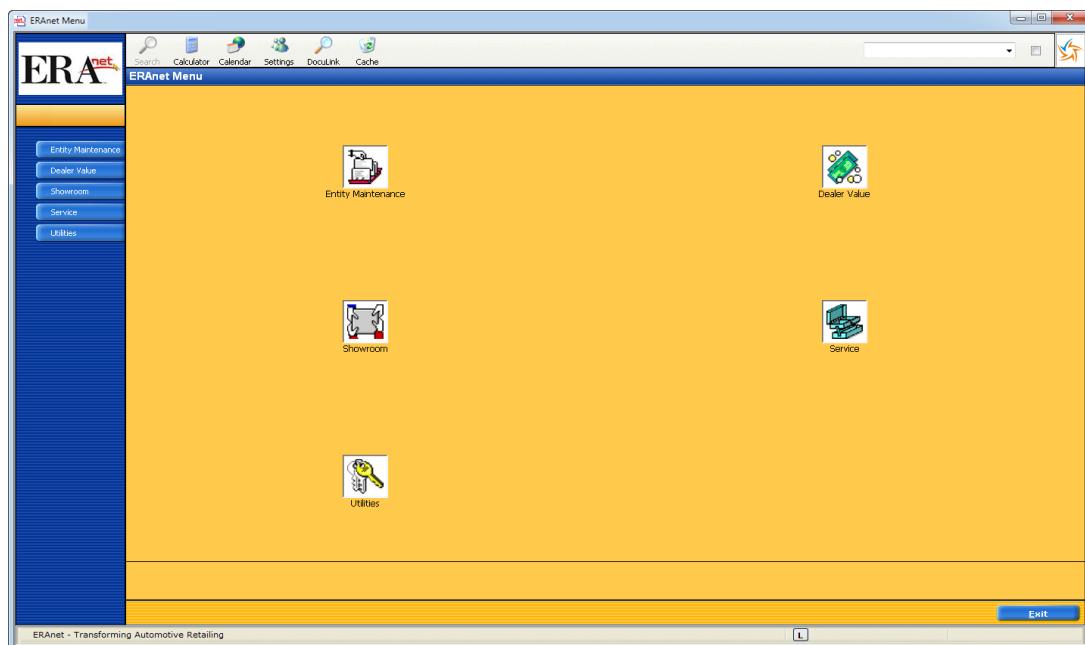
The Service UDF will already be displayed and the user will need to link it to the Vehicle UDF.

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.

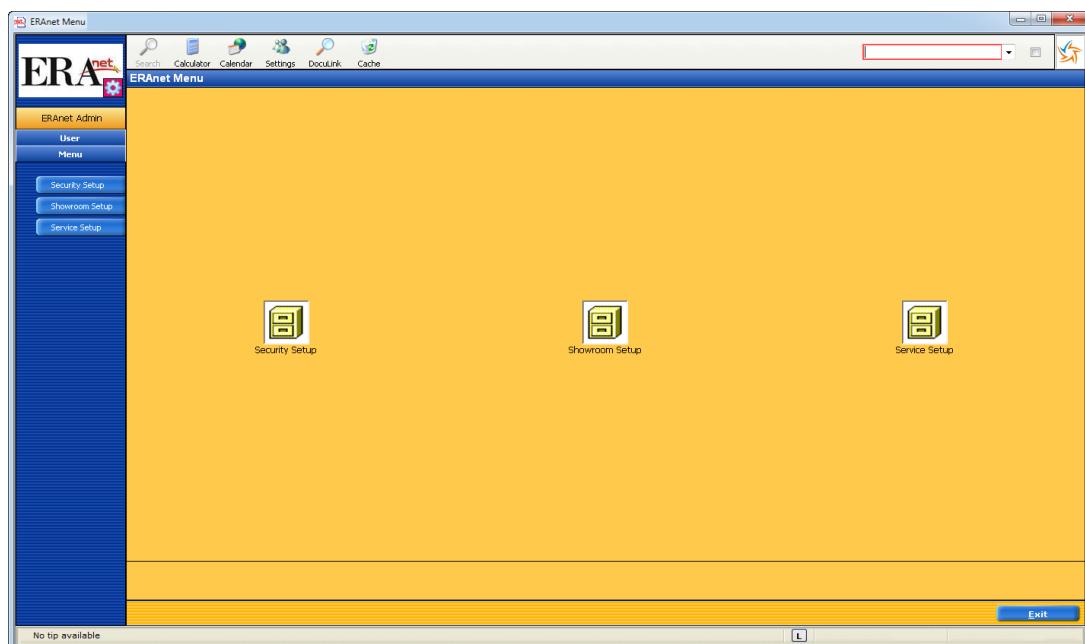
Select **Enter** from the command line to save the changes and repeat the same process for *Used Vehicle*.

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:

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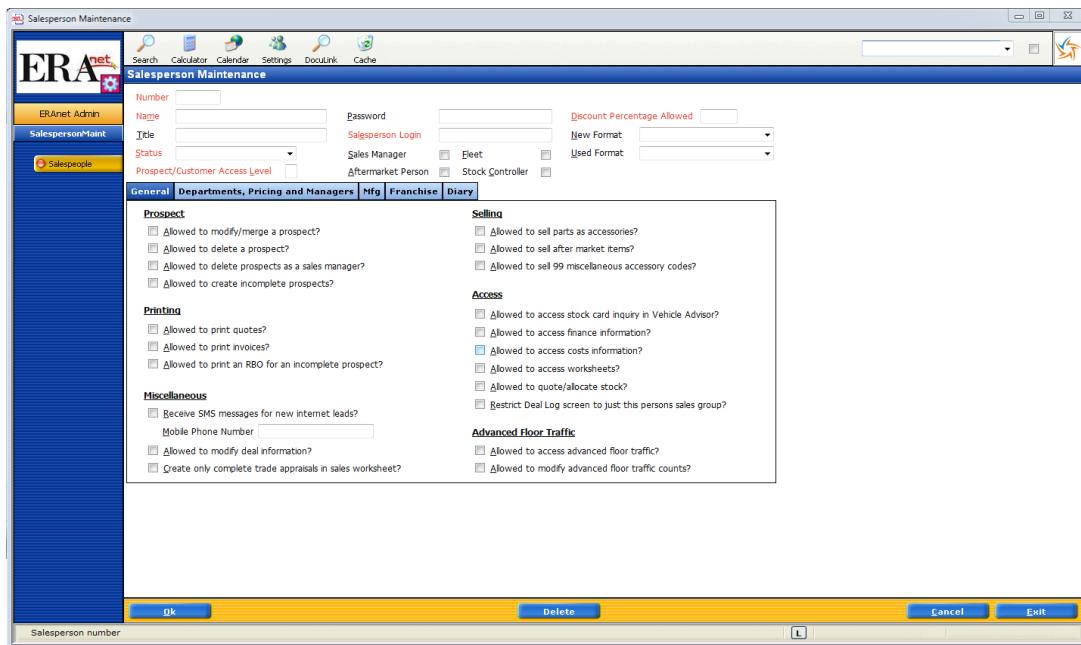


**Right click** on the **Store Number** link located on the top left corner of the screen and select the **ERAnet Admin** option from the list and the following screen will be displayed:

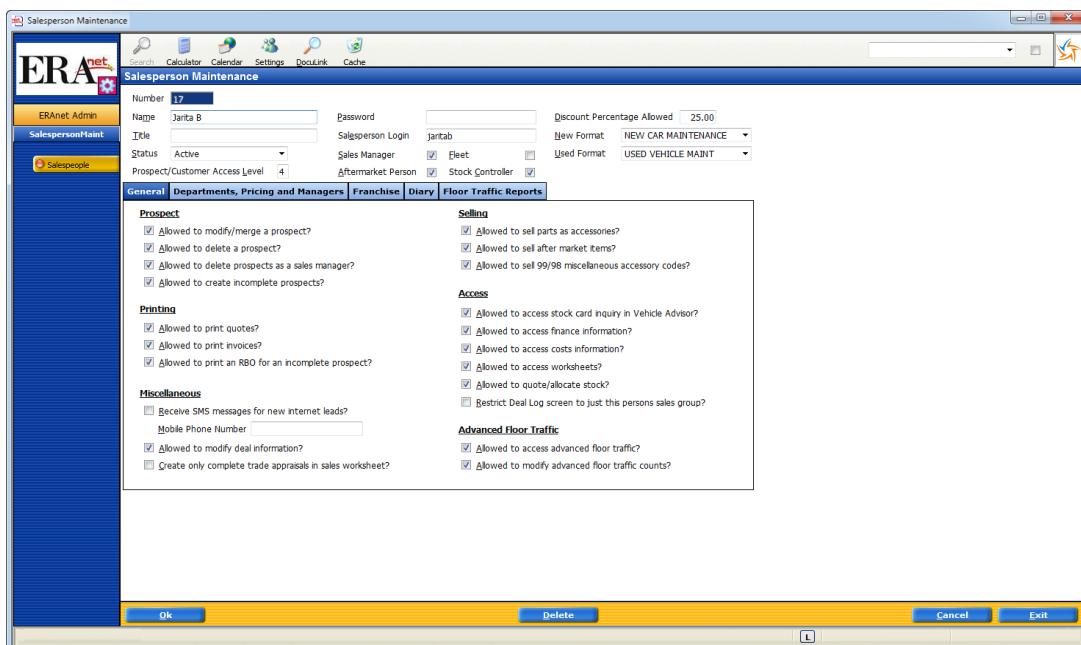


Select **Showroom Setup**, followed by **Salesperson Maintenance** and the following screen will be displayed:

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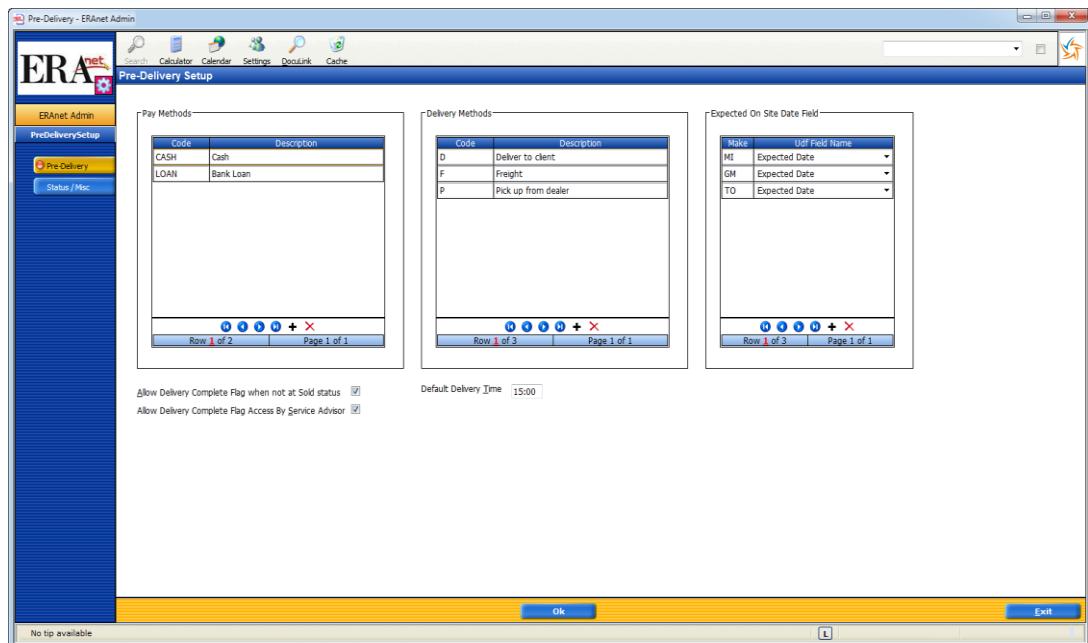
Identify each **Stock Controller** and ensure that the  **Stock Controller** check box is selected as displayed in the following example:



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

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

## Delivery Methods

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

## Expected On Site Date field

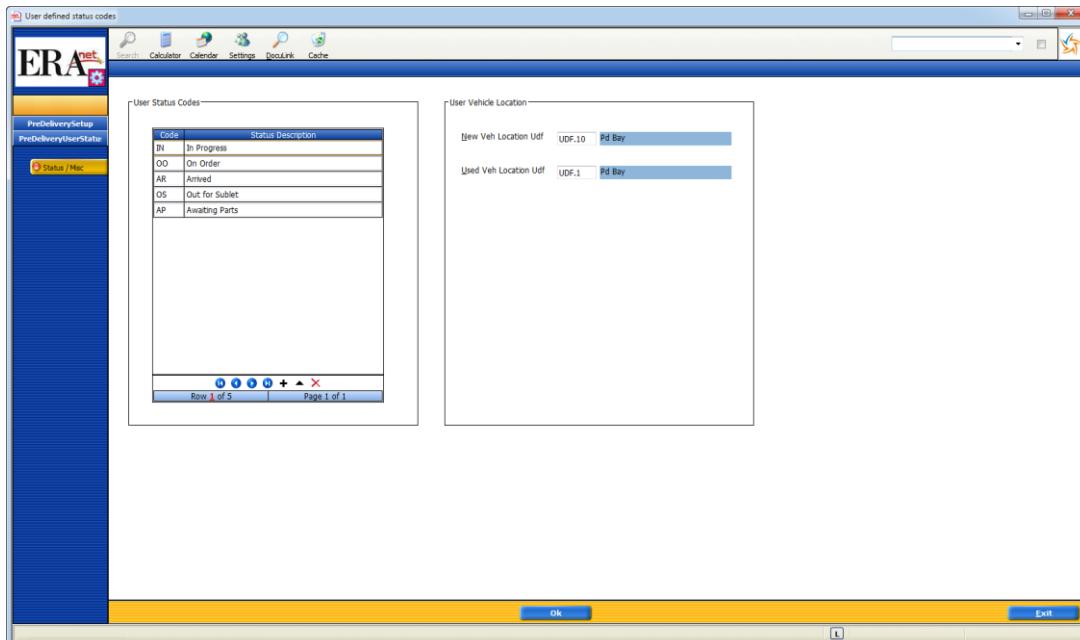
<b>Code</b>	Enter the <b>code</b> to be used for the Delivery Method. <b>Note:</b> The user is able to add multiple codes by selecting the <b>+</b> option. The user is also able to delete a code by selecting the <b>X</b> option.
<b>UDF Field Name</b>	Use the <b>▼</b> dropdown box to show the available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

<b>Allow Delivery Complete Flag when not at Sold status</b>	<input checked="" type="checkbox"/> Tick this option if the <b>Delivery Complete Flag</b> can be updated without the vehicle being at a status 5 - Sold.
<b>Default Delivery Time</b>	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 <b>Scheduled Delivery Time</b> when each <b>Scheduled Delivery Date</b> is entered.
<b>Allow Delivery Complete Flag Access By Service Advisor</b>	<input checked="" type="checkbox"/> Tick this option to allow the Service Advisor to set a deal to a <b>Delivery Complete</b> status and removing it from the <b>Pre-Delivery System</b> . The deal status does not have to be 5 – Sold in order for the Service Advisor to

# ERAnet V9

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.

<b>Code</b>	Enter the <b>code</b> to be used as the user status codes. <b>Note:</b> 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  option.
<b>Status Description</b>	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
	Enter the code <b>description</b> 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.

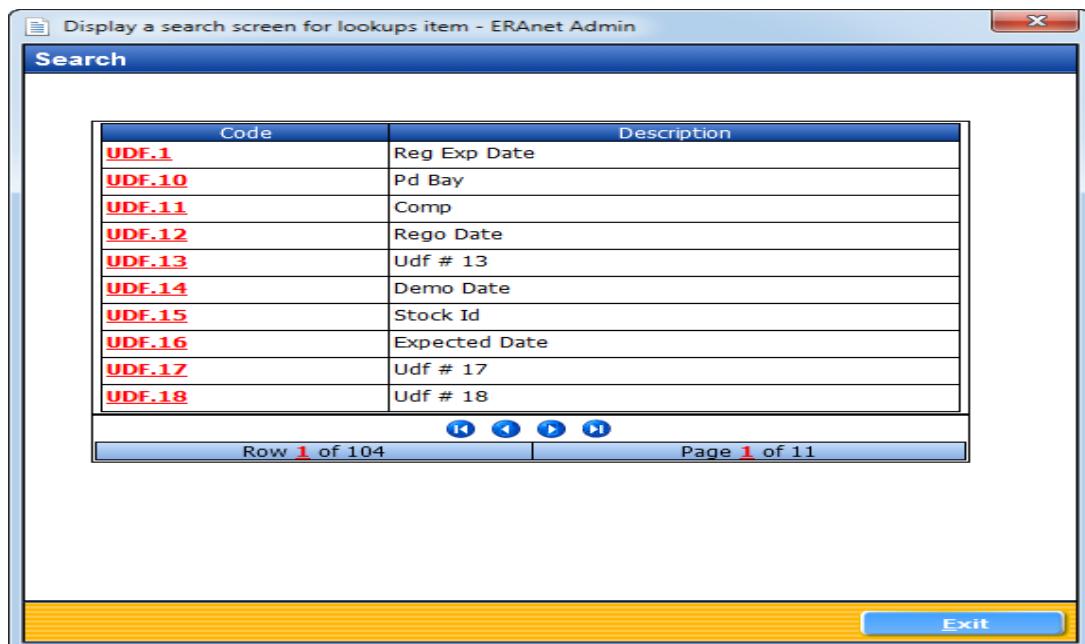
<b>New Veh Location Udf</b>	Select the <b>Search</b> option or <b>F3</b> from the keyboard to assign the <b>UDF</b> created in <i>4184 - User Defined Fields Maint</i> for New Vehicle. <b>Note:</b> The user is also able to enter the UDF name. However, the field name will need to be the name that is recognised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

# Service Manual

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.

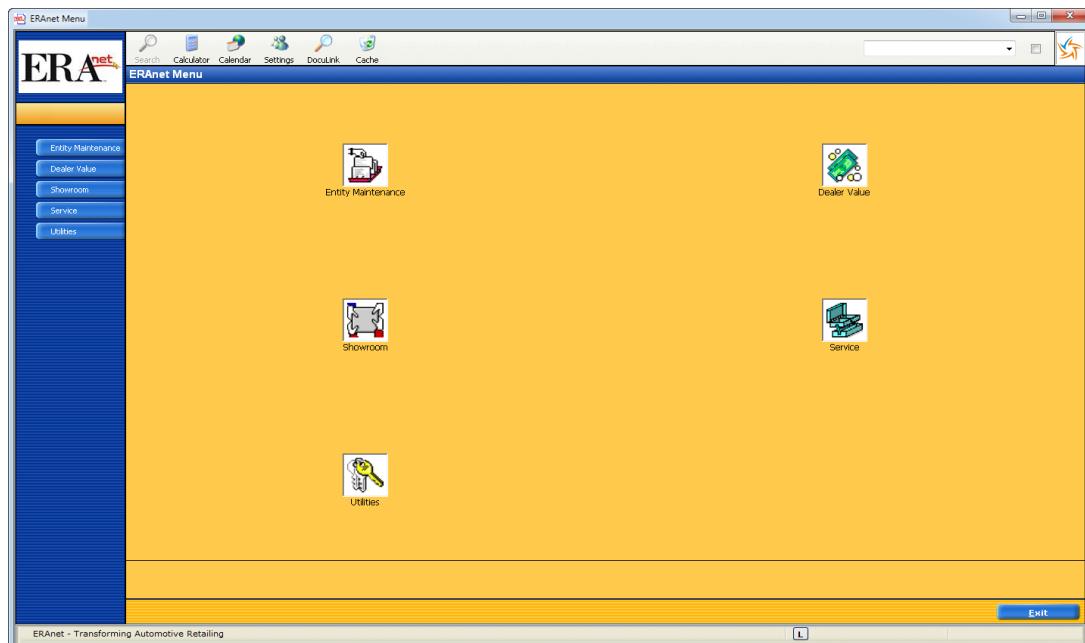
Selecting the  **Search** option or **F3** from the keyboard will display the following pop up screen:



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.

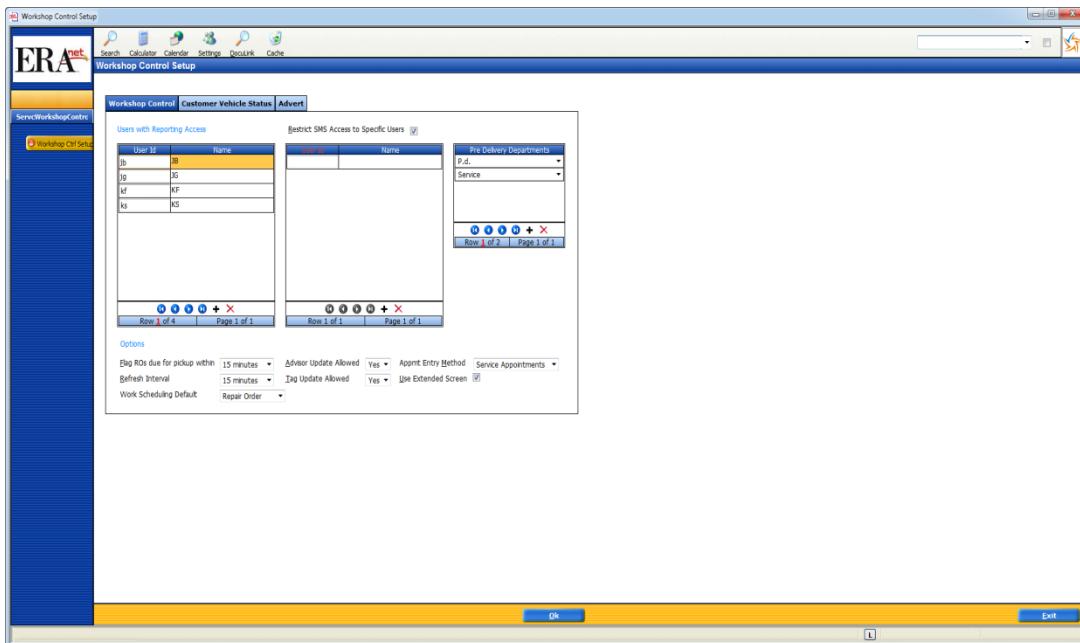
From the **ERAnet Menu (Showroom Setup)** screen **Right click** on the **ERAnet Admin** link located on the top left corner of the screen and select the relevant **Store Number** option from the list and the following screen will be displayed:



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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:



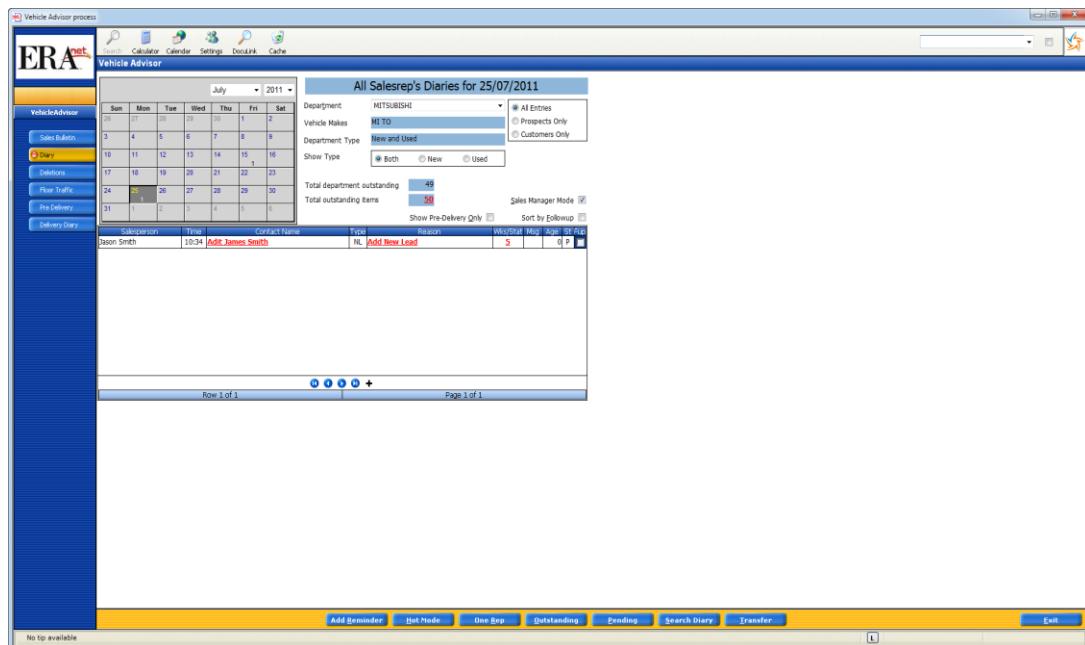
At the **Appmt Entry Method** field, select **Service Appointments** from the  dropdown box and save the changes by selecting the **Ok** option from the action bar.

## The Process

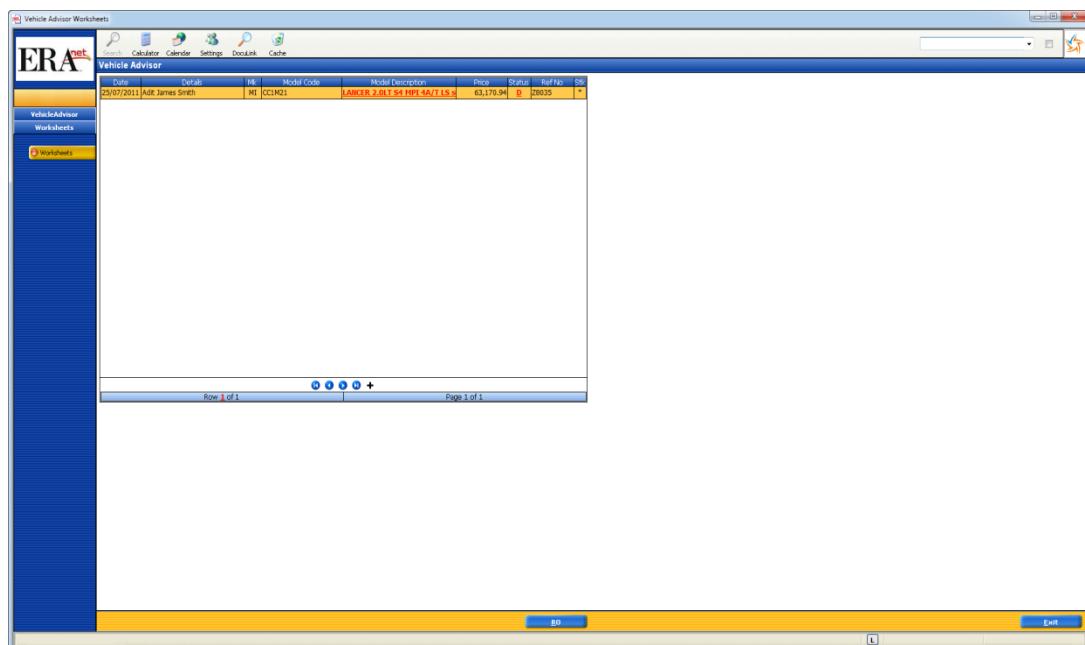
Within ERAnet  **Vehicle Advisor** a deal is raised as per existing functionality. Once the deal has been created the Sales Manager will then need to approve the deal through Sale Managers Mode in order for it to appear in **Pre-Delivery**.

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

# Service Manual

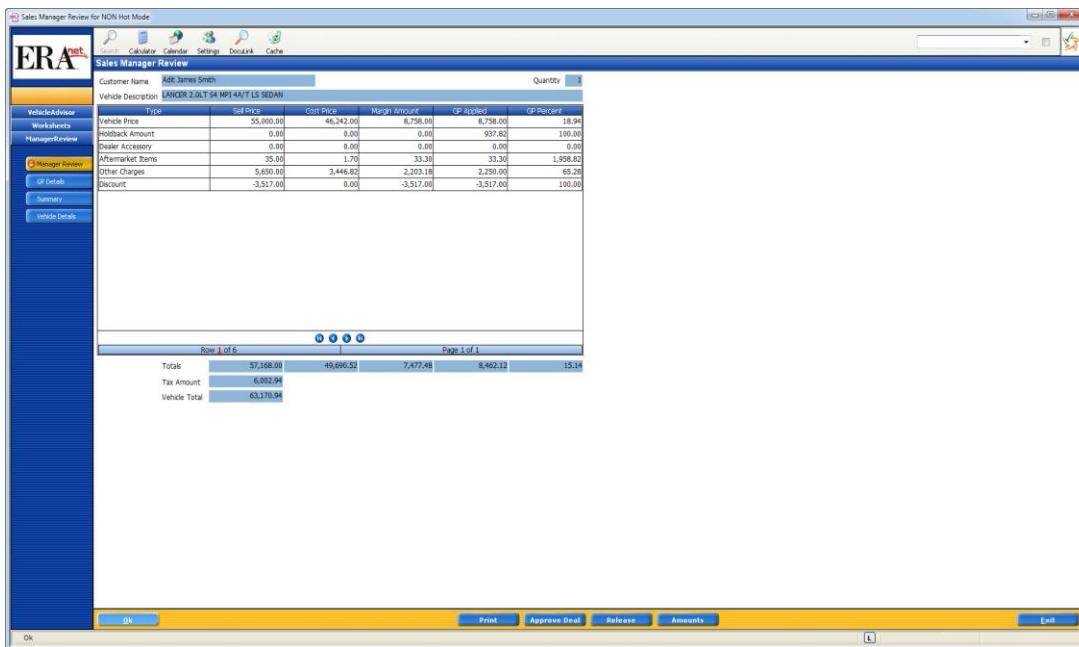


Select the relevant customer by clicking on the [Wks/Stat](#) hyperlink and the following screen will be displayed:



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

# ERAnet V9



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:



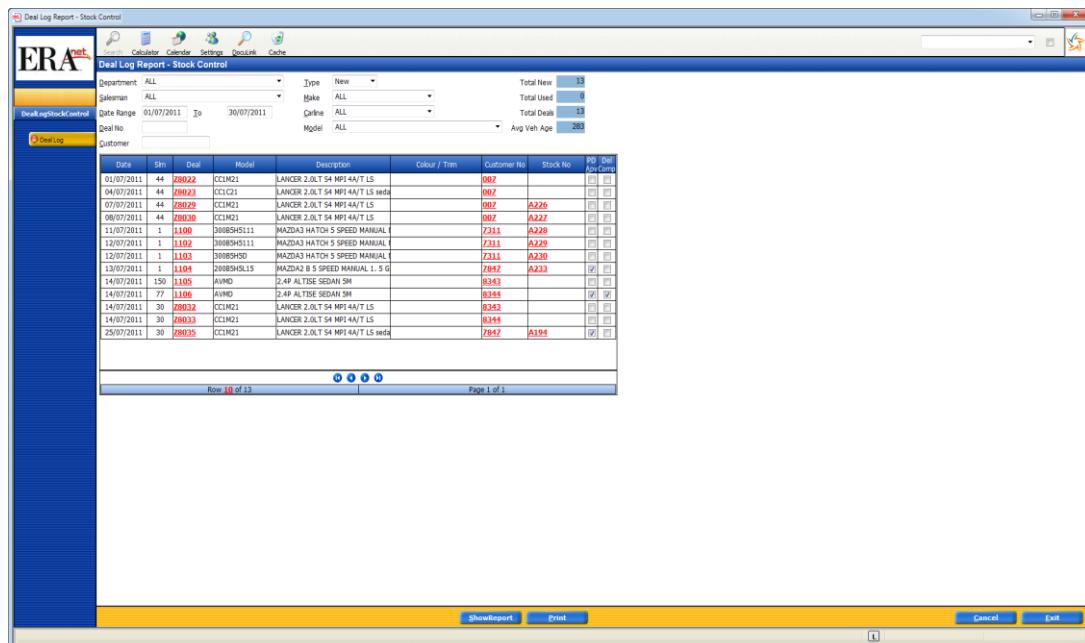
Select **Yes** to approve the deal and return to the *Sales Manager Review* screen or **No** to not approve it. Selecting the Yes option will send the deal through to Pre-Delivery.

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:

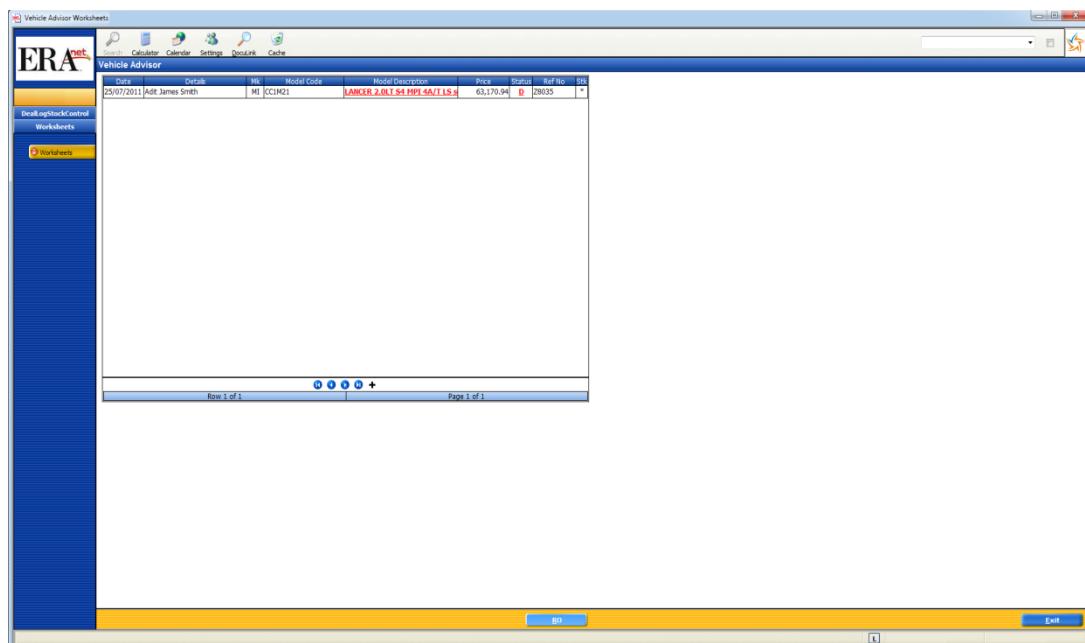
# Service Manual



Two new columns have been added to this report.

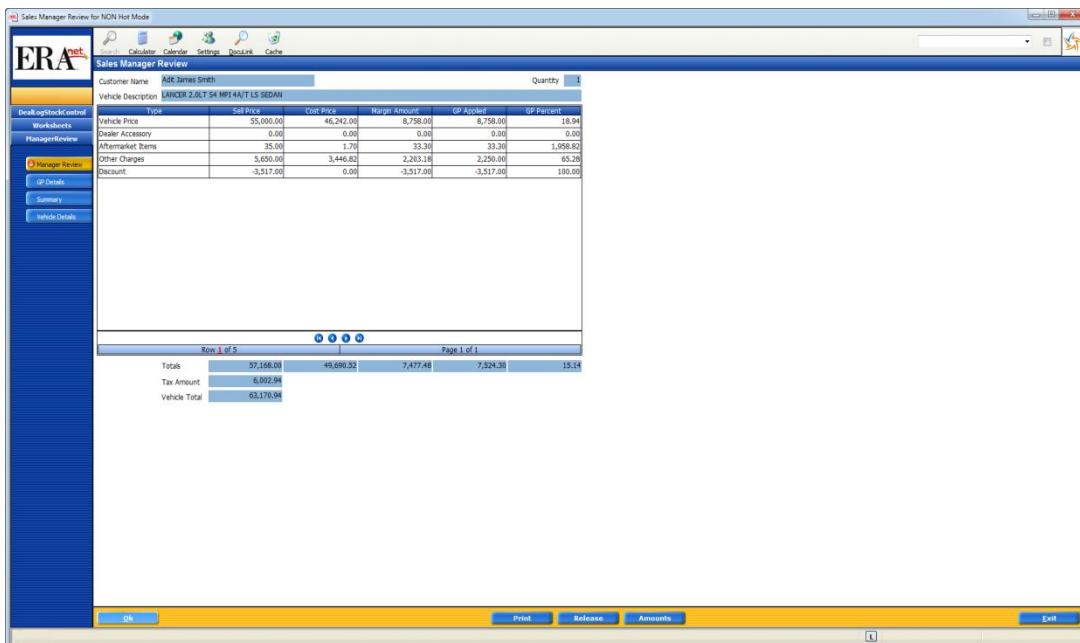
<b>PD Apv</b>	<input checked="" type="checkbox"/> Tick this option to approve a deal for Pre-Delivery instead of going through <i>the Sales Managers Review</i> screen.
<b>Del Comp</b>	<input checked="" type="checkbox"/> Tick this option to complete the delivery process rather than going through the 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

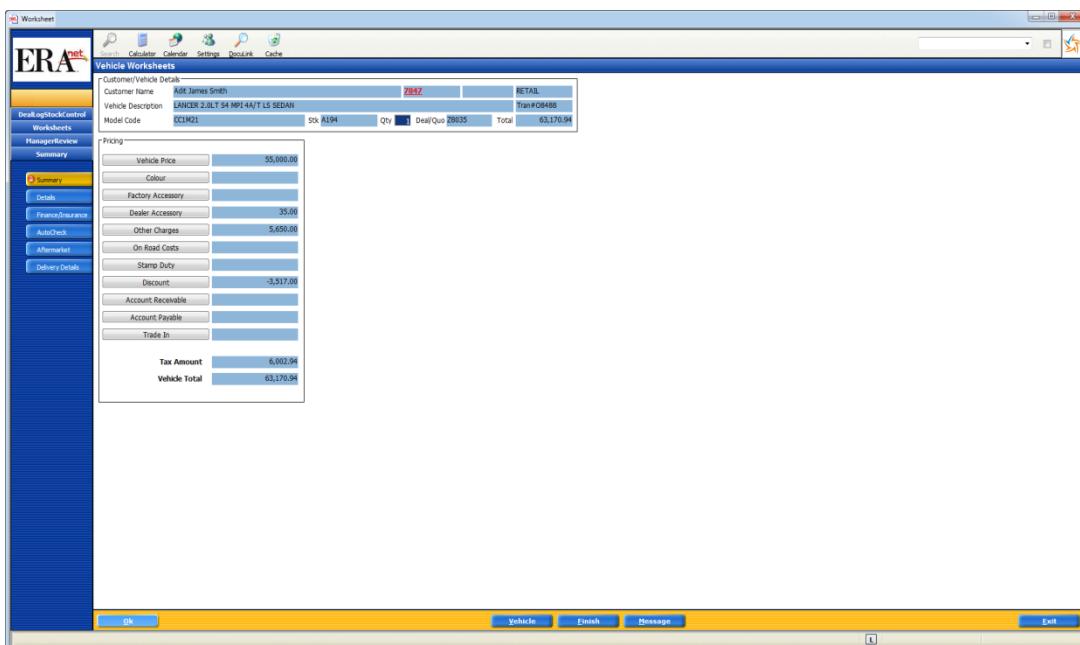


Click on the relevant Model Description hyperlink and the following screen will be displayed:

# ERAnet V9

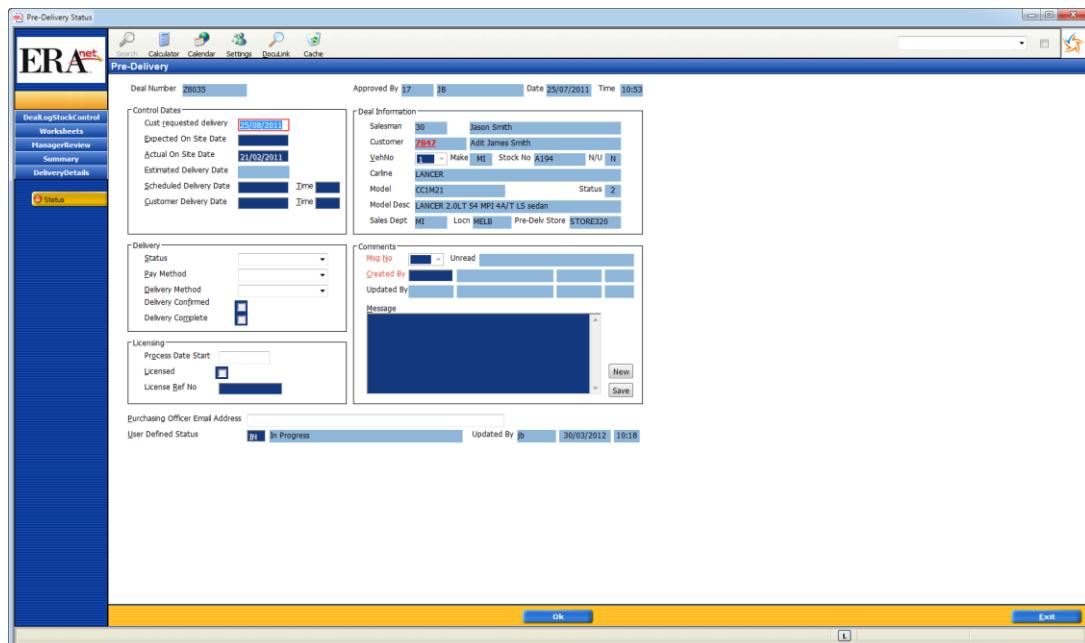


Select the **Summary** option from the navigation bar and the following screen will be displayed:



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

# Service Manual



Once in this screen the following items can be entered:

<b>Cust requested delivery</b>	Enter the <b>date</b> 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. <b>Note:</b> 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.
<b>Status</b>	Select a <b>Status</b> from the <input type="button"/> dropdown box. <b>Note:</b> The Salesperson will need to enter this information.
<b>Pay Method</b>	Select a <b>Pay Method</b> from the <input type="button"/> dropdown box. This is the way final payment will be received and is allocated by the Salesperson or the Finance Manager. <b>Note:</b> The pay method is setup in <i>Pre-Delivery Setup</i> within <i>Showroom Setup</i> .
<b>Delivery Method</b>	Select a <b>Delivery Method</b> from the <input type="button"/> dropdown box. This is how the vehicle will be delivered to the customer and is allocated by the Salesperson. <b>Note:</b> The delivery method is setup in <i>Pre-Delivery Setup</i> in <i>Showroom Setup</i> .

## Comments

<b>New</b>	Select the <b>New</b> button to create a new message.
<b>Save</b>	Select the <b>Save</b> button to save the message that has been created.
<b>Msg No</b>	The user is able to select a message to read from the <input type="button"/> dropdown box.
<b>Unread</b>	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.
<b>Created By</b>	This field will display the user id and name of the user who created the message.
<b>Updated By</b>	This field will display the user id and name of the user that modified that message.
<b>Message</b>	The user is able to enter a detailed <b>message</b> as required.

<b>Purchasing Officer Email Address</b>	The user is able to enter the <b>email address</b> of a purchasing officer. This is the email address that any email can be sent to. <b>Note:</b> Once an email address has been stored within this screen it will be stored
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# ERAnet V9

	against this customer until a new email address is entered.
<b>User Defined Status</b>	This field will display the user status code and description as entered from the <i>Pre-Delivery Control</i> screen.
<b>Updated By</b>	This field will display the username, date and time when the user status code was updated.

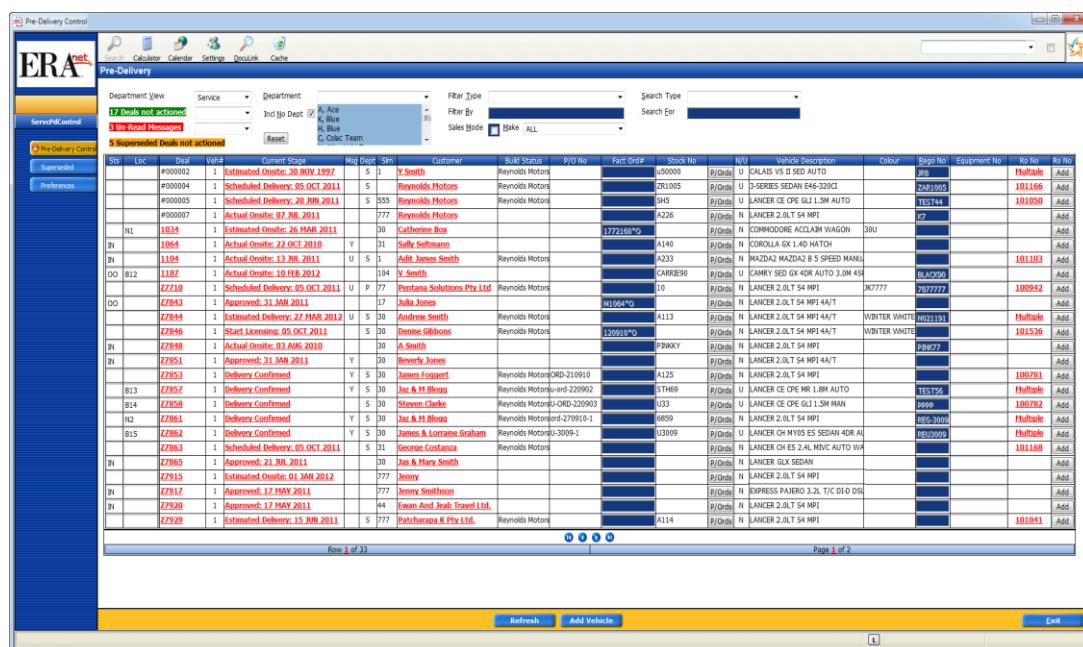
Dependent upon the user security the  **Pre-Delivery** screen can be accessed from both the  **Service** and the  **Showroom** module.

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.

<b>Department View</b>	This field will either display <b>Service</b> or <b>Vehicle Sales</b> , depending on the user setup.  The user is able to select a different department view by selecting from the dropdown box.
<b>Deals not actioned</b>	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 <b>deal</b> 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.

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

<b>Sts</b>	Enter the <b>User Status Code</b> or select the  <b>Search</b> option or <b>F3</b> from the keyboard to select a valid <b>code</b> .
<b>Loc</b>	Enter the physical <b>location</b> of the pre-delivery vehicle. The location will inform the Stock Controller where the vehicle is physically located. For example, Bay 1. <b>Note:</b> 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> .
<b>Deal</b>	This field will display the deal number that has been approved by the Sales Manager. Any deal beginning with # indicates that is has been created by selecting the <b>Add Vehicle</b> option from the action bar.
<b>Veh #</b>	Where multiple vehicles have been assigned to the one deal number, this field will display the vehicle number for the deal.
<b>Current Stage</b>	This field will display the <b>current stage</b> of the deal along with the date. Selecting this hyperlink will take the user to the <i>Pre-Delivery Status</i> screen.
<b>Msg</b>	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.
<b>Dept</b>	This field will display the department. <b>Note:</b> 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.
<b>Slm</b>	This field will display the salesperson number for the deal.
<b>Customer</b>	This field will display the customer name that is attached to the deal.
<b>Cust Type</b>	This field will display the type of sale and is only available in Sales Mode. For example: Retail, Fleet, Demo.
<b>Build Status</b>	This will display the name of any sublet supplier when the vehicle is out to sublet and is available only in Pre-Delivery Mode.
<b>P/O No</b>	This field will display the customer purchase order number for the deal. <b>Note:</b> This is the customer order number as entered in the <i>Modify Print Specific RBO details</i> screen within the Worksheet screen.
<b>Fact Ord#</b>	This field will display the order number for the vehicle.
<b>Stock No</b>	This field will display the stock number attached to the deal. <b>Note:</b> 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.
<b>P/Ords</b>	Select the <b>P/Ords</b> button to display any Purchase Orders that have been created via <i>6973 Purchase Order Creation/Maint.</i>
<b>N/U</b>	This field will display N for New vehicle deals or U for Used vehicle deals.
<b>Vehicle Description</b>	This field will display the vehicle description.
<b>Colour</b>	This field will display the exterior colour of the vehicle.
<b>Rego No</b>	This field will display the vehicle registration number.
<b>Equipment No</b>	Enter a <b>reference number</b> 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.
<b>Ro No</b>	This field will either be blank or it will display the <b>Repair Order Number</b> for the work being performed. Deals with multiple open repair orders will display <b>Multiple</b> . 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.
<b>Ro No</b>	Select the <b>Add</b> button to create a new repair order.

## Navigation Bar options:

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

## Action Bar options:

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

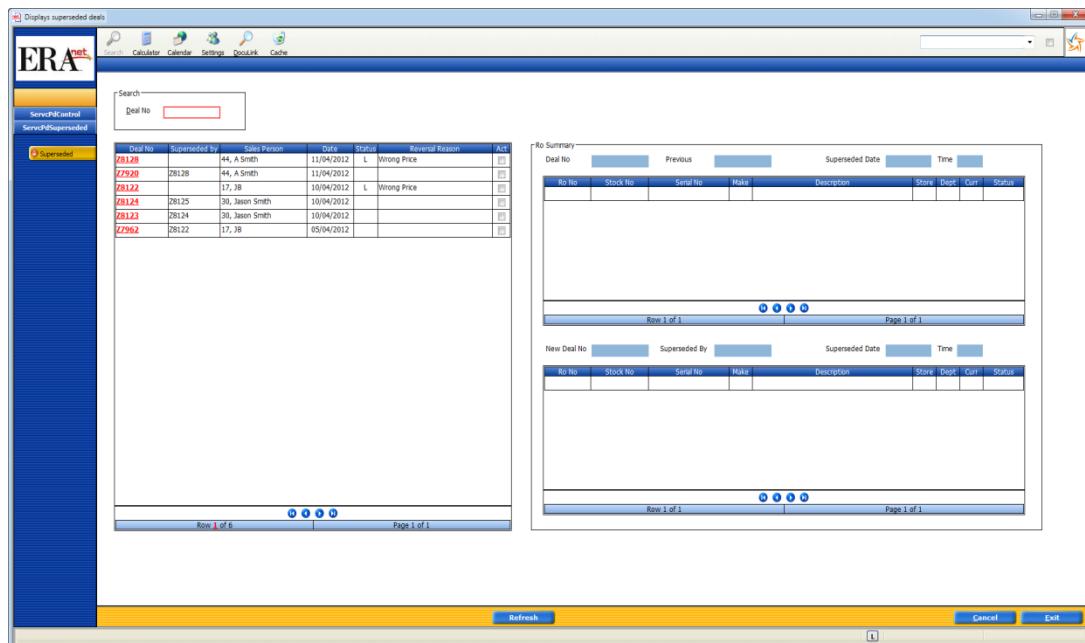
## Superseded screen

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:

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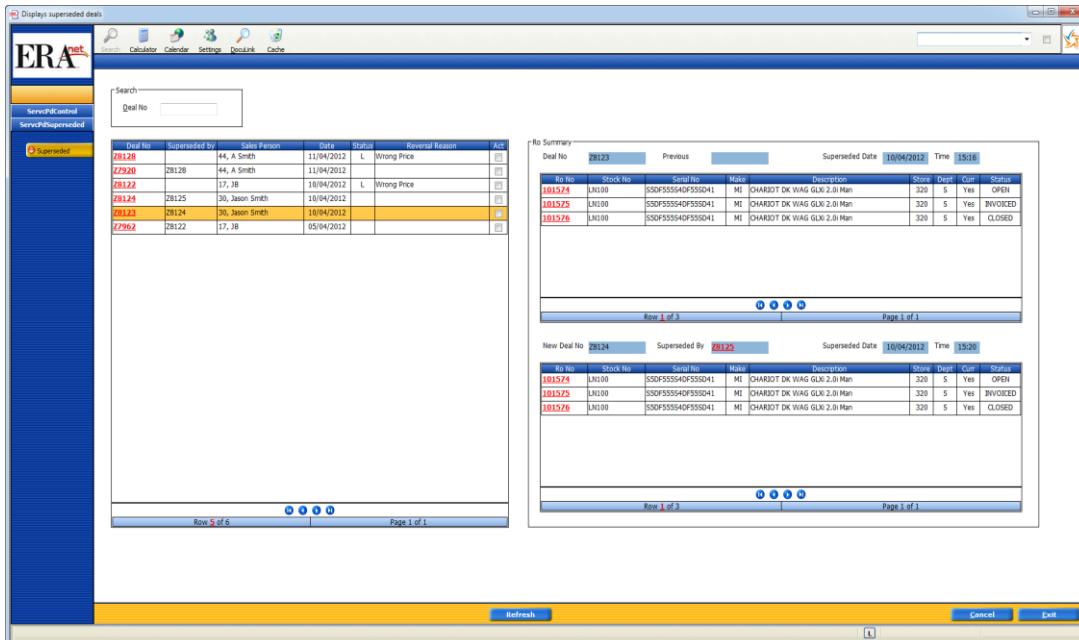


## Search

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

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

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

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

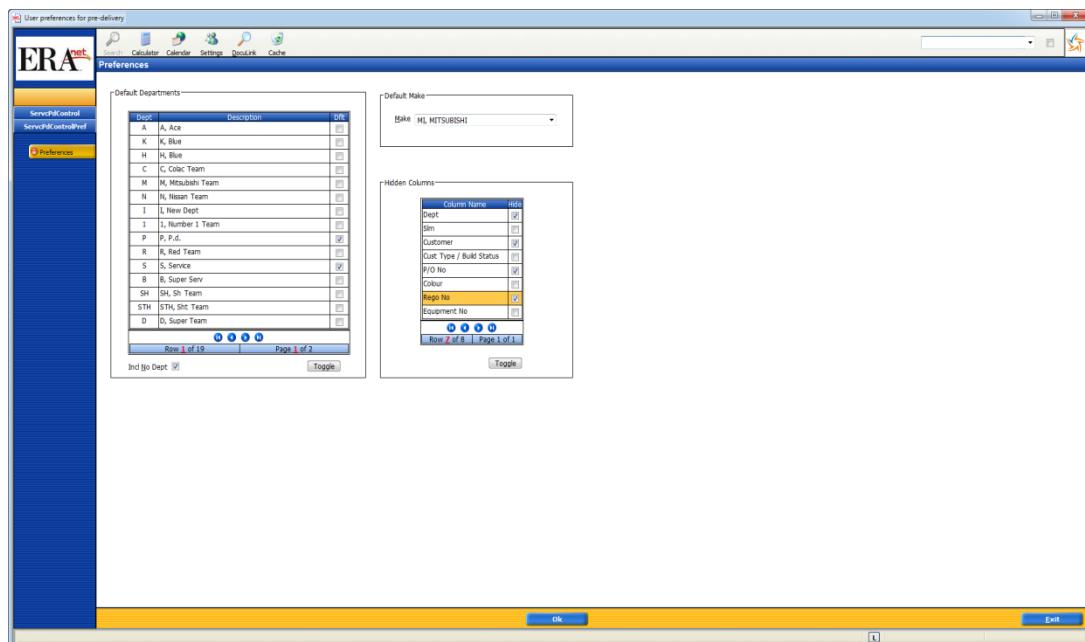
<b>Ro No</b>	This field will display the <b>repair order number</b> associated with the new deal number. The user is able to select the repair order and update repair order details.
<b>Stock No</b>	This field will display the stock number associated with the new deal number.
<b>Serial No</b>	This field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

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

<b>Refresh</b>	Select this option to refresh the screen.
<b>Cancel</b>	Select this option to reset the screen so that the user is able to select a superseded deal and see the details.
<b>Exit</b>	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

<b>Dept</b>	This column will display all the service departments.
<b>Description</b>	This column will display all service department description.
<b>Dflt</b>	<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.
<b>Incl No Dept</b>	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. <b>Note:</b> It is recommended to have this option <input checked="" type="checkbox"/> ticked.
<b>Toggle</b>	Select the <b>Toggle</b> button to quickly change between <input checked="" type="checkbox"/> ticked and <input type="checkbox"/> unticked for the default departments.

### Default Make

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

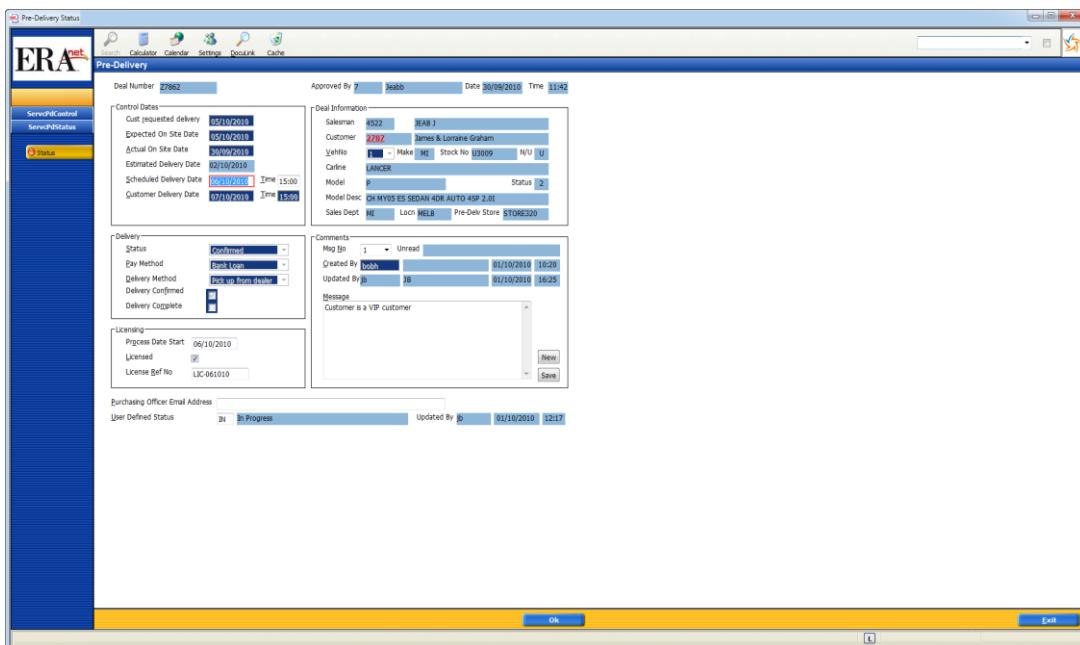
<b>Column Name</b>	This field will display the column names of fields that are available to be hidden in the <i>Pre-Delivery Control</i> screen.
<b>Hide</b>	<input checked="" type="checkbox"/> Tick this option to select specific columns to hide in the <i>Pre-Delivery Control</i> screen. <b>Note:</b>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



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

## Control Dates

<b>Cust requested delivery</b>	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.
<b>Expected On Site Date</b>	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. <b>Note:</b> 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

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

## Delivery

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

## Licensing

<b>Process Date Start</b>	Enter the <b>date</b> that Licensing has been performed. This function is performed by the Stock Controller or Licensing Clerk.
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# ERAnet V9

Licensed	The Stock Controller is required to <input checked="" type="checkbox"/> tick the <b>Licensed</b> check box when the vehicle has been licensed. <b>Note:</b> 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 <b>reference number</b> for the registration.

## Deal Information

Salesman	This field will display the salesperson number and name.
<u>Customer</u>	This field will display the <u>customer number</u> and the name. <b>Note:</b> Selecting the <u>customer number</u> 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 <b>New</b> button to create a new message.
Save	Select the <b>Save</b> button to save the message that has been created.
Msg No	The user is able to select a message to read from the <input type="button"/> 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 <b>message</b> as required.

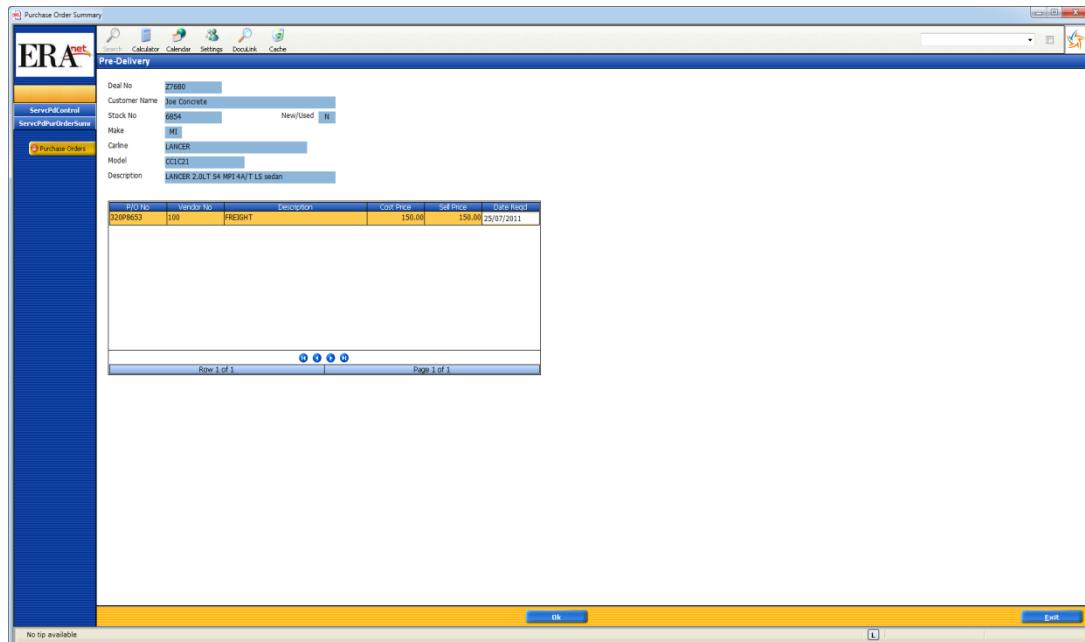
Purchasing Officer Email Address	The user is able to enter the <b>email address</b> of a purchasing officer. This is the email address that any email can be sent to. <b>Note:</b> Once an email address has been stored within this screen it will be stored against this customer until a new email address 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 <b>User Status Code</b> .
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.

# Service Manual

## 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:



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

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

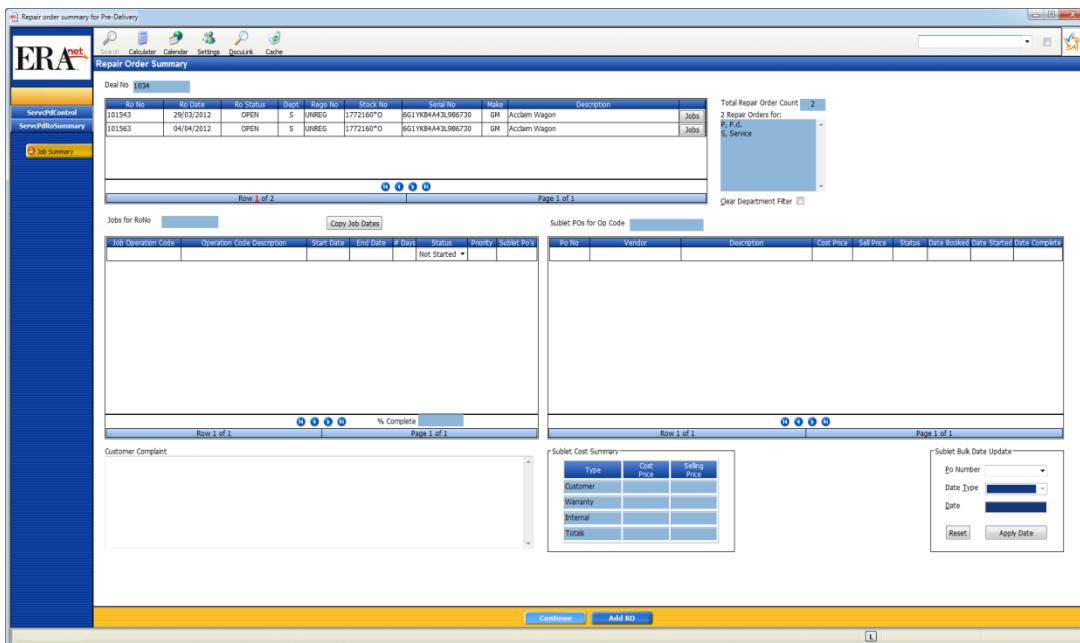
Select **Ok** from the action bar to save the changes or **Exit** to return to the *Pre-Delivery Control* screen without saving any details.

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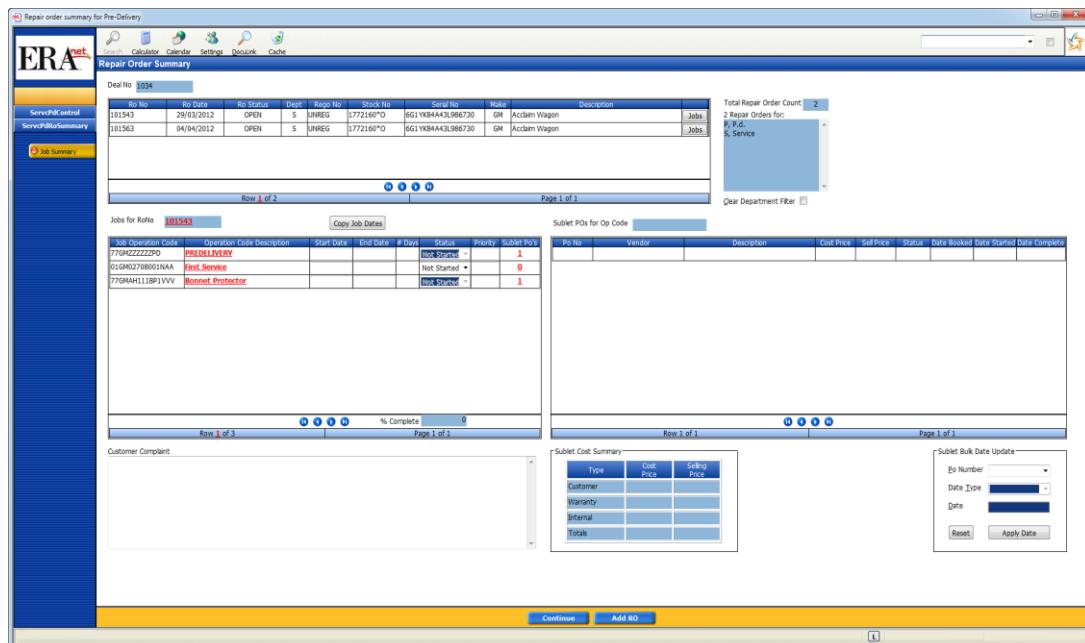
<b>Ro No</b>	This field will display the repair order number.
<b>Ro Date</b>	This field will display the repair order date.
<b>Ro Status</b>	This field will display the repair order status.
<b>Dept</b>	This field will display the department the repair order was created for.
<b>Rego No</b>	This field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

<b>Total Repair Order Count</b>	This field will display the total number of repair orders attached to that deal.
<b>Repair Order for:</b>	This field will display the number of repair orders created for the selected departments. <b>Note:</b> The departments listed in this field are service departments and they will display as per setup in the <b>Preference</b> screen.
<b>Clear Department Filter</b>	<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.

# Service Manual

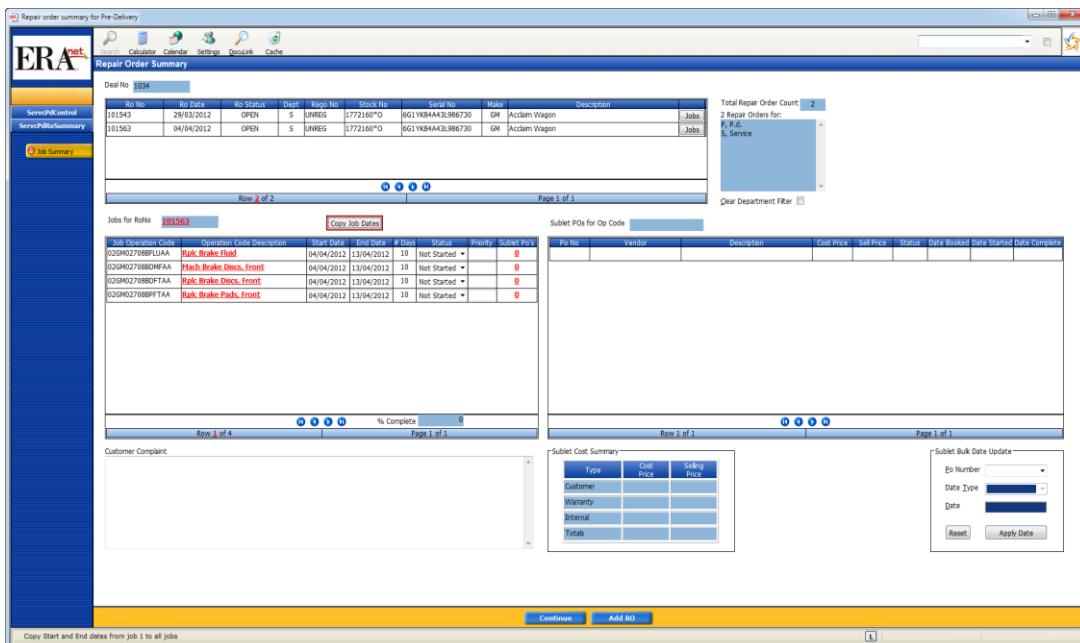


<b>Jobs for Rono</b>	This field will display the <a href="#">repair order number</a> . Selecting this option will take the user to the  <i>RO Close Out</i> screen. The user is able to update the repair order.
<b>Copy Job Dates</b>	For repair orders with multiple jobs, the <b>Copy Dates</b> button can be used to apply the same dates against each job that do not have any sublet purchase orders attached.

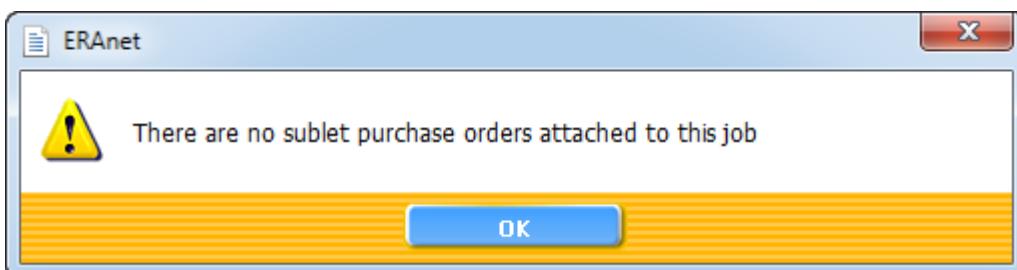
<b>Job Operation Code</b>	This field will display the operation code.
<b><u>Operation Code Description</u></b>	This field will display the <a href="#">operation code description</a> . Selecting this hyperlink will display any customer complaints.
<b>Start Date</b>	Enter the <b>start date</b> of when that job is scheduled to begin work. <b>Note:</b> The <i>start date</i> 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.
<b>End Date</b>	Enter the <b>end date</b> of when that job is scheduled to finish. <b>Note:</b> The <i>end date</i> 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.
<b># Days</b>	This field will automatically display the number of days it will take to complete that job.
<b>Status</b>	Select a valid <b>status</b> from the  dropdown box. Valid options include, Not Started, Started and Complete. <b>Note:</b> This field will be disabled for any jobs with sublets attached to it. The sublet purchase order dates will control this status.
<b>Priority</b>	The user is able to enter the <b>priority</b> of the work to be completed.
<b>Sublet Po's</b>	This field will display the number of <a href="#">sublet purchase orders</a> 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:

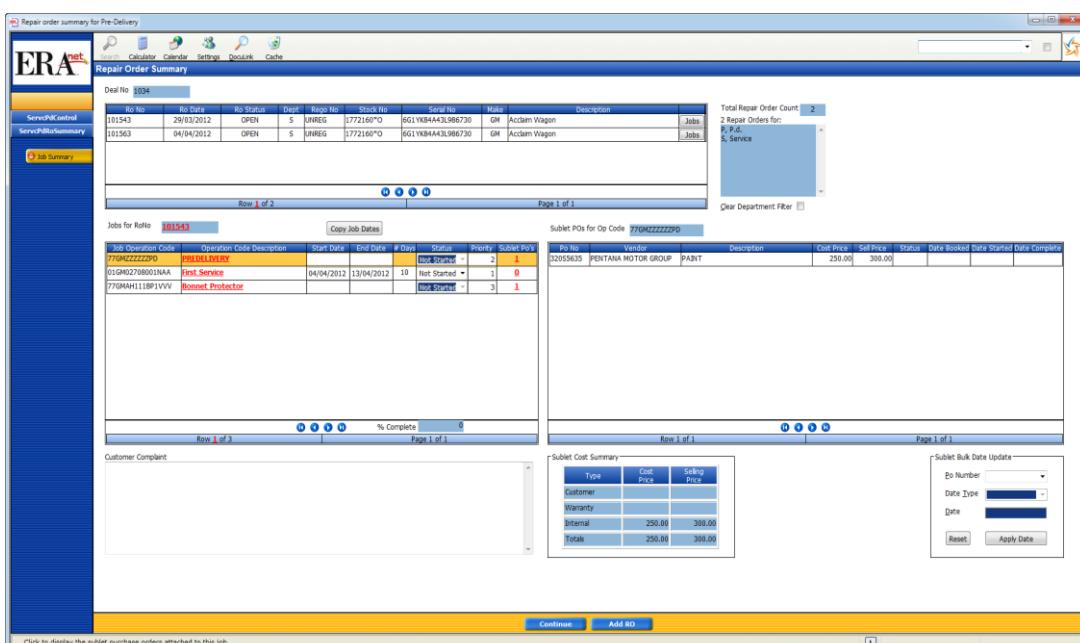
# ERAnet V9



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.

# Service Manual

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

## Sublet Cost Summary

<b>Type</b>	This column will display the sublet sale type.
<b>Cost Price</b>	This column will display the cost price of the sublet for that job.
<b>Selling Price</b>	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.

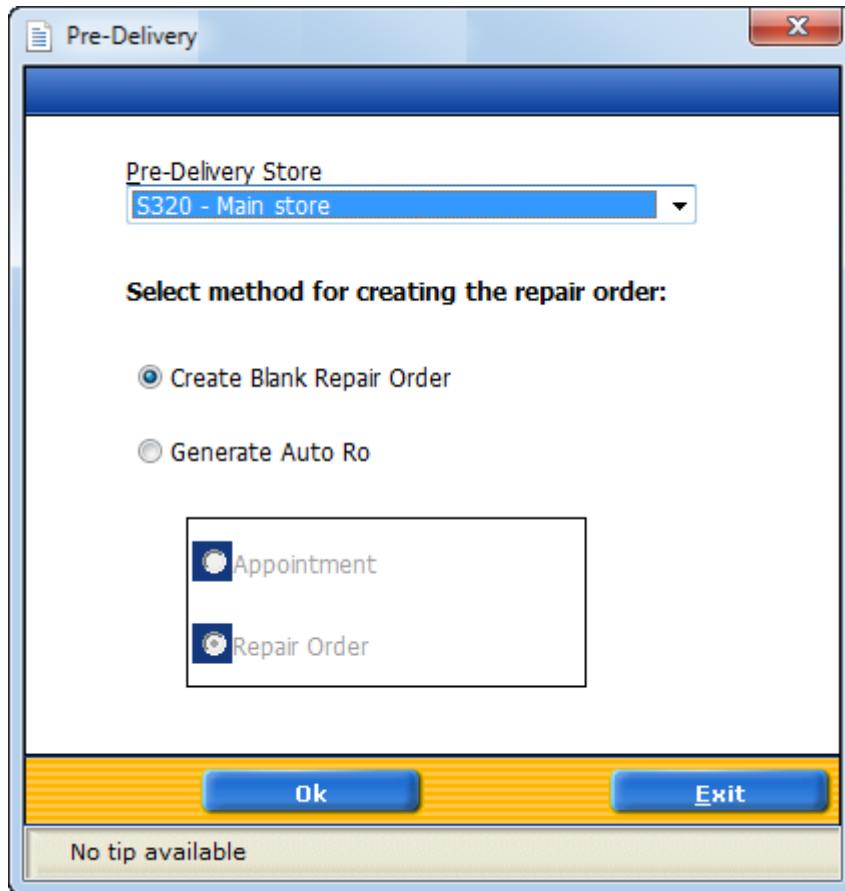
<b>Po Number</b>	Select the required <b>purchase order number</b> from the  dropdown box to update.
<b>Date Type</b>	Select the <b>date type</b> from the  dropdown box. Valid options include Date Booked, Date Started and Date Complete.
<b>Date</b>	Enter the <b>date</b> to apply to all lines as per <b>date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

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

# ERAnet V9

## 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.

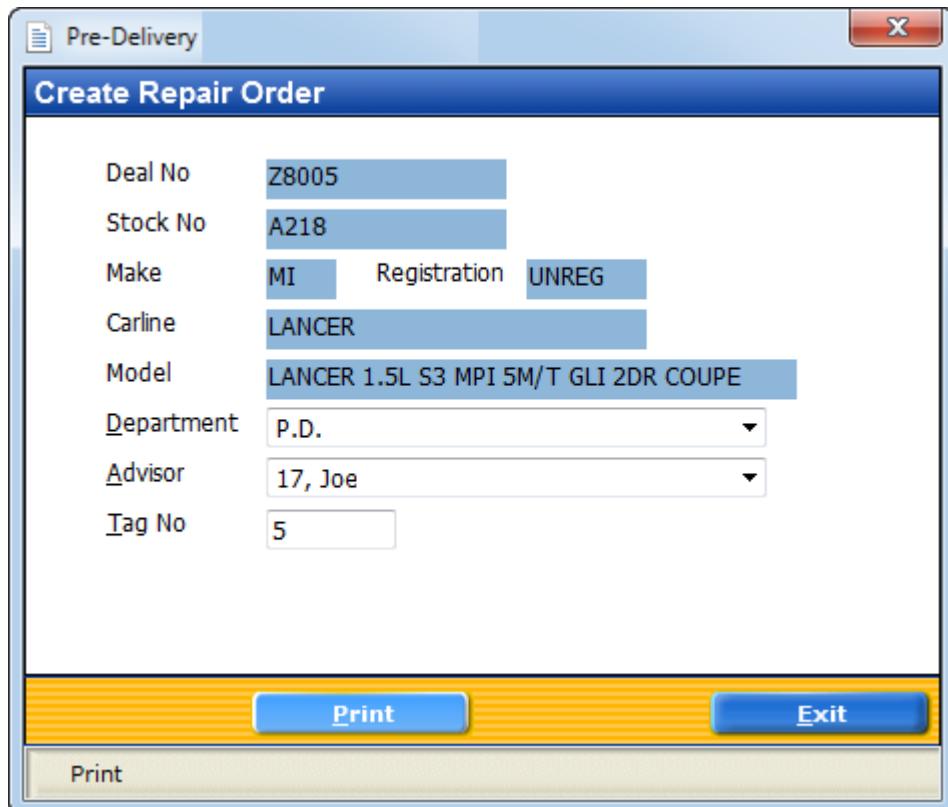
Select the **Create Blank Repair Order** option for deals that do not have a Factory Order Number or a Stock Number allocated or select **Generate Auto Ro** to create an appointment, quote or repair order as per existing **Service Appointments** functionality.

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:



Pre-Delivery

Create Repair Order

Deal No	Z8005		
Stock No	A218		
Make	MI	Registration	UNREG
Carline	LANCER		
Model	LANCER 1.5L S3 MPI 5M/T GLI 2DR COUPE		
Department	P.D.		
Advisor	17, Joe		
Tag No	5		

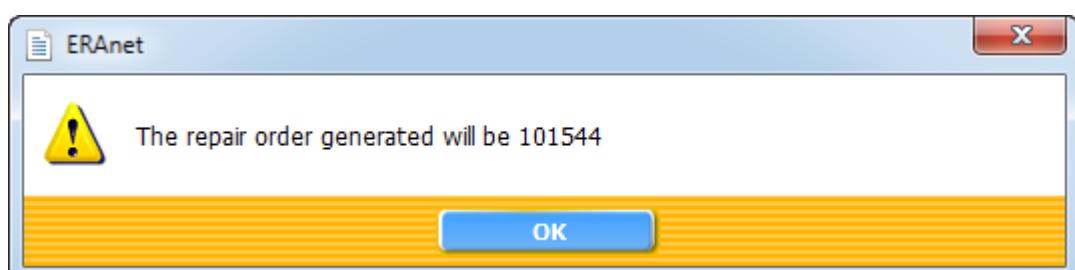
Print      Exit

Print

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 <b>department</b> from the ▼ dropdown box.
Advisor	Select a service <b>advisor</b> from the ▼ dropdown box.
Tag No	Enter the required <b>tag number</b> .

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:

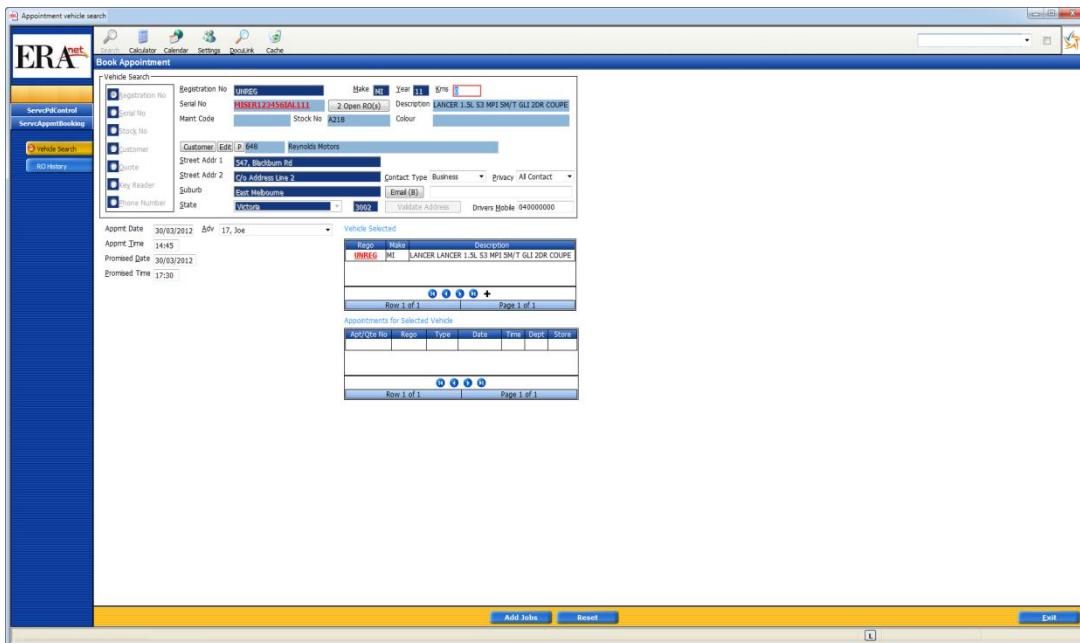


Select **Ok** to print the blank repair order.

# ERAnet V9

## 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:

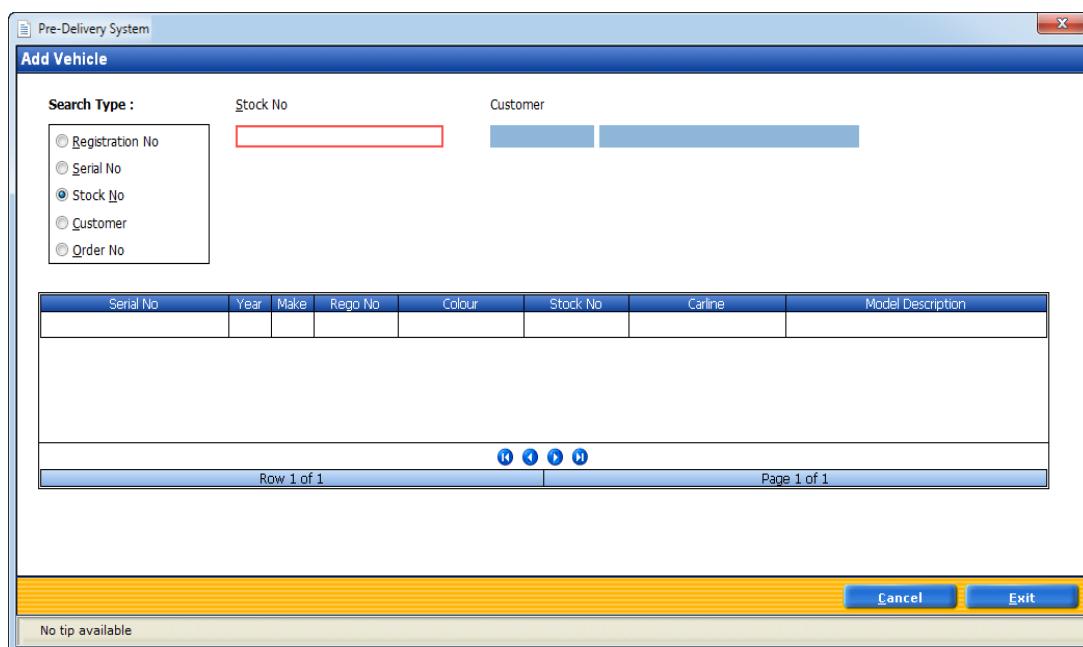


Proceed towards creating the repair order as per existing  **Service Appointments** functionality.

## 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:



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

# Service Manual

Pre-Delivery System

Add Vehicle

Search Type : Stock No Customer

Registration No A226 648 Reyn Motors

Serial No  
Stock No  
Customer  
Order No

Serial No	Year	Make	Rego No	Colour	Stock No	Carline	Model Description
SWERIASDFKKIOWEEC	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

Service Department

Estimated Onsite: 30 NOV 1997

Stn	UIC	Deal	Vehicle	Current Stage	Rego	Dept	Customer	Build Status	PRO No	Fact Ord#	Stock No	P/U	Vehicle Description	Colour	Rego No	Equipment No	Ro No	Mo No	
DO	#00002	1	Estimated Onsite: 30 NOV 1997	S	1	Yellow	Reynolds Motors	Completed	150000	P/Qnds	U CALAVIS VS II SED AUTO	206							
	#00004	1	Scheduled Delivery: 05 OCT 2011	S	5	Reynolds Motors	Reynolds Motors	Completed	ZN1005	P/Qnds	U LANCER CE 1.6 4WD 4DR CI	ZAP-0054	101186	Add					
	#00005	1	Scheduled Delivery: 20 JUN 2011	S	355	Reynolds Motors	Reynolds Motors	Completed	SH5	P/Qnds	U LANCER CE 1.6 4WD 4DR AUTO	TEST744	101059	Add					
	#00007	1	Actual Onsite: 07 NOV 2011	S	777	Reynolds Motors	Reynolds Motors	Completed	A226	P/Qnds	U LANCER 2.0LT S4 MPI	107							
	#00008	1	Actual Onsite: 07 NOV 2011	S	777	Reynolds Motors	Reynolds Motors	Completed	A1112	P/Qnds	U FALCON AU BT 6ED 4DR TURBO 4WD AUTO	000055		Add					
BAY 1	1034	1	Estimated Onsite: 26 MAR 2011	S	30	Catherine Bob	Reynolds Motors	Completed	1772150#Q	P/Qnds	N COMMODORE ACCLAIM WAGON	30U							
BI	1064	1	Actual Onsite: 22 OCT 2010	Y	31	Sally Sellman	Reynolds Motors	Completed	A140	P/Qnds	N COROLLA COROLLA EX 1.6 4WD HATCH	101543	Add						
BI	1104	1	Actual Onsite: 12 MAR 2011	U	5	Edith James Smith	Reynolds Motors	Completed	A233	P/Qnds	N MAZDA MAZDA 5 5 SPEED MANU	101182	Add						
DO	1182	1	Actual Onsite: 10 FEB 2012	U	104	V Smith	Reynolds Motors	Completed	CAR8390	P/Qnds	U CAMRY SED 2.5 4WD AUTO 3.0H 4WD	BLA296	Add						
	Z7629	1	Actual Onsite: 06 MAR 2009	S	777	David & June Connors	Reynolds Motors	Completed	6855	P/Qnds	N LANCER 2.0LT S4 MPI	107		Add					
	Z7680	1	Actual Onsite: 06 MAR 2009	S	777	Ive Concrete	Reynolds Motors	Completed	6854	P/Qnds	N LANCER 2.0LT S4 MPI	107		Add					
	Z7710	1	Scheduled Delivery: 05 OCT 2011	Y	77	Pentana Solutions Pty Ltd	Reynolds Motors	Completed	10164#Q	P/Qnds	N LANCER 2.0LT S4 MPI	109777	707777	Add					
DO	Z7843	1	Approved: 31 JAN 2011	U	17	Julia Jones	Reynolds Motors	Completed	A1113	P/Qnds	N LANCER 2.0LT S4 MPI	WINTER WHITE	W01191	Hold					
	Z7844	1	Estimated Delivery: 27 MAR 2012	U	30	Andrew Smith	Reynolds Motors	Completed	13991#Q	P/Qnds	N LANCER MODEL DESCRIPTION	WINTER WHITE	101536	Add					
	Z7846	1	Start Licence: 05 OCT 2011	S	30	Dennis Gibbons	Reynolds Motors	Completed	PINKY	P/Qnds	N LANCER 2.0LT S4 MPI	107		Add					
BI	Z7848	1	Actual Onsite: 03 APR 2010	S	30	A Smith	Reynolds Motors	Completed	10164#Q	P/Qnds	N LANCER 2.0LT S4 MPI	107		Add					
IN	Z7851	1	Approved: 31 JAN 2011	Y	30	Beverly Jones	Reynolds Motors	Completed	10164#Q	P/Qnds	N LANCER 2.0LT S4 MPI	107		Add					
	Z7853	1	Delivery Confirmed	Y	5	James Foogert	Reynolds Motors	Completed	A125	P/Qnds	N LANCER 2.0LT S4 MPI	100781	Add						
B13	Z7857	1	Delivery Confirmed	Y	5	Jax & H Bloop	Reynolds Motors	Completed	STH69	P/Qnds	U LANCER CE 1.6M 4WD AUTO	TEST756	Hold	Add					
B14	Z7858	1	Delivery Confirmed	Y	5	Stevon Clarke	Reynolds Motors	Completed	U33	P/Qnds	U LANCER CE 1.6L 5M MAN	9999	100782	Add					
H2	Z7861	1	Delivery Confirmed	Y	5	Jax & H Bloop	Reynolds Motors	Completed	6859	P/Qnds	U LANCER 2.0LT S4 MPI	9999	9999	Hold					
B15	Z7862	1	Delivery Confirmed	Y	5	4522 James & Lorraine Graham	Reynolds Motors	Completed	U3009	P/Qnds	U LANCER CH MY15 ES SEDAN 4DR A	REU0999	101168	Add					
	Z7863	1	Scheduled Delivery: 05 OCT 2011	S	31	George Costanza	Reynolds Motors	Completed	9009	P/Qnds	U LANCER CH MY15 ES 2.4L MYVC AUTO W/	101168	Add						
	Z7865	1	Approved: 21 JUN 2011	S	30	Jax & Harry Smith	Reynolds Motors	Completed	9009	P/Qnds	U LANCER LANCER GLX SEDAN	107		Add					
	Z7913	1	Estimated Onsite: 01 JUN 2012	S	777	Jenny	Reynolds Motors	Completed	9009	P/Qnds	U LANCER 2.0LT S4 MPI	107		Add					

Row 8 of 37 Page 1 of 2

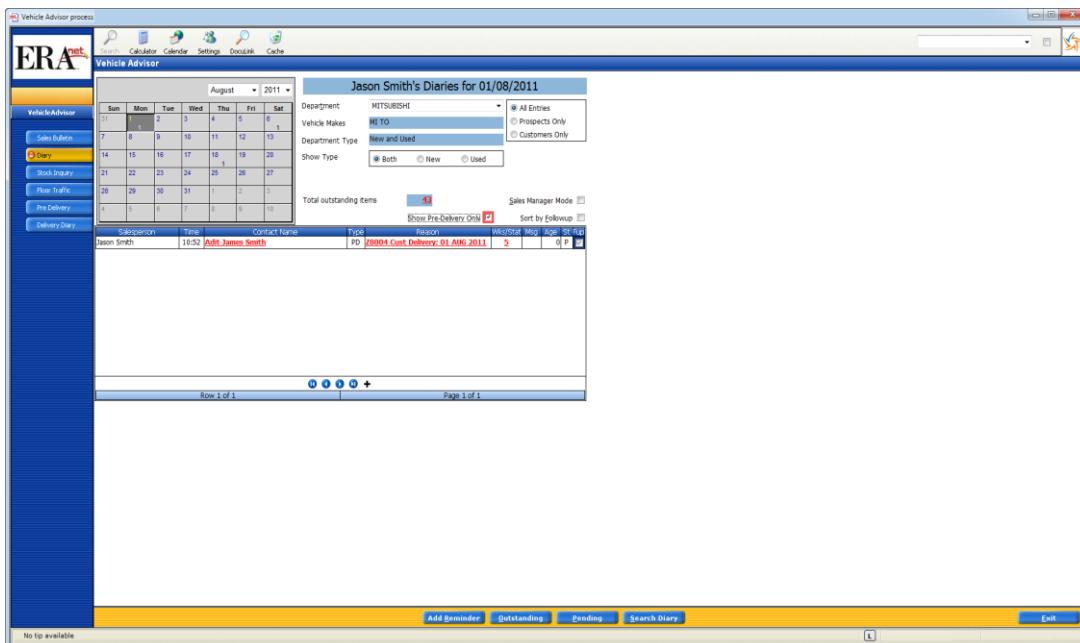
Refresh Add Vehicle Exit

**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 through  *Vehicle Advisor* as per following example:

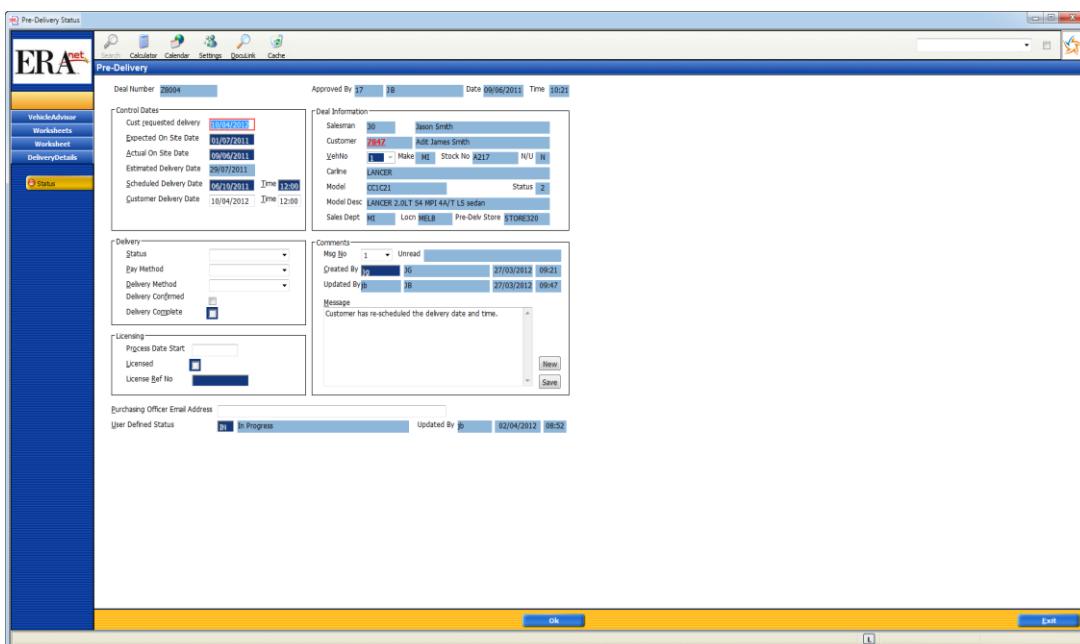
# ERAnet V9



**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:



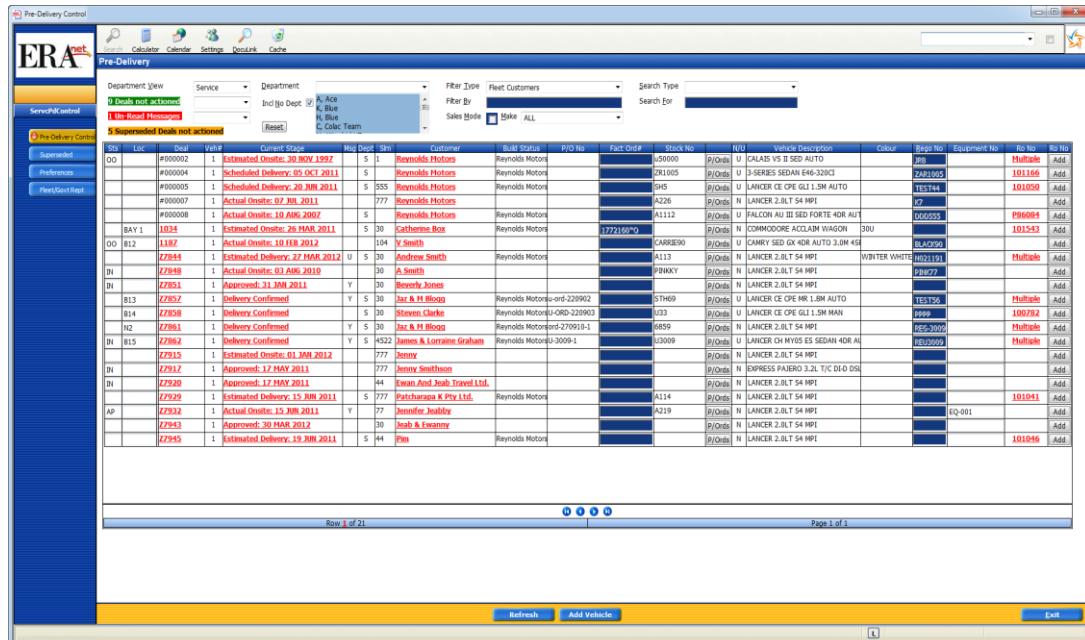
Select **Ok** from the action bar to save the changes and return to the *Vehicle Worksheets* screen as per existing functionality.

# Service Manual

## Fleet/Govt Report

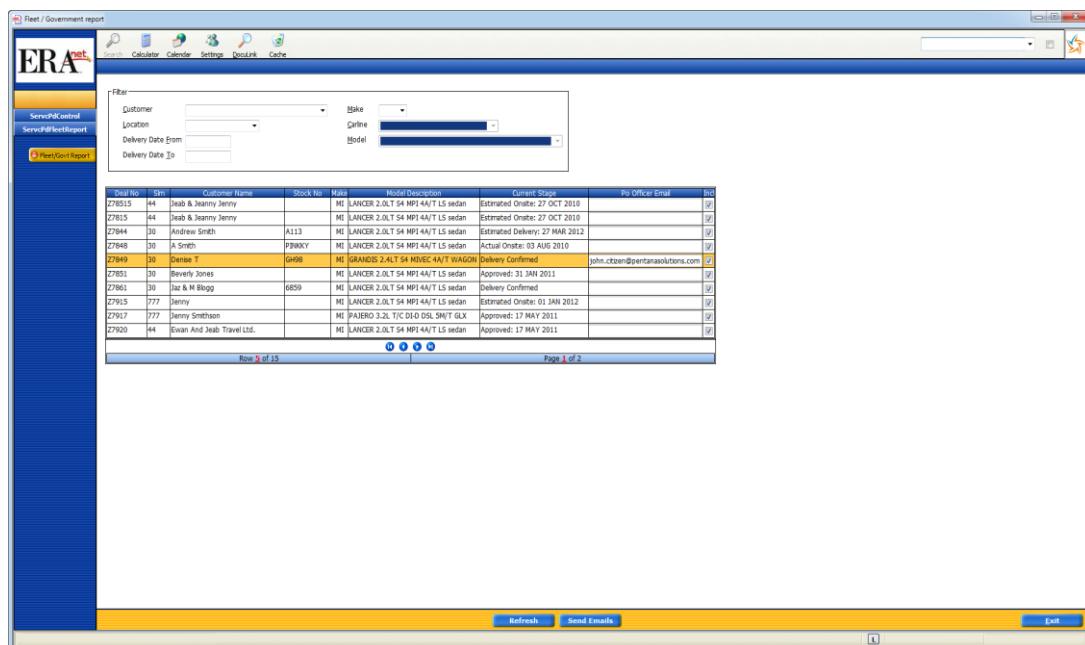
The user is able to generate a report for Fleet Customers to notify them on the status of their vehicle orders.

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:



The screenshot shows the ERA.net Pre-Delivery Control interface. The 'Fleet/Govt Report' option is selected in the navigation bar. The main area displays a grid of vehicle deals. The 'Filter Type' dropdown is set to 'Fleet Customers'. The grid columns include Deal No, Strt, Customer Name, Stock No, Make, Model Description, Current Stage, Po Officer Email, and various vehicle details like VIN, Colour, Registration No, and Equipment No. The deals listed are primarily for Reynolds Motors, with some entries for Catherine Box, Andrew Smith, and others. The interface includes standard Windows-style buttons for Refresh, Add Vehicle, and Exit.

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



The screenshot shows the ERA.net Fleet / Government report interface. The 'Fleet/Govt Report' option is selected in the navigation bar. The main area displays a grid of vehicle deals, filtered by specific criteria in the 'Filter' section. The 'Filter' section includes dropdowns for Customer, Location, Delivery Date From, and Delivery Date To. The grid columns are identical to the Pre-Delivery Control screen. The deals listed are for various customers like Beverly Jones, Jar & H Bogg, Steven Clarke, and others, with specific details like model numbers and delivery dates. The interface includes standard Windows-style buttons for Refresh, Send Emails, and Exit.

### Filter

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

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

<b>Deal No</b>	This field will display the deal number as displayed in the <i>Pre-Delivery Control</i> screen.
<b>Slm</b>	This field will display the salesperson number as displayed in the <i>Pre-Delivery Control</i> screen.
<b>Customer Name</b>	This field will display the fleet customer name as displayed in the <i>Pre-Delivery Control</i> screen.
<b>Stock No</b>	This field will display the vehicle stock number as displayed in the <i>Pre-Delivery Control</i> screen.
<b>Make</b>	This field will display the vehicle make as displayed in the <i>Pre-Delivery Control</i> screen.
<b>Model Description</b>	This field will display the vehicle model description as displayed in the <i>Pre-Delivery Control</i> screen.
<b>Current Stage</b>	This field will display the current stage the deal is at as displayed in the <i>Pre-Delivery Control</i> screen.
<b>Po Officer Email</b>	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 <b>email address</b> in this field. The report will be sent to the email recipient entered in this field. <b>Note:</b> This is not a mandatory field.
<b>Incl</b>	<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. <b>Note:</b> 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.

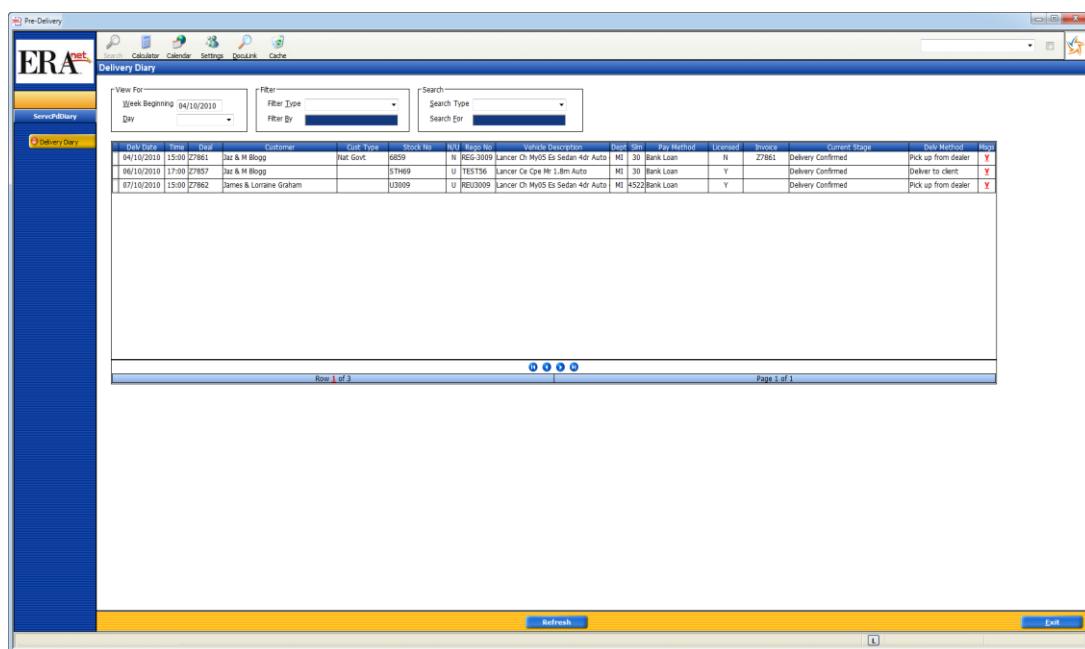
# Service Manual

Following is an example of the emailed report:

01 AUG	Delivery Advice for Denise T	Enet
11:37		Page 1
<hr/>		
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

<b>Week Beginning</b>	Enter the <b>date</b> for the week to view the delivery details for. <b>Note:</b> 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.
<b>Day</b>	Select a <b>day</b> from the  dropdown box to view a specific day's deliveries.

## Filter

<b>Filter Type</b>	Select a valid <b>Filter Type</b> option from the  dropdown box. <b>Note:</b> 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> .
<b>Filter By</b>	Enter the filter by <b>criteria</b> based upon the Filter Type selected. <b>Note:</b> This field will be disabled until a Filter Type has been selected.

# ERAnet V9

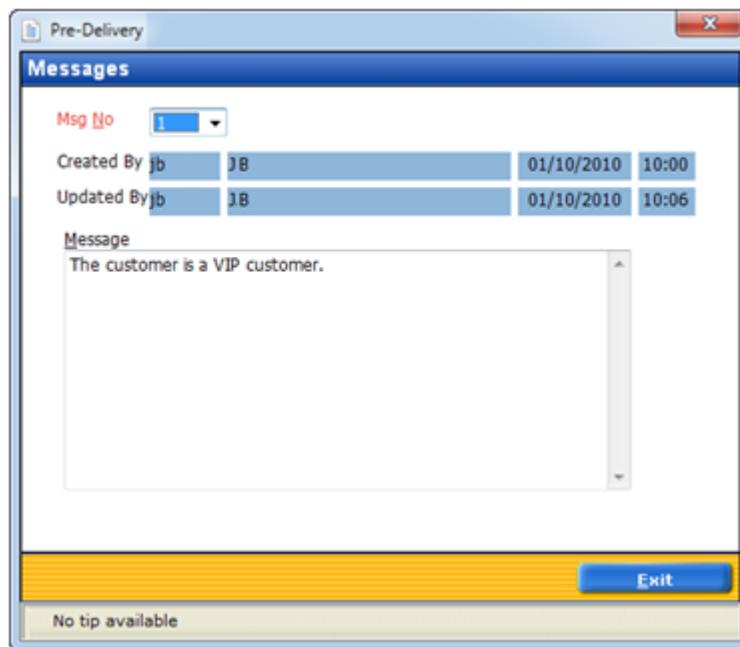
## Search

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

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

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

**Note:** This screen is display only.



<b>Msg No</b>	Select a <b>message</b> to read from the dropdown box.
<b>Created By</b>	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.
<b>Updated By</b>	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.
<b>Message</b>	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

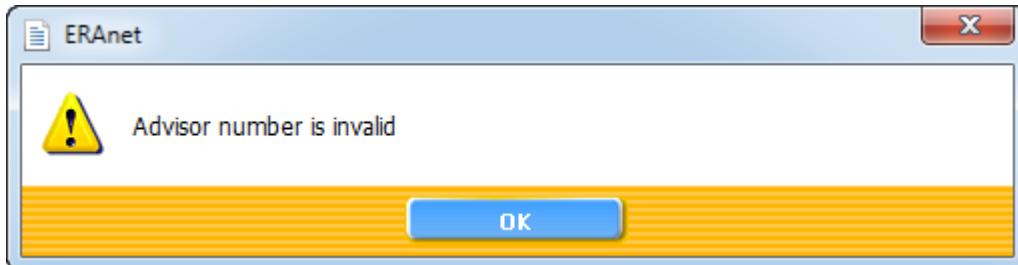
#### Ro Summary

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

# Service Manual

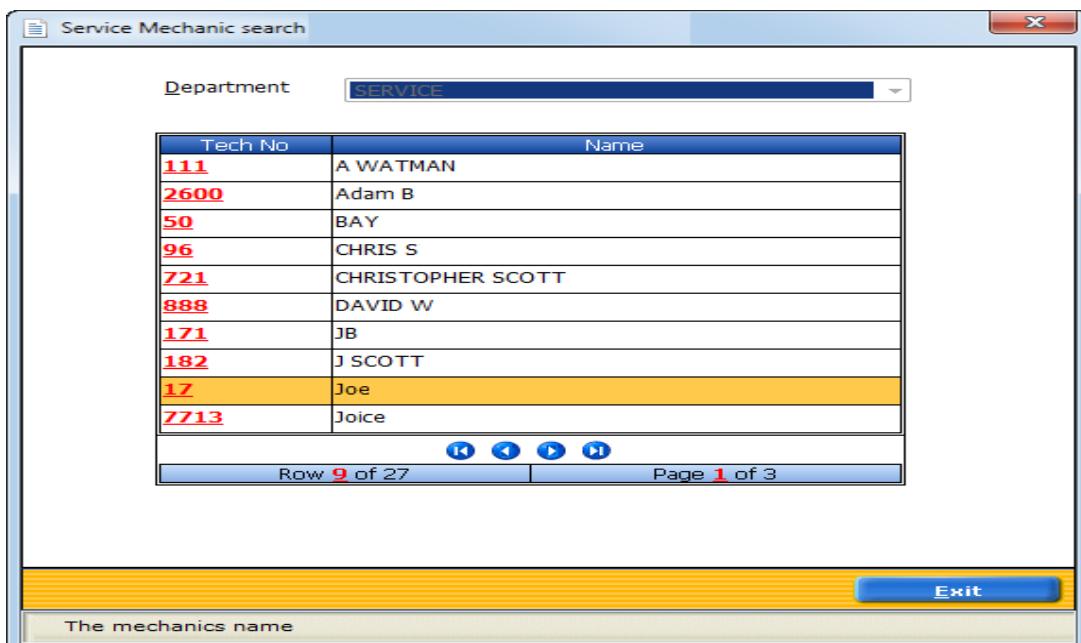
Advisor No field is now a text field. The user is able to enter a valid **advisor number** or search for a valid advisor by clicking on  **Search** or press **F3** from the keyboard.

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:



**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.

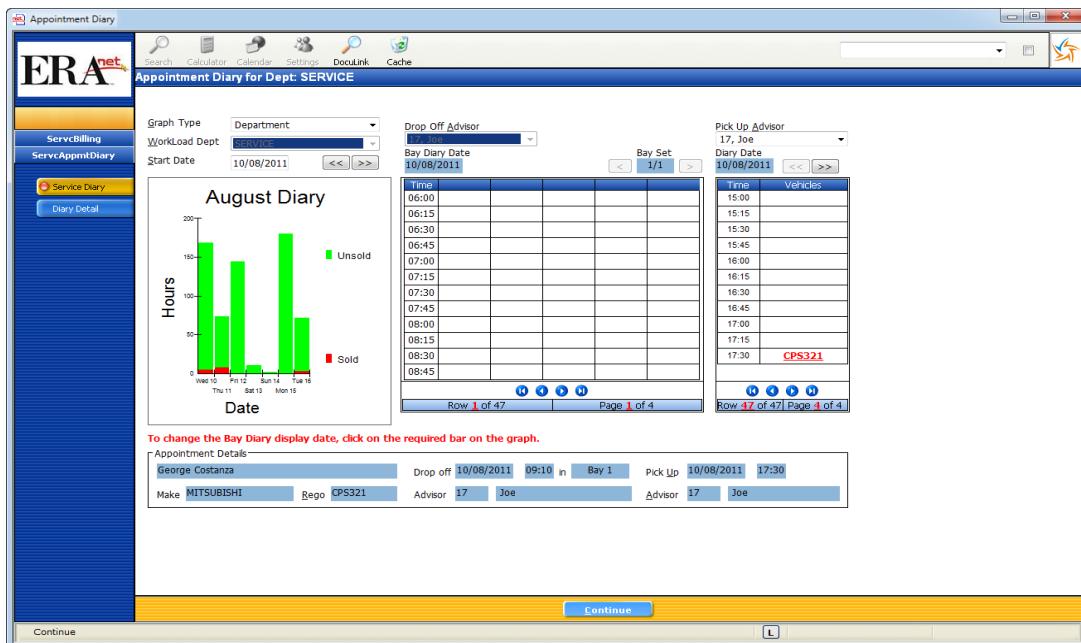
## Appointment Diary

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:

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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



Service Appointments

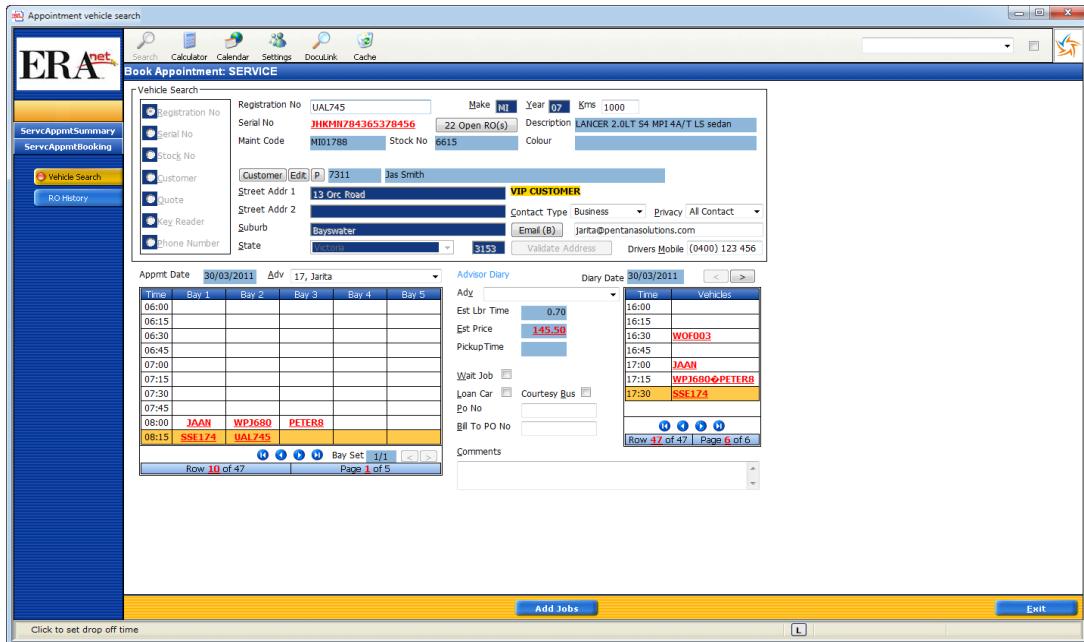
#### The Change

##### Estimate Details

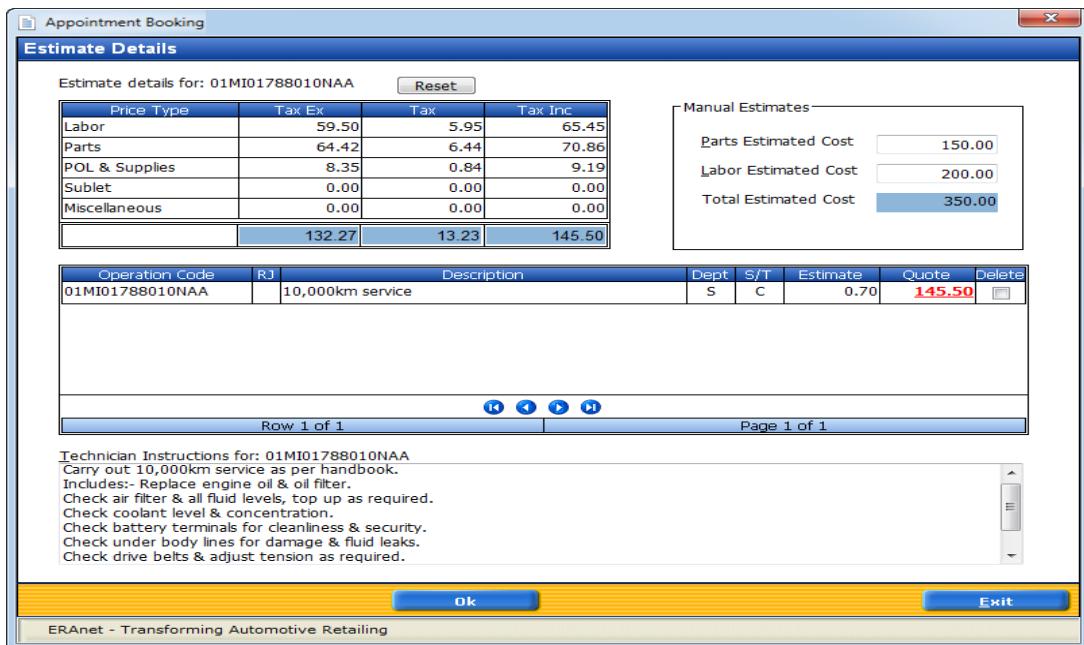
Within ERAnet, select **Service**, **Appointments Menu**, followed by **Service Appointments** and the following screen will be displayed:

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



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



Following are changes made to the Estimate Details screen:

## Manual Estimates

<b>Parts Estimated Cost</b>	Enter the estimated <b>parts</b> cost.
<b>Labor Estimated Cost</b>	Enter the estimated <b>labor</b> cost.
<b>Total Estimated Cost</b>	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:

# Service Manual

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:

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**

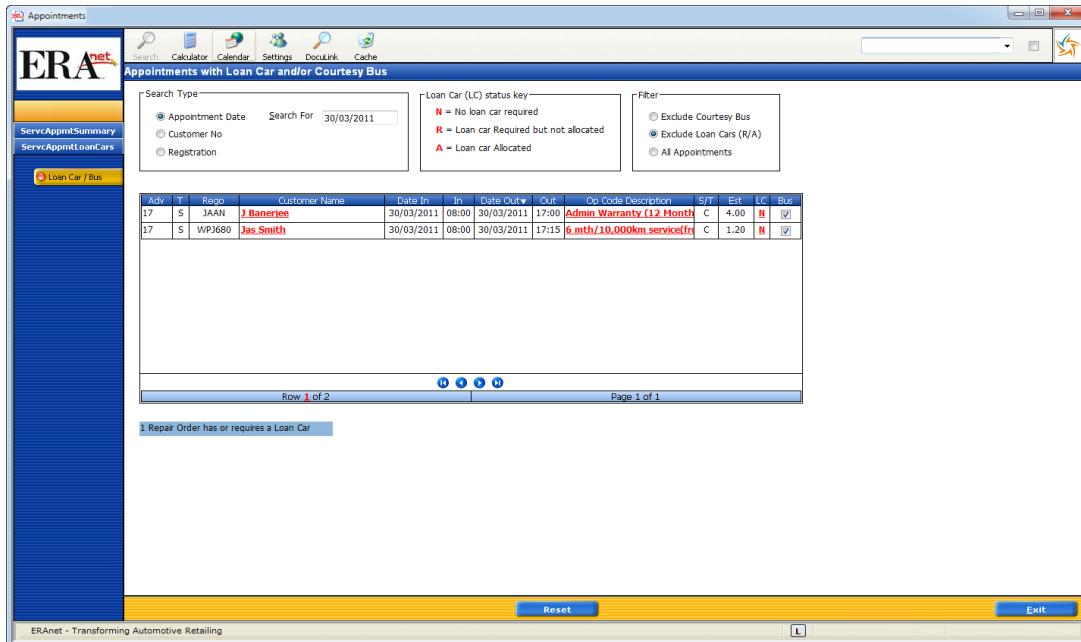
Select this option to exclude any appointments where courtesy bus is required.

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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:



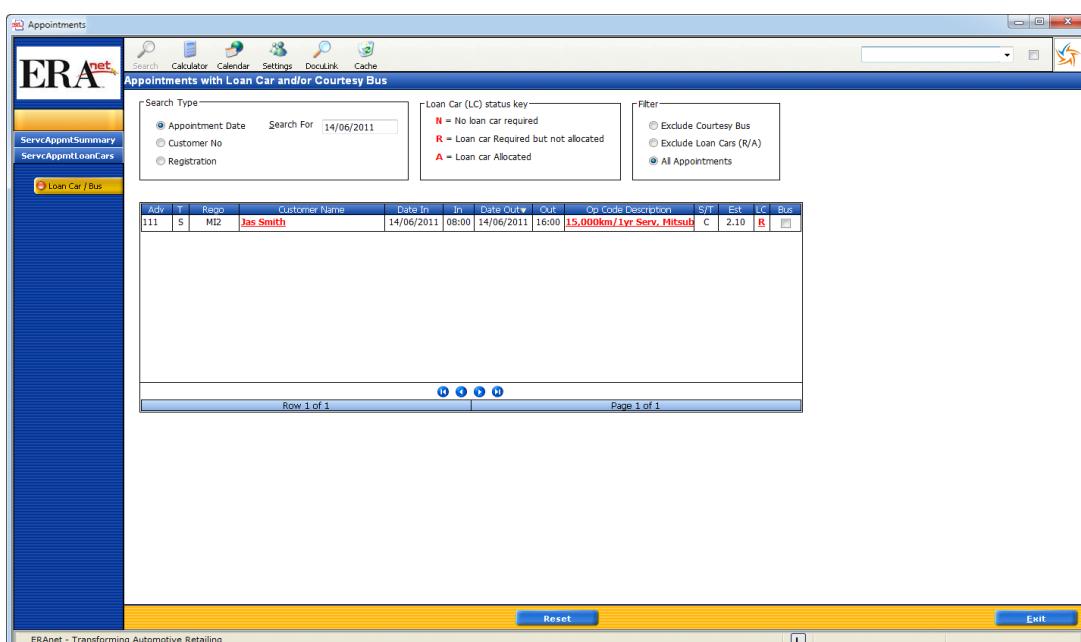
The screenshot shows the ERA.net software interface with the 'Appointments' screen selected. The search criteria are set to 'Exclude Loan Cars (R/A)'. The results table shows two rows of appointment data:

Adv	T	Rego	Customer Name	Date In	In	Date Out	Out	Op. Code Description	S/T	Est.	LC	Bus
17	S	JAAN	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	WPJ680	Jas Smith	30/03/2011	08:00	30/03/2011	17:15	6.mth/10,000km service(frc	C	1.20	N	<input checked="" type="checkbox"/>

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:



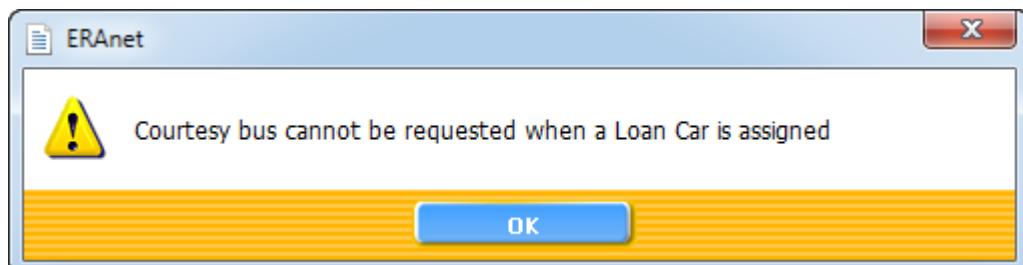
The screenshot shows the ERA.net software interface with the 'Appointments' screen selected. The search criteria are set to 'All Appointments'. The results table shows one row of appointment data:

Adv	T	Rego	Customer Name	Date In	In	Date Out	Out	Op. Code Description	S/T	Est.	LC	Bus
111	S	M12	Jas Smith	14/06/2011	08:00	14/06/2011	16:00	15,000km/1yr Serv. Mitsubishi	C	2.10	R	<input 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

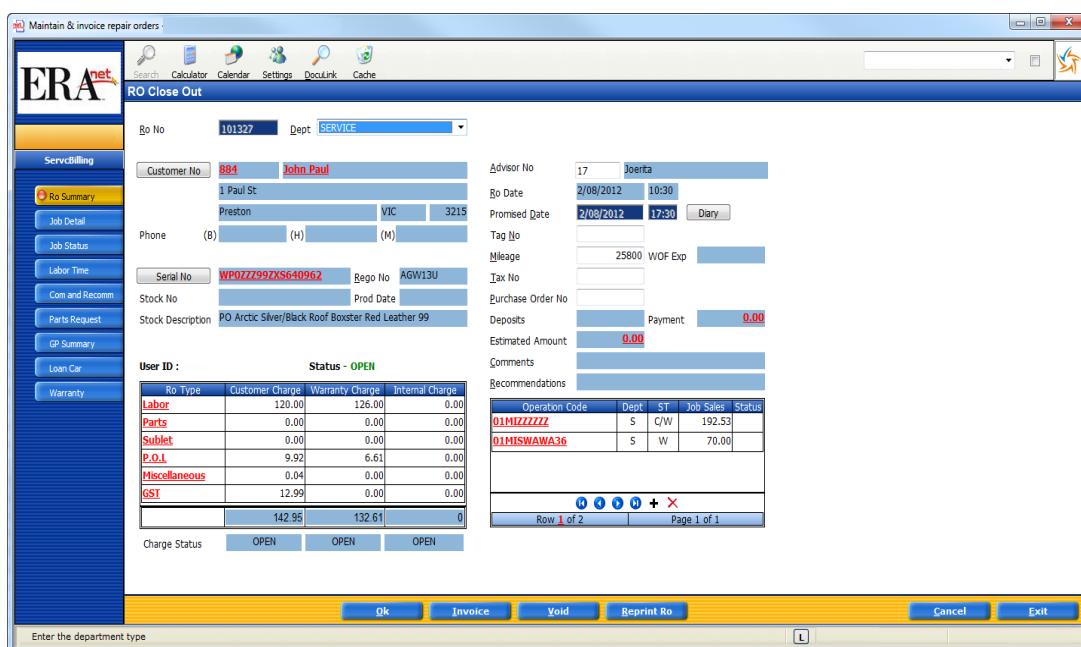
This change was made through a Request for Development submission to enhance existing functionality.

### Screens



### The Process

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

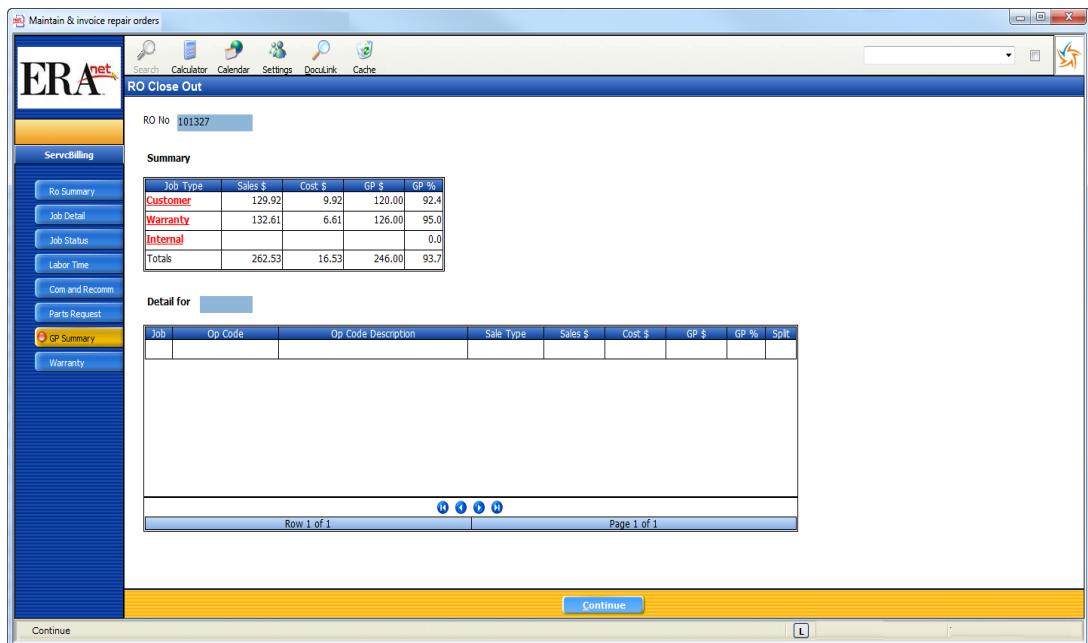


The screenshot shows the 'RO Close Out' screen in the ERAnet application. The 'GP Summary' option is selected in the navigation bar. The main area displays repair order details and a summary table. The summary table has the following data:

Ro Type	Customer Charge	Warranty Charge	Internal Charge
<b>Labor</b>	120.00	126.00	0.00
<b>Parts</b>	0.00	0.00	0.00
<b>Sublet</b>	0.00	0.00	0.00
<b>P.O.L</b>	9.92	6.61	0.00
<b>Miscellaneous</b>	0.04	0.00	0.00
<b>GST</b>	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:

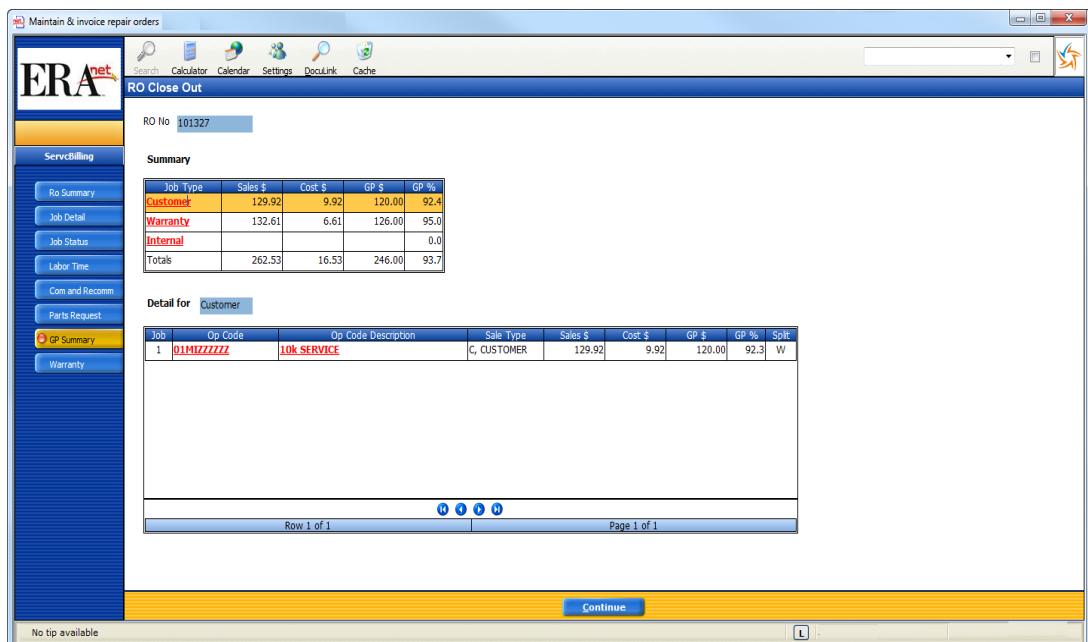
# Service Manual



## Summary:

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



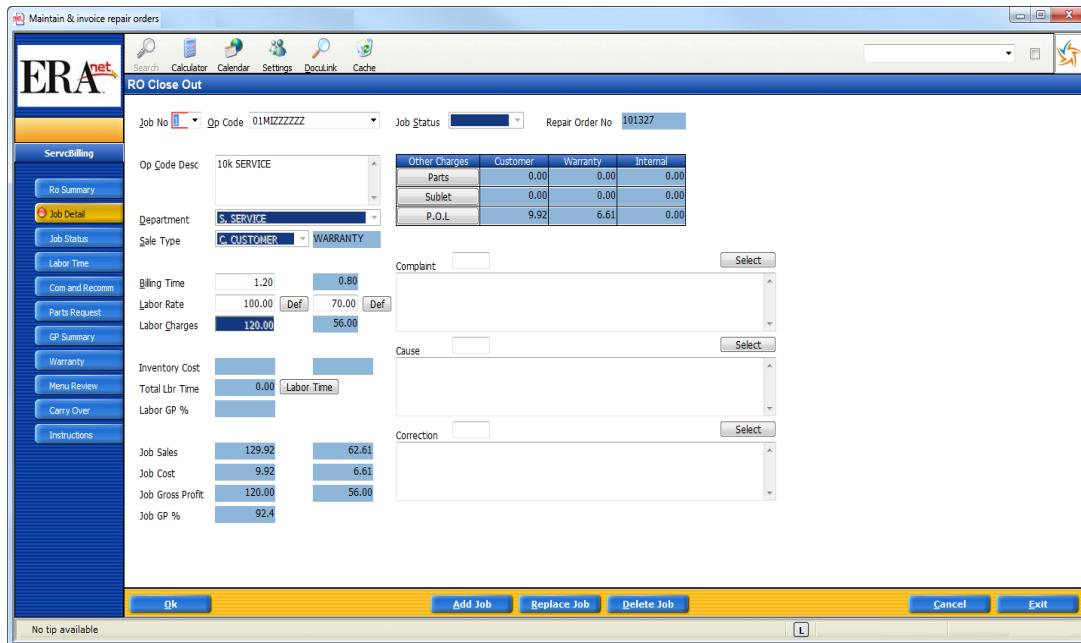
## Detail for:

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

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



Job No: 01MIZZZZZZ Job Status: Repair Order No: 101327

	Other Charges	Customer	Warranty	Internal
Parts	0.00	0.00	0.00	0.00
Sublet	0.00	0.00	0.00	0.00
P.O.L	9.92	6.61	0.00	0.00

Department: S. SERVICE Sale Type: C\_CUSTOMER WARRANTY

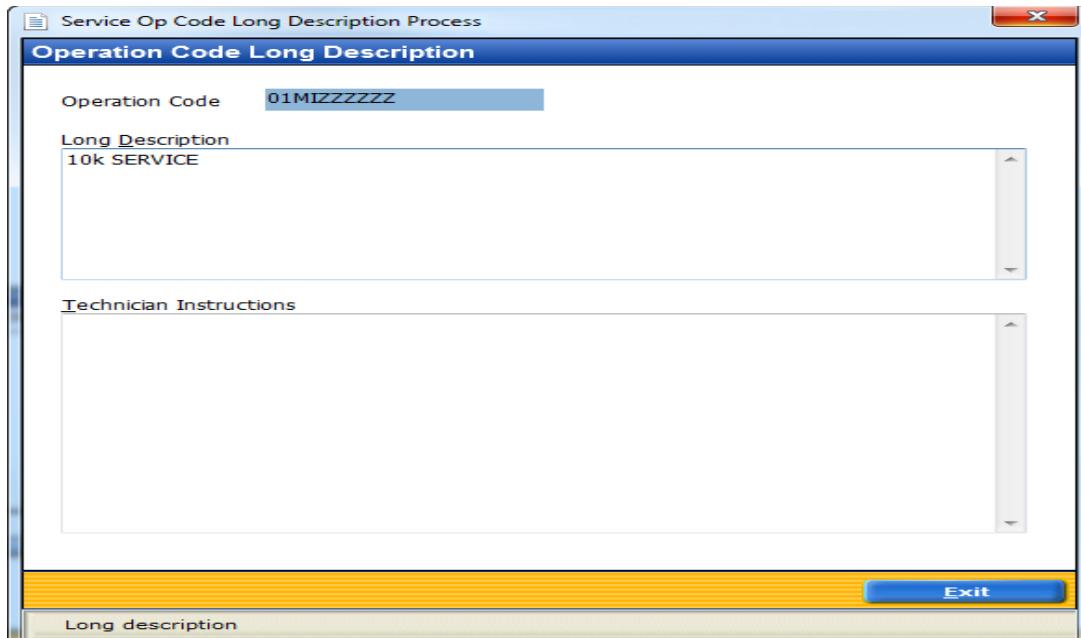
Billing Time: 1.20 Labor Rate: 100.00 Def: 70.00 Def: Labor Charges: 120.00 56.00

Inventory Cost: 0.00 Total Lbr Time: 0.00 Labor Time: Labor GP %: 92.4

Job Sales: 129.92 62.61 Job Cost: 9.92 6.61 Job Gross Profit: 120.00 56.00 Job GP %: 92.4

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:



Operation Code: 01MIZZZZZZ

Long Description: 10k SERVICE

Technician Instructions

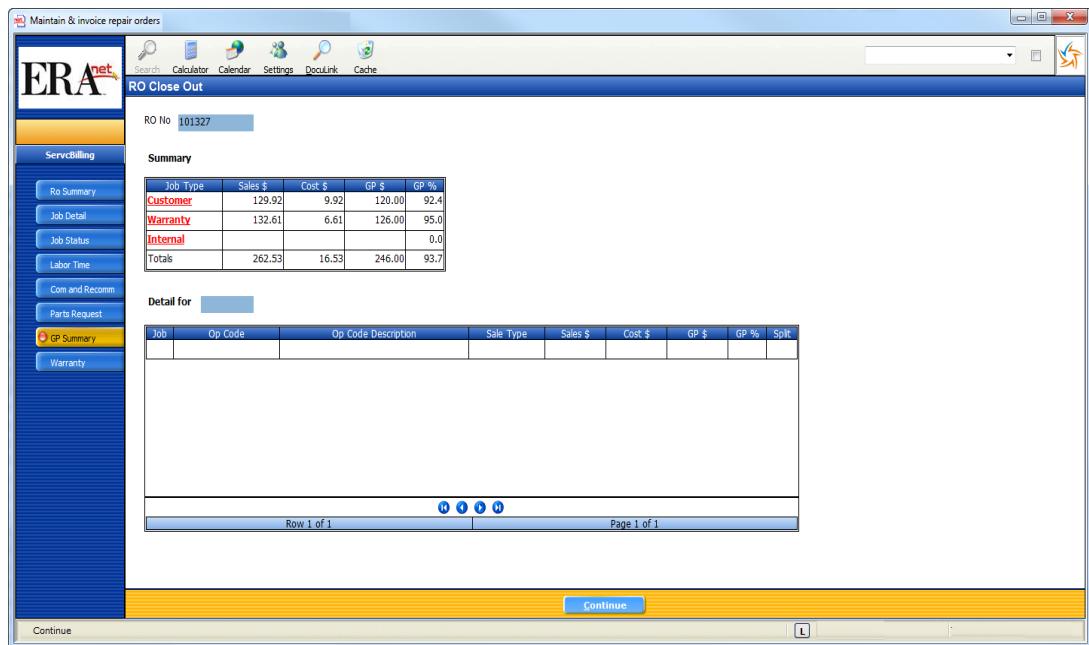
Exit

Long description

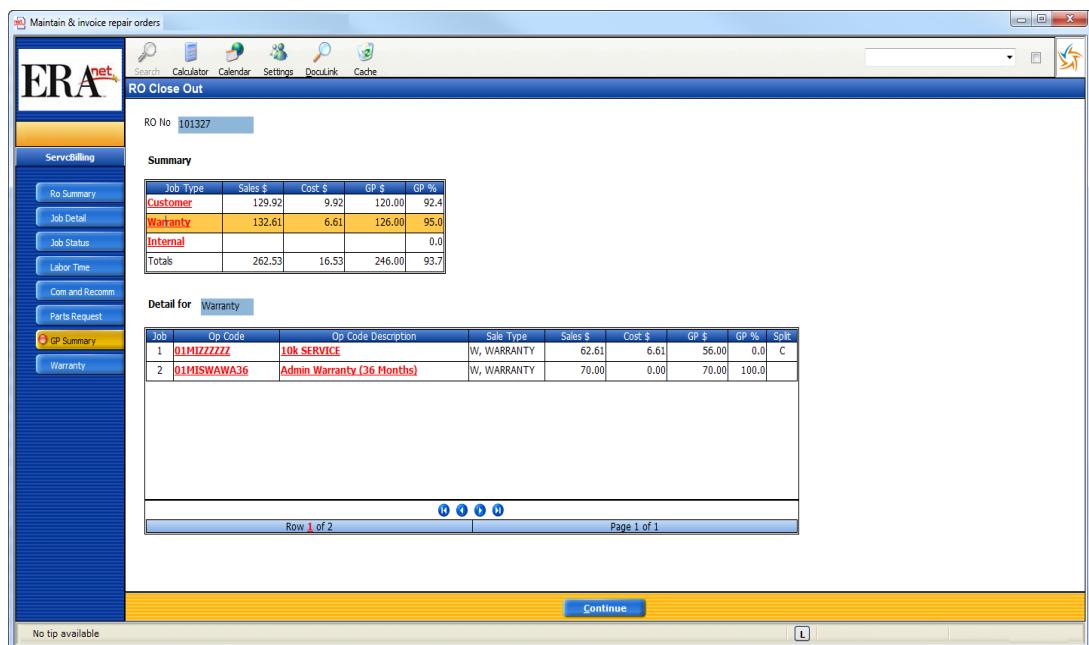
Select **Exit** option and to return to the *GP Summary* screen.

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:

# Service Manual



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



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

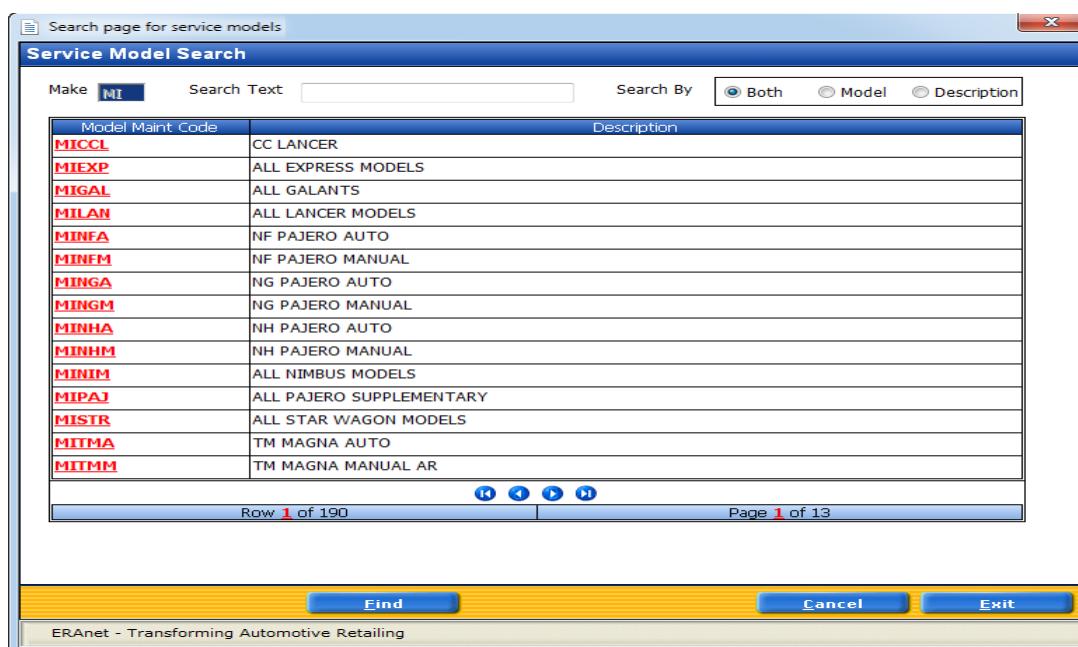
This change was made to improve the core product and to continue to develop and enhance the ERAnet Service product.

#### 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.



The screenshot shows a Windows application window titled "Service Model Search". At the top, there is a toolbar with a "Make" dropdown set to "MI", a "Search Text" input field, and a "Search By" button with three radio button options: "Both" (selected), "Model", and "Description". Below the toolbar is a table with two columns: "Model Maint. Code" and "Description". The table contains 190 rows of data, with the first few rows visible. The "Description" column is significantly wider than the "Model Maint. Code" column. At the bottom of the table, there are navigation buttons (first, previous, next, last) and status bars indicating "Row 1 of 190" and "Page 1 of 13". The footer of the window includes buttons for "Find", "Cancel", and "Exit", and a copyright notice: "ERAnet - Transforming Automotive Retailing".

**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



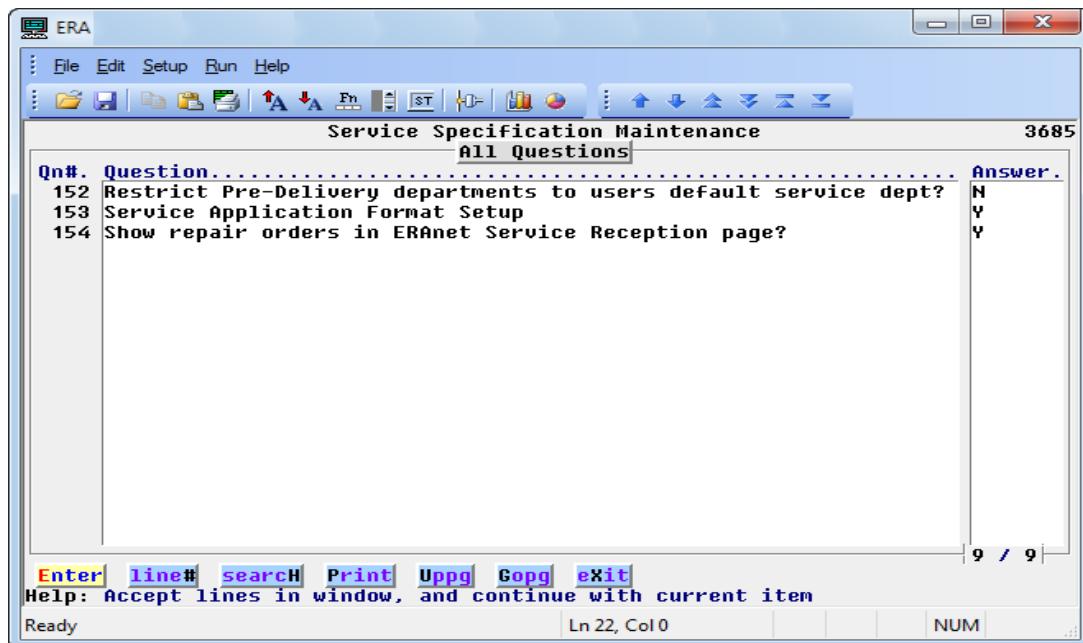
Service

#### 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:

# ERAnet V9



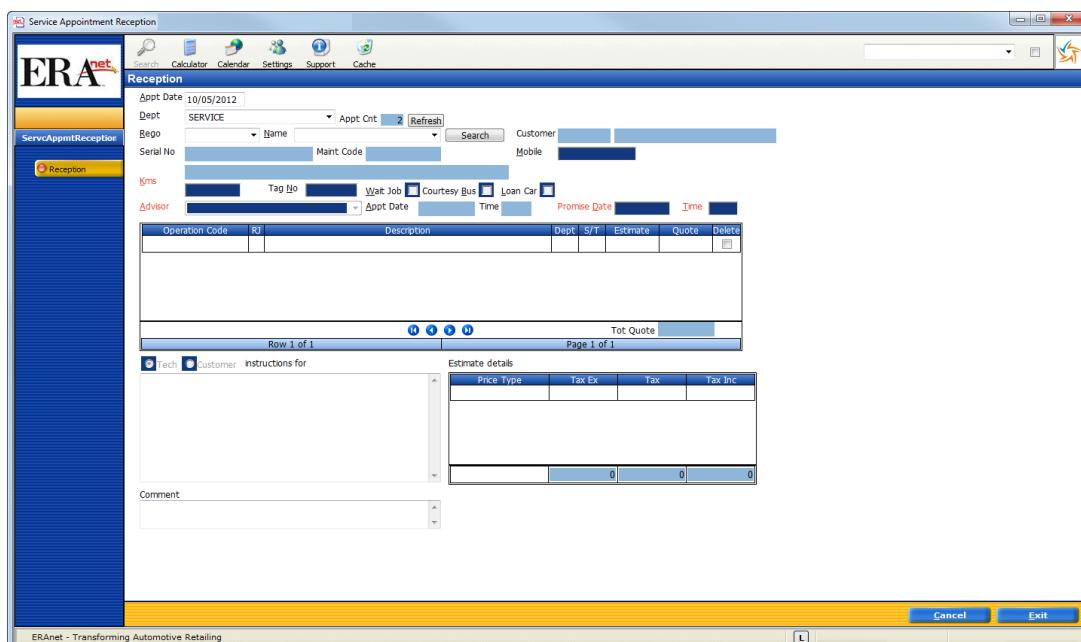
## 154 – Show repair orders in ERAnet Service Reception page?

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:

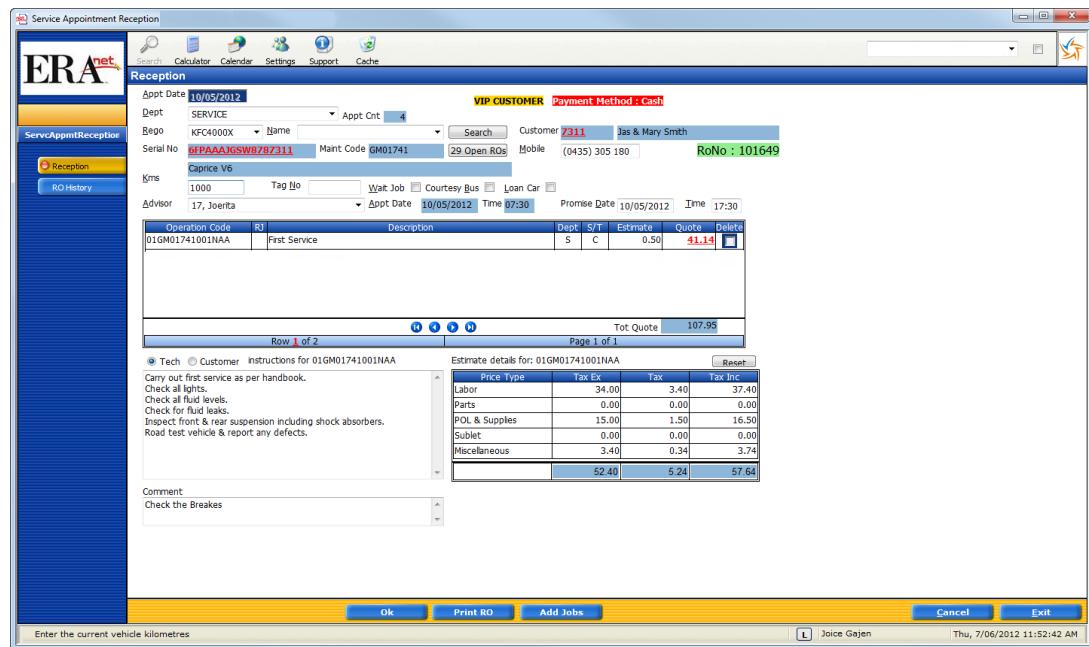


## Repair Orders

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.

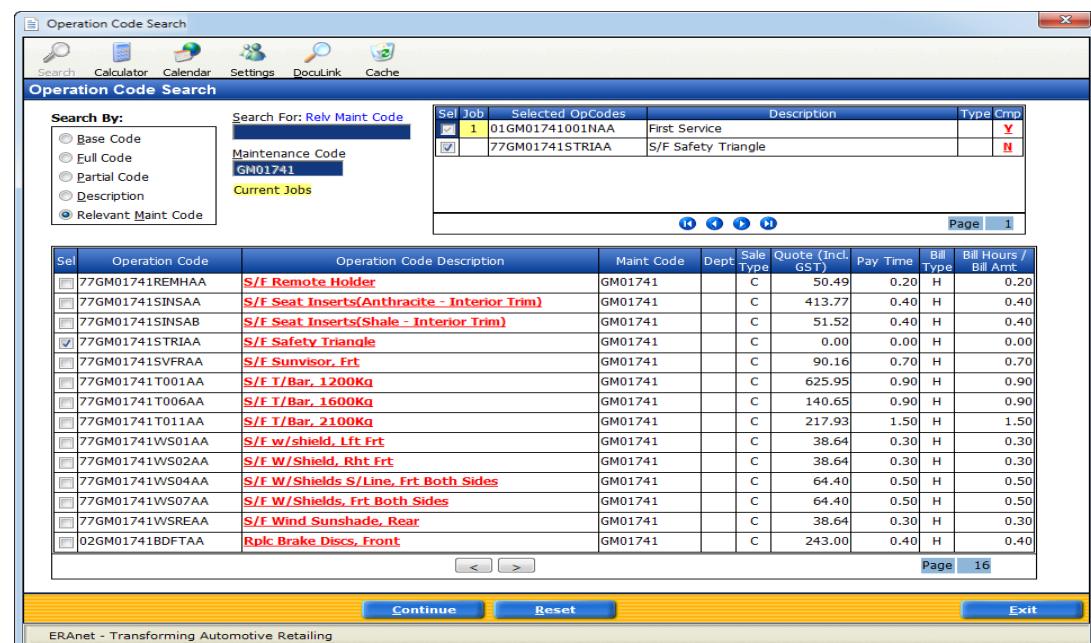
Select the **registration number** of the repair order from the **Rego** drop down box and the following screen will be displayed:



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.

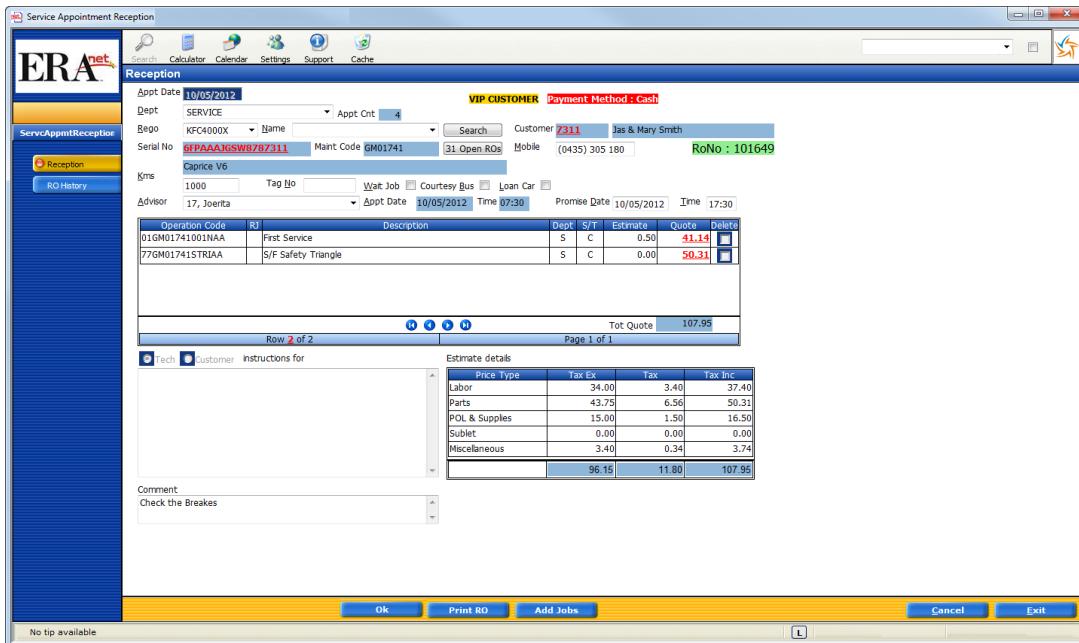
**Note:** **RoNo** is highlighted in green.

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:



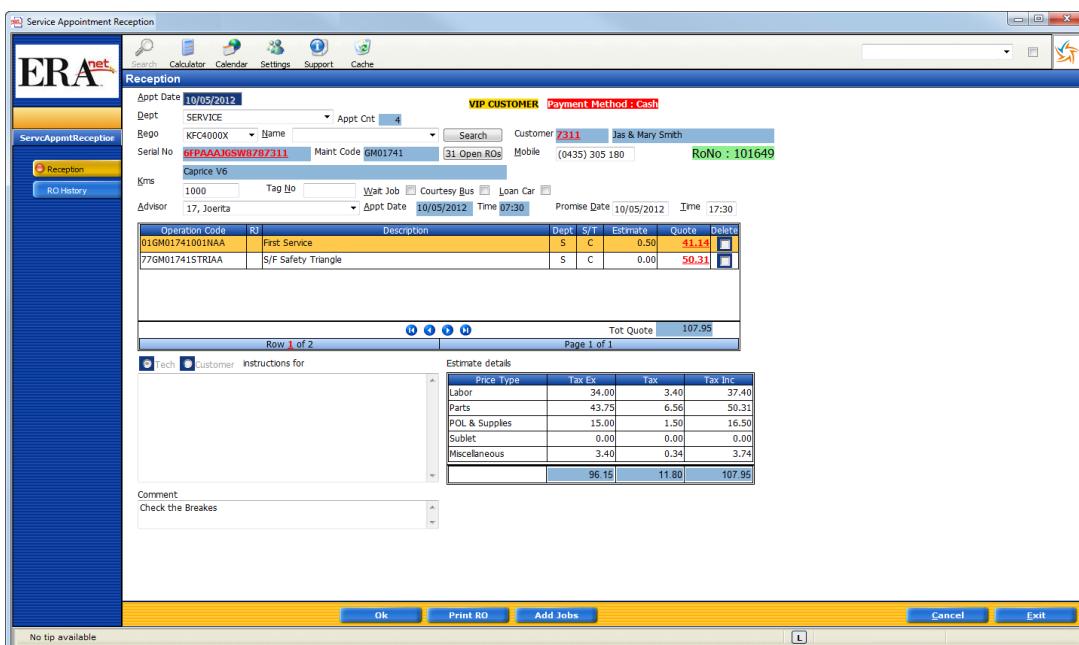
# ERAnet V9

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:



**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:



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.

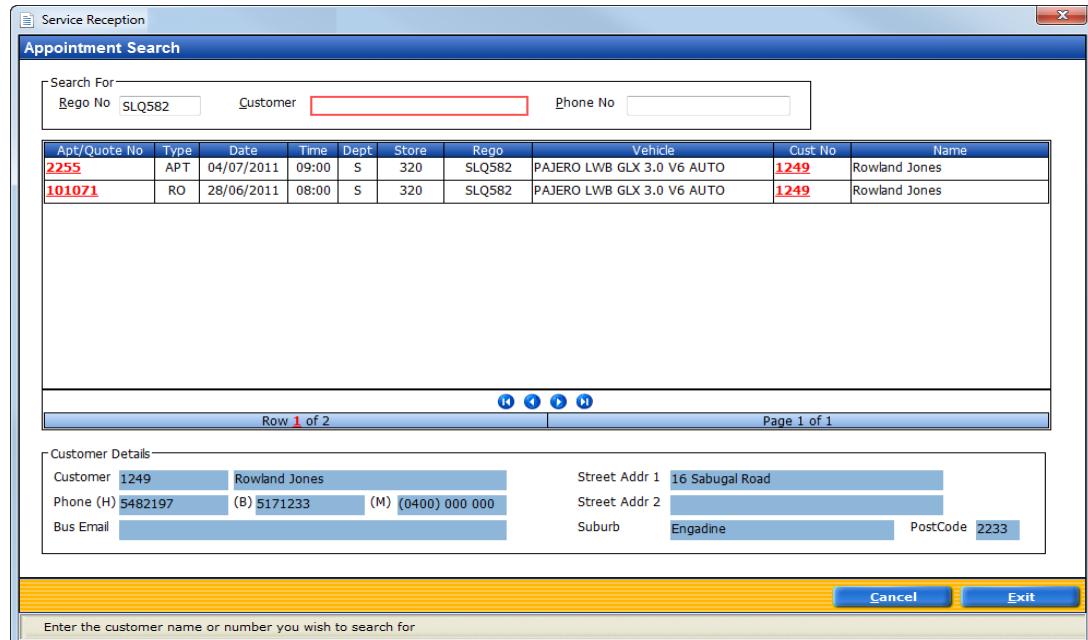
# Service Manual

**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:



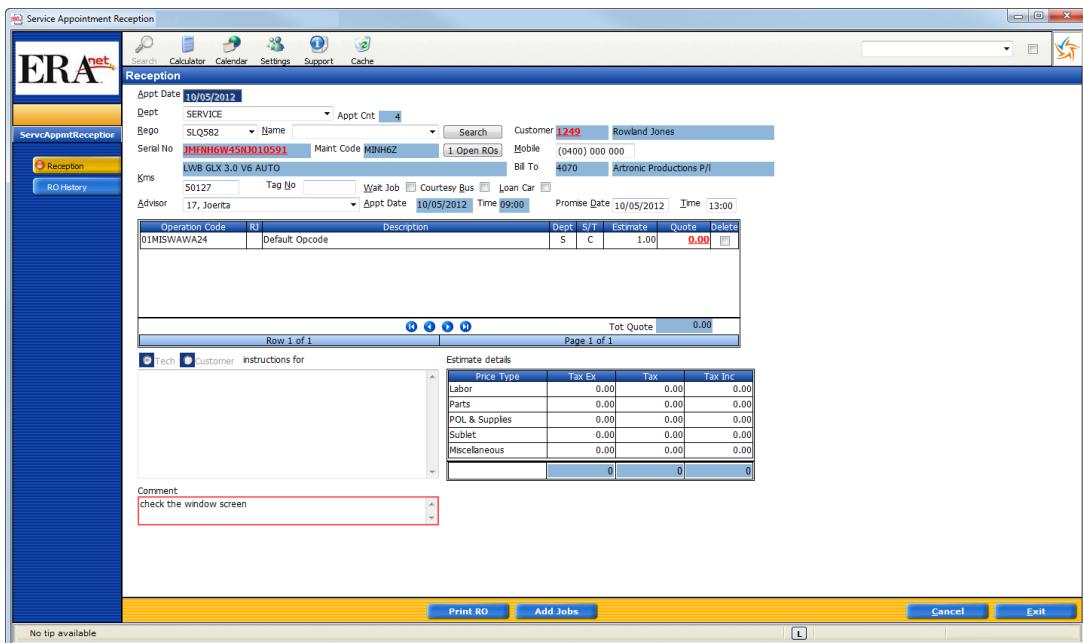
Apt/Quote No	Type	Date	Time	Dept	Store	Rego	Vehicle	Cust No	Name
2255	APT	04/07/2011	09:00	S	320	SLQ582	PAJERO LWB GLX 3.0 V6 AUTO	1249	Rowland Jones
101071	RO	28/06/2011	08:00	S	320	SLQ582	PAJERO LWB GLX 3.0 V6 AUTO	1249	Rowland Jones

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

# ERAnet V9

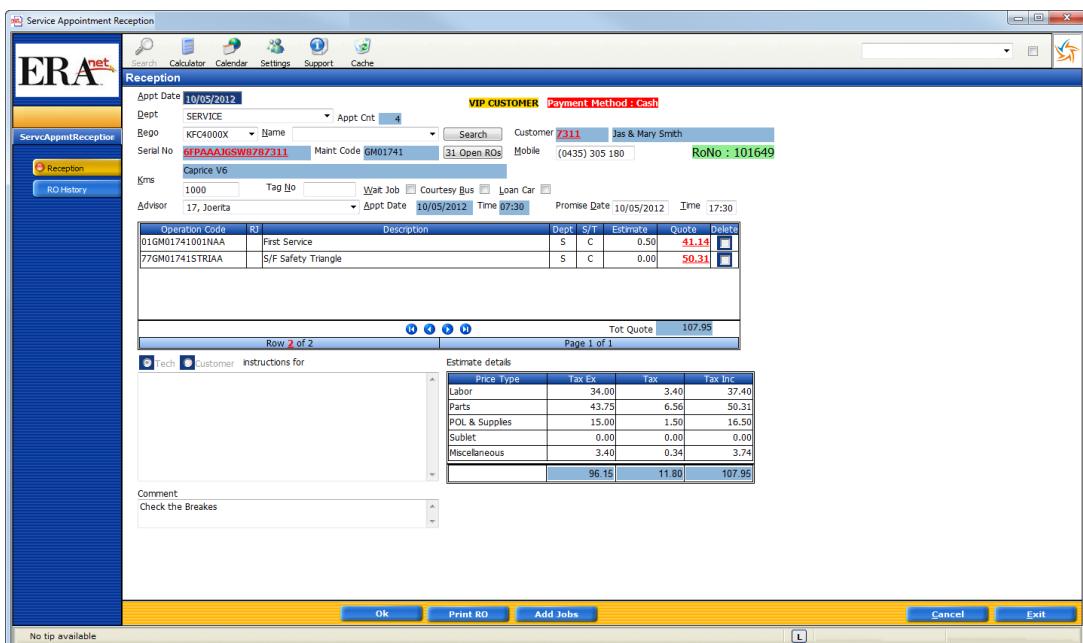


If the appointment has any comments it will be displayed in the comment field and the user is able to update the comments and save it by selecting the **Print RO** option from the action bar.

## Appt Date field

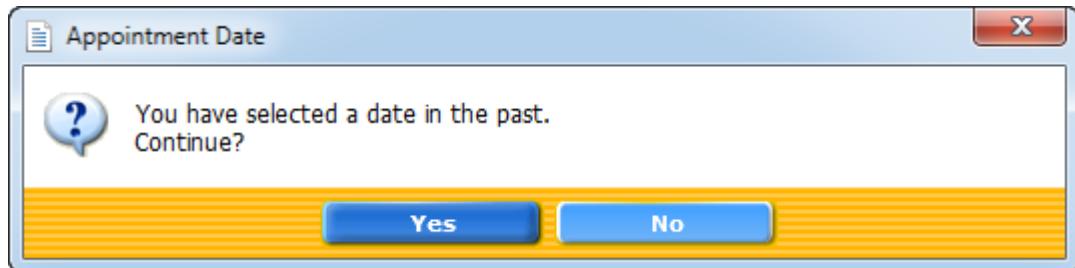
The **Appt Date** field allows the user to enter a future date and modify the appointment or repair order in the event something was left out at the time the appointment or repair order was created.

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:



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

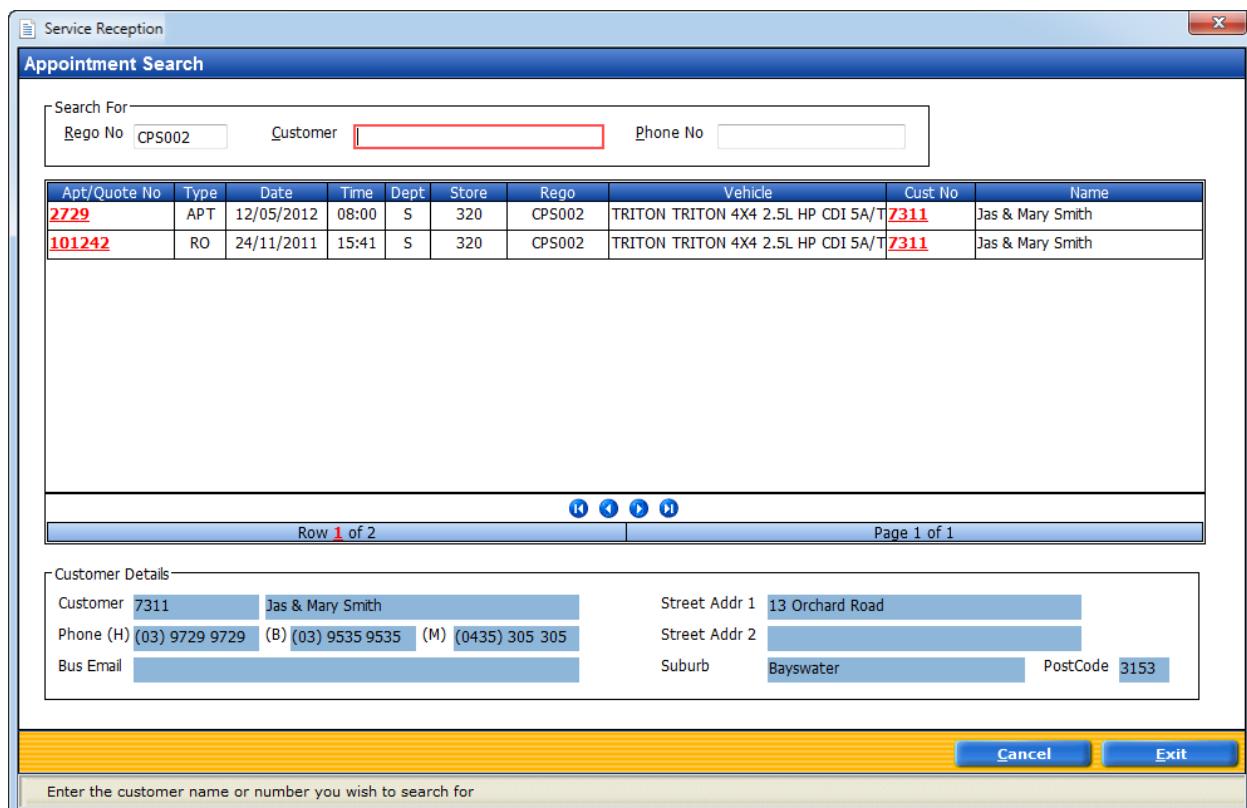
**Note:** The user is also able to enter a date in the past. Entering a **past date** in the *Appt Date* field will display the following pop up message:



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:



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:



# ERAnet V9

---

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

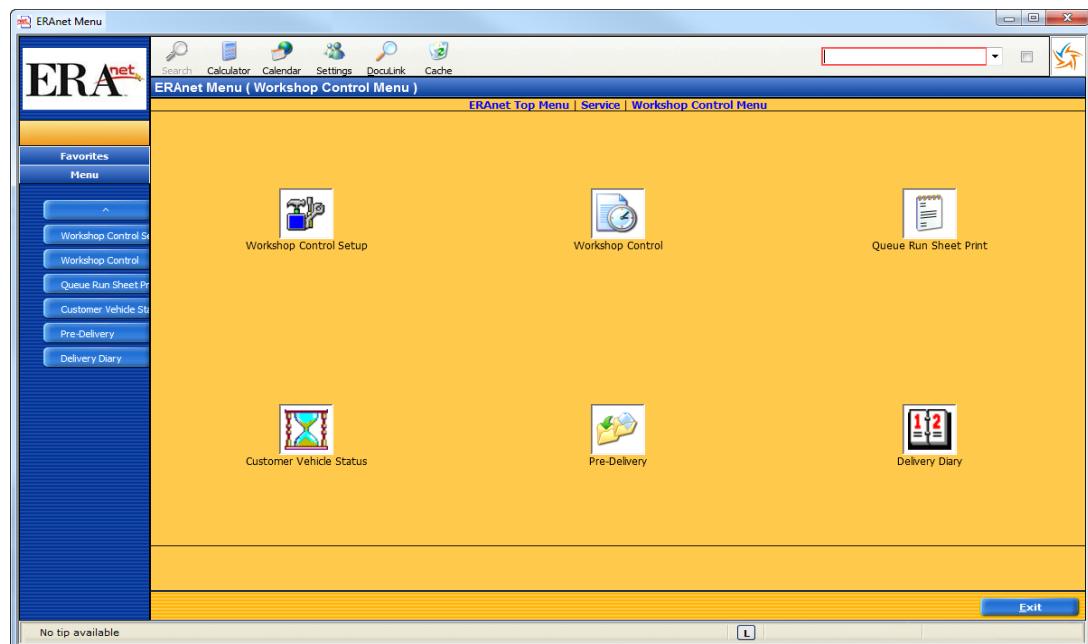
A Visual solution for workshop controllers to see what work is yet to be allocated.

#### Screens

-  Workshop Control
-  Workshop Control Menu
-  Workshop Control Setup

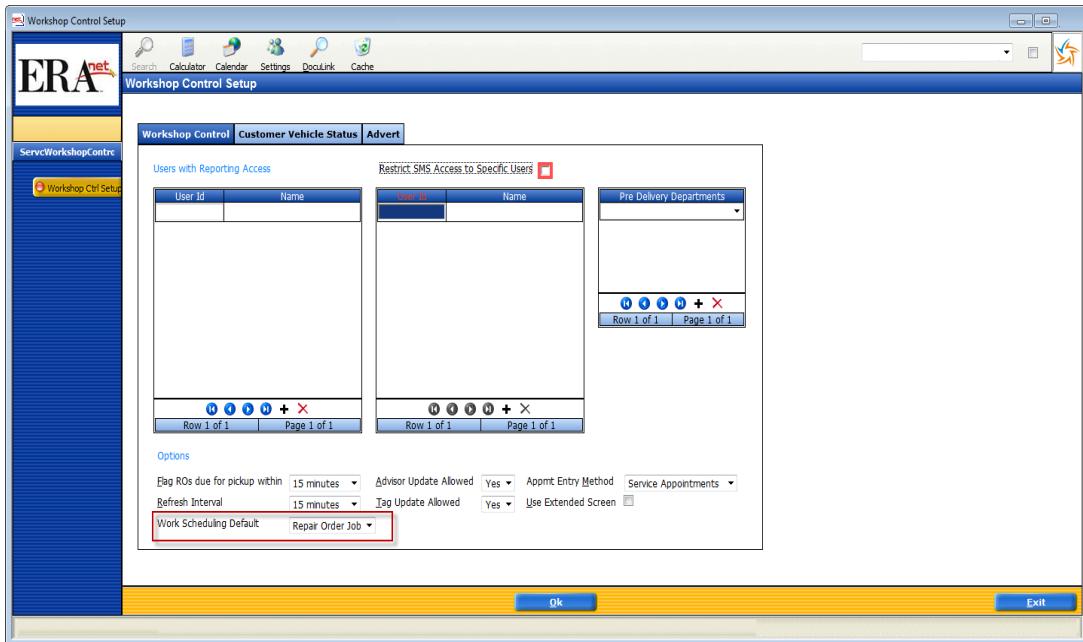
#### The Setup

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:

# ERAnet V9



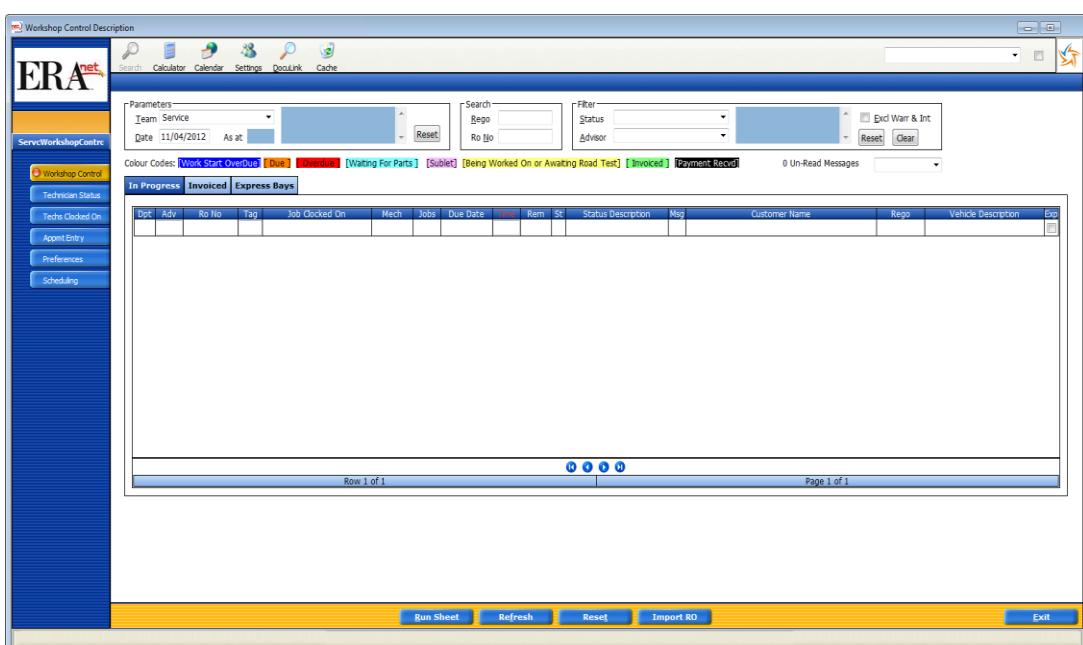
A new field **Work Scheduling Default** has been added to allow the user to choose from two workshop levels. 1: Repair Order & 2: Repair Job.

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

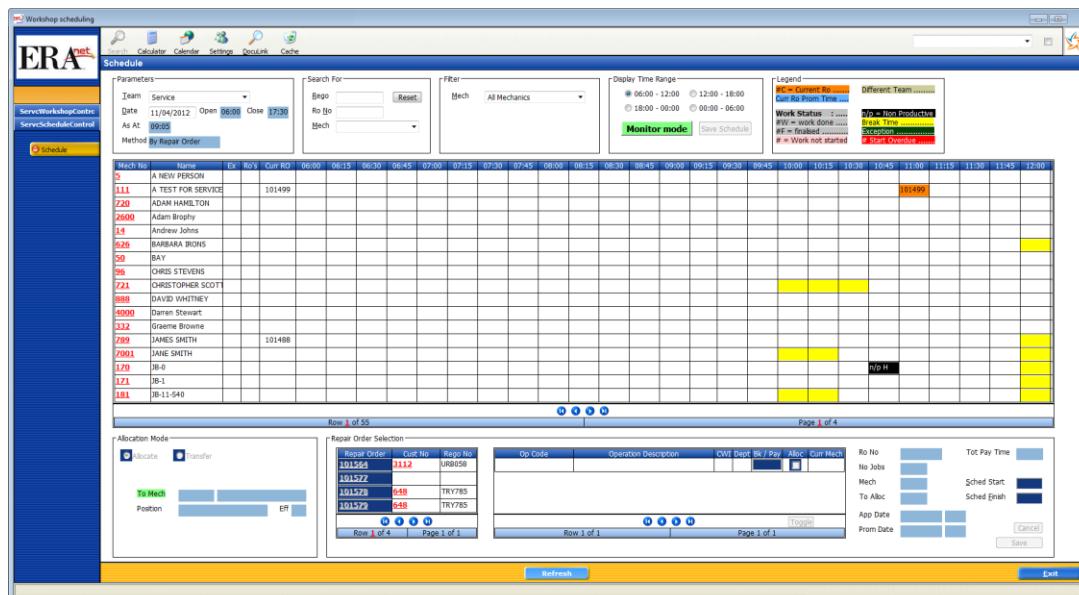
Once the setup has been completed, select **Workshop Control**, from the **Workshop Control Menu** and the following screen will be displayed:



# Service Manual

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.

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



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

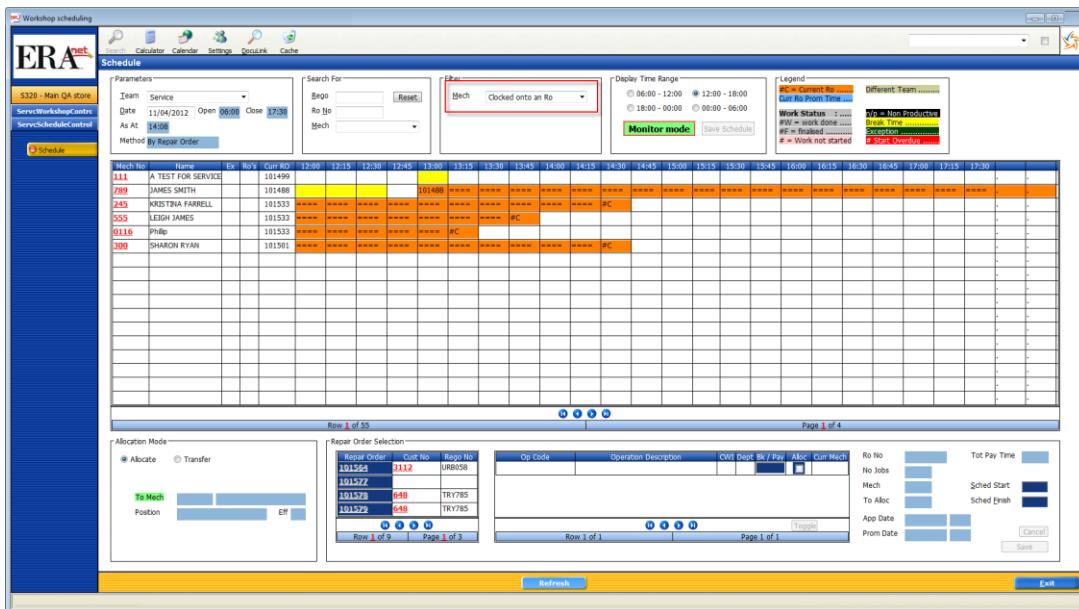
## Parameters

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

# ERAnet V9

## Filter

<b>Mech</b>	<p>The user can filter from a drop down box  selection between Technicians clocked onto a Repair Order <b>Or</b> Not clocked onto a Repair Order.</p> <p><b>Note:</b> 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.

# Service Manual

## Schedule Mode

Workshop scheduling

ERA.net

5320 - Main QA store

ServiceWorkshopControl

ServScheduleControl

Schedule

Parameters

Team: Service Date: 12/04/2012 Open: 06:00 Close: 17:30

As At: 12:35 Method: By Repair Order

Search For: Begn: \_\_\_\_\_ Ro No: \_\_\_\_\_ Mech: \_\_\_\_\_

Filter: Mech: All Mechanics

Display Time Range: 06:00 - 12:00 12:00 - 18:00 18:00 - 06:00 06:00 - 06:00

Legend: PC = Current Job CR = Plan Time Work Status: W = Work done ... F = Failed ... # = Work not started ... N = Non Productive Break Time S = Start Overdue D = Start Overdue

Schedule mode Save Schedule

Mech No Name Es Ro's Curr RO 12:00 12:15 12:30 12:45 13:00 13:15 13:30 13:45 14:00 14:15 14:30 14:45 15:00 15:15 15:30 15:45 16:00 16:15 16:30 16:45 17:00 17:15 17:30

111 A TEST FOR SERVICE 101499

120 ADAM HAMILTON 2600 Adam Brophy

14 Andrew John 626 BARBARA BROWN 50 BAY 96 CHRIS STEVENS 721 CHRISTOPHER SCOTT 888 DAVID WHITNEY 4000 Darren Stewart 332 Graeme Browne 789 JAMES SMITH 101488 101489

7001 JANE SMITH 170 38-1 171 38-1 181 38-11-540

Row 1 of 55 Page 1 of 4

Allocation Mode:  Allocate  Transfer

To Mech:  Position:  Eff:

Repair Order Selection:

Repair Order	Cust No	Rep No
101586	6424	SAL111
101587	648	

Op Code: Operation Description: CWL Dept Blk / Pay: Alloc: Curr Mech:

Row 1 of 1 Page 1 of 1

Refresh Save

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

<b>Allocate</b>	Select the radio button  to Allocate
<b>hyperlink</b>	Select the <b>hyperlink</b> Mech No relevant to the Mechanic in the column to Allocate work. <b>Note:</b> The Mechanic selected will be highlighted in <b>Green</b> . <b>Multiple selections will also be highlighted</b>

Workshop scheduling

ERA.net

5320 - Main QA store

ServiceWorkshopControl

ServScheduleControl

Schedule

Parameters

Team: Service Date: 12/04/2012 Open: 06:00 Close: 17:30

As At: 12:35 Method: By Repair Order

Search For: Begn: \_\_\_\_\_ Ro No: \_\_\_\_\_ Mech: \_\_\_\_\_

Filter: Mech: All Mechanics

Display Time Range: 06:00 - 12:00 12:00 - 18:00 18:00 - 06:00 06:00 - 06:00

Legend: PC = Current Job CR = Plan Time Work Status: W = Work done ... F = Failed ... # = Work not started ... N = Non Productive Break Time S = Start Overdue D = Start Overdue

Schedule mode Save Schedule

Mech No Name Es Ro's Curr RO 12:00 12:15 12:30 12:45 13:00 13:15 13:30 13:45 14:00 14:15 14:30 14:45 15:00 15:15 15:30 15:45 16:00 16:15 16:30 16:45 17:00 17:15 17:30

111 A TEST FOR SERVICE 101499

120 ADAM HAMILTON 2600 Adam Brophy

14 Andrew John **626 BARBARA BROWN 50 BAY 96 CHRIS STEVENS 721 CHRISTOPHER SCOTT 888 DAVID WHITNEY 4000 Darren Stewart 332 Graeme Browne 789 JAMES SMITH 101488 101489**

7001 JANE SMITH 170 38-1 171 38-1 181 38-11-540

Row 1 of 55 Page 1 of 4

Allocation Mode:  Allocate  Transfer

To Mech: **14 Andrew John** Position:  Eff:

Repair Order Selection:

Repair Order	Cust No	Rep No
101586	6424	SAL111
101587	648	

Op Code: Operation Description: CWL Dept Blk / Pay: Alloc: Curr Mech:

Row 1 of 1 Page 1 of 1

Refresh Save

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

# ERAnet V9

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

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

## Transfer

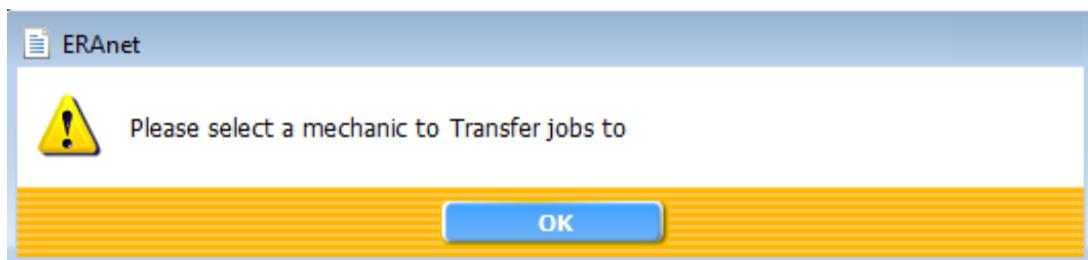
To  **Transfer** the Repair Order **from** a Mechanic, select the Mech No [hyperlink](#) that currently has a Repair Order allocated to them.  
**Note:** The Mechanic will be highlighted in **Blue**.

# Service Manual

## 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.

# ERAnet V9

Workshop scheduling

Schedule

Parameters: Team - Service, Date - 19/04/2012, Open 06:00, Close 17:00, As At - 06:16, Method - By Repair Order

Display Time Range: 06:00 - 12:00, 12:00 - 18:00, 18:00 - 00:00, 00:00 - 06:00

Schedule mode: Schedule, Save Schedule

Legend: **Allocated To** **Current Rep** **Different Team**  
**Work Status**: **NP** Non Productive, **BP** Break Time, **FW** Work done, **FF** Finalised, **W** Work not started, **SO** Start Overview

Mech No Name Est. R/o Curr R/o 06:00 06:15 06:30 06:45 07:00 07:15 07:30 07:45 08:00 08:15 08:30 08:45 09:00 09:15 09:30 09:45 10:00 10:15 10:30 10:45 11:00 11:15 11:30 11:45 12:00

Row 8 of 55 Page 1 of 4

Allocation Mode:  Allocate  Transfer  
From Mech: 629 BARBARA BONS  
To Mech: 96 CHRIS STEVENS  
Position: Eff 100

Repair Order Selection

Repair Order	Cust No	Rep No	Alloc Mech
100044	6983	23M665	
100011	648		

Op Code Operation Description C/W Digit Blk / Par C/W Mech  
01MD2222P0 pre delivery test 1 S 0.10 96  
01MD222200 CAR SERVICE 1 S 0.50 96  
01MBNGHNG TEST NATKA 1 S 1.00 96

Row 1 of 1 Page 1 of 1

Row 1 of 3 Page 1 of 1

Refresh  Exit

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

Workshop scheduling

Schedule

Parameters: Team - Service, Date - 19/04/2012, Open 06:00, Close 17:00, As At - 06:16, Method - By Repair Order

Display Time Range: 06:00 - 12:00, 12:00 - 18:00, 18:00 - 00:00, 00:00 - 06:00

Schedule mode: Schedule, Save Schedule

Legend: **Allocated To** **Current Rep** **Different Team**  
**Work Status**: **NP** Non Productive, **BP** Break Time, **FW** Work done, **FF** Finalised, **W** Work not started, **SO** Start Overview

Mech No Name Est. R/o Curr R/o 06:00 06:15 06:30 06:45 07:00 07:15 07:30 07:45 08:00 08:15 08:30 08:45 09:00 09:15 09:30 09:45 10:00 10:15 10:30 10:45 11:00 11:15 11:30 11:45 12:00

Row 8 of 55 Page 1 of 4

Allocation Mode:  Allocate  Transfer  
From Mech: 629 BARBARA BONS  
To Mech: 96 CHRIS STEVENS  
Position: Eff 100

Repair Order Selection

Repair Order	Cust No	Rep No	Alloc Mech
100044	6983	23M665	
100011	648		

Op Code Operation Description C/W Digit Blk / Par C/W Mech  
01MD2222P0 pre delivery test 1 S 0.10 96  
01MD222200 CAR SERVICE 1 S 0.50 96  
01MBNGHNG TEST NATKA 1 S 1.00 96

Row 1 of 1 Page 1 of 1

Row 1 of 2 Page 1 of 1

Refresh  Exit

Select **Save Schedule** to apply changes.

<input type="button" value="Cancel"/>	<b>Note:</b> You can <input type="button" value="Cancel"/> your selection in <b>Transfer</b> Mode at any time. This will return your Schedule to the original table.
	<b>Note:</b> Users have the ability to switch Mechanics already selected in <input type="radio"/> <b>Transfer</b> 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 .....	Yellow	Currently clocked and working
Break Time .....	Yellow	Break time as defined in 3072.
Curr Ro Prom Time .....	Light Blue	Promise time as per WIPROCESS for current job being worked on
n/p = Non Productive	Black	Technician has been scheduled for an exception or has clocked a NON Productive category
Exception	Green	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



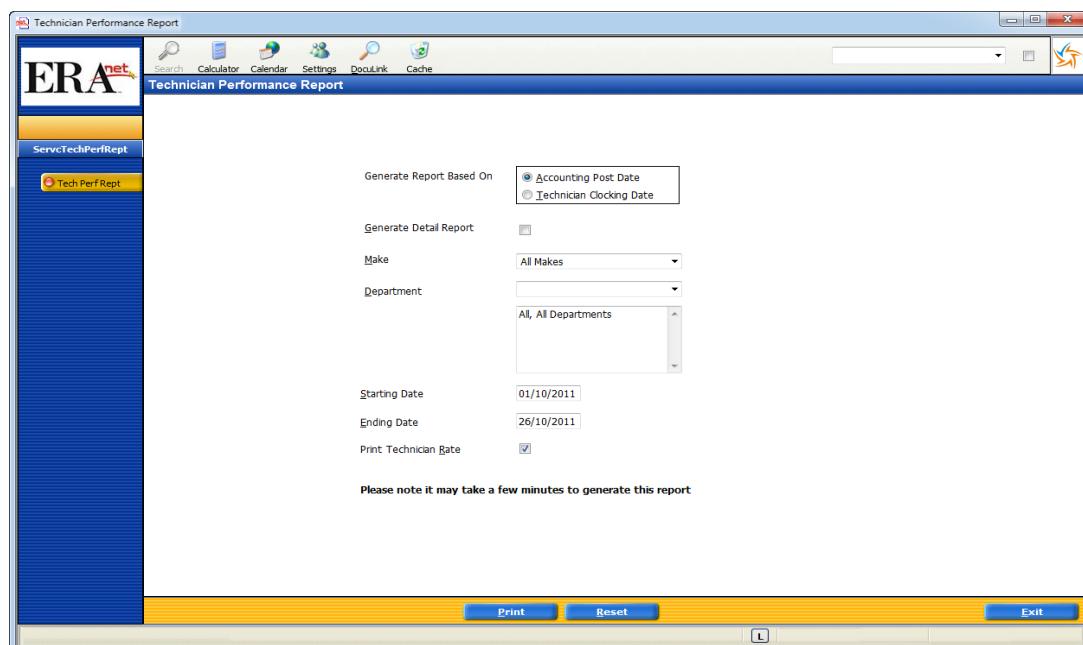
Technician Performance Report  
3612 – Technician Performance Rpt

### 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

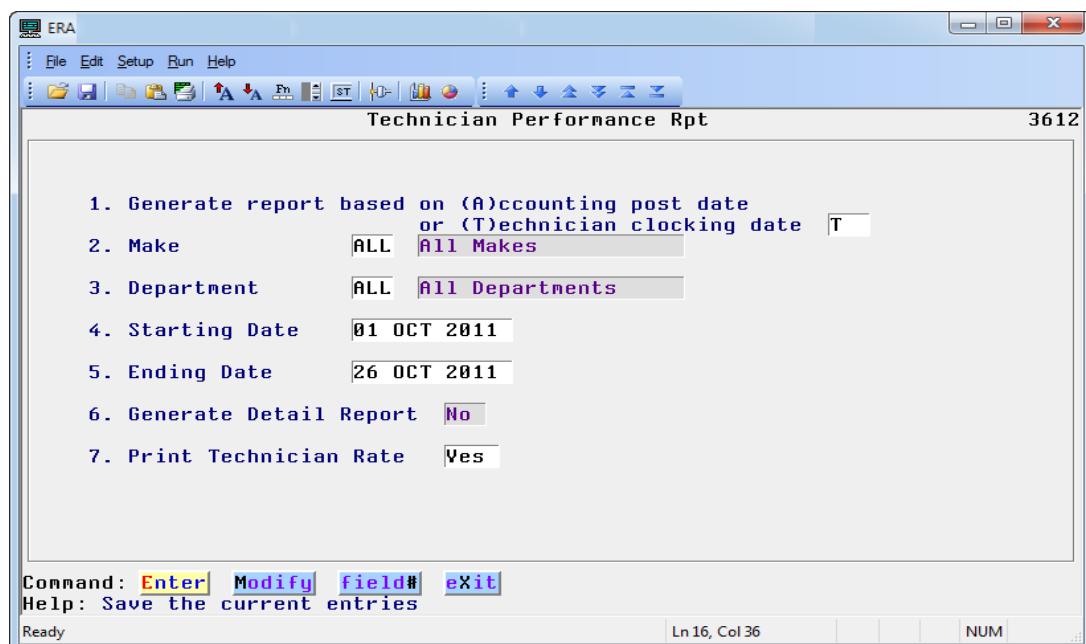


Tick this option to display the technician's **rate** on the report, or leave this option un-ticked to not display the technician's rate on the report.

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:



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 *No*.

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

Technicians Performance Report										
26/10/11 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	Ubld/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 0.00
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 0.00
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 0.00
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 0.67
* 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:

Technicians Performance Report										
26/10/11 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	Ubld/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

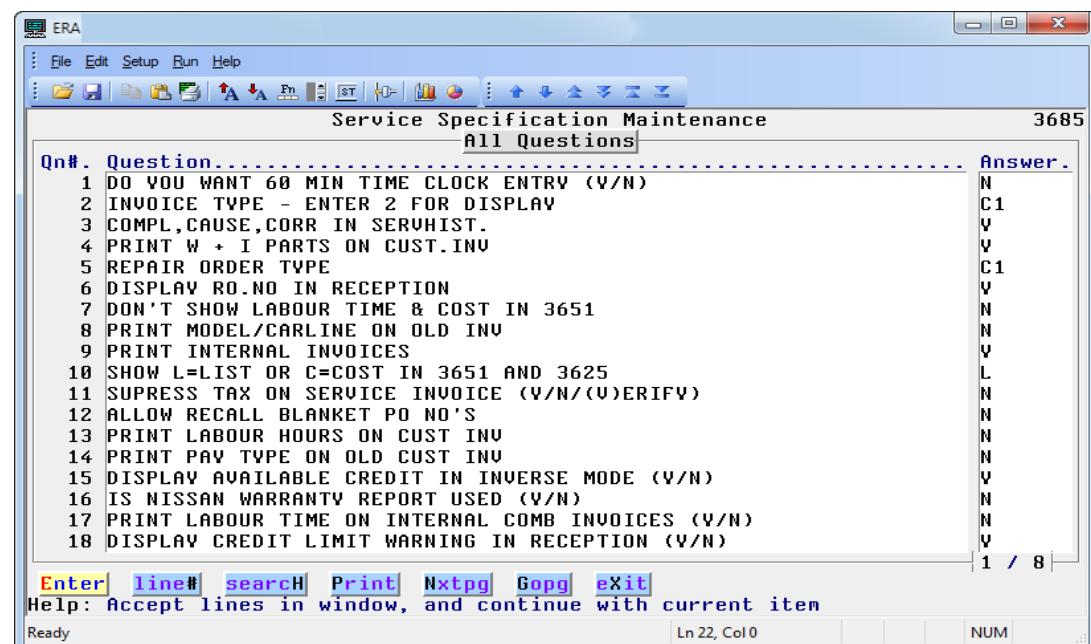
This change was made through a Request For Development submission to enhance existing functionality.

#### Screens



#### 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 <b>Y</b> for Yes to add available hours by team or <b>N</b> for No to not add available hours by team.  <b>Note:</b> If this question was previously set to N for No and is changed
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# ERAnet V9

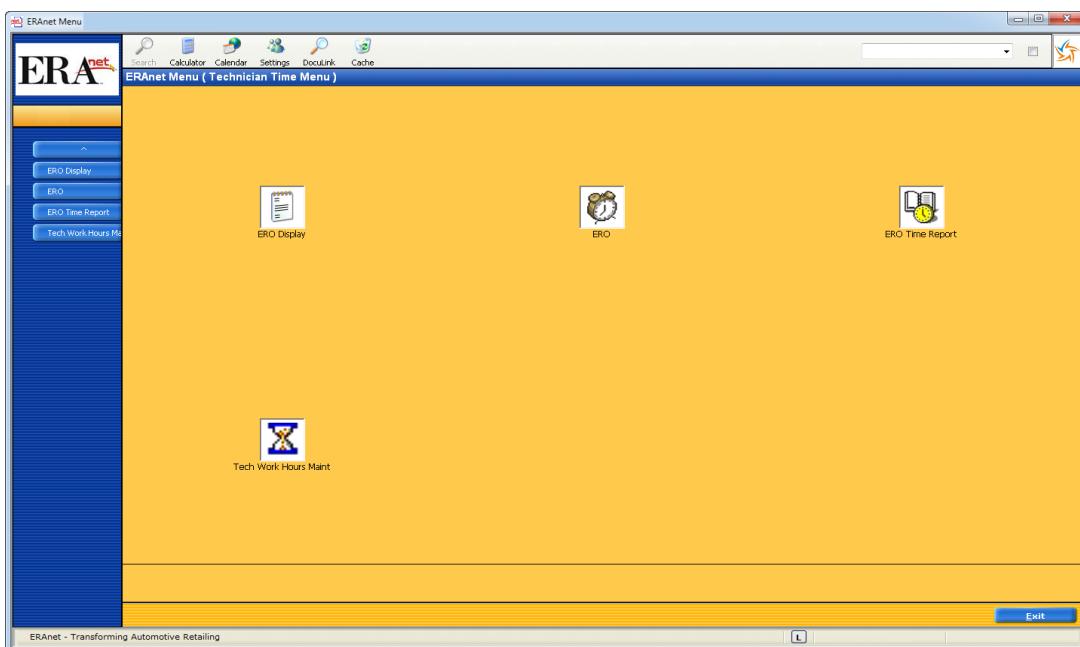
to Y for Yes, then the user must go through  **Tech Work Hours Maint** and for those technician with multiple teams allocated, the normal attendance hours and exceptions other than public holidays will need to be distributed between all the departments.

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.

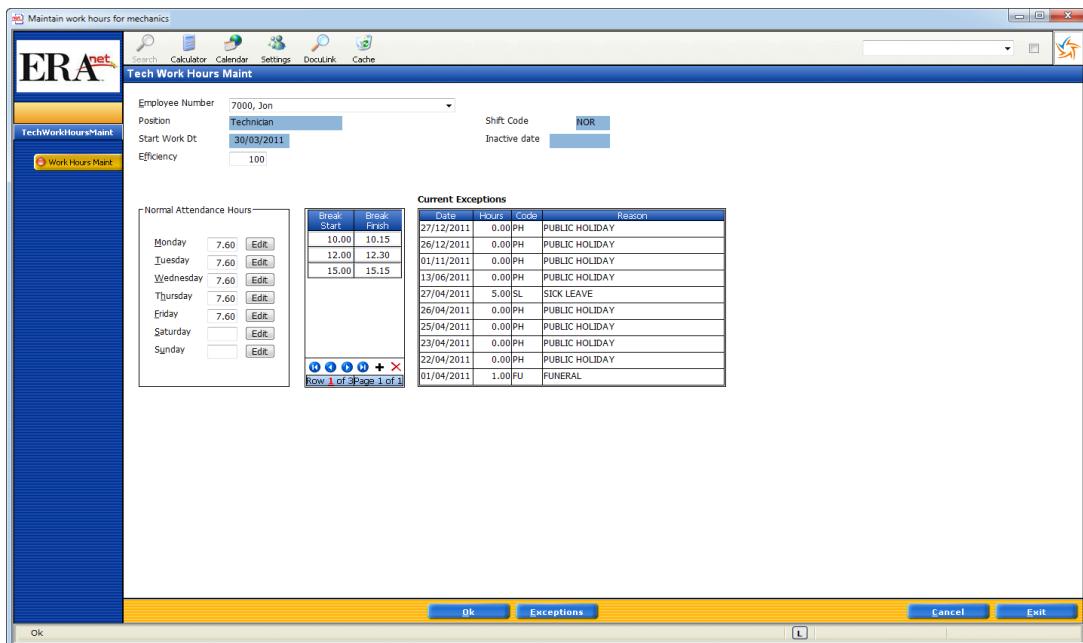
Select **Enter** from the command line to save the changes.

## 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:



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

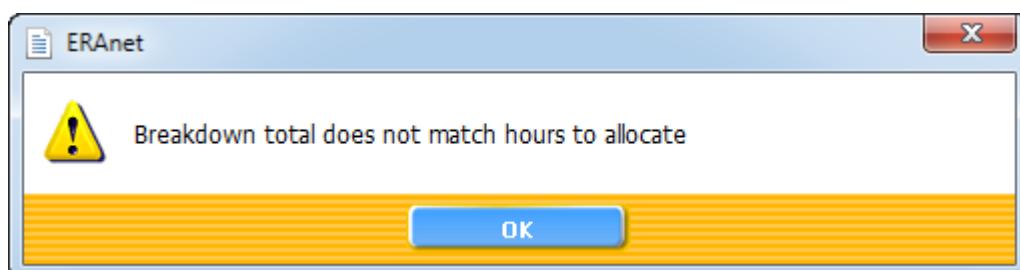
Teams	Description	Hours
S	SERVICE	7.60
P	P.D.	0.00

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

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

## 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 option.

## Current Exceptions

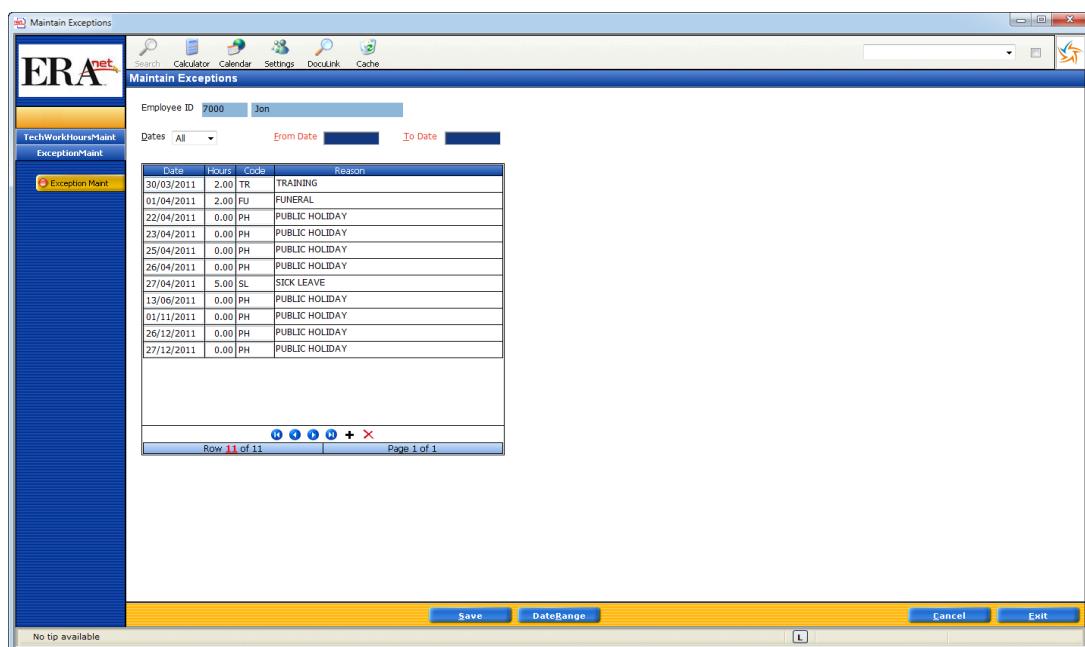
This table will display the last ten exceptions. The table will display the exception date, available hours and the exception code and reason.

### Action bar options:

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



**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*.

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

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

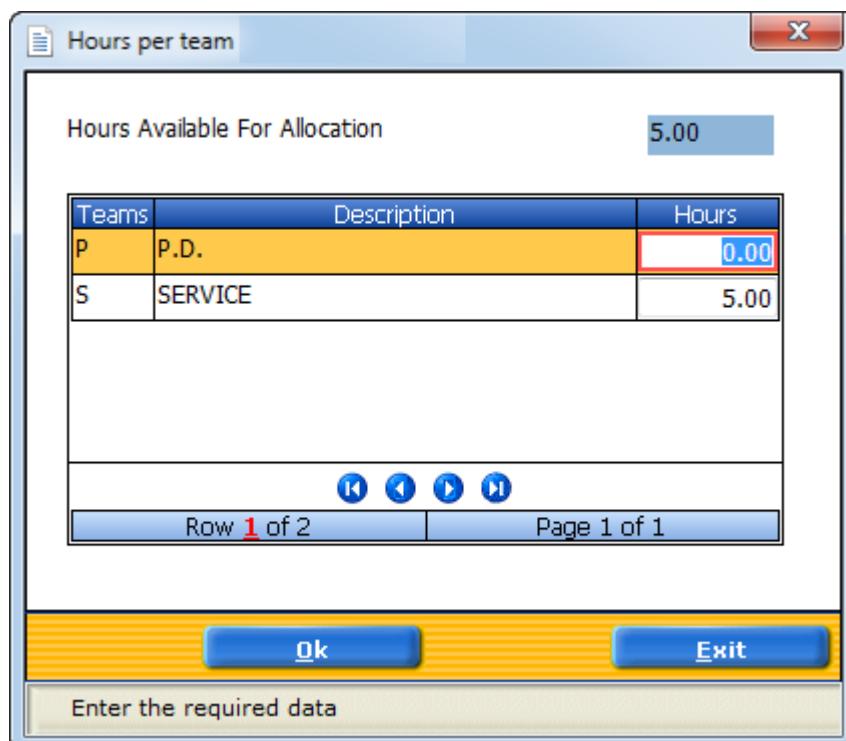
To add a new exception, select the  option and enter the **exception details**. To remove an existing exception, select the relevant **line** followed by the  option.

## Action bar options:

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

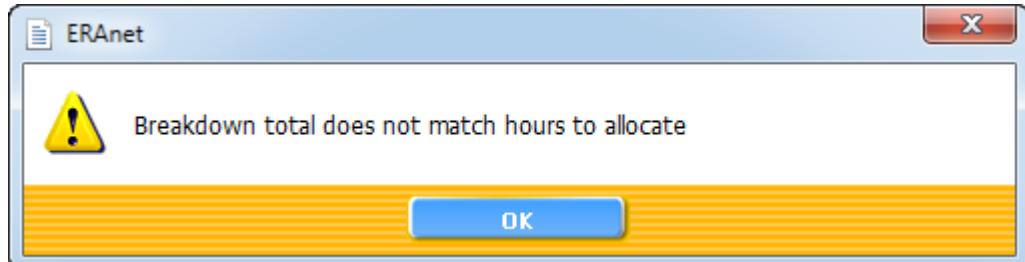


Teams	Description	Hours
P	P.D.	0.00
S	SERVICE	5.00

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

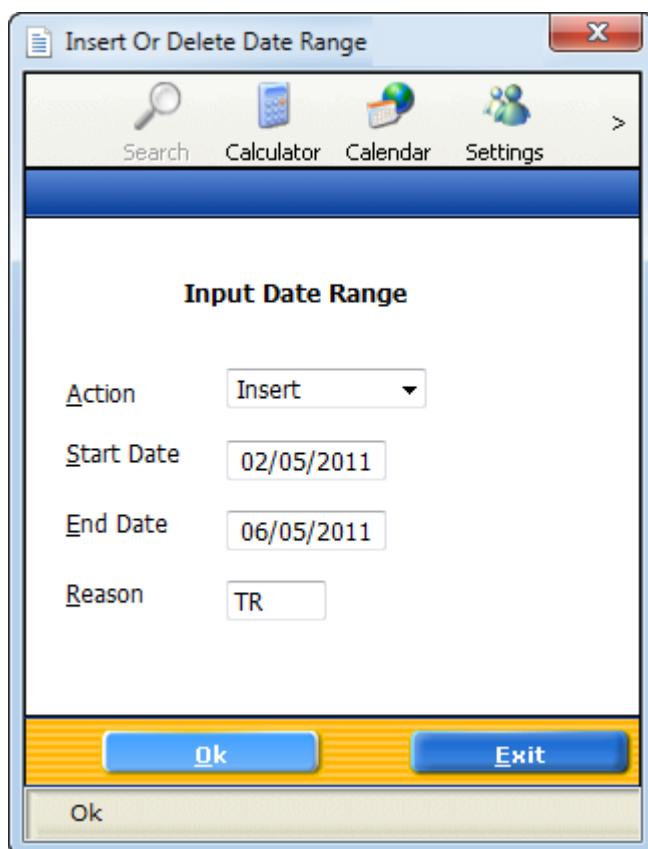
**Note:** The system will not allow the user to exit the *Hours per team* screen until all *Hours Available For Allocation* have been allocated. The following pop up message will display as an indication that hours need to be allocated:



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 <b>Insert</b> or <b>Delete</b> from the <b>dropdown box</b> .
Start Date	Enter the <b>start date</b> .
End Date	Enter the <b>end date</b> .
Reason	Enter the <b>exception reason</b> or select a valid reason from the  <b>Search</b> option. <b>Note:</b> 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 <b>available hours</b> and distribute the exception hours for employees allocated to multiple teams.

# ERAnet V9

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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



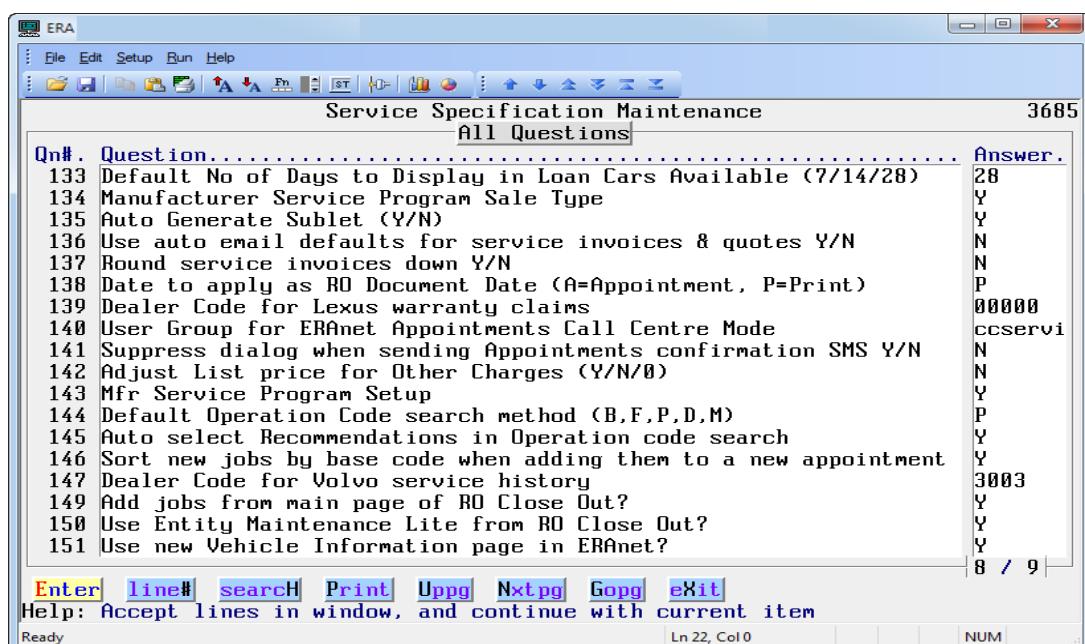
Vehicle Information  
3045 – User Definable Fields  
3685 – Service Spec Maint  
6210 – Maintain User Security

#### 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:



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.

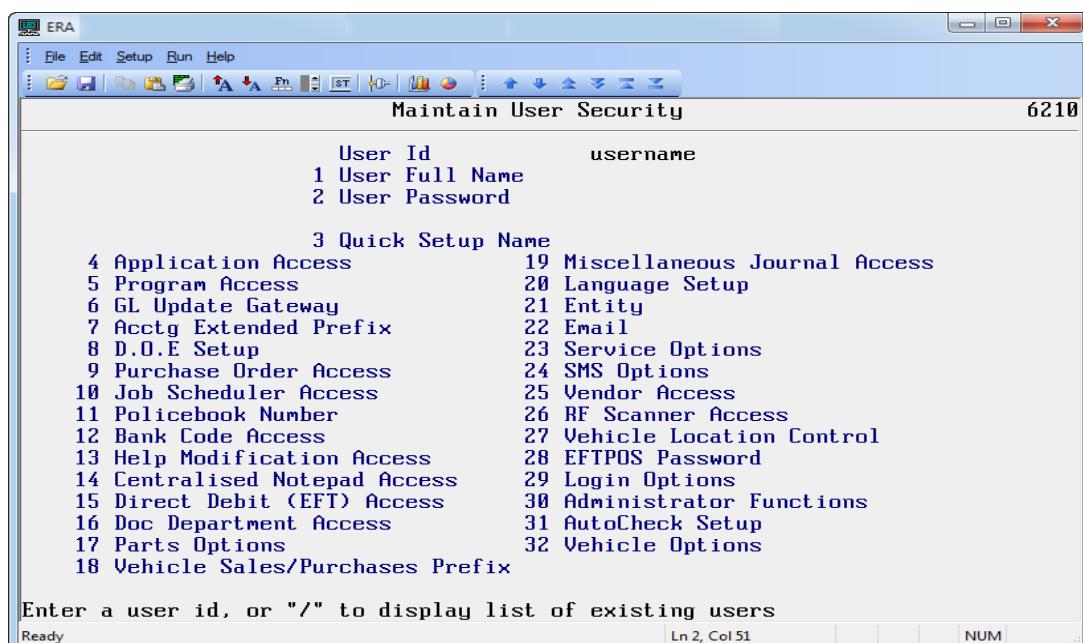
# ERAnet V9

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

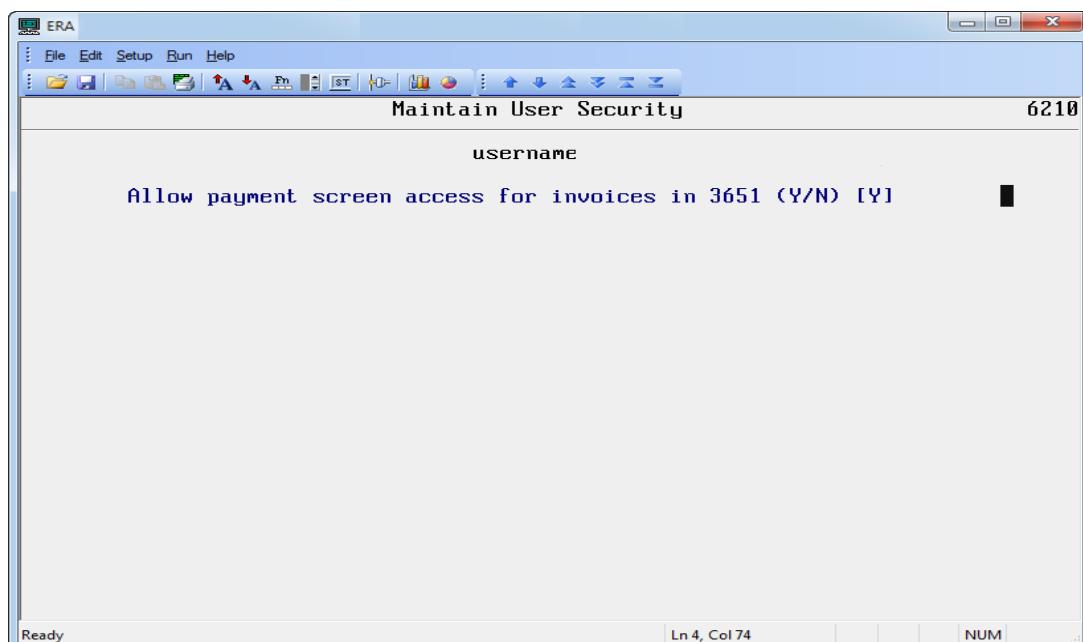
To control specific user access to the new  *Vehicle Information* interface, the user will need to set this up in **6210 – Maintain User Security** for the relevant users.

**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:

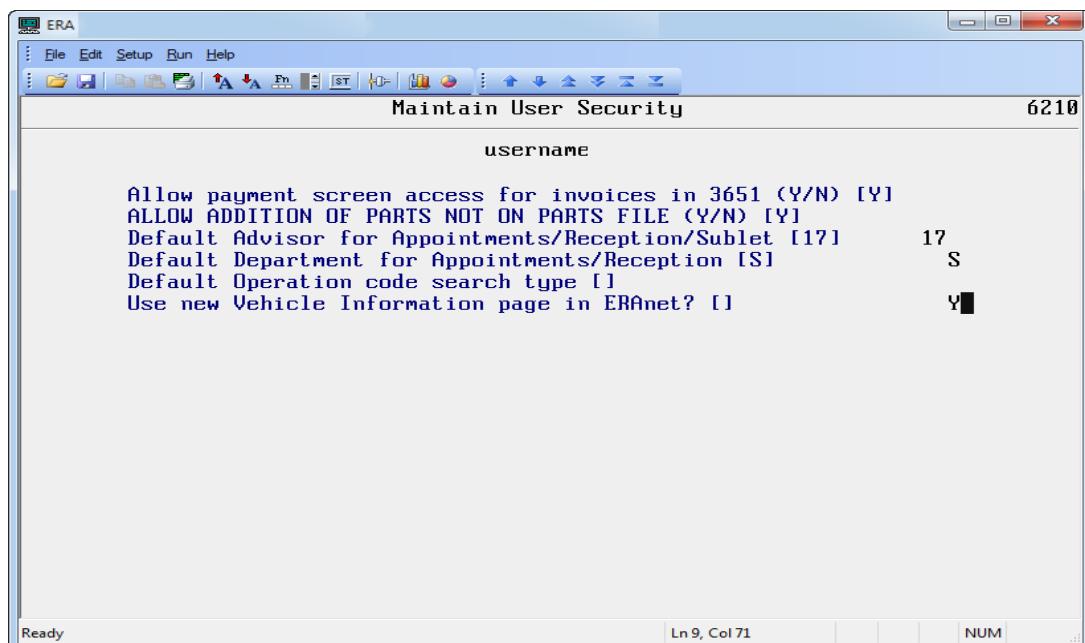


Enter the relevant **username** in the **User Id** field and select **23 – Service Options** and the following screen will be displayed:



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

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**Use new Vehicle Information page in ERAnet?**

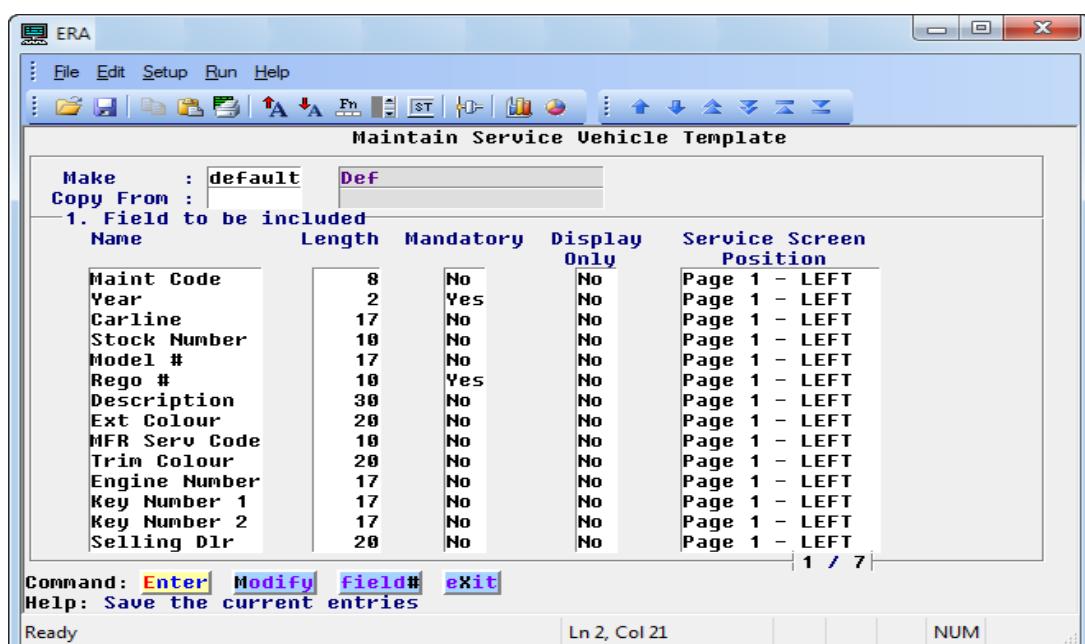
Enter **Y** for Yes to use the new *Vehicle Information* interface or **N** for No to use the old *Vehicle Information* interface.

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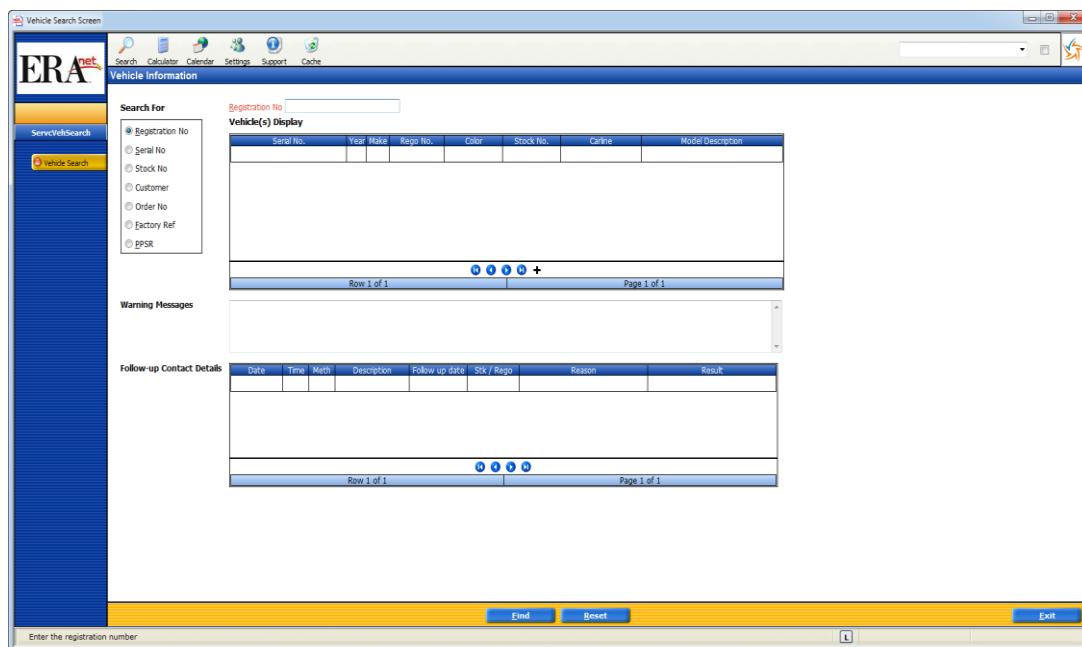
**Note:** Fields not setup in 3045 – *User Definable Fields* will not have the input box displayed in the  **Vehicle Information** screen.

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:

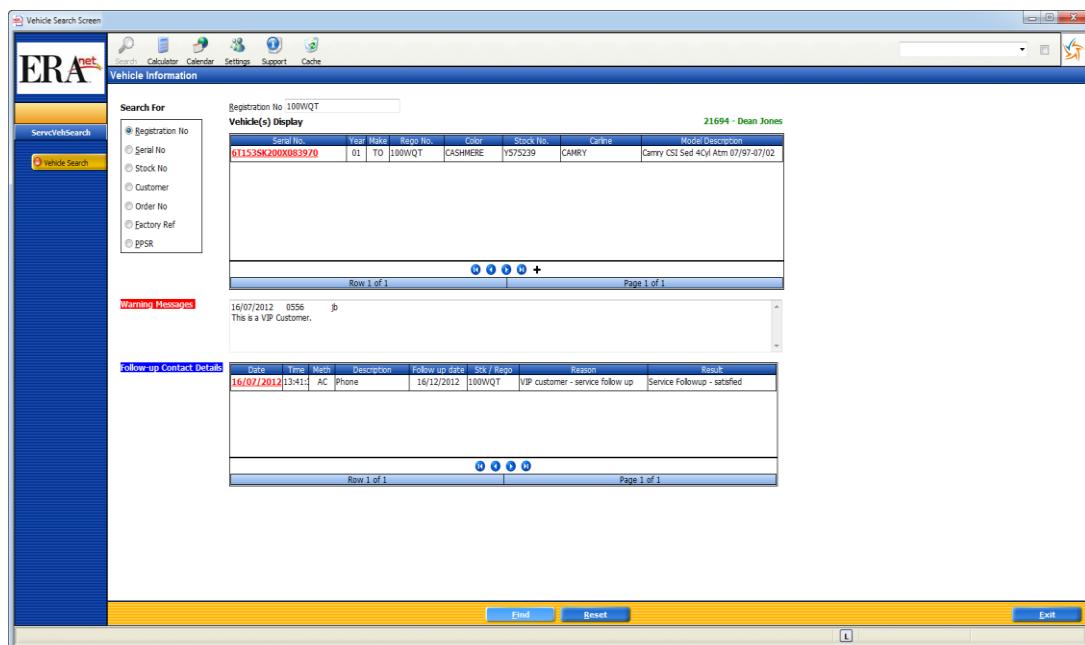
Registration No	Select the  <b>Registration No</b> radio button and enter the vehicle's <b>registration number</b> to search for.
Serial No	Select the  <b>Serial No</b> radio button and enter the vehicle's <b>serial number</b> to search for.
Stock No	Select the  <b>Stock No</b> radio button and enter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

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	<b>Note:</b> 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.
<b>Factory Ref</b>	Select the <input checked="" type="radio"/> <b>Factory Ref</b> radio button and enter the vehicle's <b>Factory Reference number</b> to search for. <b>Note:</b> The <i>stock controller</i> will have this information if required. It will be different for each OEM.
<b>PPSR</b>	Select the <input checked="" type="radio"/> <b>PPSR</b> radio button and enter the vehicle's <b>Personal Property Security Register Number</b> to search for. <b>Note:</b> 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:

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

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

ERAnet V9

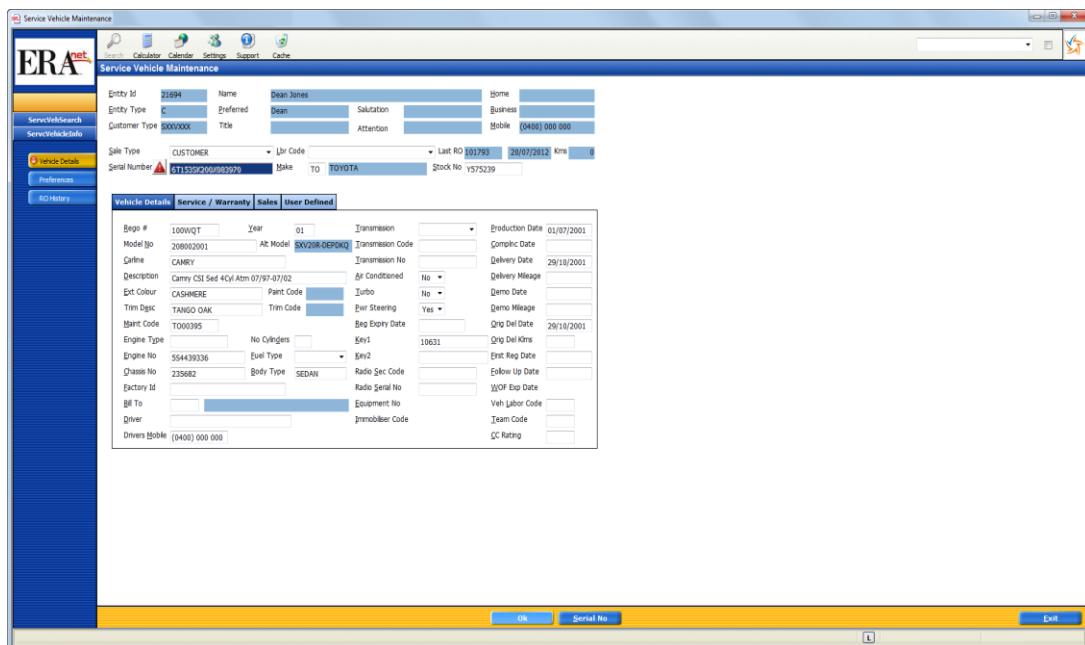
### Follow-up Contact Details:

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

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

<b>Vehicle Details</b>	Select the <b>Vehicle Details</b> option from the navigation bar to view the <i>Service Vehicle Maintenance</i> screen.
<b>Preferences</b>	Select the <b>Preferences</b> 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.
<b>RO History</b>	Select the <b>RO History</b> option from the navigation bar to view the <i>Repair Order History</i> screen.

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

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

<b>Sale Type</b>	Select a <b>sale type</b> from the  dropdown box. <b>Note:</b> This is not a mandatory field.
<b>Lbr Code</b>	Select a <b>labour code</b> from the  dropdown box. <b>Note:</b> This is not a mandatory field.
<b>Last RO</b>	This field will display the last repair order number and date.
<b>Kms</b>	This field will display the last repair order kilometres.
<b>Serial Number</b>	This field will display the vehicle's serial number. <b>Note:</b> 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> .
<b>Make</b>	This field will display the vehicle <b>make</b> for an existing vehicle, the user is able to enter the <b>make</b> for any new vehicle.
<b>Stock No</b>	The <b>stock number</b> will display in this field. The user is able to enter a <b>stock number</b> .

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.

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

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

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.

# Service Manual

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

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

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.

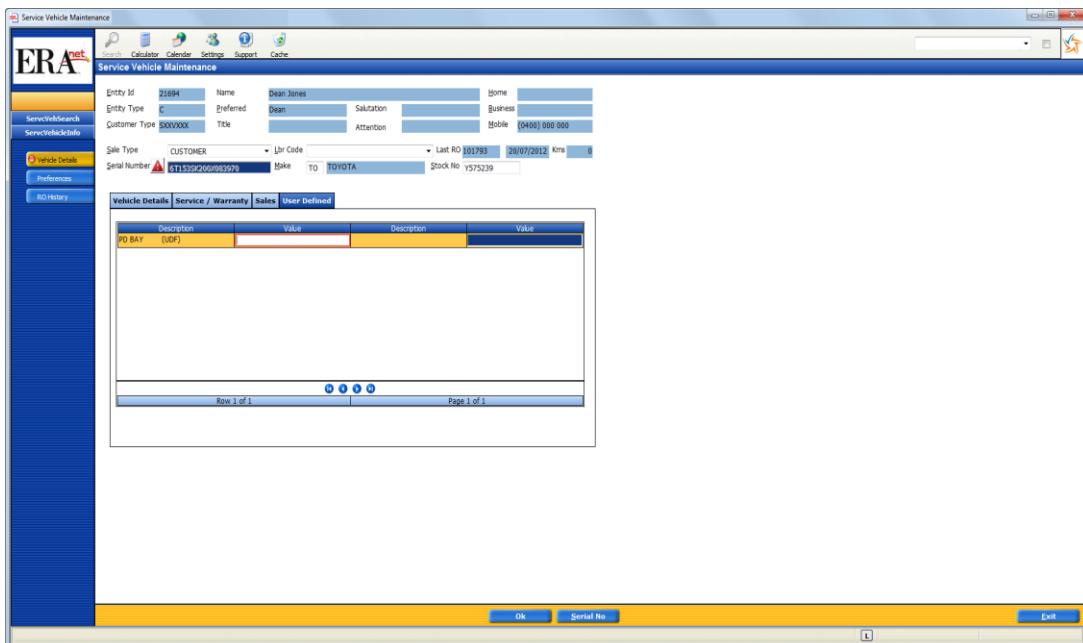
# Service Manual

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

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*.

# ERAnet V9



<b>Description</b>	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> .
<b>Value</b>	Enter the relevant details for the relevant user defined field.

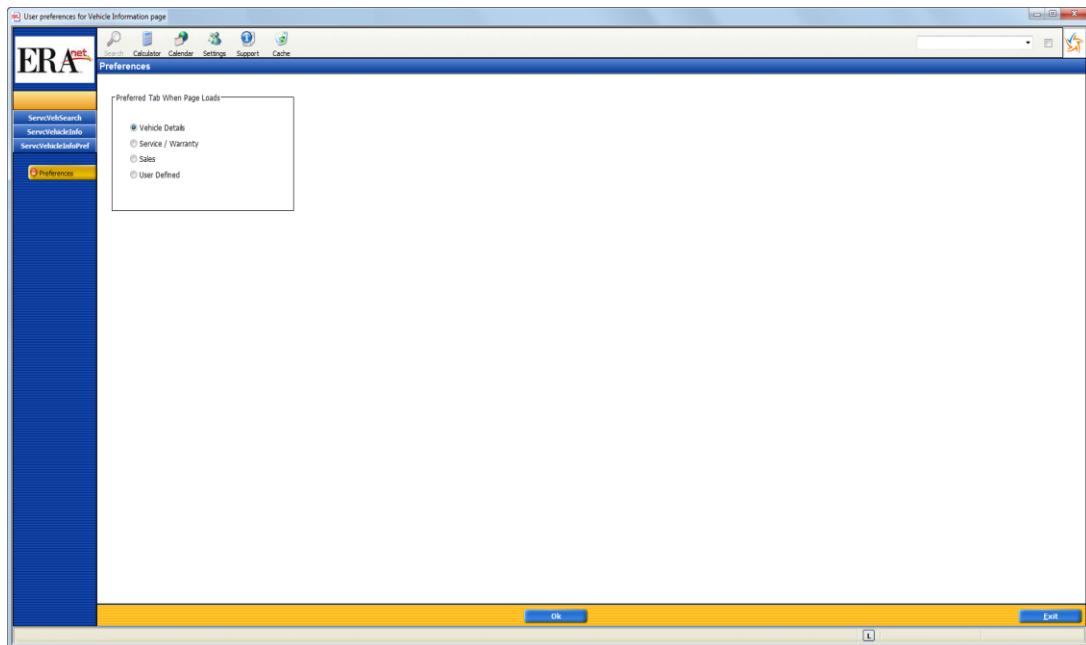
## Action Bar options:

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

# Service Manual

## Preferences screen

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

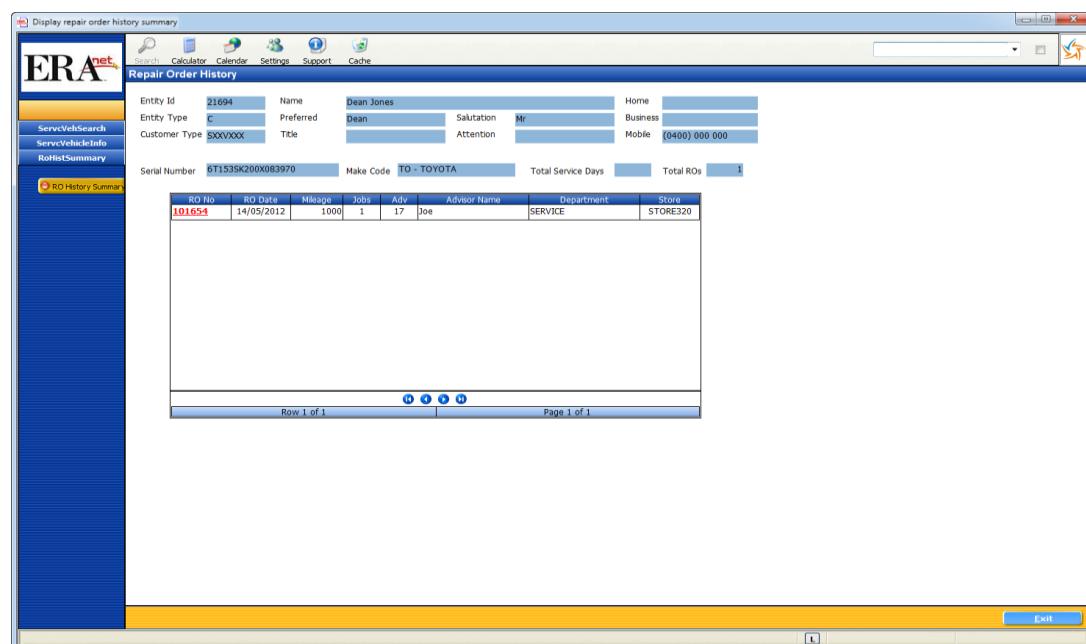


The user is able to select a **default tab** by selecting a  radio button option. Select the **Ok** option from the action bar to save the changes or **Exit** to return to the *Service Vehicle Maintenance* screen without saving any changes.

**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:



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

# ERAnet V9

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

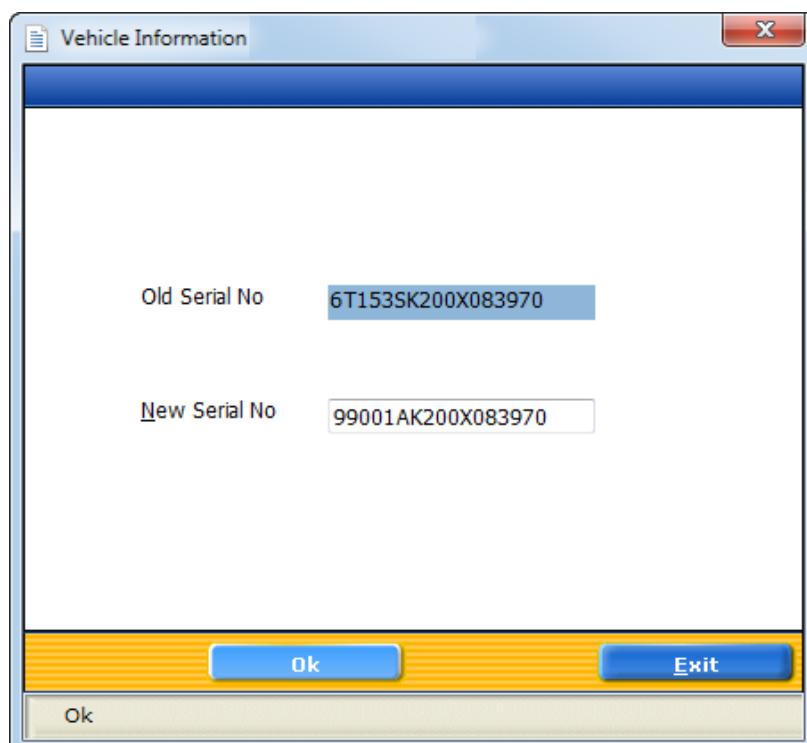
<b>Serial Number</b>	This field will display the <i>serial number</i> of the vehicle.
<b>Make Code</b>	This field will display the <i>make</i> of the vehicle.
<b>Total Service Days</b>	This field will display the total service days. This is the total number of days the vehicle has had work done at the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

<b>RO No</b>	This field will display the <a href="#"><b>repair order</b></a> number. Selecting the <a href="#"><b>repair order</b></a> 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.
<b>RO Date</b>	This field will display the <i>date</i> the repair order was created.
<b>Mileage</b>	This field will display the service <i>kilometres</i> .
<b>Jobs</b>	This field will display the number of <i>jobs</i> on the repair order.
<b>Adv</b>	This field will display the <i>advisor number</i> .
<b>Advisor Name</b>	This field will display the <i>advisor name</i> .
<b>Department</b>	This field will display the <i>department name</i> .
<b>Store</b>	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:



# Service Manual

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:

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



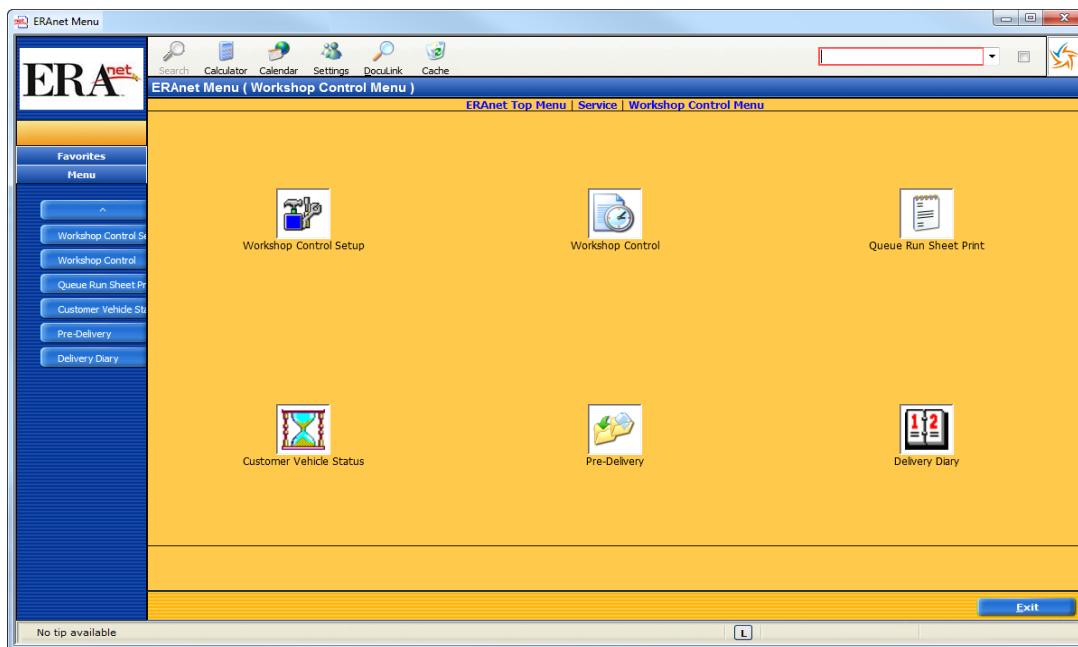
Workshop Control Menu



## Workshop Control Setup

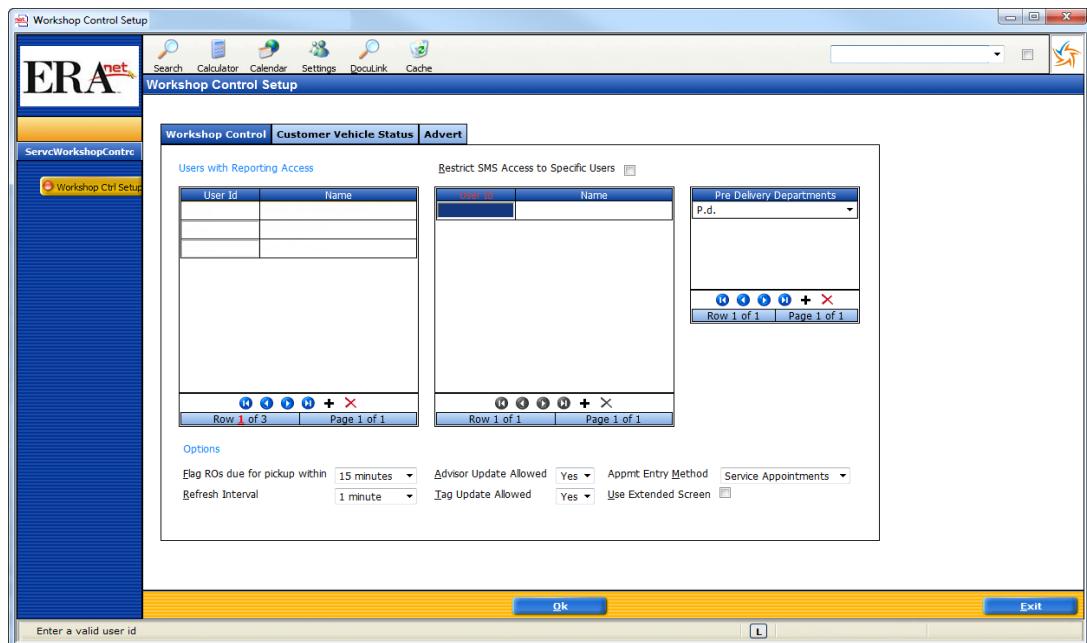
# The Setup

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:

# Service Manual

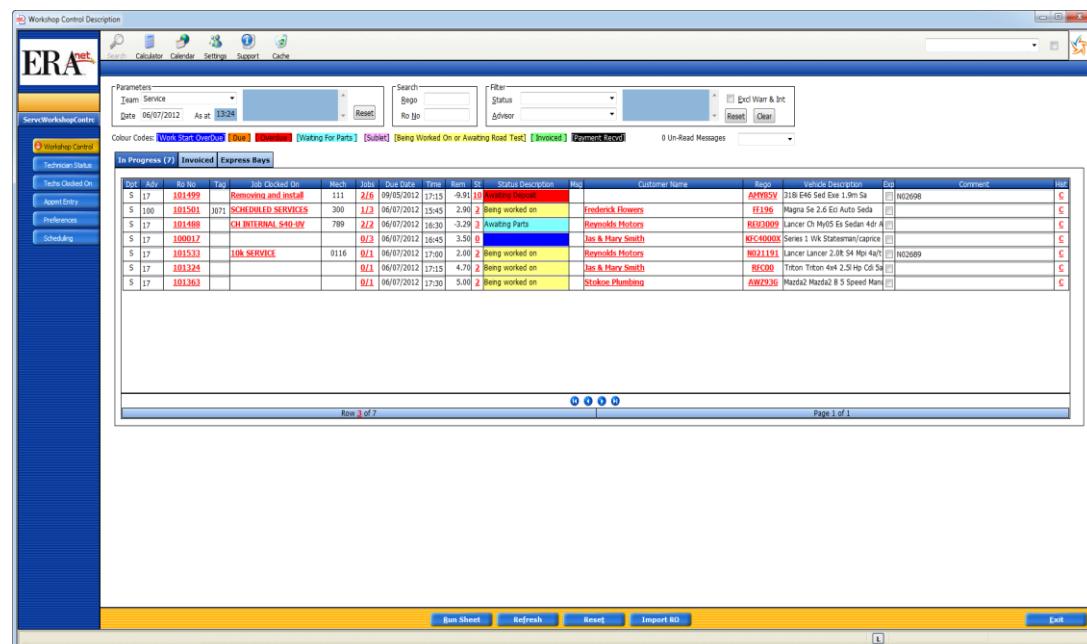


A new field **Use Extended Screen** has been added to allow the user to choose the standard or extended page. If the user selects this option it will allow them to view more records in *Workshop Control* screen.

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

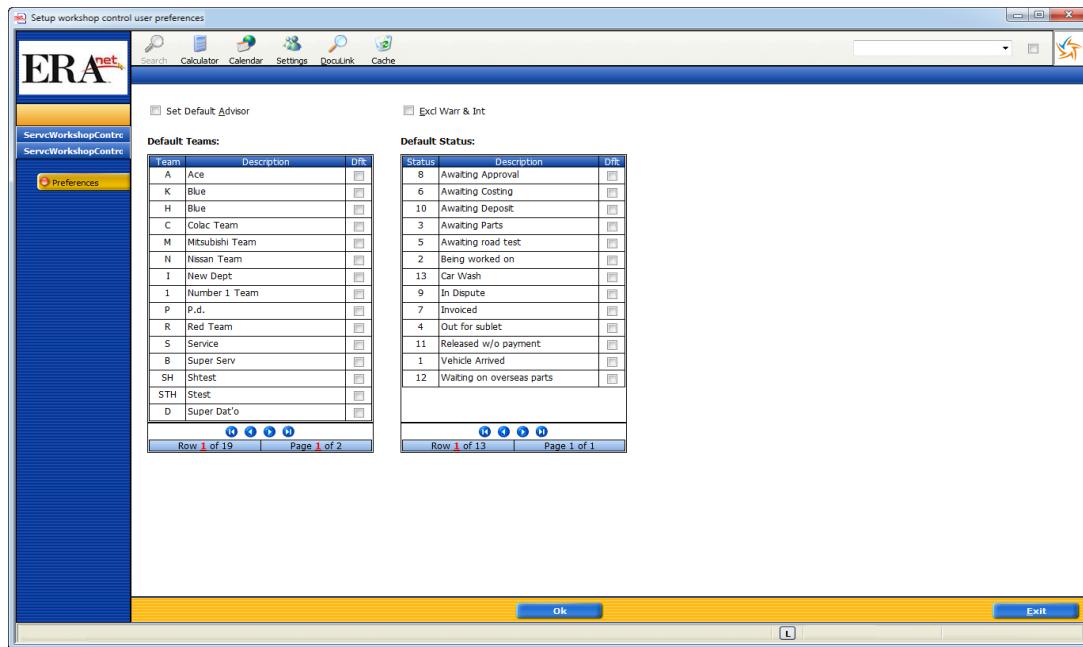
Work Start Overdue option has been added to the colour code section

Comment field in the In Progress tab

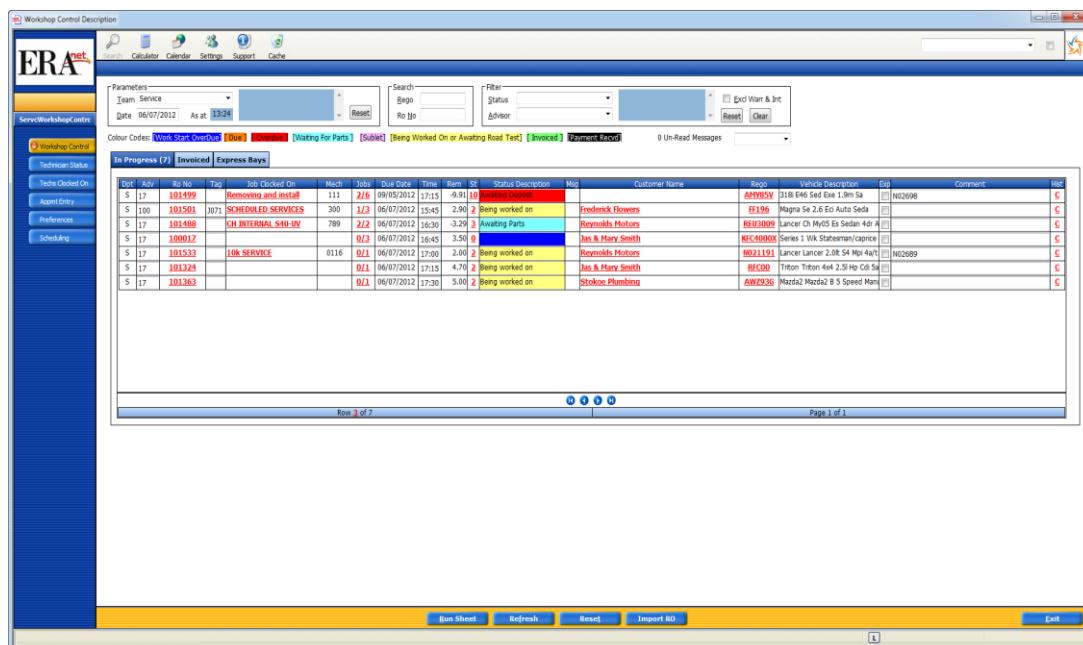
Hist field in the In Progress tab

## 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:



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:



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

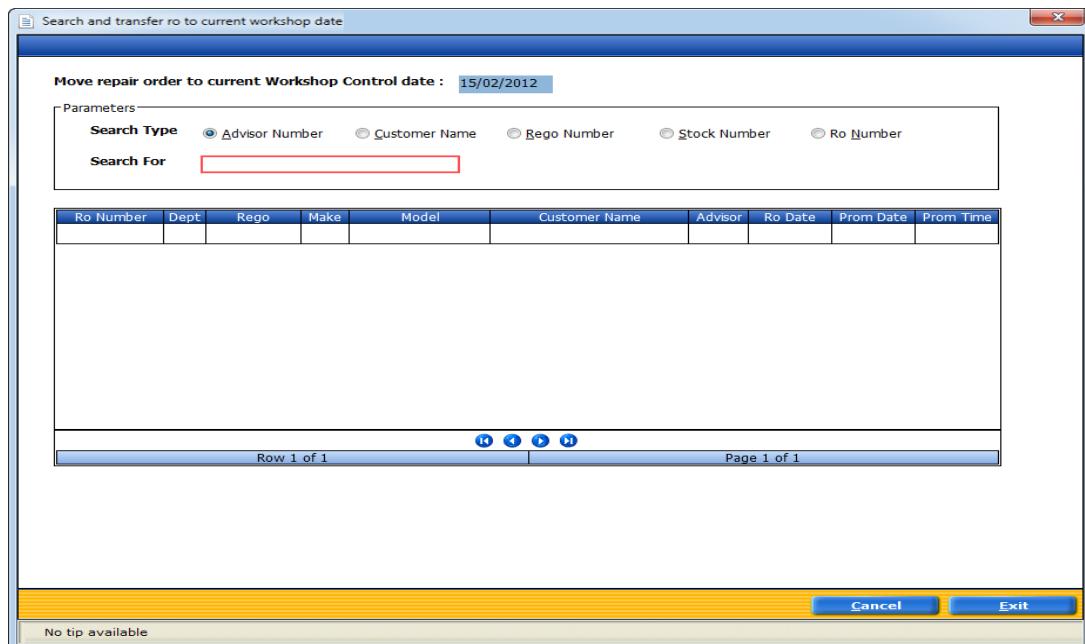
This is a new column in the *In Progress* tab. When the user clicks on this check box it will move the repair order to *Express Bays* tab.

## 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:



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.

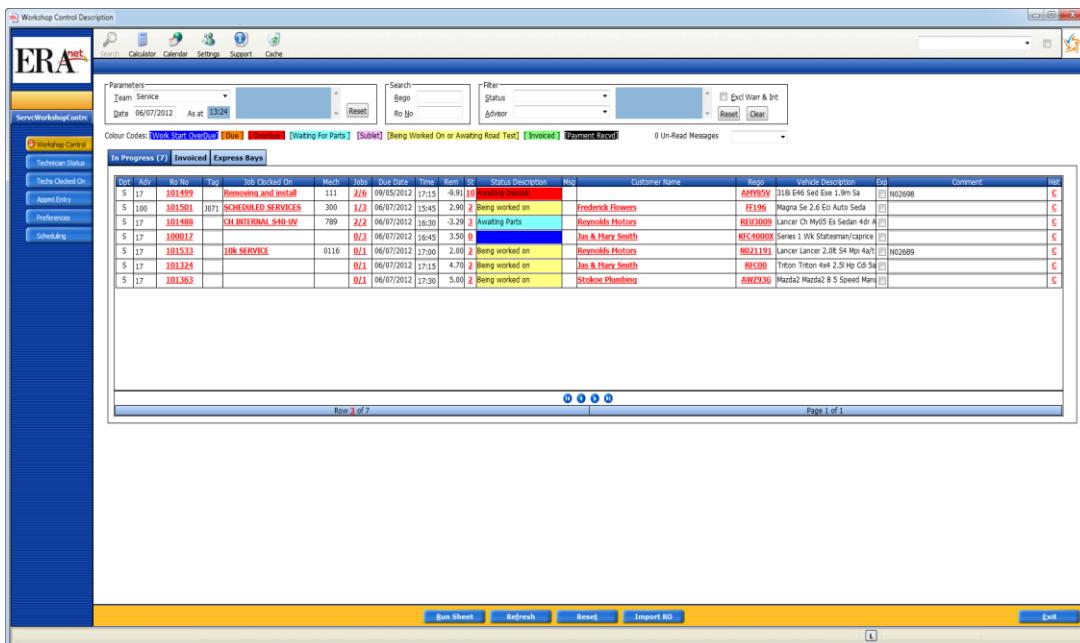
The promise time column from *Workshop Control* sheet can now be modifiable.

## 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

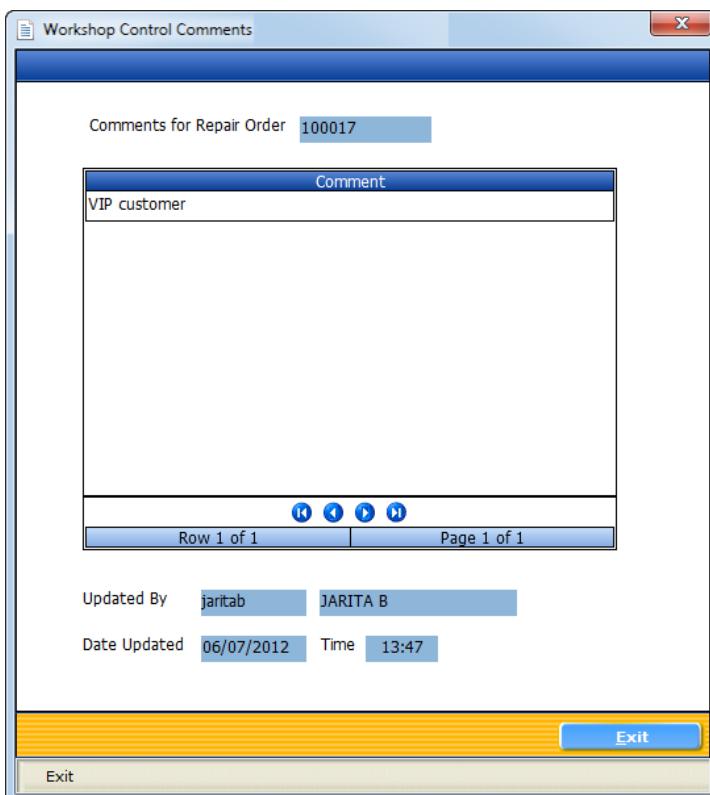


## Comment

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

SERVC-WORK-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

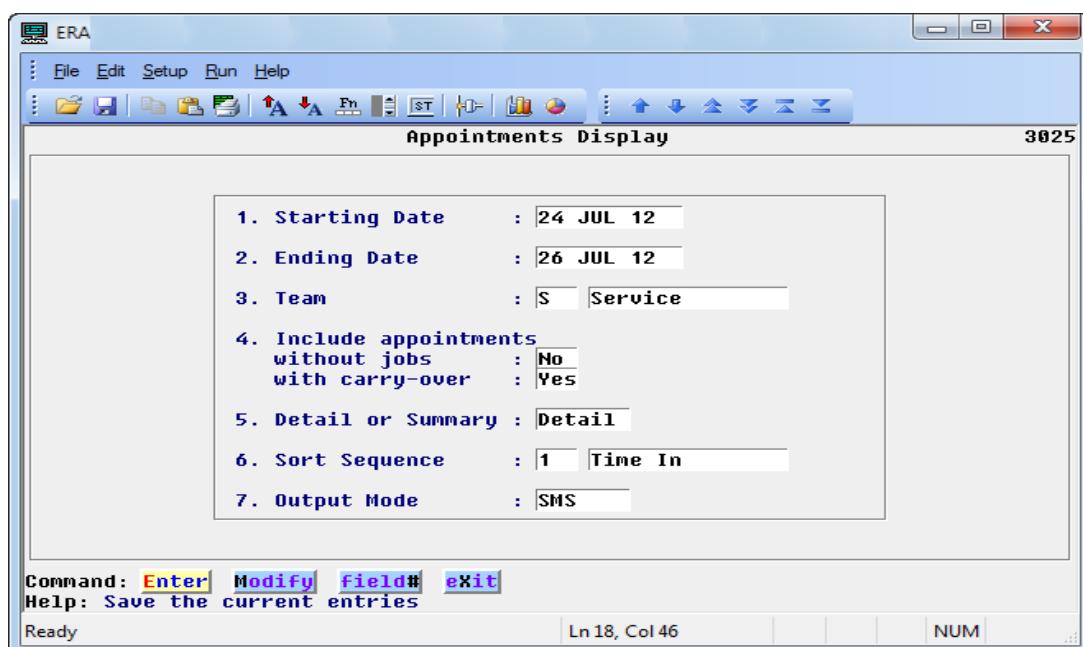
This change was made through a Request For Development submission to enhance existing functionality.

### Screens

3025 – Appointments Display

### The Change

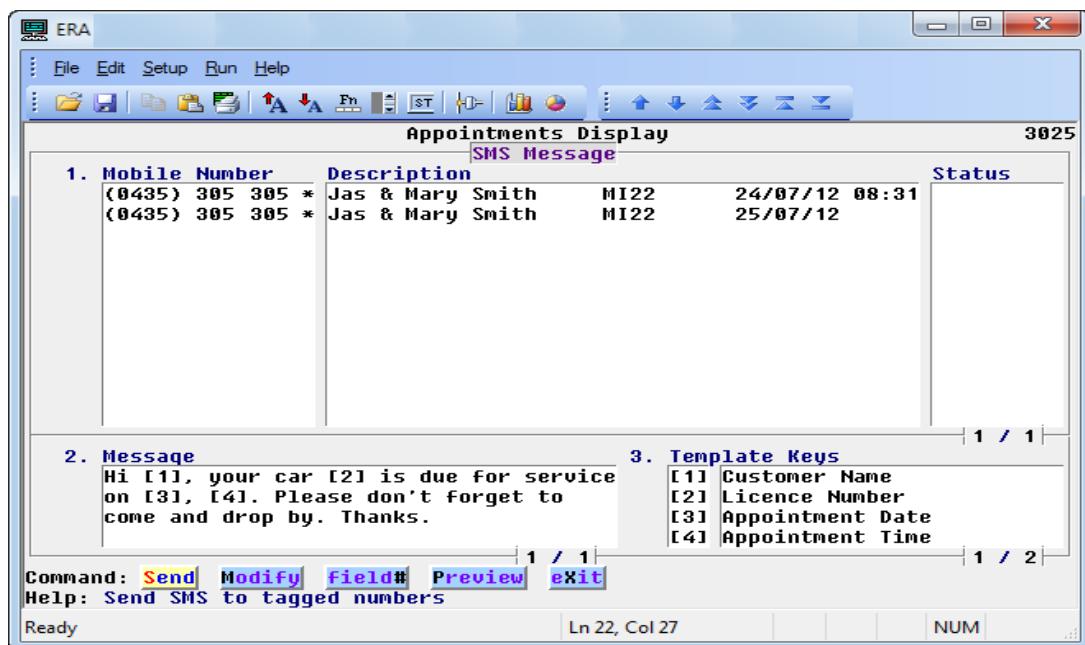
Appointments or Repair Orders with carry-over hours will now display in 3025 – Appointments Display. Select **3025 – Appointments Display** and the following screen will be displayed:



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

<b>4 – Include appointments with carry-over</b>	Enter <b>Yes</b> to include carry-over appointments or <b>No</b> to exclude carry-over appointments. <b>Note:</b> The default option is <b>Yes</b> .
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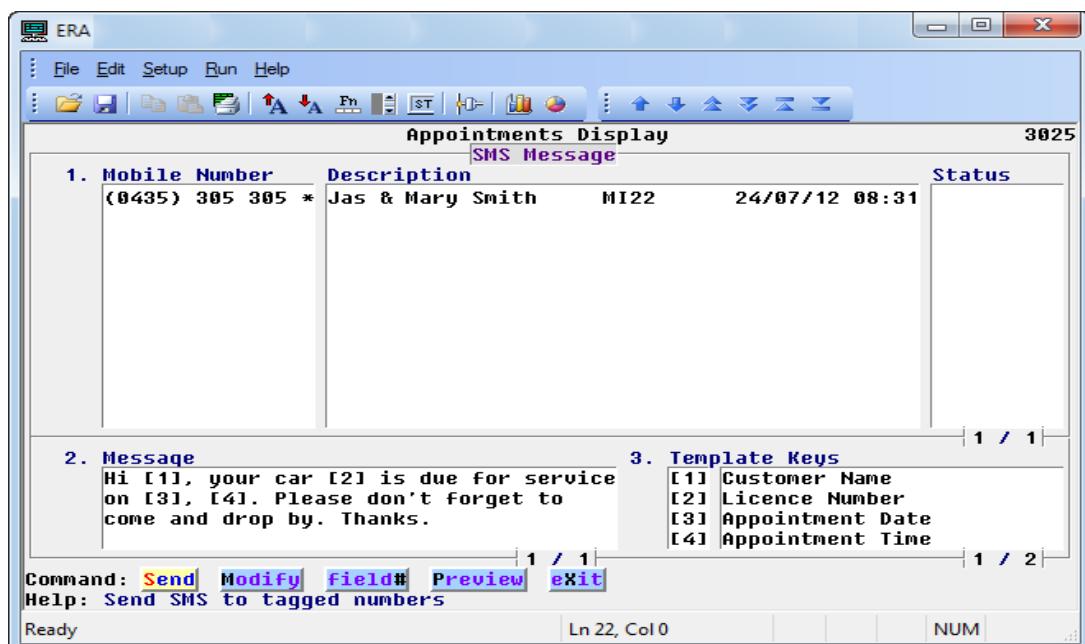
Selecting the **Yes** option followed by the **Enter** option from the command line will display the following screen:



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:



**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

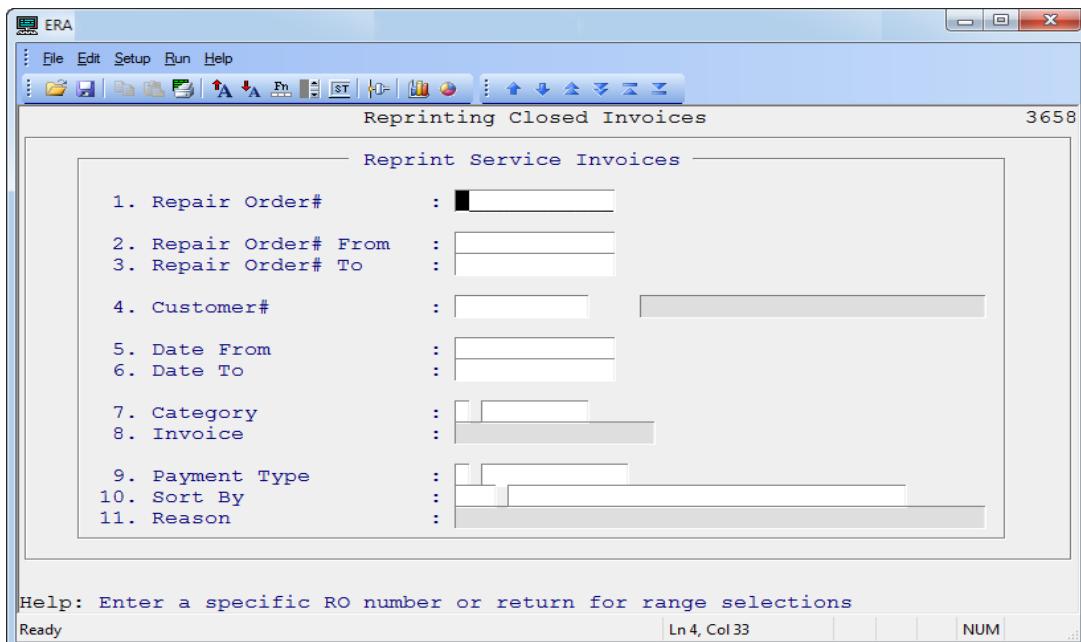
This change was made through a Request For Development submission to enhance existing functionality.

### Screens

3658 – Reprinting Closed Invoices

### The Process

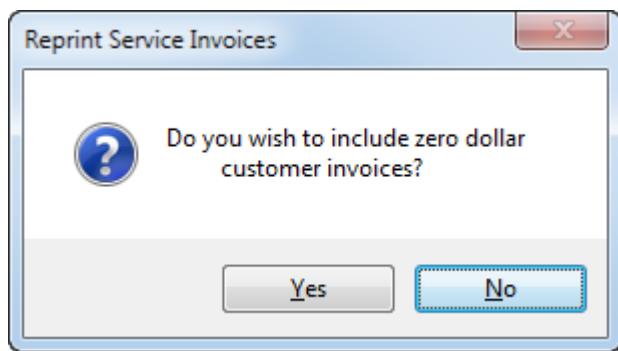
Select **3658 – Reprinting Closed Invoices** and the following screen will be displayed:



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

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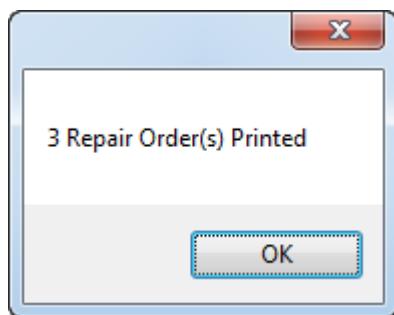
The following pop up message will display when the customer number is entered:



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.