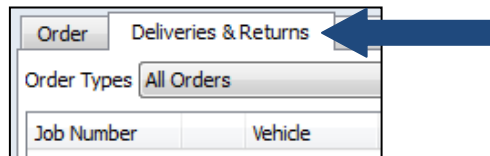




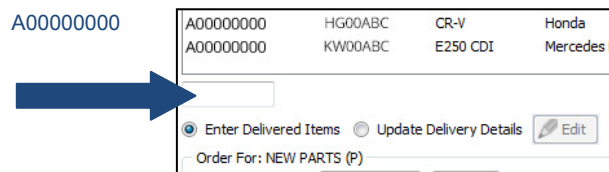
Booking Parts In

- Select Parts by clicking the Parts Button on the right hand side of the screen.  Parts
- Ensure that the Deliveries and Returns Tab is selected. (Shown Below).



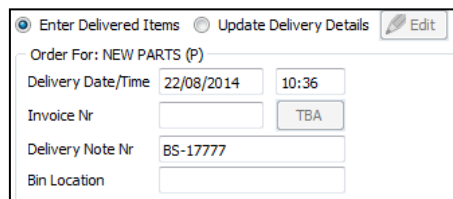
The screenshot shows a software interface with two tabs: 'Order' and 'Deliveries & Returns'. The 'Deliveries & Returns' tab is selected, indicated by a blue arrow pointing to it. Below the tabs, there is a section for 'Order Types' with a dropdown menu set to 'All Orders'. At the bottom, there are input fields for 'Job Number' and 'Vehicle'.

- Locate and highlight the required job/order. This can be done by clicking on the order in the list provided or by entering the Job Number or Purchase Order Number in the search box and pressing the tab key. (Shown Below).



The screenshot shows a list of jobs/orders. On the left, there is a search box containing 'A00000000'. A blue arrow points from this search box to the first row of the list. The list has four columns: Job Number, Part Code, Vehicle, and Supplier. The first row contains 'A00000000', 'HG00ABC', 'CR-V', and 'Honda'. The second row contains 'A00000000', 'KW00ABC', 'E250 CDI', and 'Mercedes t'. Below the list, there are radio buttons for 'Enter Delivered Items' (selected) and 'Update Delivery Details', an 'Edit' button, and a label 'Order For: NEW PARTS (P)'.

- Insert the delivery date/time, Invoice Number, Delivery note number (if required, if not will default to user's ID), and storage Bin Location (where applicable). (Shown Below).



The screenshot shows a form for entering delivery details. It has radio buttons for 'Enter Delivered Items' (selected) and 'Update Delivery Details', and an 'Edit' button. Below these, there is a label 'Order For: NEW PARTS (P)'. The form contains several input fields: 'Delivery Date/Time' (22/08/2014), 'Invoice Nr' (TBA), 'Delivery Note Nr' (BS-17777), and 'Bin Location'.

- Move to the lower half of the screen (where the parts are listed) and click onto the first item you wish to book in. Use the tab key to move through the fields, amending where necessary. Repeat for all parts received on the invoice supplied. (Shown Below).

Qty	Description	Stock Code	Del Bin	Retail	Trade	Ext'd	Surchg	Status	F	Buy %	Sell %	Sup	Del Note	Inv No
1	AIR CON CONDENSER 4465	92 11 000 01R	0	183.69	0.00	0.00	0.00	Ordered	☐	100.00	8.00	☐		

- If there are additional parts on the invoice that were not ordered, these **MUST** be added onto the job (even if you are going to send them back).

- A running total is provided in the bottom left corner to assist



The screenshot shows a small box titled 'Invoice Totals'. It contains two fields: 'Nr Of Items' with the value '1' and 'Total Value' with the value '183.69'.

- After booking in all the parts received, click the Accept key in the top left corner

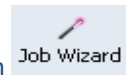




Creating a New Job

Assuming the Jobs List is already displayed.

At the top of the screen, click the Job Wizard Button



The Job Wizard box will be displayed

- Enter the Customer Shortname and press the tab key.
- Fill in the customer details and save them. Then click the next button to move to the Insurer Tab.
- If the job is NOT insured, click the next button OR insert a tick in the Insured Tick box and then complete the insurer details. Then click the next button to move to the Vehicle Tab.
- Enter the vehicle registration number and press the tab key. Select or create the vehicle as required. Then click the next button to move to the Recovery Tab.
- Complete the recovery tab as required – **Remember, if you choose Recovered or TP Recovery, you will have to enter a recovery date.** Then click the next button to move to the Replacement Vehicle tab.
- Specify whether a loan vehicle is required and then click the next button to move to the Dates Tab.
- Enter the relevant dates, and then click the next to move to the References Tab.
- Enter the relevant references. **Note – take care to enter the Estimator and Source Code (you won't be able to save the job otherwise).** Then click the next button to move to the notes tab.
- Enter any job notes that may be required.
- Click the Accept key at the bottom to save the job – the job number will then be displayed.





Invoicing a Job

Assuming the Jobs Screen is displayed.

- Click onto the TRIM Details tab and ensure Workshop is complete and Estimator's have checked the estimate prices prior to invoicing (The delivery does not have to be complete, as this may be completed after invoicing),
- Click on the Financials tab on the Job screen,

Nr	Location	Milestone	Driver/Ins
1		Handover to Customer	Miss Luda

- Double check all the details are correct on the screen; Final Calculation, Labour Details, References, Job Details, and any other section. Edit if applicable. When a ? is beside a labour or parts description, this indicates something is not quite right and needs to be checked. Can click on the description with the ? and then the Job Estimating screen will appear which you can then edit/view prices and the labour hours,

Job Value Details

Description	Agreed	W/Shop	Actual	Value	Disc	Nett VAT
NEW PARTS				40.91	3.38	37.53
OTHER SERVICES				26.00	2.32	23.68
PAINT & MATERIALS				213.92	17.11	196.81
COLLECTION	0.00	0.00	0.00	0.00	0.00	0.00
GEOMETRY CHECK	0.70	0.61	0.02	18.90	1.51	17.39
STRIP OUT	1.04	0.96	0.70	28.08	2.25	25.83
PANELWORK	5.50	4.05	0.00	148.50	11.88	136.62
PAINT PREPARATION	3.20	2.21	2.50	86.40	6.91	79.49
PAINT WORK	2.56	1.77	1.07	69.12	5.53	63.59
REFIT	2.16	1.99	0.79	58.32	4.67	53.65
	16.40	12.03	5.34			

Final Calculation

	Nett	VAT
Audatex	640.35	128.15
Job Total	668.49	133.70
Job Gross	668.49	
Invoiced	0.00	0.00
Net Invoiced	668.49	133.70

Labour Details

	Agreed Hours
Agreed Hours	16.40
Agreed Value	442.80
Priced Labour	0.00
Invoice Value	407.37

VAT Analysis

	Nett @ Std Rate	Nett @ Other Rates
	668.49	0.00

Profitability

	Workshop Rate	Invoiced Rate	Profit	As %
Labour	407.37	0.00	407.37	100.00
Parts	37.63	30.53	7.10	18.87
Paint	196.81	117.63	79.18	40.22
Other	26.68	0.00	26.68	100.00
Total	668.49	148.18	520.31	77.83

References

	Policy Nr	Claim Nr	Order Nr	Eng's Ref
	12/262515	49039310		

Job Details

	Insured/Excess	Contribution	Standard Rate
	Yes 250	0.00	20.0%

Job Discount

	Job Discount
	8.00

- If the information on the screen is correct click onto Guess,

Guess New Split History Files

- If the VAT liability in the Split Details section needs changing, click the "Bill To" section for the insurer/insured/driver, the following window will appear and edit the information accordingly (shown below),

Billing Address

Address Type	Account	Short Name
Engineer		
Fee Payer		
Fleet Manager		
Home		
Insured Site		
Insured	A00227	O'SULL
Insurer	A00039	COV
Invoice To		
Office		
Other		
Owner		
Recovery Agent		
Recovery Location		
Referrer		

Short Name O'SULL

Account Code A00227

Miss Lucia **Rial-O'Sullivan**

75 Vancouver road

Broxbourne

Hertfordshire

Post Code EN10 6FE **Recharge VAT** Yes

T/P Code R001 **Liability** 0.00

Pay Method

Edit





- If the Billing Address in the Split Details section needs changing, click the “Billing Address” section for the insurer/insured/driver, the following window will appear and edit the information accordingly (shown below),

A screenshot of a software window titled "Eclipse". Inside the window, there is a section labeled "Delivery Address". Below this label is a dropdown menu currently showing "Billing Account". To the right of the dropdown is a small icon of a document with a pencil. Below the dropdown are several text input fields containing the following information: "COVEA INSURANCE", "PO Box 410", "Halifax", "West Yorkshire", and "HX1 2YB". At the bottom of the window are two buttons: "Accept" with a green checkmark icon and "Cancel" with a red X icon.

- It may be necessary to do more than a two way split of an invoice. This can be done using the New Split button  New Split ,
- If you are unhappy with the New Split of invoices, it is possible to click  Undo ,
- **ALWAYS** preview the invoice first to double check the details are correct by clicking  PreView ,
- Once everything has been checked and edited accordingly, click the commit button to produce the invoices  Committ .
- The invoices will then appear in a PDF document to print off.





Linking to Audatex

Exporting an Eclipse Shell to Audatex

- Locate the job and click on it once.
- Click the drop down box on the right titled "Export Job" and select the Audatex option.
- Import the job into Audatex – you may need to look for the assessment it will be located in the following directory – **c:\bms\get\audatex**.

Importing an Audatex Assessment

Assuming the jobs screen is displayed

- Locate the job and click on it once.
- Initial Detail Tab
 - Ensure that the Audatex Assessment number is in the TP Ass Nr box (it will be if you have previously exported the shell to Audatex).
 - Set the Estimator Name
- Dates and Status Tab
 - Set the Scheduled Return Date
- Click the Accept key to save the changes.

In Audatex

- Locate the job and export it.

In Eclipse

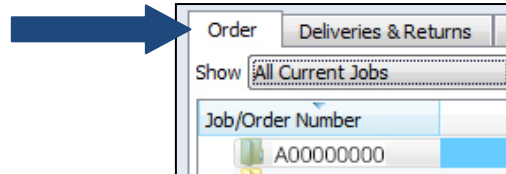
- In the Jobs Screen, click the drop down box titled Import Assessment and select Audatex.
- The job will be imported and the import screen will be displayed.
- Place a tick in the tick box and click the accept key.
- Answer any questions that may come up.
- Go into Job Estimating and check that all items and times are in the correct place on the job.
- Print the Job Card
 - The first time you print the job card, you will be offered a number of different options – select the relevant one.



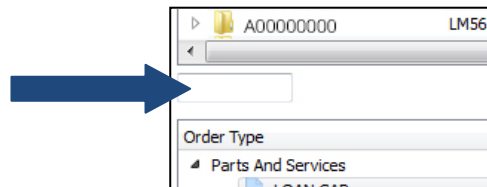


Ordering Parts

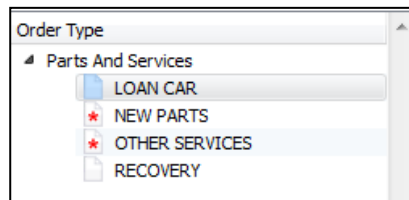
- Select Parts by clicking the Parts Button on the right hand side of the screen.  Parts
- Ensure that the Order Tab is selected. (Shown Below).



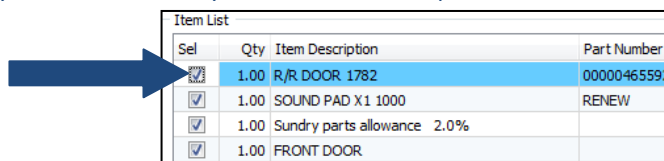
- Locate and highlight the required job/order. This can be done by clicking on the order in the list provided or by entering the Job Number or Registration Number in the search box and pressing the tab key. (Shown Below).



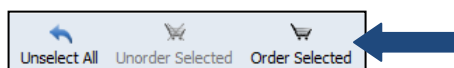
- After choosing the job, select whether you want to order parts or services by clicking on the relevant option in the lower half of the screen. (Shown Below).



- Place a tick in the tick box to the left of each part that you to order. After selecting the first one, you will be asked if you wish to order all parts. Answer accordingly. (Shown Below).



- Click the order selected button at the top of the page. (Shown Below).





- The following screen will then be displayed:

Supplier

Account Code

Short Name

T/P Account Nr

References

Order Ref1

Order Ref2

Order Date/Time 09/09/2014 16:31

Expected Date/Time 09/09/2014 16:31

Accept Cancel

- Enter the required supplier details. This can be done by inserting the Account code, Short name or T/P Account nr, press the tab key and where necessary double click to select the required supplier.
- Add any references as required and check/amend the expected delivery date and time where relevant. Then click the Accept Key to save the details (shown below).

Supplier

Account Code TPS01

Short Name TPS

T/P Account Nr TPS01

Trade Parts Specialists

P.O. Box 974

ST Albans

AL1 9GZ

References

Order Ref1

Order Ref2

Order Date/Time 09/09/2014 16:31

Expected Date/Time 10/09/2014 16:31

Accept Cancel

- Click Accept again in the top left corner to save and produce the Purchase Order as a PDF.





Returning Parts

- Select Parts by clicking the Parts Button on the right hand side of the screen.
- Ensure that the Deliveries and Returns Tab is selected. (Shown Below).

Order Deliveries & Returns
Order Types All Orders
Job Number Vehicle

- Locate and highlight the required job/order. This can be done by clicking on the order in the list provide or by entering the Job Number or Purchase Order Number in the search box and pressing the tab key. (Shown Below).

A00000000	HG00ABC	CR-V	Honda
A00000000	KW00ABC	E250 CDI	Mercedes t

☒ Enter Delivered Items ☐ Update Delivery Details
Order For: NEW PARTS (P)

- Move the radio button over to the Update Delivery Details option in the middle of the screen.

☐ Enter Delivered Items ☒ Update Delivery Details

- Click the Edit button. (Shown Below).

☐ Enter Delivered Items ☒ Update Delivery Details

- Click onto the Status column of the part that you wish to return, and select Return to Supplier from the drop down box provided. (Shown Below).

Ext'd	Surchg	Status	F
10.00	0.00	Return To Supplier	
1.00	0.00	Delivered	

- You will be asked if you wish to return all delivered parts, answer accordingly. Select a return reason from the drop down box provided.

Eclipse
Return Reason: DAMAGED
Credit Note Expected ☒
Remove From Order ☐
Remove From Job ☐

- If you expect the item to be replaced by the same supplier, leave the tick boxes empty.
- If the item is to be removed from the order (i.e. no replacement is expected), place a tick in the tick box.
- If the item is to be removed from the job (i.e. not to be charged), place a tick in the tick box.
- Click Accept to save the details.
- Click Accept again in the top left corner to save.
- A returns note will be produced which can be printed if required.

