SIMMS

# Automotive Maintenance

**SIMMS** Inventory Management Software 2012

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# Contents

# Automotive Maintenance

Use SIMMS' Automotive Maintenance module to process your customer's automotive service requests.

This process includes recording your customer's vehicle information, and creating, approving, and invoicing your work orders.

Before you can process your customer's service request, you need to predefine labor, vehicle and operation details. This reduces the time required to enter repeatedly these details for each service request.

Technicians can add recommendations to a work order, suggesting additional services or repairs for a vehicle. SIMMS alerts you to these recommendations when you open a work order that has a recommendation attached to it.

## Predefining Labor Charges

You need to add your labor charges before you can set up the details of your operations. These labor charges appear on the customer's invoice.

For example, if you charge $45.00 for an oil change, you would create a miscellaneous charge (Misc. Charge) in the Item Manager called Oil Change and enter $45.00 as its price.

When you setup the details for the operation oil change, you would select your miscellaneous charge (Oil Change). The result is that $45.00 would then appear as the labor charge on your customer's invoice.

### Predefine Labor Charges for an Operation

1. Open the **Warehouse** menu, click **Item Manager**, and then click the **New** icon .
2. In the **Type** list, select **Misc. Charge**.
3. In the **Description** text box, type the name of your labor charge.
4. In the **Item Code** text box, type the charge's code.
5. In the **Category** list, select the charge's category.
6. In the Standard **UM** list, select your item's standard unit of measure.

   Typically the unit of measure is Each.
7. Click the **Prices** tab, and then in the **Price** box, type your labor charge.

8. Click the **Save** icon.

# Predefining Vehicle Details

The vehicle details you can predefine include model, make, and body style.

## Predefine Vehicle Details

1. Open the **Service** menu, open the **Automotive Maintenance** submenu, and then click **Set Up Products**.
2. Type the vehicle details in the grid.

**Table 1: Vehicle Details**

| Field | Action |
| --- | --- |
| **Vehicle** | Type the vehicle's make. |
| **Model** | Type the vehicle's model. |
| **Body Style** | Type vehicle's body style. |
| **Manufacturer** | Type the name of the vehicle's manufacturer. |
| **Made In** | In this field's list, select the country the vehicle was made in. |

# Predefining Operational Details

The operations details you can predefine are the estimated labor costs and the materials needed for an operation.

## Predefine an Operation's Details

1. Open the **Service** menu, open the **Automotive Maintenance** submenu, and then click **Setup Operations**.
2. Under **Operations/Jobs**, enter the appropriate information in the grid's fields.
3. Under **Estimate Materials**, enter the appropriate information in the grid's fields.

**Table 2: Operations**

| Field | Action |
| --- | --- |
| **Description** | Type a description for your operation, such as oil change or install tires. |
| **Misc. Code** | In the field's list, select the charge for this operation.<br>The field lists the miscellaneous charges (misc. charge) entered in the Item Manager. This is the labor charge that appears on a customer's invoice. |
| **Labor Cost (Est.)** | Type the estimated labor cost for your operation. |
| **Item Cost (Est.)** | This is a read only field. SIMMS enters in this field your estimated item cost. This is based on your entries in Estimate Materials pane. |
| **Comments** | Type a comment. |

**Table 3: Materials**

| Field | Action |
| --- | --- |
| **Item Code** | Type the item code for the materials used for this operation. |
| **UM** | SIMMS enters in this field the item's default unit of measure. |
| **Quantity** | Type the quantity of the item used for the operation. |

**Table 3: Materials**

| Field | Action |
|---|---|
| **Unit Cost** | This is a read only field. SIMMS enter the unit cost for your item as it is set in the Item Manager. |

# Processing a Customer’s Service Request

Begin processing your customer’s service request by adding their vehicle’s information in the Customer Manager. After you enter their vehicle’s information you create a work order for that vehicle. Your new work order is assigned the status of Quote. Once a work order is approved, its status is changed to Open and it is given a work order number. You can invoice your work order and process your customer’s payment only after you close your work order.

## Add a Customer’s Vehicle Information

1. Open the **Sales** menu, open the **Sales** submenu, and then click **Customer Manager**.
2. Select your customer from the list (leftmost), click the **Edit** icon , and then click the **Automotive Maintenance** tab.
3. In the top pane’s grid, enter the details for your customer’s vehicle.

**Table 4: A Customer’s Vehicle Details**

| Field | Action |
|---|---|
| **VIN** | Type the vehicle identification number. |
| **Plate No.** | Type the vehicle’s licence plate number. |
| **Vehicle Name** | Select from the field’s list, the vehicle’s name. |
| **Year/Make** | Select from the field’s list, the vehicle’s year. |
| **Model** | Select from the field’s list, the vehicle’s model. |

**Table 4: A Customer's Vehicle Details**

| Field | Action |
|---|---|
| **Body Style** | Select from the field's list, the vehicle's body style. |
| **Engine/Fuel** | Type the vehicle's engine and fuel information. |
| **Comments** | Type a comment. |

## Create a Work Order

1. On the **Automotive Maintenance** tab in the **Customer Manager**, click **New WO**.

   The Automotive Manager opens.

2. Enter the appropriate details in the grid.

**Table 5: Work Order Details**

| Field | Action |
|---|---|
| **Quote No** | Type a quote number. |
| **Status** | This field is read only. SIMMS assigns a status of either Quote, Open, Close to your work order.<br>When you first create a work order it is assigned the status of Quote. After you approve the work order, it is assigned the status of Open and given a work order number. After you close your work order it is assigned the status of Closed. |
| **Priority** | In the field's list, select the priority for the work order. (Low, Normal, High, Critical) |

**Table 5: Work Order Details**

| Field | Action |
|---|---|
| **WO No.** | This is a read only field. SIMMS enters in this field a work order number. A work order number is only generated after a work order is approved. |
| **VIN** | If not entered, in the field's list, select the vehicle's identification number. |
| **Odometer (km)** | Type the vehicle's odometer reading. |
| **Location** | In the field's list, select the location the vehicle is being serviced. |
| **Repair Request** | Type your customer's repair request.<br>This is a required field. You cannot add operations to a work order unless you enter a repair request. |
| **Schedule Start Date** | In the field's calendar, select a scheduled start date. |
| **Schedule Close Date** | In the field's calendar, select a scheduled close date. |
| **Est. Cost** | This is a read only field. SIMMS enters in this field the estimated cost of the service. This estimate is based on your work order details. |
| **Act. Cost** | This is a read only field. SIMMS enters in this field the actual cost of the service. This cost is based on your work order details. |
| **Close Date** | SIMMS enters in this field the close date for the service. SIMMS enters this date when you close your work order. |

**Table 5: Work Order Details**

| Field | Action |
|---|---|
| **Actual Labors** | This is a read only field. SIMMS enters in this field your actual labor cost for the service. This cost is based on your work order details. |
| **Scrap Cost** | Type any scrap cost associated with the service.<br>SIMMS includes the scrap cost when calculating the gross margins for the service. |

## Add a Task to a Work Order

Use tasks to organize your operations into logical groups. SIMMS enters the first task for you so, there is no need to create your first task.

1. In the **Automotive Manager**, click **Detail**.

   The Work Order Detail window opens.

2. Click the **New Task** icon.
3. In the **Description** field, type the name of the task.

After you add a task to a work order you can add the operations that make up that task.

## Add an Operations to a Task

Operations are entered under tasks. After you add an operation to a task, you book the time needed to complete the operation. SIMMS enters the predefined materials for an operation. However, you can edit these details or add other materials to the operation.

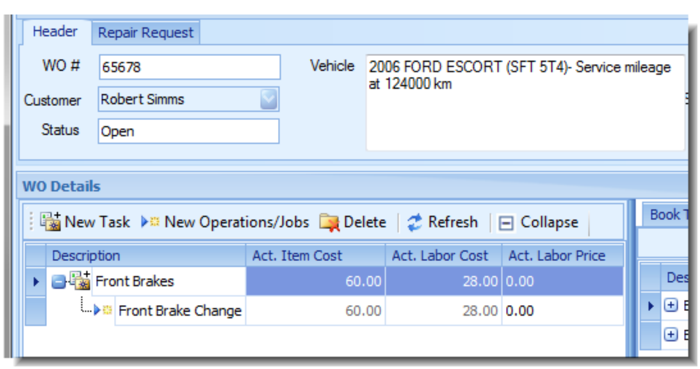



*Figure 1: A task with an operation added to it.*

1. In the **Work Order Detail** window, select the task you want to add an operation to, and then click **New Operations/Jobs**.
2. In the **Description** field, click the **Search** icon.
3. Find and select the operation you want to add to your task, and then click **Retrieve**.

## Edit Materials for an Operation

SIMMS automatically adds the predefined materials for an operation. You can edit these details or add other materials to an operation.

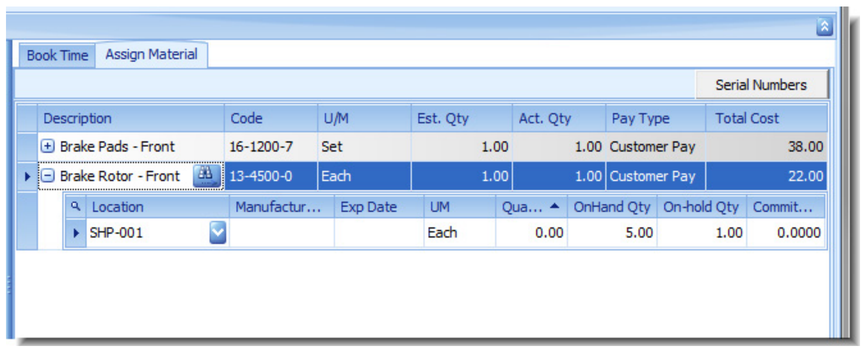



*Figure 2: The materials for an operation.*

**Table 6: Materials**

| Field | Action |
|---|---|
| **Code** | Click the Search icon to find and retrieve the materials you want to add to your operation. |
| **Description** | SIMMS enters your operation's description when you select your item's code. |
| **UM** | This is a read only field. SIMMS enters your material's unit of measure. |
| **Est. Qty.** | Type the estimated quantity of materials needed for the operation. |

**Table 6: Materials**

| Field | Action |
|---|---|
| **Act. Qty** | Type the actual quantity used for the operation.<br>You can only enter the actual quantity used for an operation after a work order is approved. |
| **Est. Cost** | This is read only field. SIMMS enters in this field the estimated cost of your materials based on the estimated quantity of the item and its unit cost. |
| **Total Cost** | This field is read only. SIMMS enters in this field the actual cost of your materials based on the actual quantity used for the operation and its unit cost. |
| **Pay Type** | In the field's list, select one of the following (the default is Customer Pay):<br>• **Customer Pay**<br>Select this option if the customer is paying for this materials.<br>• **Warranty**<br>Select this option if the materials are under warranty. |

## Book Time for an Operation

1. In the **Work Order Detail** window, select the operation you want to book time for, and then click the **Book Time** tab.
2. In the grid enter the appropriate details.

**Table 7: Book Time**

| Field | Action |
|---|---|
| **Employee** | In the field's list, select the employee to perform this operation.<br>To appear in this list the employee must be assigned the status of production employee in the User Manager. |
| **Book Date** | In the field's calendar, select the date you want to book your employee for. |
| **Labor Description** | Type a description of the operation the employee is to perform.<br>This description appears on the Technician Work Sheet. |
| **Est. Hours** | In the field, type the estimated number of hours required to complete the operation. |
| **Est. Cost** | This is a read only field. SIMMS enters the cost of the operation based on the estimated hours and the employee's wage. |
| **Pay Type** | In the field's list, select one of the following (the default is Customer Pay):<br>• **Customer Pay** Select this option if the customer is paying for the labor charges.<br>• **Warranty** Select this option if the labor charges are under warranty. |

**Table 7: Book Time**

| Field | Action |
|---|---|
| **Act. Hours** | In this field, type the actual number of hours needed to complete the operation.<br>You can only enter the actual hours for an operation after a work order is approved. |
| **Act. Cost** | This is a read only field. SIMMS enters the actual cost of the operation based on the employee's hourly rate and the actual number of hours it took the employee to complete the operation. |
| **Technician Comments** | Type in the fields text box a comment.<br>This comment appears on the Technicians Work Sheet. |

## Print a Quote

The quote you print is based on the details you have entered for your work order.

- In the **Automotive Manager** window, select the work order you want to print a quote for, and then click **Quote**.

## Approve a Work Order

A work order that is approved has its status changed from Quote to Open. The work order is also assigned a work order number. After you approve a work order, you can enter the actual labor costs and the actual quantity of materials used for the operation.

- In the **Automotive Manager**, select your work order, and then click **Approve**.

## Print a Technician Work Sheet

The Technician Work Sheet details what operations a technician is required to perform for a work order.

1. In the **Automotive Manager** window, select the work order you want to print a **Technician Work Sheet** for.
2. Click **Detail**, and then click the **Technician Work Sheet** icon.

3. Click the **Print** icon.

## Enter Actual Hours

You cannot enter the actual hours needed for an operation until your work order is approved.

1. In the **Automotive Manager**, select your work order, and then click **Details**.
2. In the left pane, select the operation for which you want to enter its actual hours.
3. Click the **Book Time** tab, and then in the **Act Hours** field, type the actual hours needed to complete the operation.

## Enter the Actual Quantity of Materials

You cannot enter the actual quantity of materials used for an operation until your work order is approved.

1. In the **Automotive Manager**, select your work order, and then click **Details**.
2. In the left pane, select the operation for which you want to enter the actual quantity of materials used.
3. Click the **Assign Material** tab, in the **Code** field click the Plus (+) sign to expand the tree view.
4. For any of the item/location combination listed, in the **Quantity** field, type the quantity of the material used for the operation.

## Assign Serial Numbers

You assign serial numbers to your serialized items after you enter the actual quantity of the materials used.

1. In the **Work Order Detail** window, select the item you want to assign a serial number to, and then click **Serial Numbers**.
2. In the **Code** column, click the Plus (+) signs to fully expand the tree view.
3. In the **SN Count** column, click the check box for the serial number you want to assign to your item.

## Create a Purchase Order

SIMMS alerts you if there is insufficient stock for an operation. If you choose to proceed with assigning your materials, SIMMS enters a negative stock value as the item's on-hand quantity.

To replenish the stock needed to complete the operation you can create a purchase order from the Work Order Detail window.

1. Click the **Create PO** icon. A prompt displays asking if you want to create a purchase order for any negative stock. Click **Yes**.

   The Create PO for Stock Item Shortage window opens.

2. Click **Create**.

   SIMMS creates a purchase order for only enough stock to complete your operations. To increase the quantity of an item on a purchase order, you need to open and edit your purchase order in the Purchase Order window.

## Close a Work Order

- In the **Automotive Manager** window, select the work order you want to close, and then click **Close WO**.

## Invoice a Customer

You can only invoice a work order after it is closed.

- In the **Automotive Manager**, select the work order you want to **invoice**, and then click **Invoice WO**.

  Your invoice opens in the Invoice Manager.

## Receive Payment

You can only receive payment for a work order that has been invoiced.

1. Open the **Automotive Manager**, select the work order you want to process a payment for, and then click **Pay**.

   The Quick Payment window opens.

2. If your customer's payment is in a currency other than your default currency, in the **Currency** text box, type the currency's code.

3. Choose a payment method:

   - **Cash**
     In the **Cash** box, type your customer's payment amount.

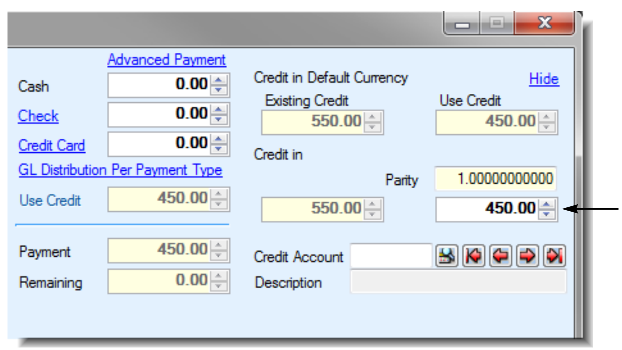
   - **Check**
     Click the **Check** link. The **Check** dialog box opens. In the **Payment Per Type** box, type the amount your customer's check is for. In the **Number** text box, type the check number. Click **OK**.

   - **Credit Card**

Click the **Credit Card** link. The Credit Card window opens. In the **Payment Per Type** box, type your customer's payment amount. In the **Type** list, select their credit card type. In the **Number** text box, type the credit card number. In the **Expiration**: **End** of box and list, enter the expiration date of the credit card. In the **Name on Card** text box, type your customer's name as it appears on the credit card. Click **OK**.

If you have previously added your customer's credit card information to their profile in the Customer Manager, you can retrieve that information. In the **Credit Card** list select your customer's credit card type, and then click the **Get Credit Card Information** link. SIMMS enters your customer's credit card information in the appropriate fields.

- **Credit**
  Click the **Use Credit** link. The link is only active if your customer has an existing credit. The Quick Payment window expands showing your customer's credit information. In the active box, type your customer's payment amount. This amount is taken from their credit.




*Type your customer's payment amount in this box. This amount is taken from their credit.*

*Figure 3: Applying a customer's credit to an invoice.*

- **Multi-Currency**
  Your customer can make multiple payments using different currencies. SIMMS converts any foreign currency payments to your default currency. Click the **Advanced Payment** link. The Advanced Payment Information window opens. In the **Payment Type** list, select your customer's payment method (Cash, Check, Credit Card, or Debit Card). In the **Amount** field, type the payment amount for your chosen method of payment. In the **Currency** list, select the currency your customer's payment is made with. Click in the **Parity** field to update all the fields. Click **OK**. Your customer's payment is added to the

Quick Payment window (converted to your default currency).

4. In the **Comments** text box, type a comment.
5. Click **Pay**.
6. If your customer's invoice was paid from an existing credit, the Apply Credit dialog box opens. In the **Apply Credit** dialog box, Do one of the following steps:
   - Click **Apply Credit**. SIMMS takes your customer's payment from the oldest credit available. If your customer's payment is greater than this credit, the remainder of the payment is taken from the next oldest credit.
   - For any available credit, in the **Applied** column type your customer's payment. If the payment amount is greater than any single credit you can use more than one credit to make up the payment.

### Print a Customer's Invoice

1. Open the **Automotive Manager**, select the work order you want to print an invoice for, and then click **Invoice**.
2. Click the **Print** icon.

## Adding Recommendations

You can add recommendations for a customer's vehicle in the Customer Manager or from the Work Order Detail window. Recommendations for a vehicle automatically display when you open a work order for that vehicle. You can also view recommendations in the Customer Manager.

If a recommendation is accepted you can transfer the recommendation to a work order.

### Create a Recommendation

1. Do one of the following steps:
   - To create a recommendation from the **Customer Manager**, open the **Customer Manager**. Select a customer, and then click the **Edit** icon . Click the **Automotive Maintenance** tab, and then in the top pane select the vehicle you want to add a recommendation for. In the bottom pane click the **Recommendations** tab.
   - To create a recommendation from a work order, open a work order for the vehicle you want to add a recommendation for. Click the **Recommendation** icon.

2. Enter in the grid the appropriate information for your recommendation.

**Table 8: Recommendations**

| **Field** | |
|---|---|
| **Entry Date** | Select from the field's calendar the current date. |
| **Needed By** | Select from the field's calendar the date the recommendation is needed by. |
| **Operation/Job** | From the field's list, select the operation you are recommending to be done. |
| **Description** | Type any additional description. |
| **Quote#** | This is a read only field. If you transfer a recommendation to a work order, SIMMS enters the quote number for the work order into this field. |

## View Recommendations in the Customer Manager

Recommendations are associated to a specific vehicle. Therefore, you need to select a vehicle before you can see any recommendations associated to it.

1. Open the **Customer Manager**, select your customer in the list (leftmost), and then click the **Automotive Maintenance** tab.
2. In the upper pane, select your customer's vehicle, and then click the **Recommendations** tab.

## Transfer Recommendations

When you open a work order for a vehicle that has recommendations associated to it, these recommendations automatically display. You can transfer any of these recommendations to your work order. SIMMS will generate a new task for the work order and enters the recommended operation under the task.

- In the **Select Operations/Jobs from Recommendation** window, in the **Selected** column, click the check box for the recommendation you want to transfer to a work order, and then click **Transfer**.

# Reports

## View Reports

1. Open the **Reporting** menu, open the **Reports Center** sub-menu, and then click **Reports Center**.
2. On the **Report Center** menu, click **Automotive Maintenance**.

   See Table 9: Automotive Maintenance Reports for a description of some of the reports available to you.

**Table 9: Automotive Maintenance Reports**

| Report | Description |
|---|---|
| **Automotive Maintenance Document Lookup Report** | This report lists a summary of your work orders by customers.<br>You can filter the information appears on this report. |
| **Automotive Maintenance Jobs Setup Report** | This report lists the operations/jobs you have predefined. |
| **Automotive Maintenance Technician Assignment Report** | This report lists each of the operations/jobs done by a technician.<br>You can filter the information appears on this report. |