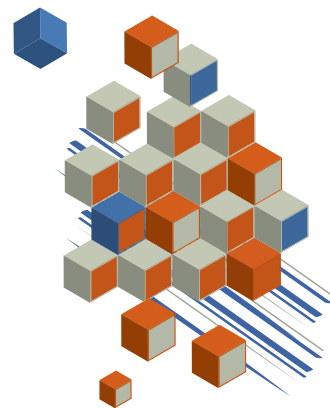




Automotive Maintenance - Work Order Module

SIMMS Inventory Management Software 7.3

August 25, 2010



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Automotive Maintenance - Work Order Module

In the Automotive Maintenance - Work Order Module you can manage the maintenance and servicing of vehicles within SIMMS Inventory Management software.

Prerequisites

To manage any vehicle in this module, the vehicle must be setup as an inventory item in SIMMS. In the Automotive Maintenance - Work Order Module you can manage the maintenance and servicing of vehicles within SIMMS Inventory Management software.

Setting Up a Vehicle

1. Type a description for the vehicle in the Vehicle Name field (such as VIM Truck 1, where VIM refers to the customer that owns the truck).
2. Type a model in the Model field (such as F250).
3. Type a body style in the Body Style field (such as longbox).
4. Type a manufacturer in the Manufacturer field (such as Ford).
5. Type a country of origin in the Country field (such as United States).

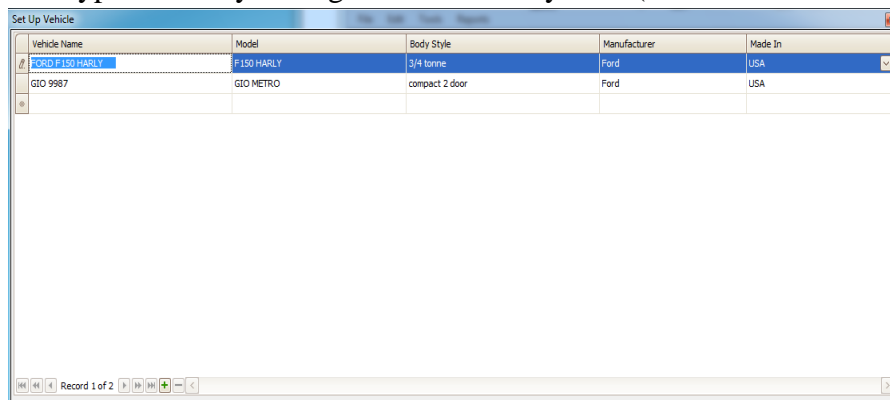



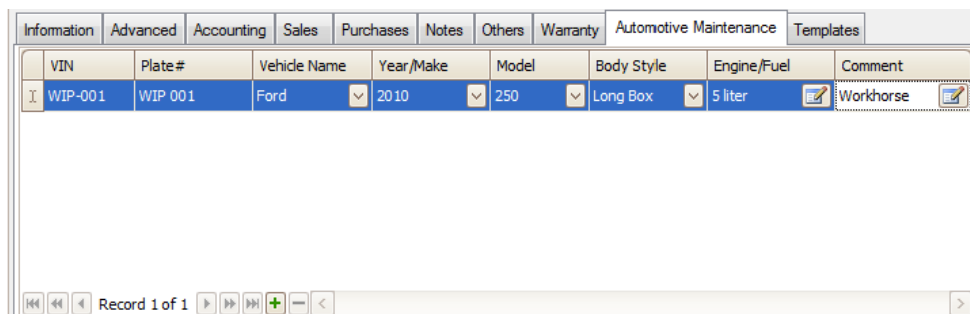
Figure 1: Setup Vehicle window

Automotive Maintenance Setup

Adding Vehicle Maintenance Information for a Customer

1. On the **Contact Manager - Customer** window, select the Customer from the list in the left pane.
2. Click the **Edit** icon  on the toolbar.

On the **Automotive Maintenance** tab, click the  icon.



VIN	Plate#	Vehicle Name	Year/Make	Model	Body Style	Engine/Fuel	Comment
WIP-001	WIP 001	Ford	2010	250	Long Box	5 liter	Workhorse

Figure 2: Automotive Maintenance tab

3. In the VIN field, type an unique Vehicle Identification Number, such as *WIP-001*.
4. In the Plate # field, type the vehicles license plate number.
5. In the Vehicle Name field, type a common name for the vehicle, such as *John's truck*.
6. In the Year/Make field, type in the vehicle's year of issue, or its manufacturer's name, or both. Examples are *2010* or *Ford* or *2010 Ford*.
7. In the Model field, type the vehicle's model, such as *F250*.
8. In the Body Style field, type the vehicle's body style, such as *long box*.
9. In the Engine/Fuel field, type the vehicle's engine size and fuel recommendation, such as *5/reg* (five liter/regular).
10. In the Comment field, type any comment particular to the vehicle, such as *delivery truck*.


When all details are complete, from the righthand-most field, press the TAB key. The cursor will skip to a new line. This action saves the entries on the previous line.

11. To exit the window, click to another tab in the Customer Manager, or click **Close**.

Work Order Operations & Jobs

Creating Work Order Operations & Jobs

To create operations/jobs for the Automotive Maintenance Work order Module, click the Modules menu>Automotive Maintenance section>Setup Operations.

1. Click the  on the bottom left of the Operations/Jobs pane to add a new Operation Type in the Description column.
2. Select a miscellaneous code to associate to the Operation/Job. This Miscellaneous Code is used for costing.
3. Type a labor cost (per hour) in the Labor Cost field.
4. Type a comment for the operation/job in the Comments field.

NOTE: The price you have defined for the Miscellaneous Charge used is the shop price used when the charge and operation are associated and used in a job.

Associating Materials to a Job

1. In the Set Up WO Operations/Jobs window, select the operation
2. In the Estimate Materials pane, select the item by clicking the Search icon to the right of the Item Code field.
3. Select a unit of measure for the item from the UM drop-down list.
4. Type the quantity of the item to be associated.
5. Press the TAB key to move down to the next row to add additional materials (if desired).

NOTE: By these details, the system will know to associate such material to the work order when the related operation is inserted.

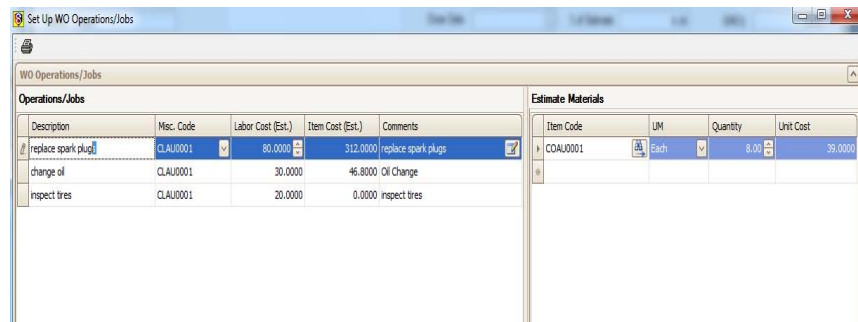



Figure 3: Setup WO Operations/Jobs window

Assigning Vehicles to a Customer

You assign vehicles to your customer before processing a work order.

1. On the Customer Manager window > Automotive Maintenance tab, click the  icon.
2. Type an unique Vehicle Information Number (VIN) in the VIN field.
3. Type the license plate number in the Plate Number field.
4. Select a pre-defined Vehicle Name.
5. Select the year and make of the vehicle in the Year/Make field.
6. Select a model in the Model field.
7. Select a body style in the Body Style field.
8. Type in the engine/fuel information in the Engine/Fuel field. This is a free-form text box that may contain specific and unique information particular to this one vehicle.
9. If you want to add additional unique information related to this customer's vehicle, you can type this information in the Comment field.

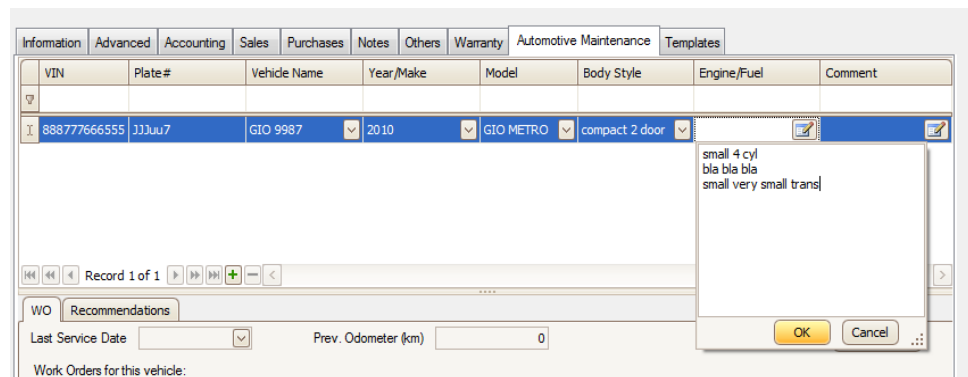


Figure 4: Automotive Maintenance tab > WO subtab

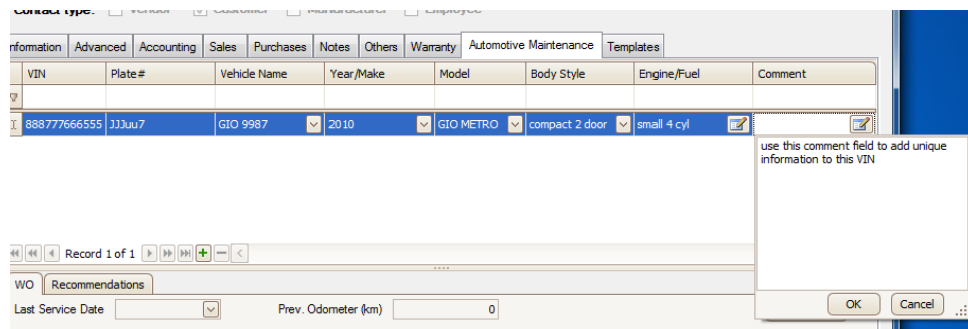



Figure 5: Automotive Maintenance tab > Recommendations subtab

Work Order Quotes

Creating the Work Order Quote

All Automotive Maintenance Module Work Orders must begin with a quote.

1. On the Customer Manager window > Automotive Maintenance tab, click **New WO**.
2. Click the  icon at the bottom left of the screen to open a new Work Order.
3. Type a Work Order Number in the WO# field.
4. Select a priority from the Priority drop-down list.
5. Type a Document Number (optional) in the Doc. # field.
6. Select the customer from the customer drop-down list.
7. Select the VIN for the vehicle you have associated to the customer.
8. Type in the current reading of the odometer date in the Odometer field.
9. Type in the status of the vehicle in the Status field.
10. Select a location (optional) from the Location drop-down list.
11. Type in any comments you have at this stage in the Comments field.
12. Select a start date for the quote from the Start Date drop-down list (optional).
13. Select a scheduled date from the Scheduled Date drop-down list (optional).
14. Type in a scrap cost for the vehicle in the Scrap Cost field (optional).

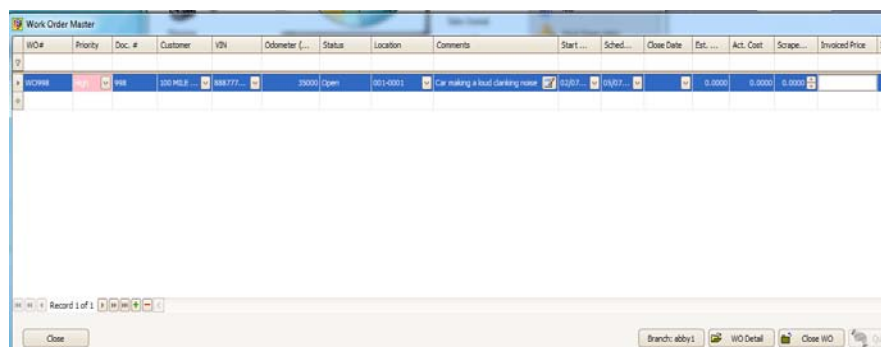


Figure 6: Automotive Maintenance tab > Recommendations subtab

Approving the Work Order Quote

Customers must approve Work Order Quotes before they can be completed.

To approve a Work Order Quote:

1. On the Work Order Master screen, select the quote.
2. Click **Approve**.

The quote has now been assigned a Work Order Number and the next steps in the work order can begin.

1. On the Work Order Master window, select the work order you want to complete.
2. Click **WO Detail**.

Printing a Worksheet

1. Click **Technician Work Sheet** to print a worksheet of the Work Order Quote.

Adding Tasks to a Work Order Quote

To add a task to the existing Work Order Quote:

1. On the Work Order Master window, select the work order you want to complete.
2. Click **WO Detail**.
3. In the WO Details window, click **New Task**.
4. Type a description of the new task in the Description field.
5. Type a comment in the Comment field.


Adding Operations/Jobs to Tasks in a Work Order Quote

To add operations or jobs to existing tasks in a Work Order Quote:

1. On the Work Order Master window, select the work order you want to complete.
2. Click **WO Detail**.
3. In the WO Details window, select a task then click **New Operations/ Jobs**.
4. Select an operation from the drop-down list.

Quoting Items to an Operation


To quote items to an operation:

1. In the WO Details window, select the operation.
2. Click the  icon to the left of the components listed.
3. Type the quantity you want to use in the Est. Qty field.
4. Select the location from which you want to pull the item.

NOTE: This action will remove the stock from inventory and commit it to the job.


Adding Additional Items to an Operation

To add additional items to an operation:

1. In the Assign Item and Book Time pane, click the  icon on the bottom left.
2. Select the item from the Item drop-down list.
3. Type the quantity you want to use in the Est. Qty field.

Booking Time to Operations

To book time to an operation:

1. Select the operation.
2. Click the  icon on the bottom of the Book Time grid.
3. Select an employee from the Employee drop-down list.
4. Type the estimated hours for the employee in the Est. Hours field.
5. Type a labor description in the Labor Description field.
6. Type additional comments in the Comments field.
7. Press the TAB key to move the cursor to the next line. This saves the change to the operation.

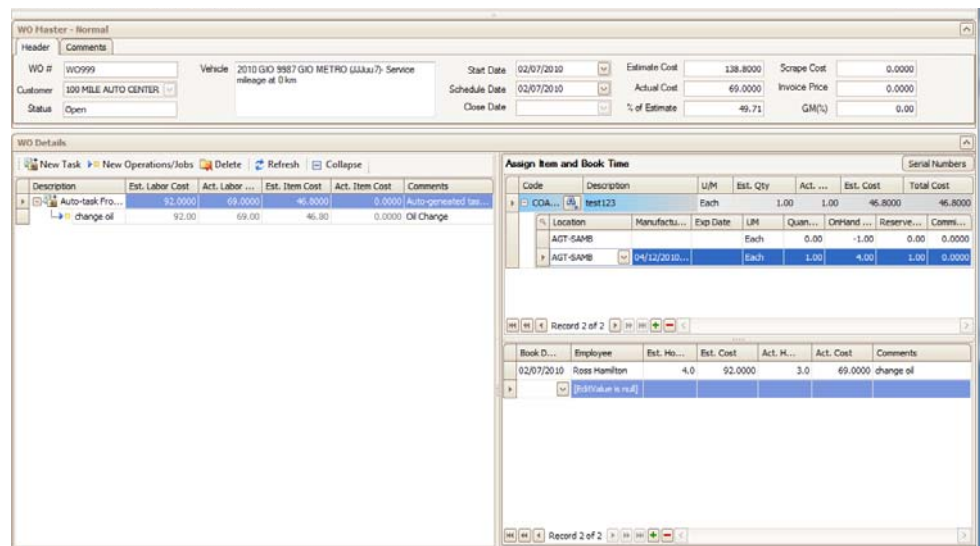


Figure 7: WO Master window

Printing Work Order Quotes


To print a Work Order Quote:

1. On the Work Order Master window, select the quote.
2. Click **Print Quote**.

Adding Recommendations to Work Order Quotes

Occasionally, you may wish to make a recommendation to your customer related to one of their vehicles, such as reminding them of scheduled oil changes or other servicing concerns.

To add a recommendation:

1. On the Contact Manager window > Automotive Maintenance tab, select the VIN for which you wish to make the recommendation.
2. Click **Recommendations**.
3. Click the  icon on the bottom of the grid.
4. Select the date that you are making the recommendation from the Entry Date drop-down list.
5. Select the date for the deadline you are recommending for the operation in the Needed By drop-down list.
6. Select the operation/job from the Operation/Job drop-down list.
7. Type any change to the operation/job description (if necessary).

NOTE: You can add recommendations to an open (ongoing) work order by selecting the work order and clicking Recommendation on the toolbar. You may want to place only certain recommendations onto one work order, and then add the rest onto a separate work order later.

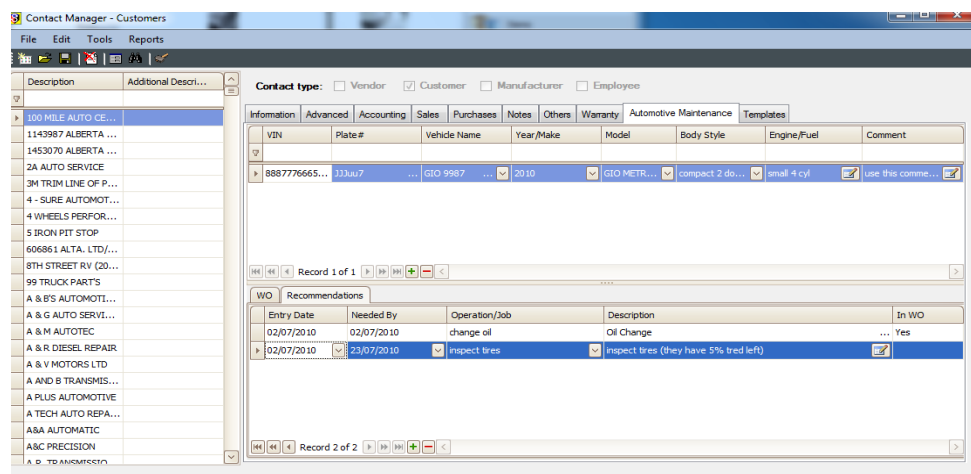


Figure 8: Automotive Maintenance tab > Recommendations subtab

Importing Recommendations

If your client has recommendations related to a vehicle VIN and if you are generating a new work order related to that VIN, you will be prompted to include the recommendation in the new Work Order.

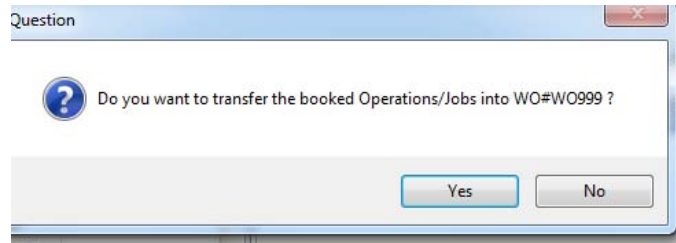


Figure 9: Question window

On the Question window, click **Yes**.

The Select Operations/Jobs from recommendations window appears, and shows a list of recommendations.

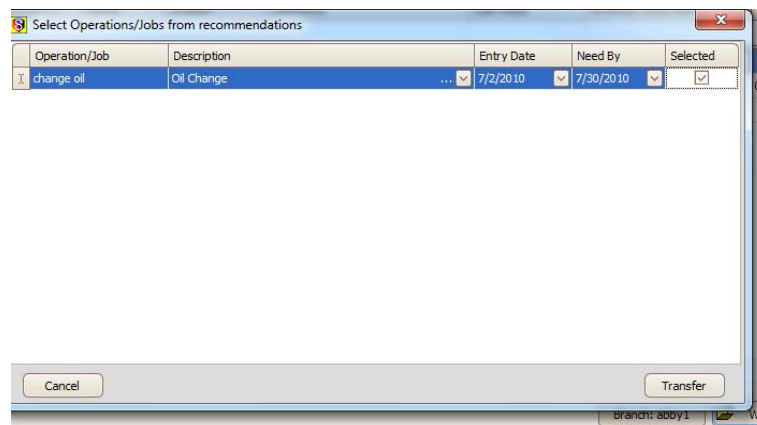


Figure 10: Select Operations/Jobs from recommendations window

To import recommendations:

1. Select the check box in the selected column for each recommendation you want to import.
2. Click **Transfer**.

The recommendations have now been imported.

Closing a Work Order

A work order must be closed before it can be invoiced.

To close a work order:

1. In the Work Order Master window, select the work order.
2. Click **Close Work Order**.

NOTE: When a work order has been closed it cannot be re-opened.

Invoicing a Work Order

An invoice must be produced to allow the Work Order to be paid for.

To invoice a work order:

3. In the Work Order Master window, select the work order.
4. Click **Invoice WO**.

A SIMMS Invoice will appear.

5. Click **Close**.
6. In the Work Order Master window, click **Invoice**.

The Work Order Invoice will appear.

The Work Order Invoice can be printed by clicking the Print icon on the report preview window.

Work Order Reports

To print a report:

1. On the **Modules** menu, point to **Automotive Maintenance**, and then click **Reports**.

A Worker Assignments Report can be generated, or you can use the WO Report Generator to customize what details you want your Work Order-related report to contain.