



Slide 1
Slide notes:

In this session we do an example of a complete cycle of a Service Job. This is a walk-in Customer who comes in for a replacement of a set of 4 tyres.

IES Navigator Client v8.04 : My IIS : [mode-Z]

Help Submit Quit Functions Commands

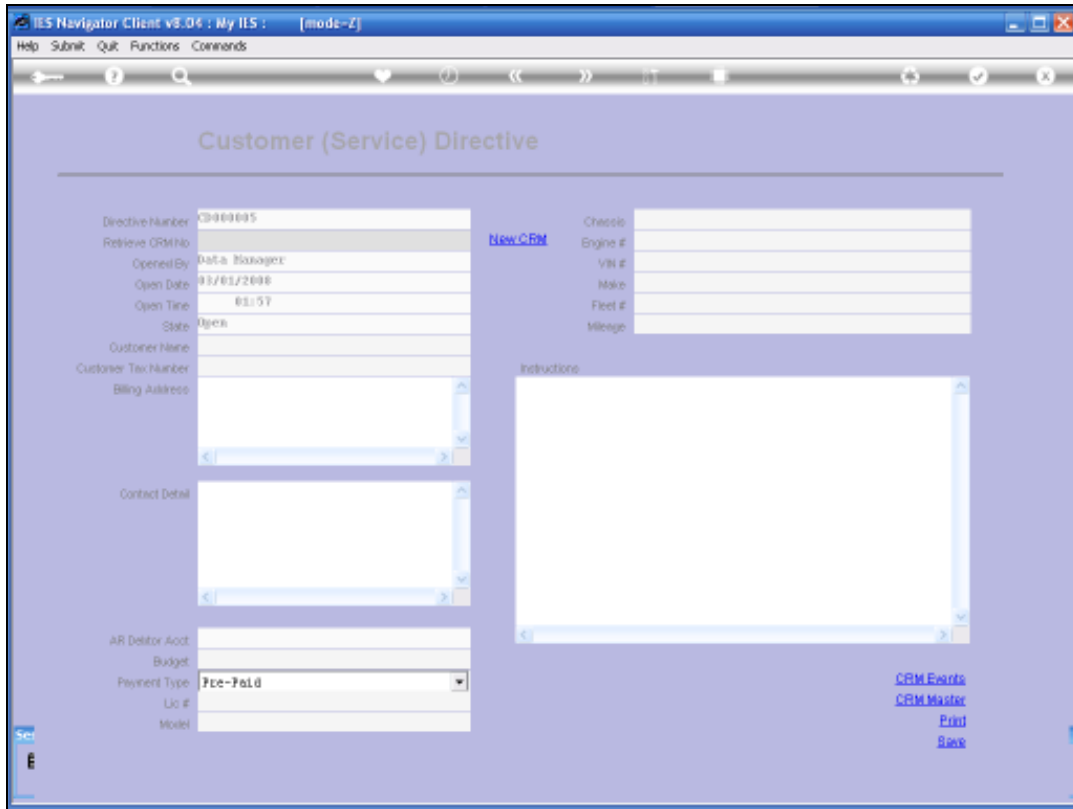
Customer (Service) Directive

| | | | |
|---------------------|--------------|--------------|--|
| Directive Number | C900005 | Chassis | |
| Retrive CRM No | | Engine # | |
| Opened By | Date Manager | VIN # | |
| Open Date | 03/03/2008 | Make | |
| Open Time | 01:57 | Fleet # | |
| State | Open | Mileage | |
| Customer Name | | | |
| Customer Tax Number | | | |
| Billing Address | | Instructions | |
| Contact Detail | | | |
| AR Debtor Acct | | | |
| Budget | | | |
| Payment Type | Pre-Paid | | |
| Lic # | | | |
| Model | | | |

[New CRM](#)

[CRM Events](#)
[CRM Master](#)
[Print](#)
[Back](#)

Slide 2
Slide notes:



Slide 3
Slide notes:

In this case we start with the Customer Directive. We retrieve a Current CRM Record for this Customer.

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Help Submit Quit Functions Commands

Customer (Service) Directive

| | | | |
|---------------------|--------------|----------|--|
| Directive Number | 03000005 | Chassis | |
| Retrieve CRM No | 00000000 | Engine # | |
| Opened By | Date Manager | VIN # | |
| Open Date | 03/03/2008 | Make | |
| Open Time | 01:57 | Fleet # | |
| State | Open | Mileage | |
| Customer Name | | | |
| Customer Tax Number | | | |
| Billing Address | | | |
| Contact Detail | | | |
| AR Debtor Acct | | | |
| Budget | | | |
| Payment Type | Pre-Paid | | |
| Lot # | | | |
| Model | | | |

[New CRM](#)

Instructions

[CRM Events](#)
[CRM Master](#)
[Print](#)
[Back](#)

Slide 4
Slide notes:

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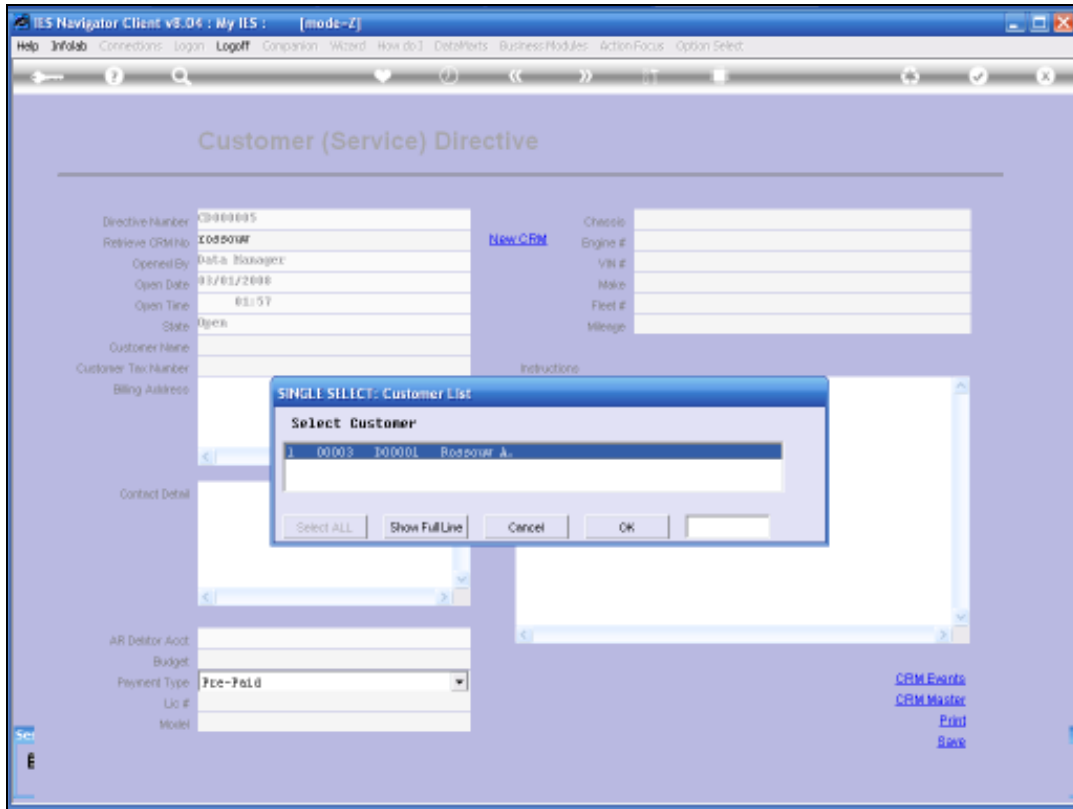
Customer (Service) Directive

| | | | |
|---------------------|--------------|--------------|--|
| Directive Number | C9888885 | Chassis | |
| Retrieve CRMinfo | C088888W | Engine # | |
| Opened By | Date Manager | VIN # | |
| Open Date | 03/03/2008 | Make | |
| Open Time | 01:57 | Fleet # | |
| State | Open | Mileage | |
| Customer Name | | | |
| Customer Tax Number | | | |
| Billing Address | | Instructions | |
| Contact Detail | | | |
| AR Debtor Acct | | | |
| Budget | | | |
| Payment Type | Pre-Paid | | |
| Lic # | | | |
| Model | | | |

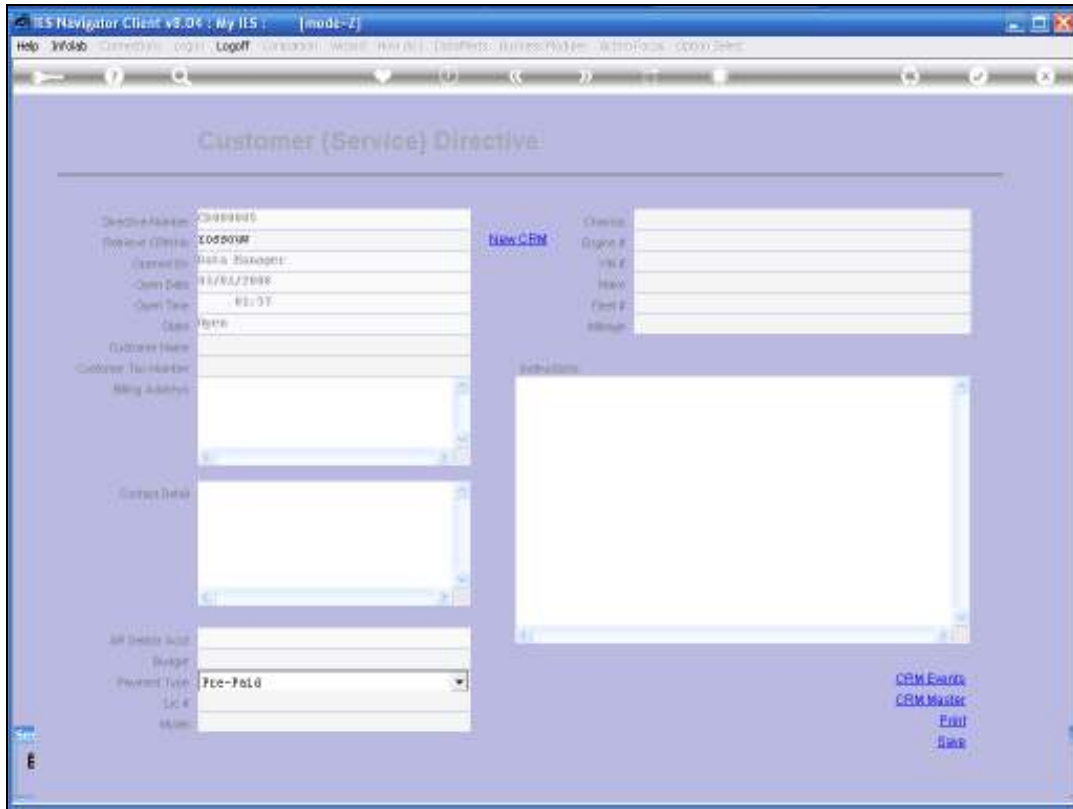
[New CRM](#)

[CRM Events](#)
[CRM Master](#)
[Print](#)
[Back](#)

Slide 5
Slide notes:



Slide 6
Slide notes:



Slide 7
Slide notes:

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Help Submit Quit Functions Commands

Customer (Service) Directive

| | |
|---------------------|---------------------------------|
| Directive Number | C999995 |
| Retiree CR# | 00003 |
| Opened By | Date Manager |
| Open Date | 03/03/2008 |
| Open Time | 01:57 |
| State | Open |
| Customer Name | A. ROSSON |
| Customer Tax Number | |
| Billing Address | PO Box 5234 Lynnwood IL05 |
| Contact Detail | |
| AR Debtor Acct | 00001 Rossone |
| Budget | |
| Payment Type | Pre-Paid |
| Loc # | |
| Model | |

[New CRM](#)

| | |
|----------|--|
| Chassis | |
| Engine # | |
| VIN # | |
| Make | |
| Fleet # | |
| Mileage | |

Instructions

[CRM Events](#)
[CRM Master](#)
[Print](#)
[Back](#)

Slide 8
Slide notes:

Customer (Service) Directive

| | | | |
|---------------------|------------------------------------|--------------|--|
| Directive Number | C900005 | Chassis | |
| Retrive CRM No | 00003 | Engine # | |
| Opened By | Date Manager | VIN # | |
| Open Date | 03/03/2008 | Make | |
| Open Time | 01:57 | Fleet # | |
| State | Open | Mileage | |
| Customer Name | A. ROSSON | | |
| Customer Tax Number | | | |
| Billing Address | PO Box 5234 Lynwood IL 60465 | Instructions | |
| Contact Detail | 555-3232 | | |
| AR Debtor Acct | 000001 Rossoneer | | |
| Budget | | | |
| Payment Type | Pre-Paid | | |
| License # | | | |
| Model | | | |

[New CRM](#)

[CRM Events](#)
[CRM Master](#)
[Print](#)
[Back](#)

Slide 9
Slide notes:

And we Record the Customer Instruction.

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Help InfoLab Connections Login Logout Companion Wizard How do I? DataMarts Business Modules Action Focus Option Select

Customer (Service) Directive

| | | | |
|---------------------|------------------------------------|---------------|--|
| Directive Number | | Chassis | |
| Retrieve CRM No | | Engine # | |
| Opened By | | VIN # | |
| Open Date | | Make | |
| Open Time | | Fleet # | |
| State | | Mileage | |
| Customer Name | | | |
| Customer Tax Number | | | |
| Billing Address | PO Box 5234 Lynwood IL 60465 | Instructions: | |
| | | New Types | |
| Contact Detail | 555-3232 | | |
| AR Debtor Acct | | | |
| Budget | | | |
| Payment Type | Free-Paid | | |
| Lic # | | | |
| Model | | | |

[New CRM](#)

[CRM Events](#)
[CRM Master](#)
[Print](#)
[Back](#)

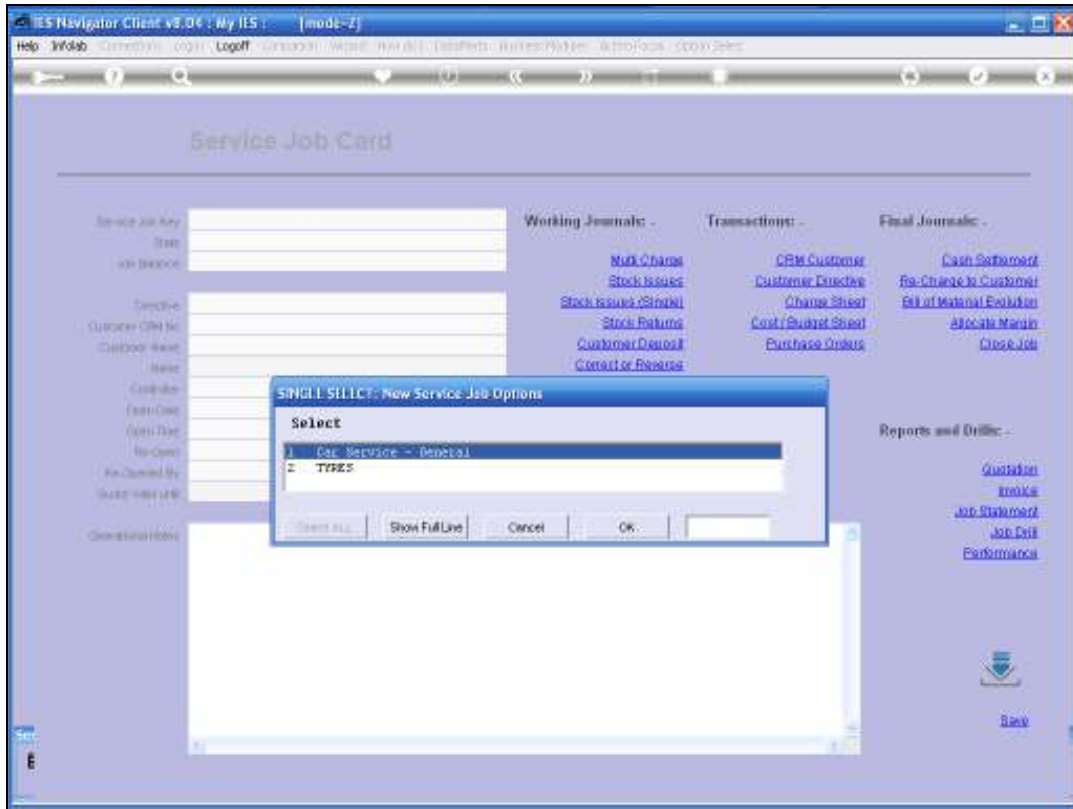
Slide 10
Slide notes:



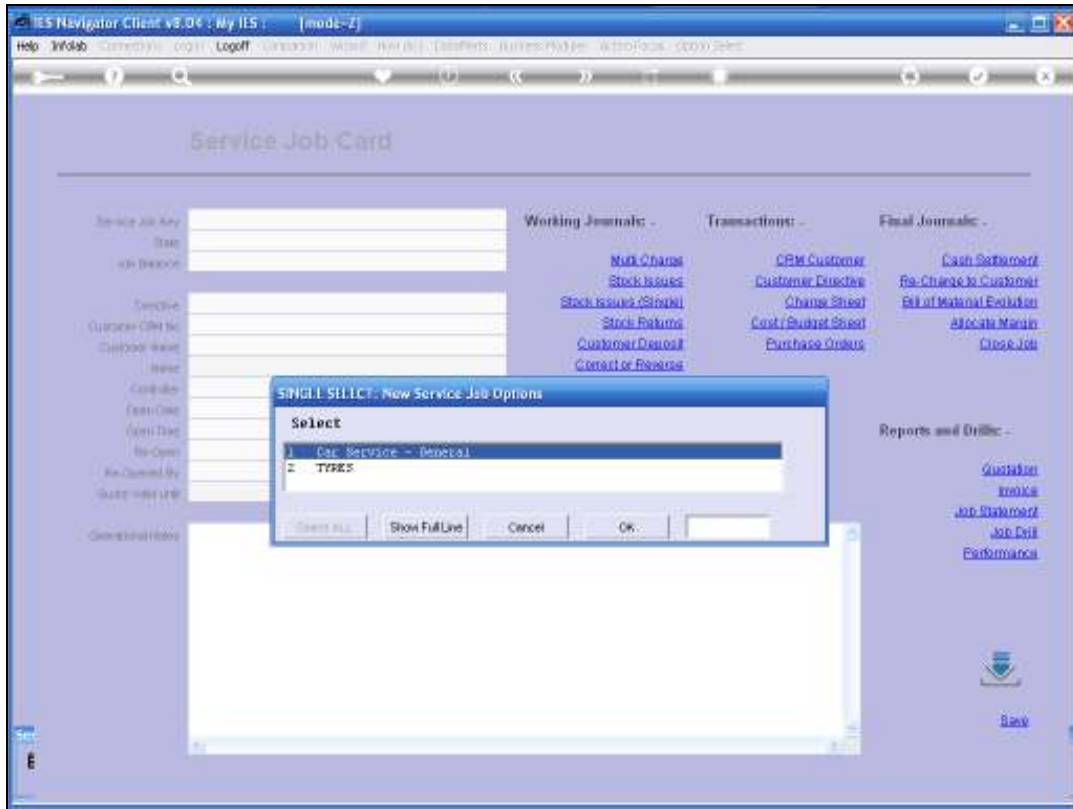
Slide 11

Slide notes:

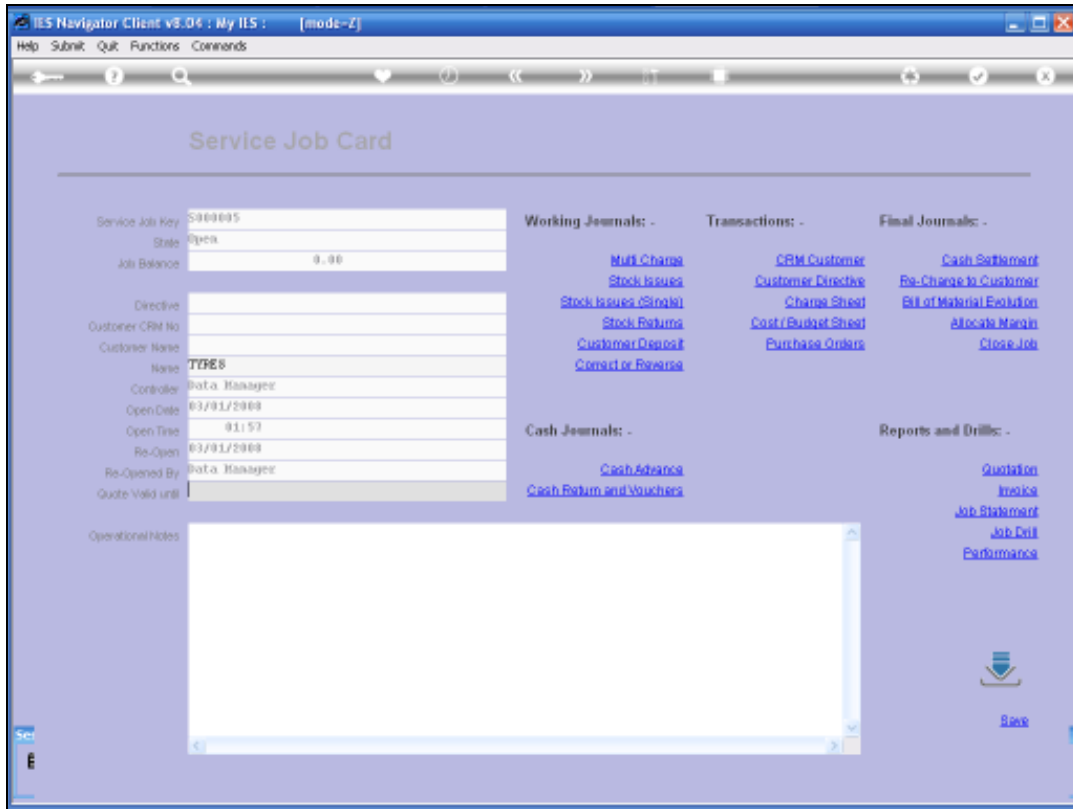
And now we Open a New Service Job.



Slide 12
Slide notes:

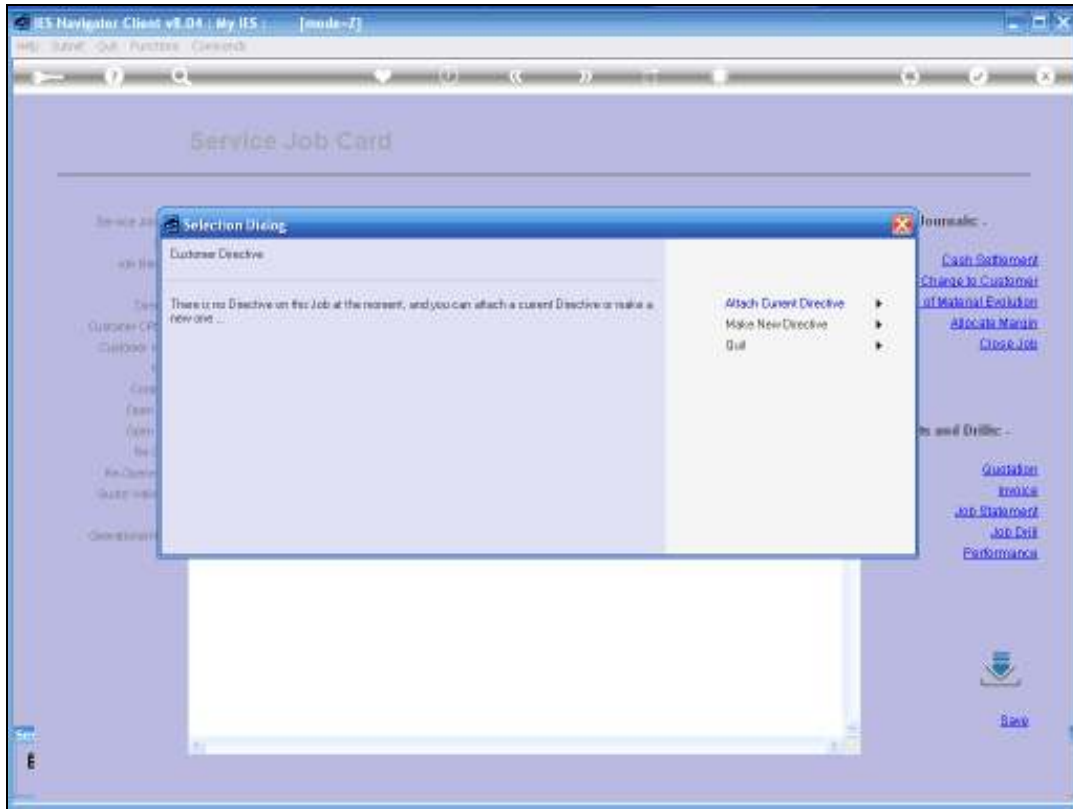


Slide 13
Slide notes:

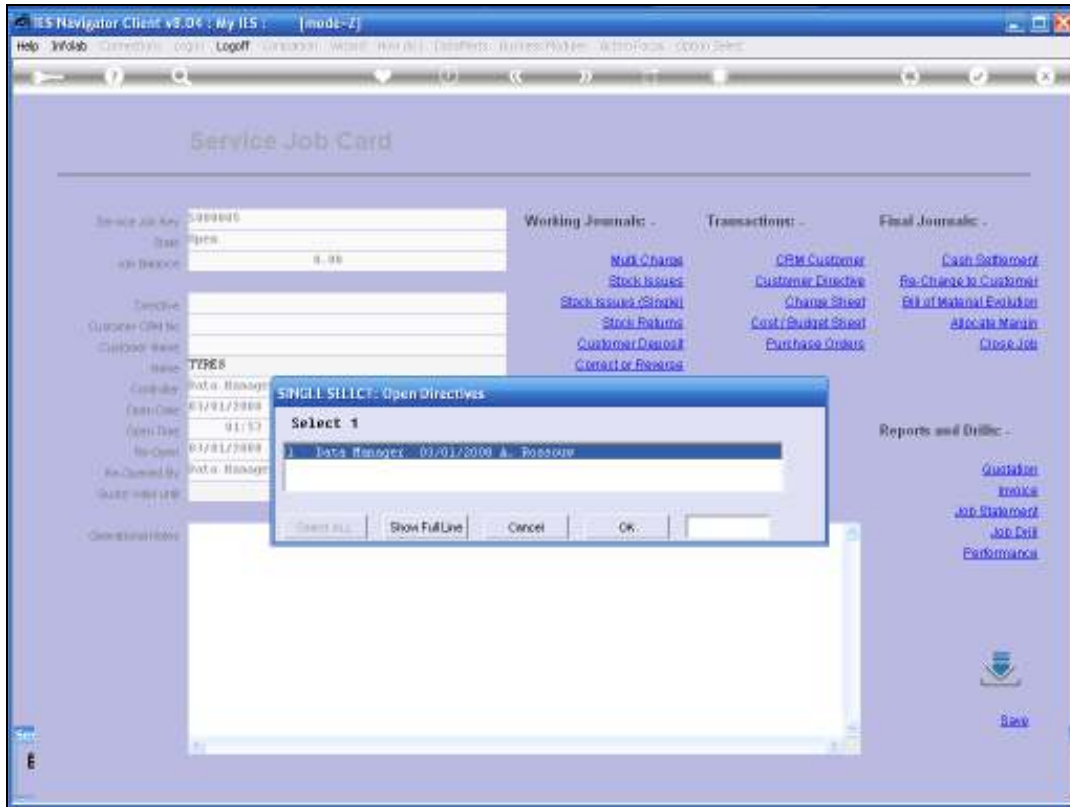


Slide 14
Slide notes:

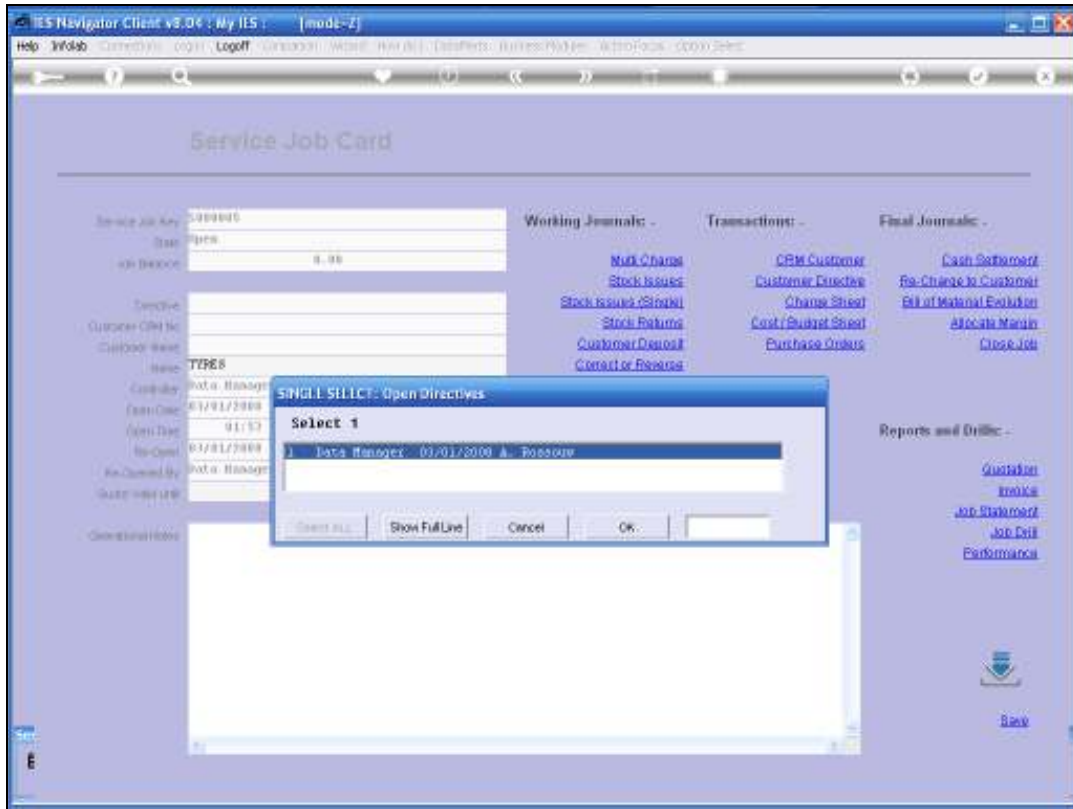
We attach the Customer Directive.



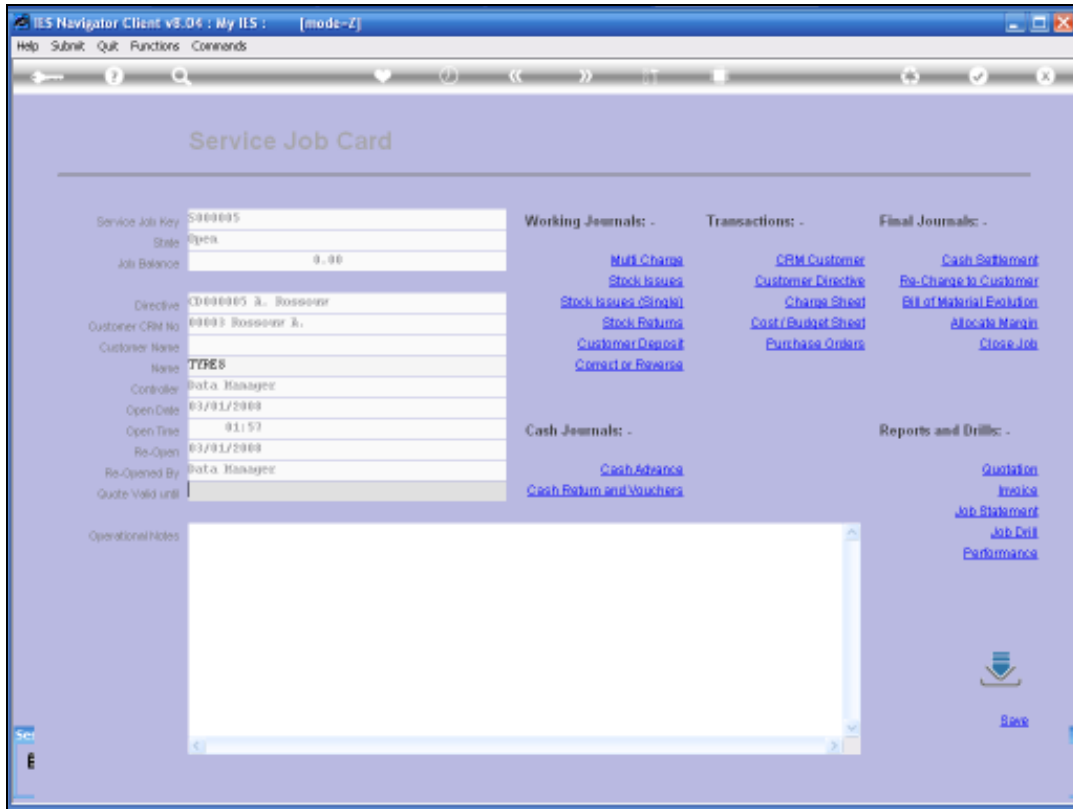
Slide 15
Slide notes:



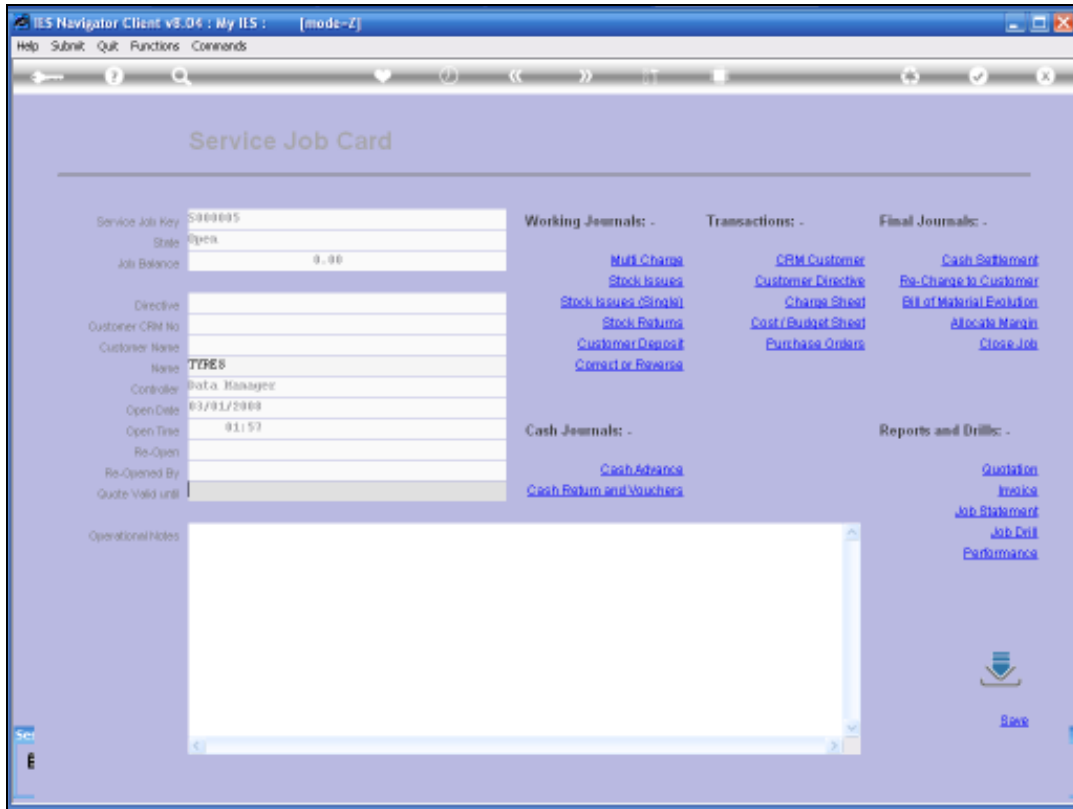
Slide 16
Slide notes:



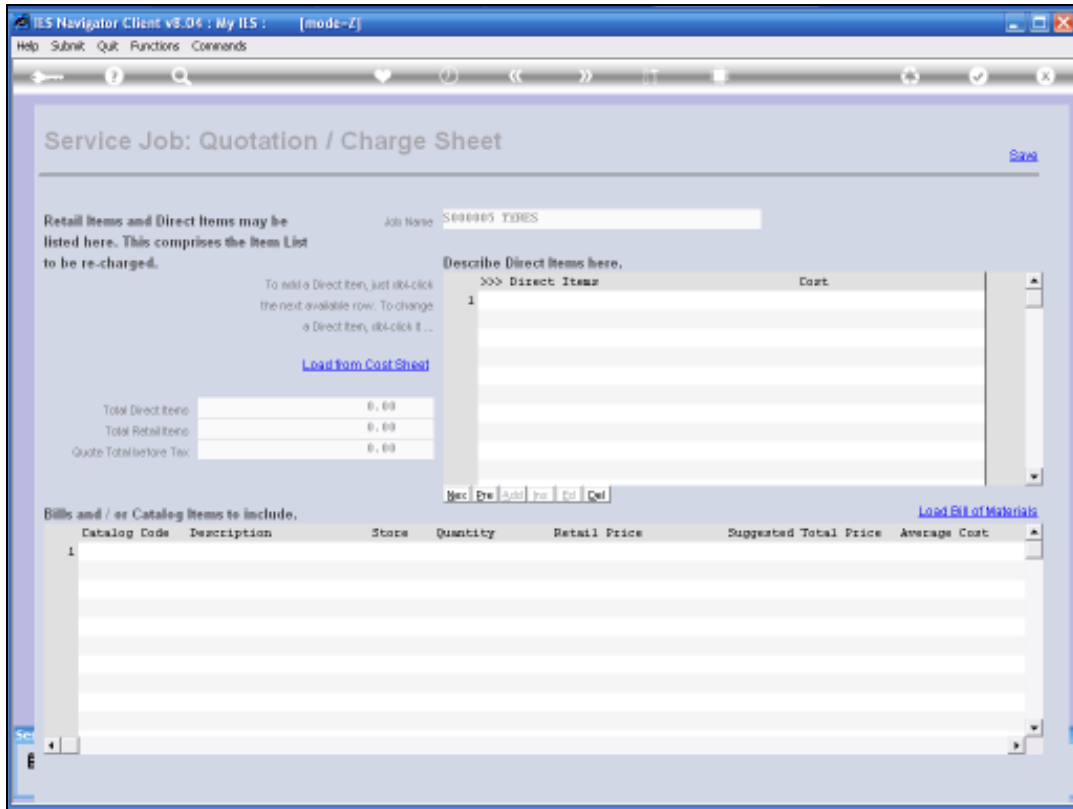
Slide 17
Slide notes:



Slide 18
Slide notes:

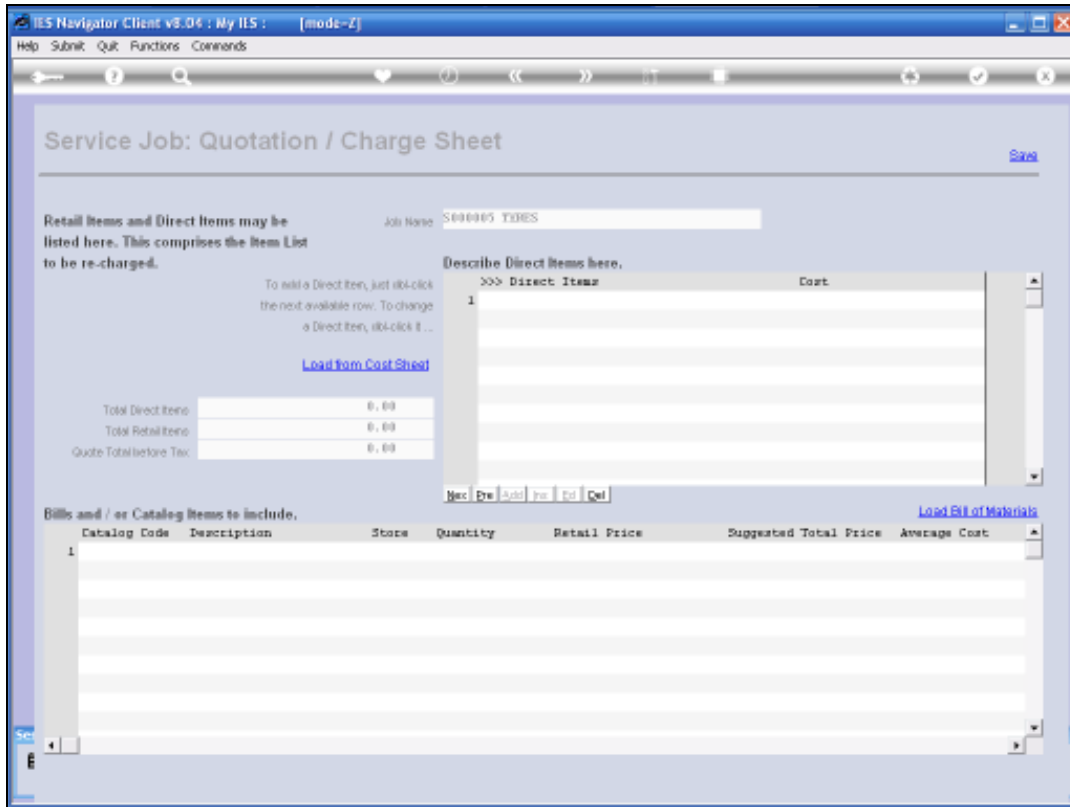


Slide 19
Slide notes:

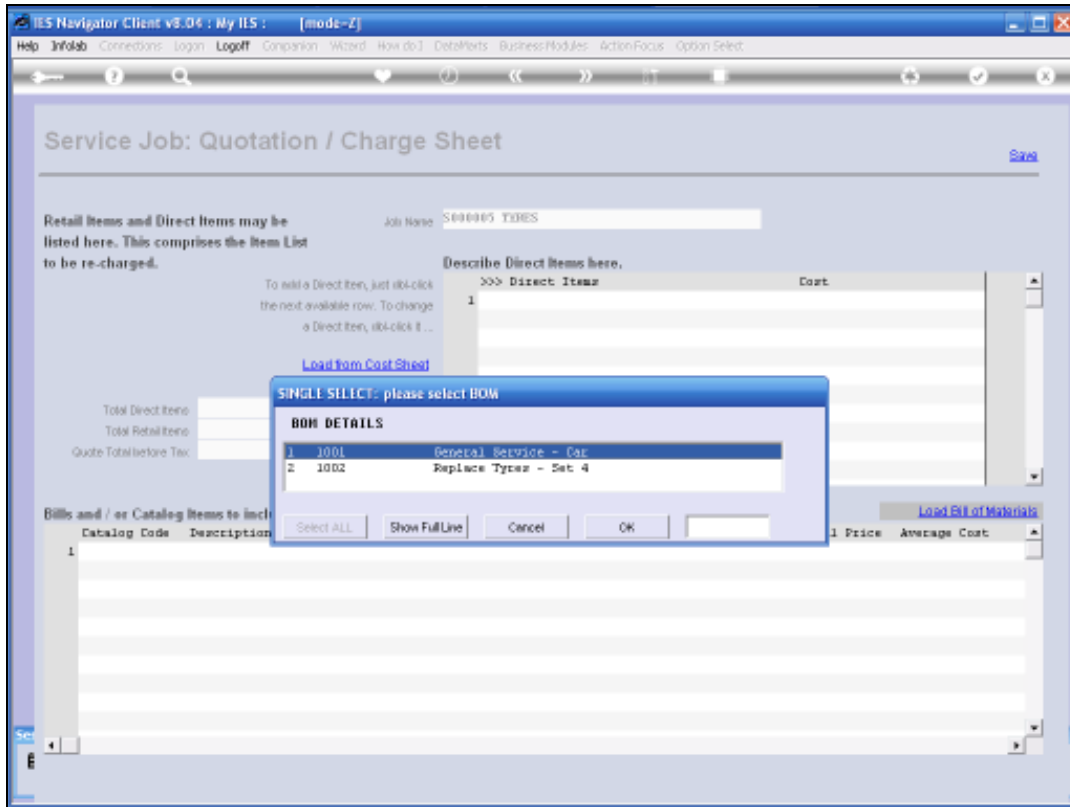


Slide 20
Slide notes:

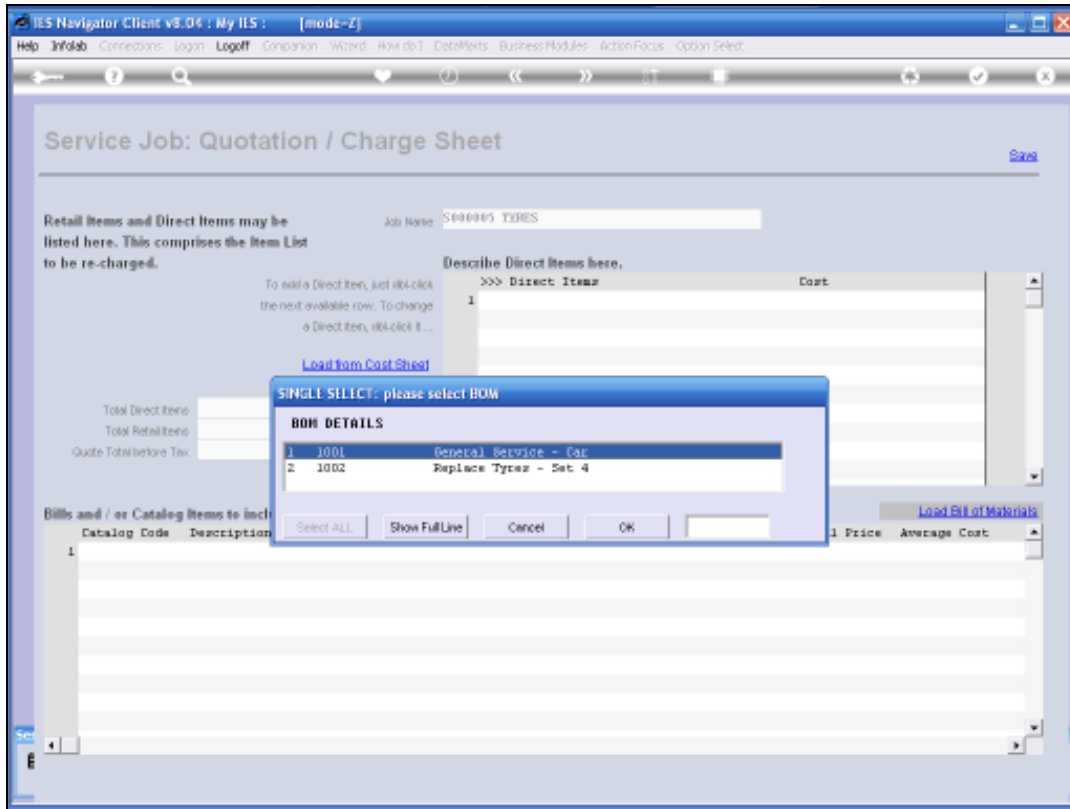
On the Charge Sheet we load a Standard Bill of Materials for the replacement of the 4 Tyres.



Slide 21
Slide notes:



Slide 22
Slide notes:



Slide 23
Slide notes:

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Help Submit Quit Functions Commands

Service Job: Quotation / Charge Sheet [Save](#)

Retail Items and Direct Items may be listed here. This comprises the Item List to be re-charged. Job Name: 5444465 TDRS

To add a Direct Item, just click the next available row. To change a Direct Item, click it ...

[Load from Cost Sheet](#)

| | |
|------------------------|----------|
| Total Direct Items | 0.00 |
| Total Retail Items | 3,459.00 |
| Quote Total before Tax | 3,459.00 |

Describe Direct Items here.

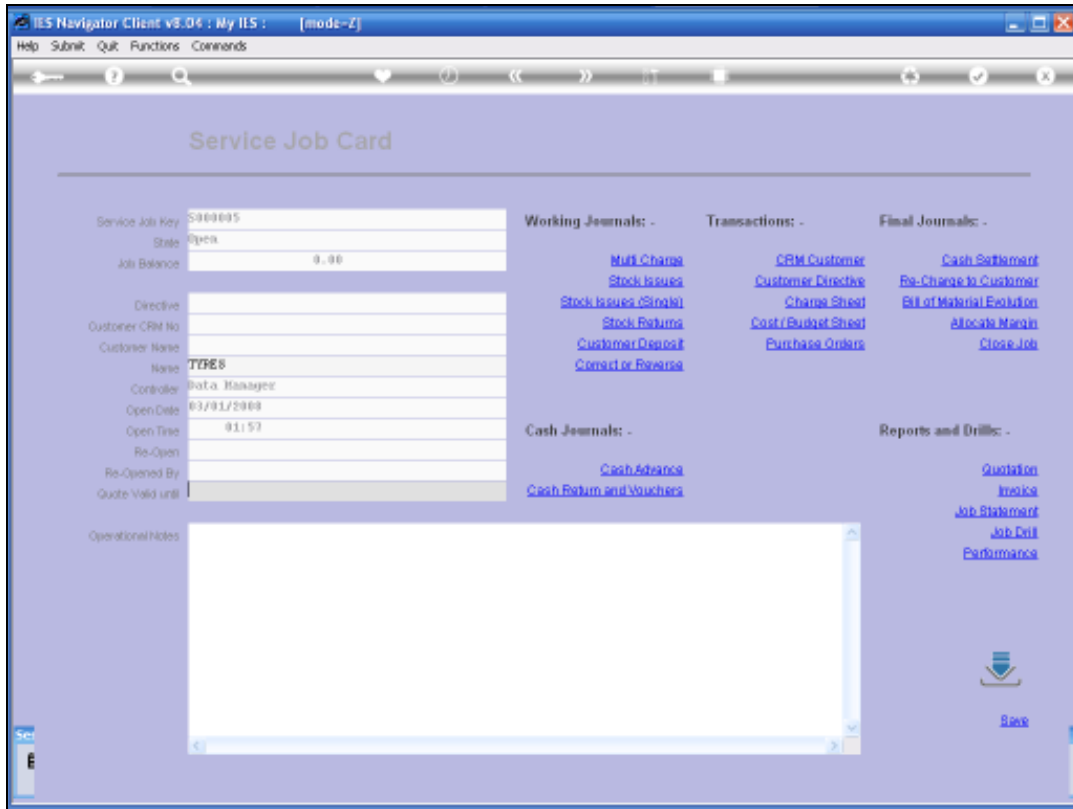
| >>> Direct Items | Cost |
|------------------|------|
| 1 | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |

New Del Add Del Del Del

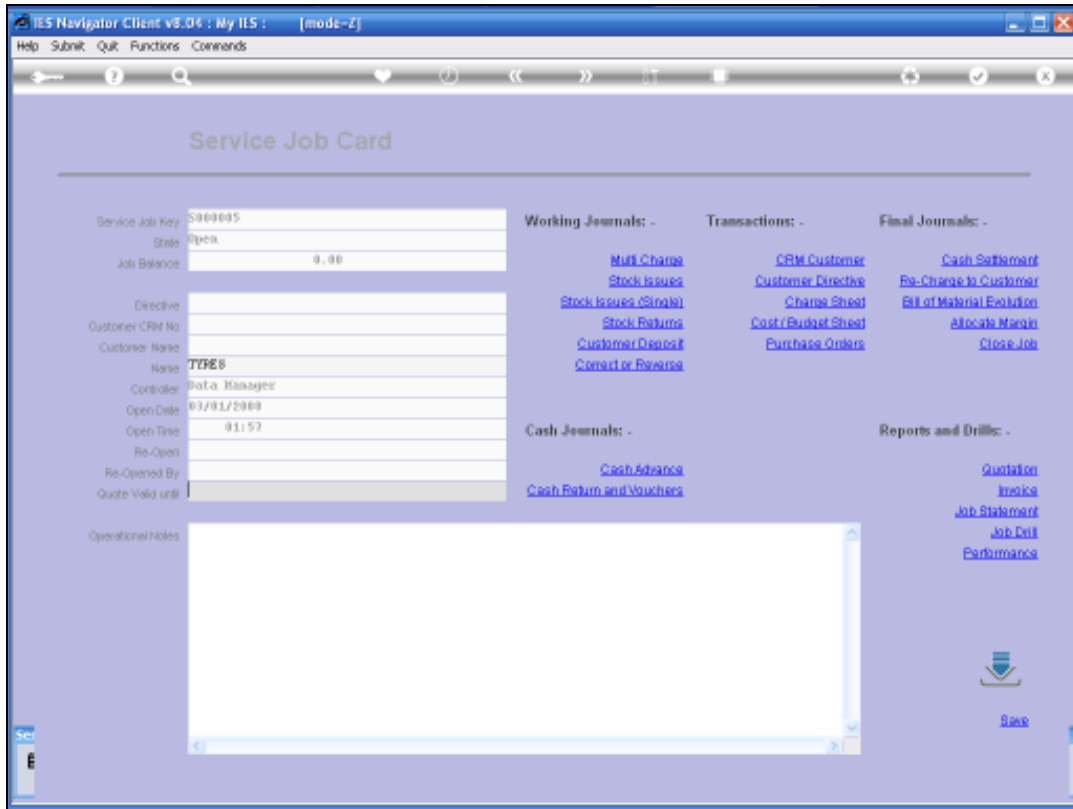
[Load Bill of Materials](#)

| Catalog Code | Description | Store | Quantity | Retail Price | Suggested Total Price | Average Cost |
|--------------|----------------------|-------|----------|--------------|-----------------------|--------------|
| 1 57011 | WHEEL ALIGNMENT - TD | F | 1.00 | 100.00 | 100.00 | 75 |
| 2 57012 | WHEEL BALANCING - OF | F | 5.00 | 15.00 | 75.00 | 10 |
| 3 100010517 | TUBELESS VALVE | 00 | 4.00 | 21.00 | 84.00 | 8 |
| 4 10020001 | 1956515VR F/S F/HAWK | 00 | 4.00 | 800.00 | 3,200.00 | 482 |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

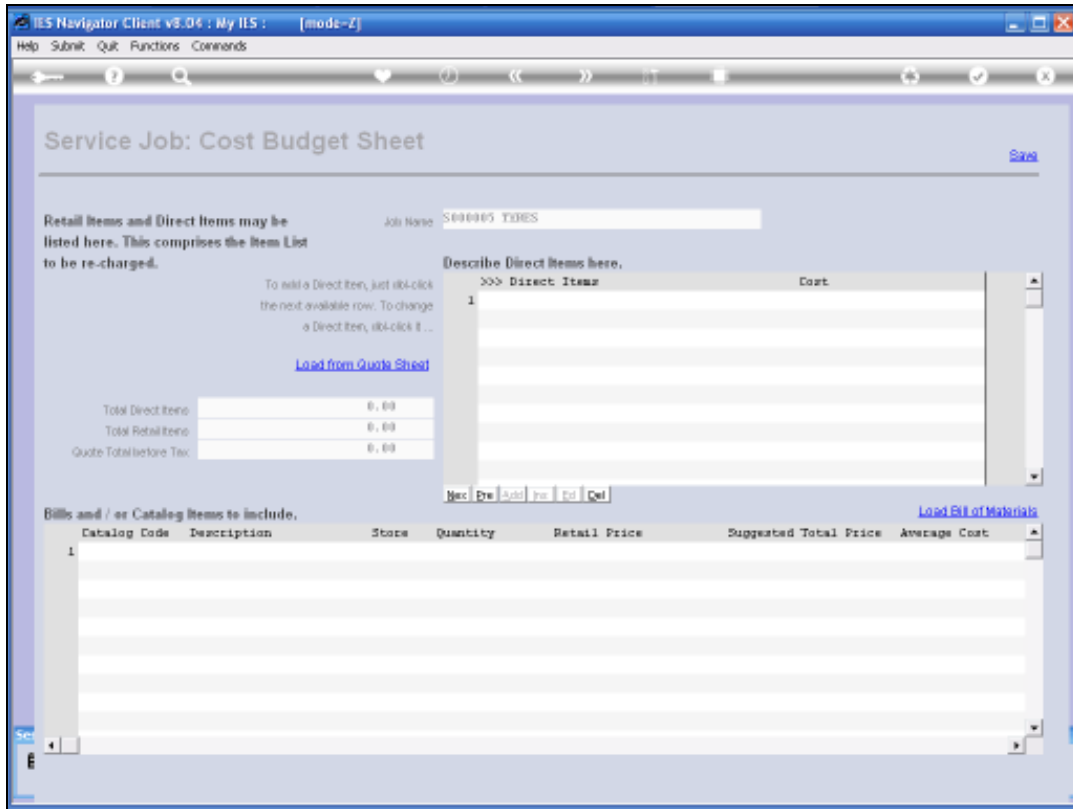
Slide 24
Slide notes:



Slide 25
Slide notes:

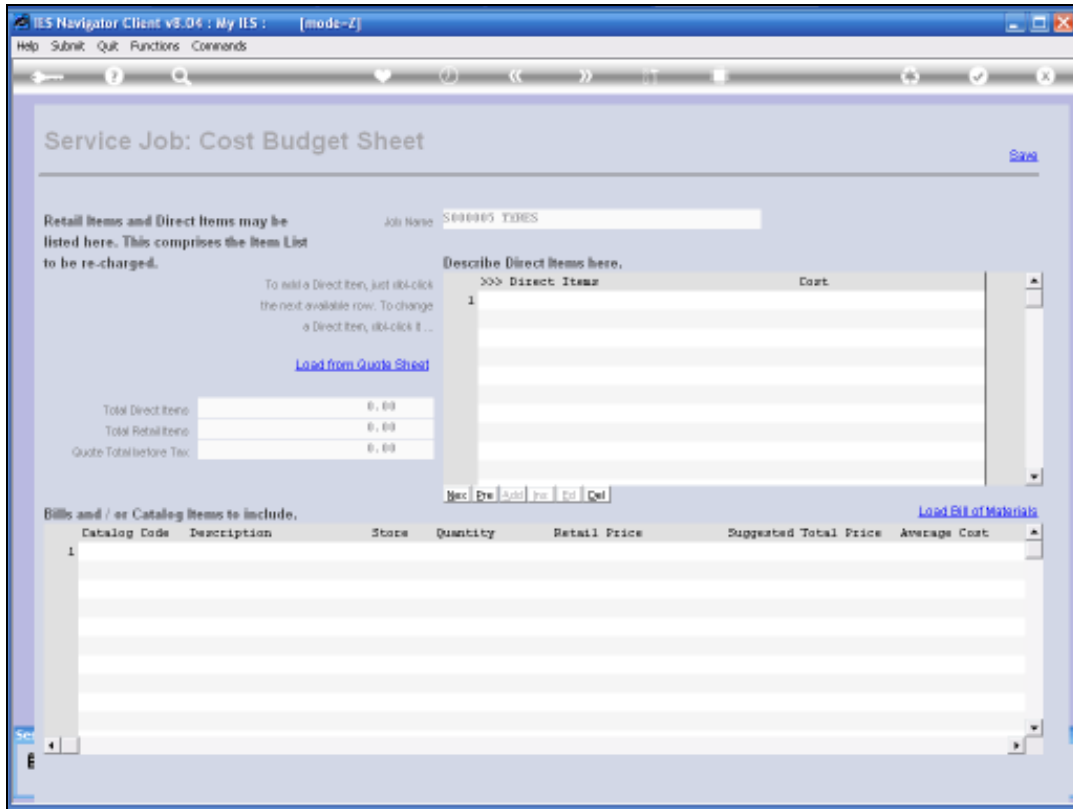


Slide 26
Slide notes:



Slide 27
Slide notes:

The Cost Sheet is mirrored to the Charge Sheet.



Slide 28
Slide notes:

Service Job: Cost Budget Sheet [Save](#)

Retail Items and Direct Items may be listed here. This comprises the Item List to be re-charged. Job Name: S444445 TDRS

To add a Direct Item, just click the next available row. To change a Direct Item, click it.

[Load from Quote Sheet](#)

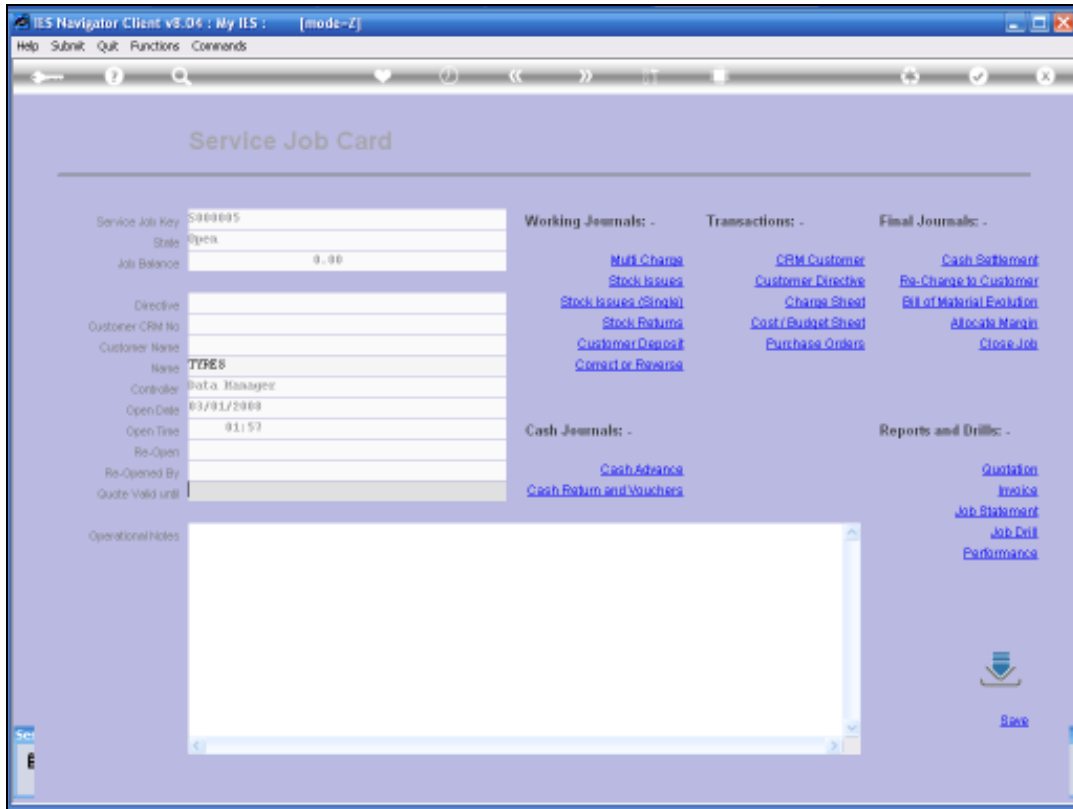
| Direct Items | Cost |
|--------------|------|
| 1 | |

Total Direct Items: 0.00
Total Retail Items: 2,099.92
Quote Total before Tax: 2,099.92

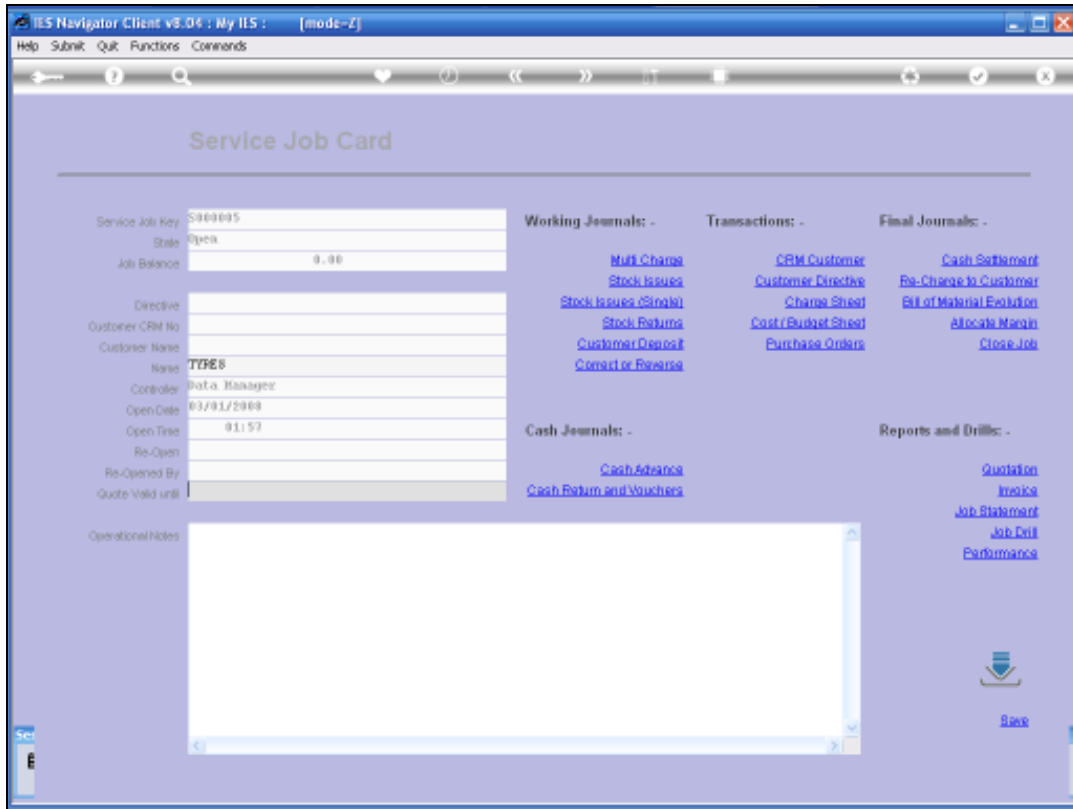
[Load Bill of Materials](#)

| Catalog Code | Description | Store | Quantity | Retail Price | Suggested Total Price | Average Cost |
|--------------|----------------------|-------|----------|--------------|-----------------------|--------------|
| 1 57011 | WHEEL ALIGNMENT - TD | F | 1.00 | 100.00 | 100.00 | 75 |
| 2 57012 | WHEEL BALANCING - OF | F | 5.00 | 15.00 | 75.00 | 10 |
| 3 100010517 | TUBELESS VALVE | 00 | 4.00 | 21.00 | 84.00 | 8 |
| 4 10020001 | 1956515VR F/S F/HAWK | 00 | 4.00 | 800.00 | 3,200.00 | 482 |

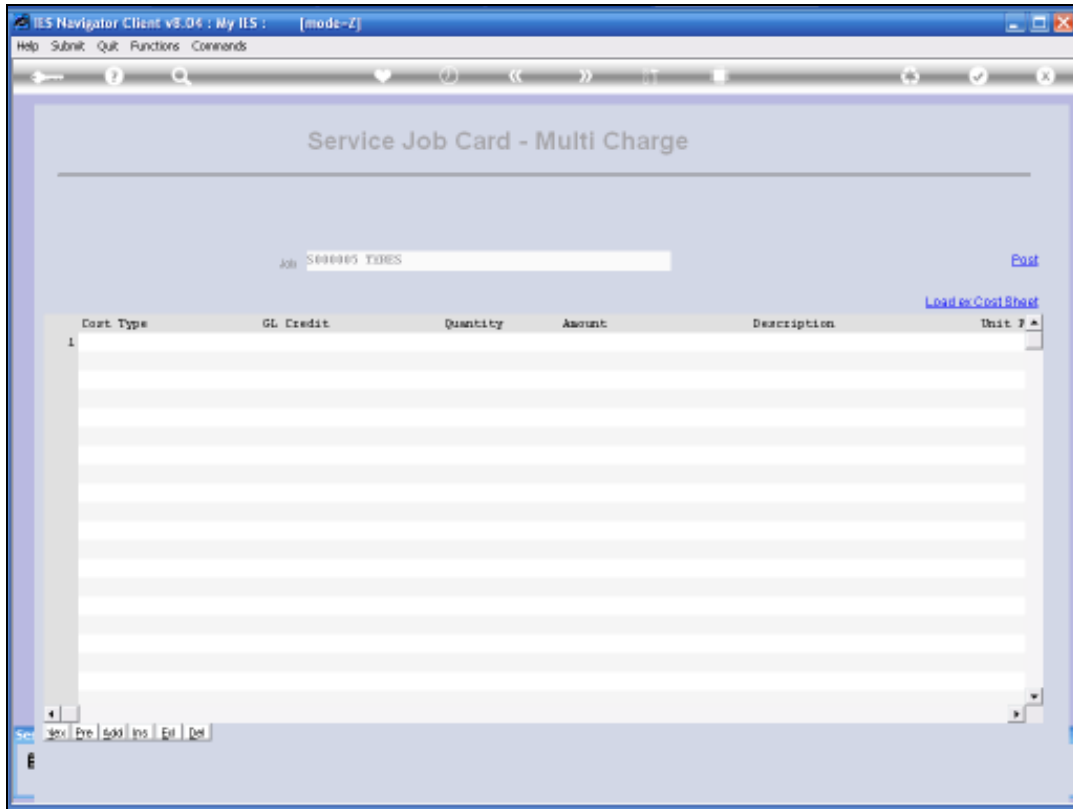
Slide 29
Slide notes:



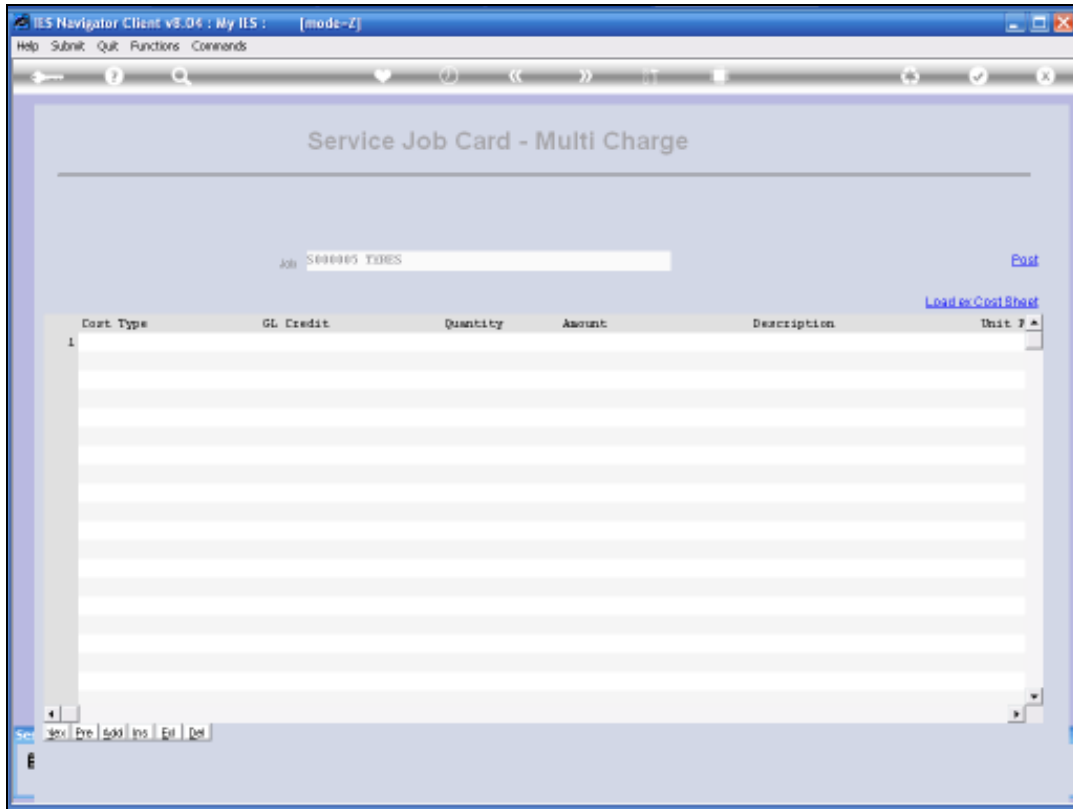
Slide 30
Slide notes:



Slide 31
Slide notes:



Slide 32
Slide notes:



Slide 33
 Slide notes:

We process the Labor Charges automatically from the Cost Sheet.

Service Job Card - Multi Charge

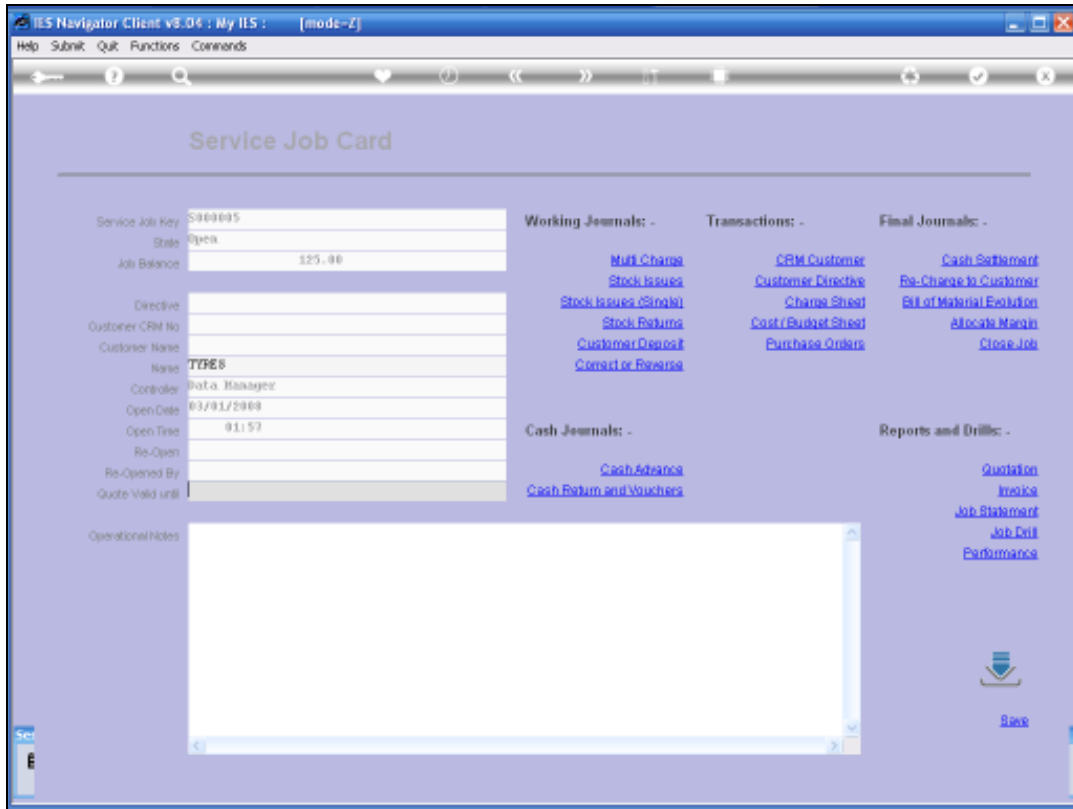
Job: S000905 TOES [Post](#)

[Load Cost Sheet](#)

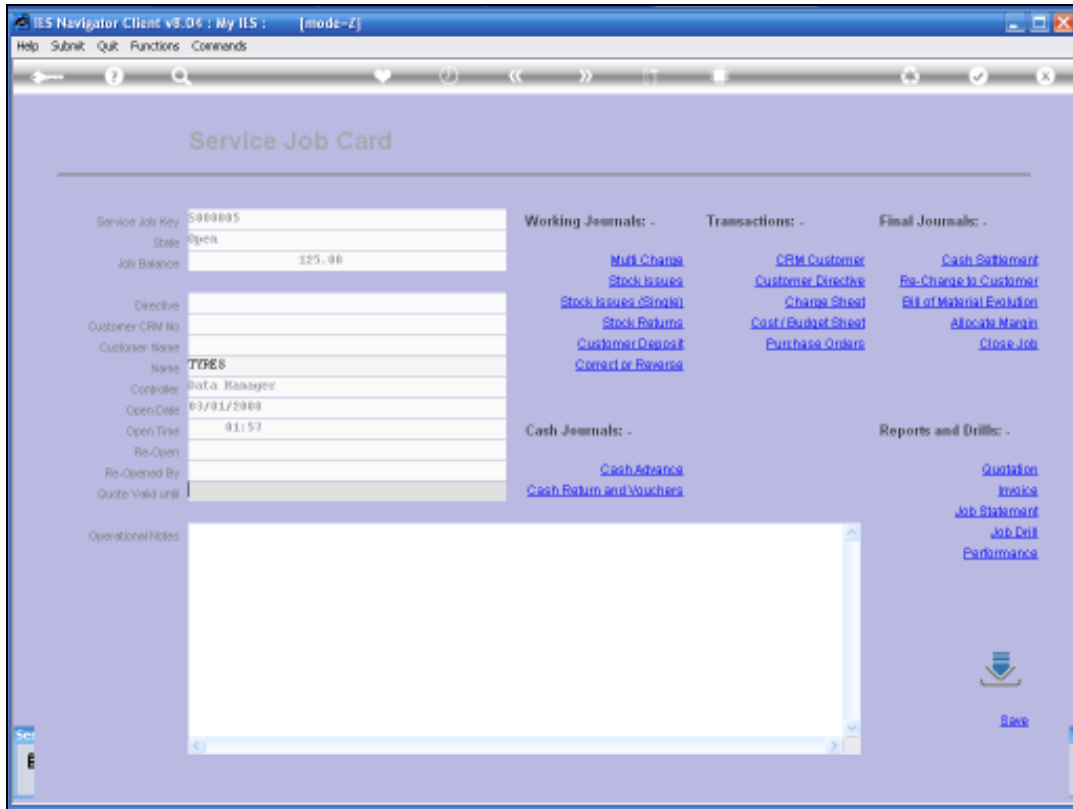
| Cost Type | GL Credit | Quantity | Amount | Description | Unit |
|------------------------|-----------|----------|--------|---------------------------|------|
| 1 LAB3 LABOR - GRADE 3 | 1031 | 1.00 | 75.00 | WHEEL ALIGNMENT - TOE IN | |
| 2 LAB1 LABOR - GRADE 1 | 1031 | 5.00 | 50.00 | WHEEL BALANCING - OFF CAR | |

Sec | Max | Pre | Add | Ins | Edit | Del

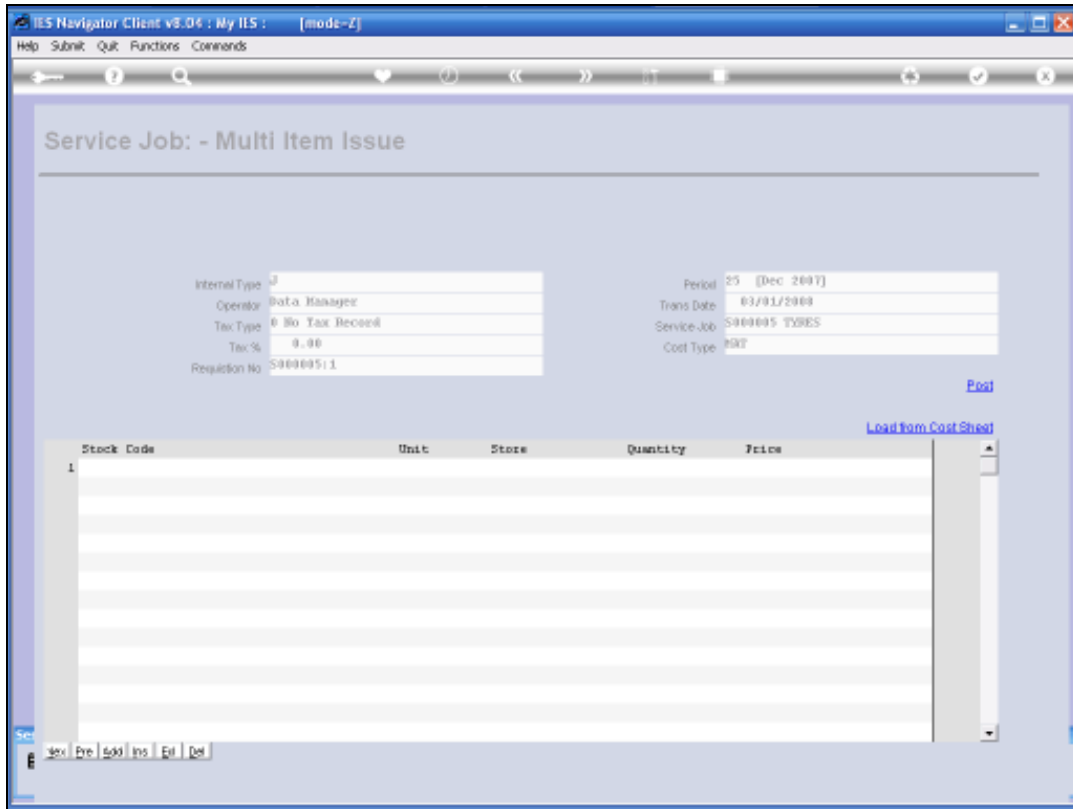
Slide 34
Slide notes:



Slide 35
Slide notes:

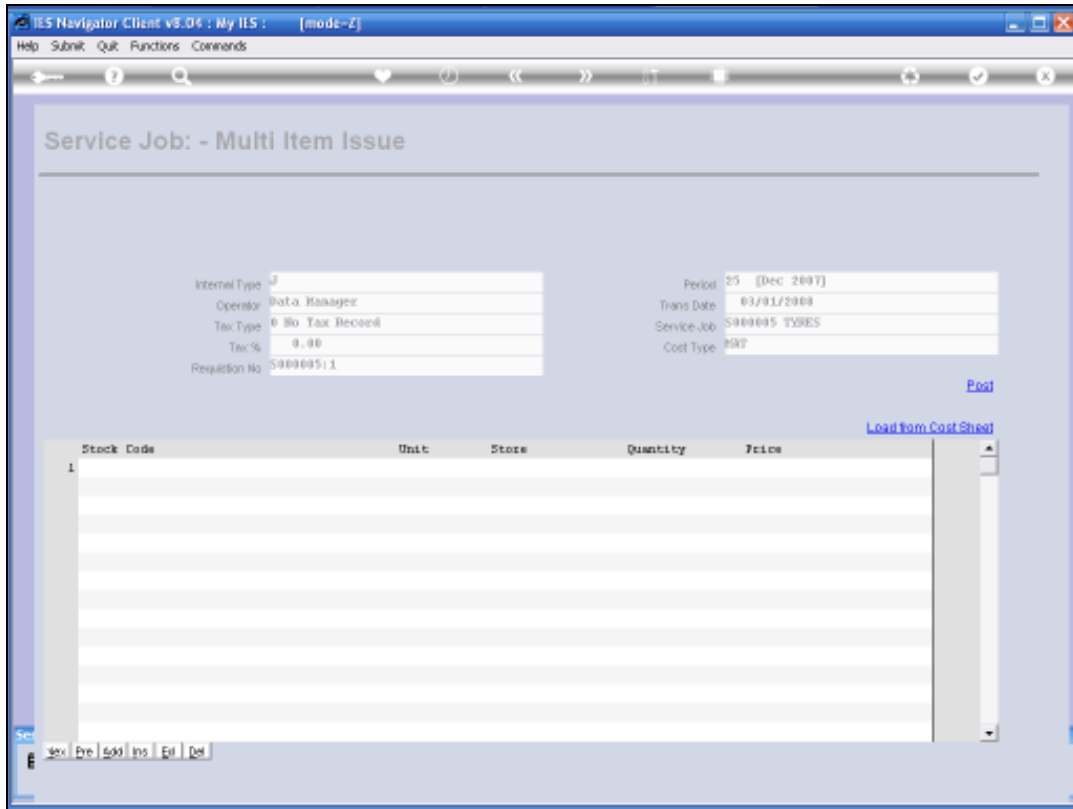


Slide 36
Slide notes:

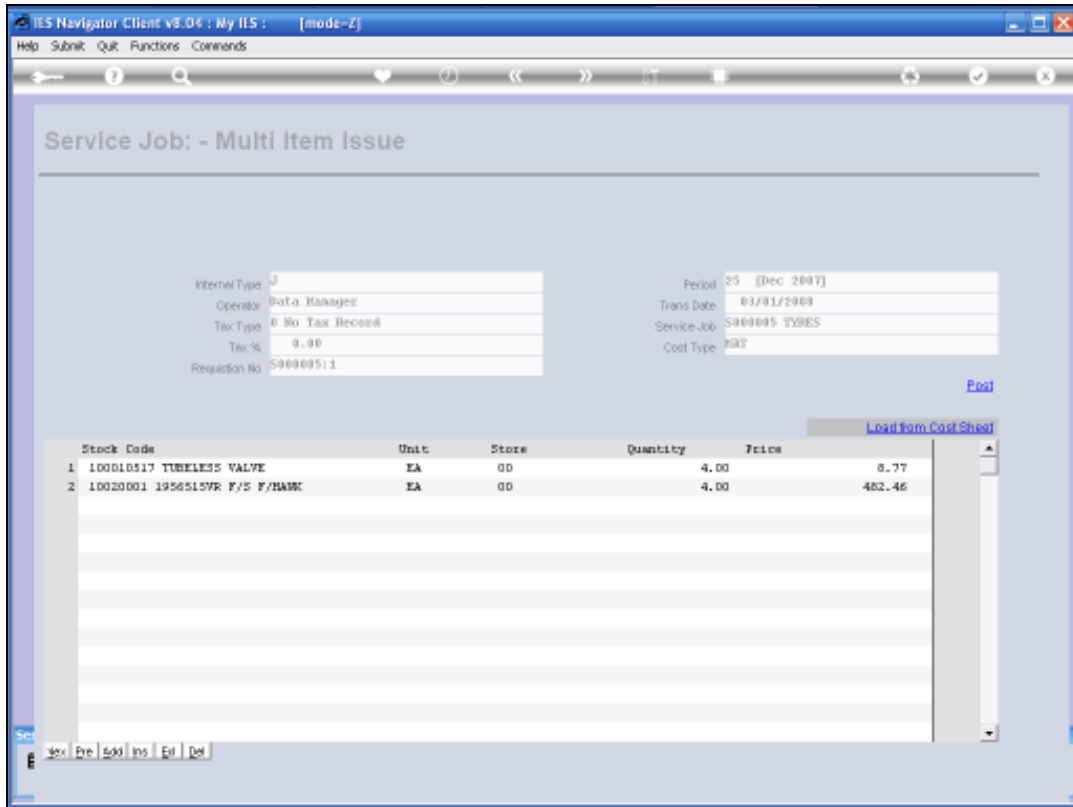


Slide 37
Slide notes:

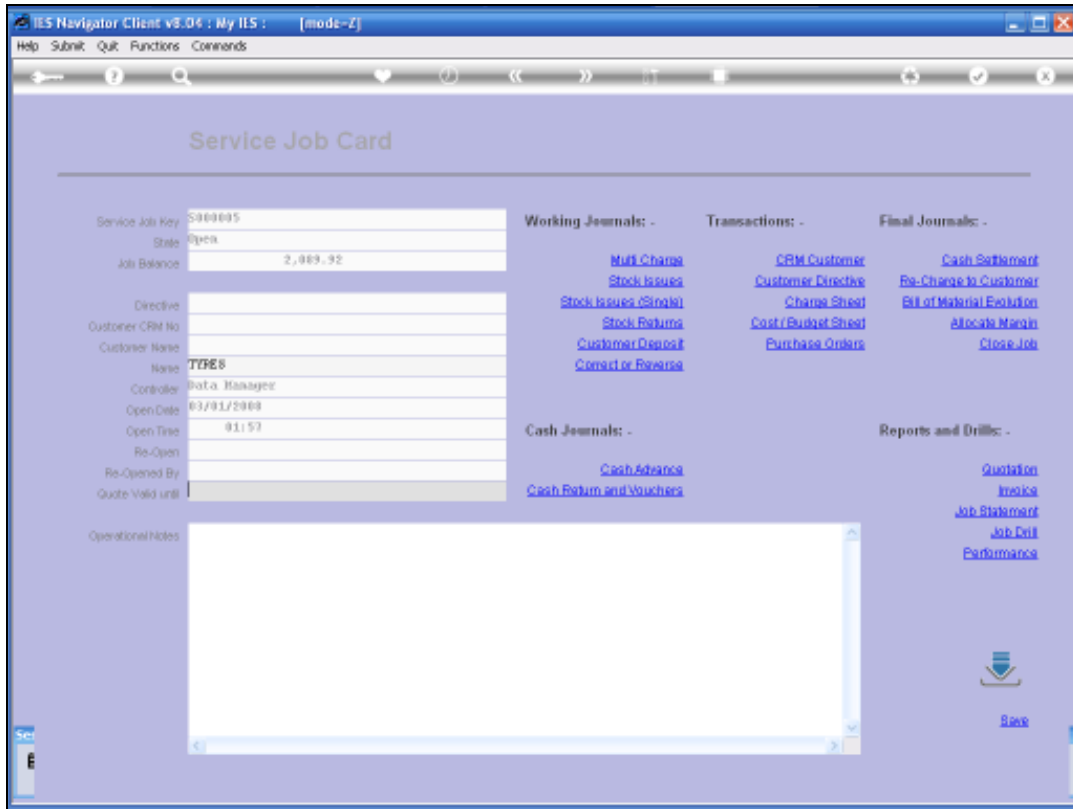
And we Issue the Stock also from the Cost Sheet.



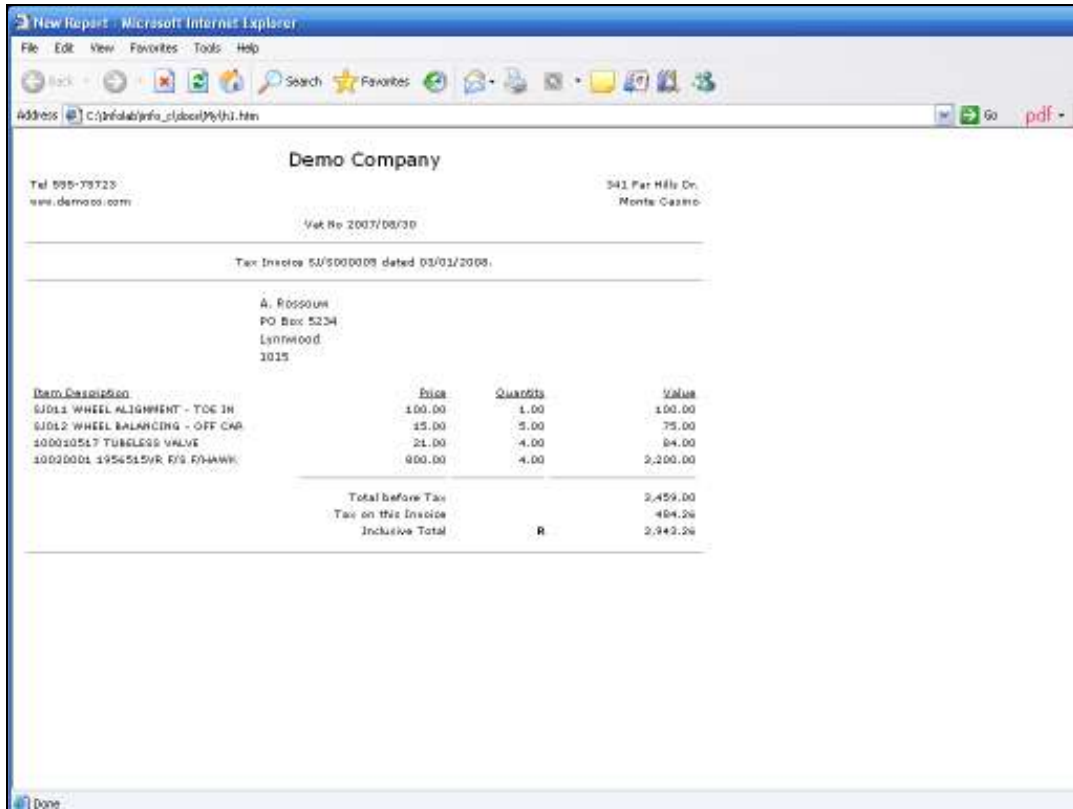
Slide 38
Slide notes:



Slide 39
Slide notes:

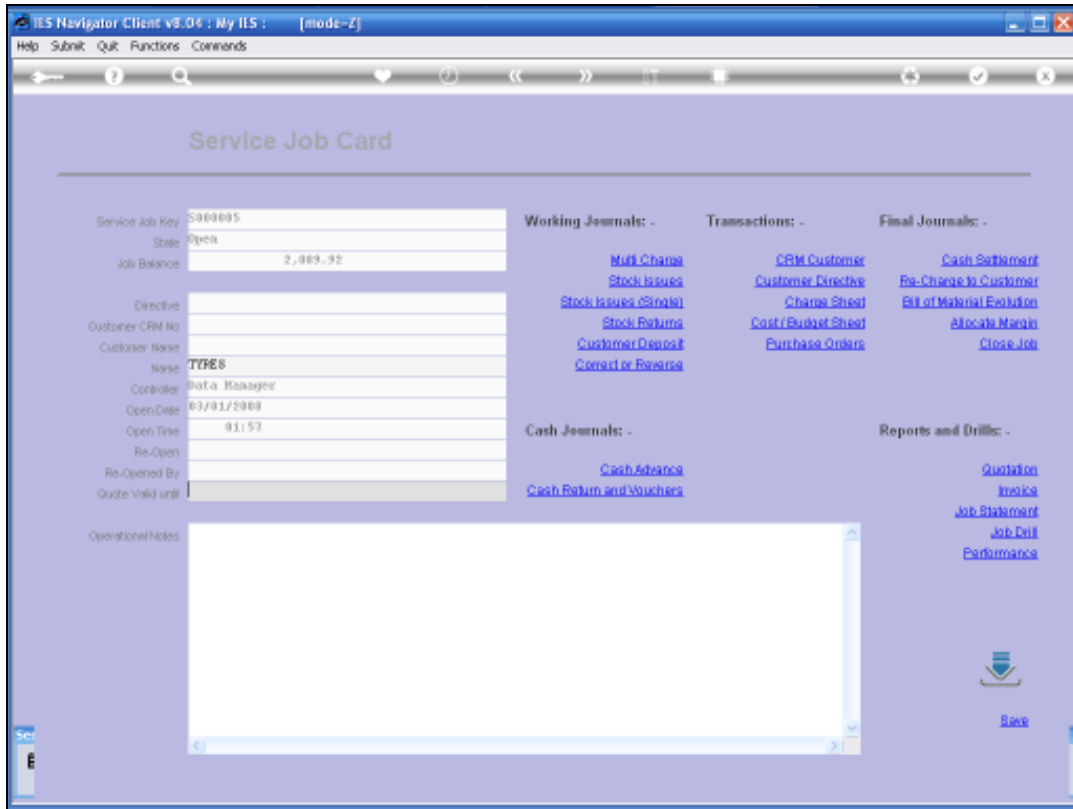


Slide 40
Slide notes:

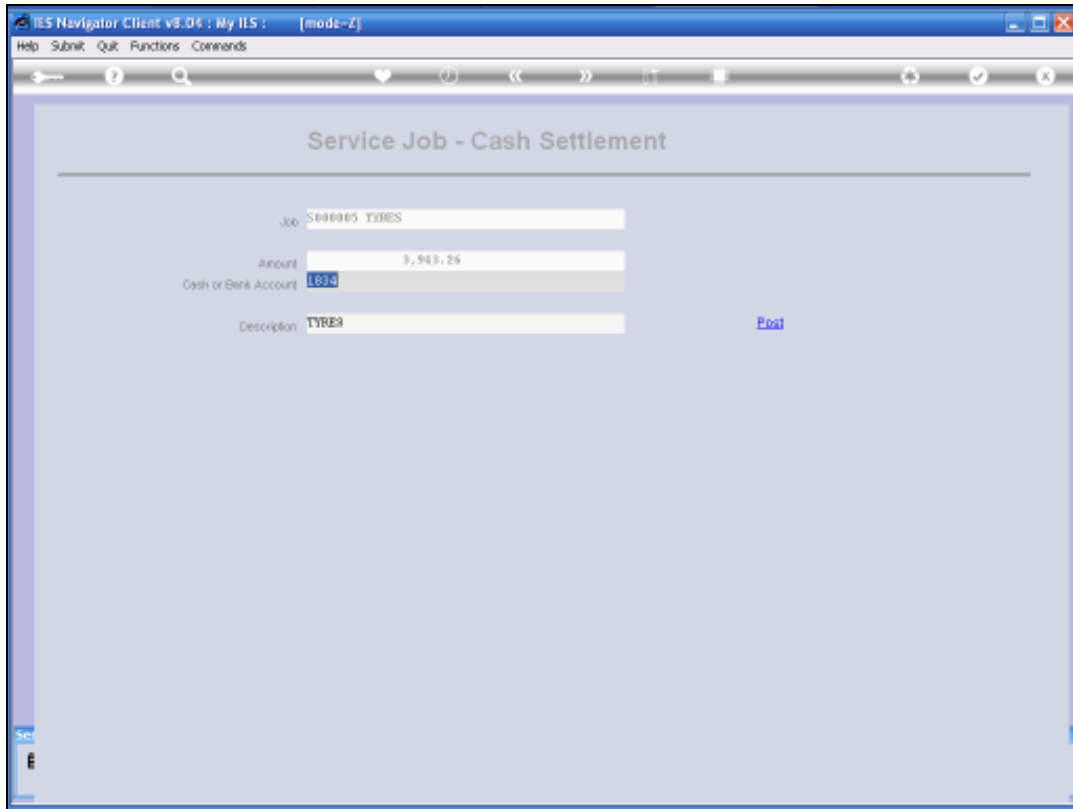


Slide 41
 Slide notes:

We produce an Invoice.

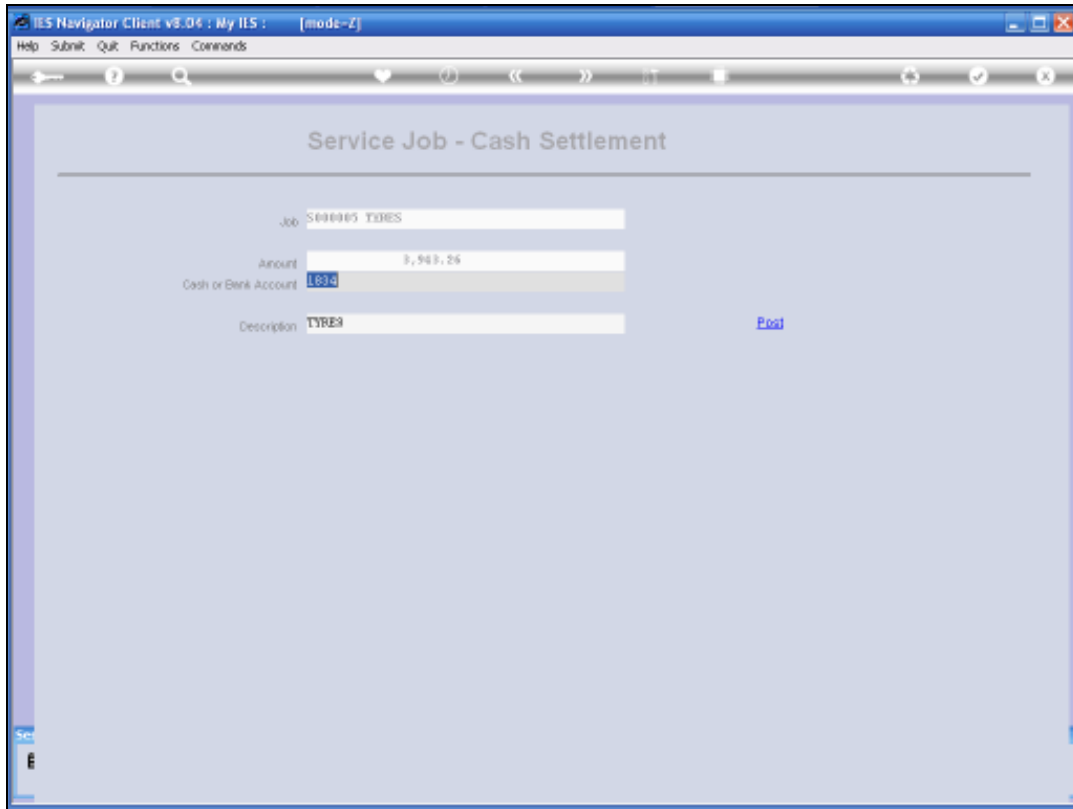


Slide 42
Slide notes:

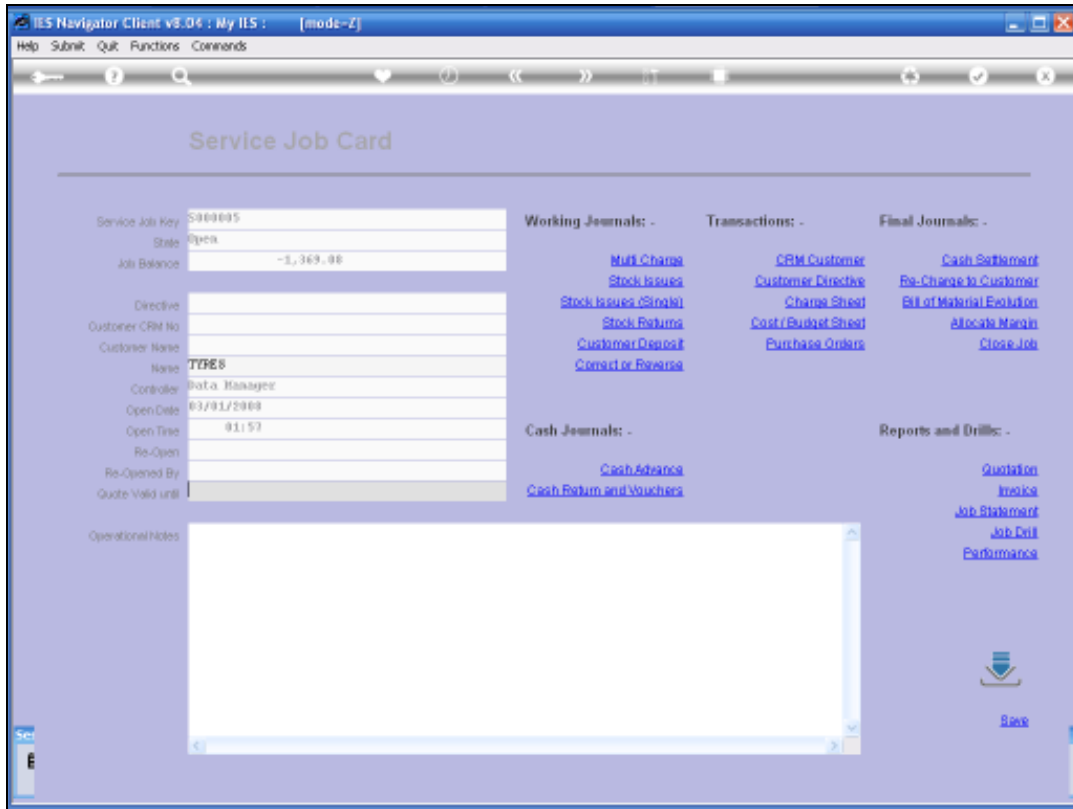


Slide 43
Slide notes:

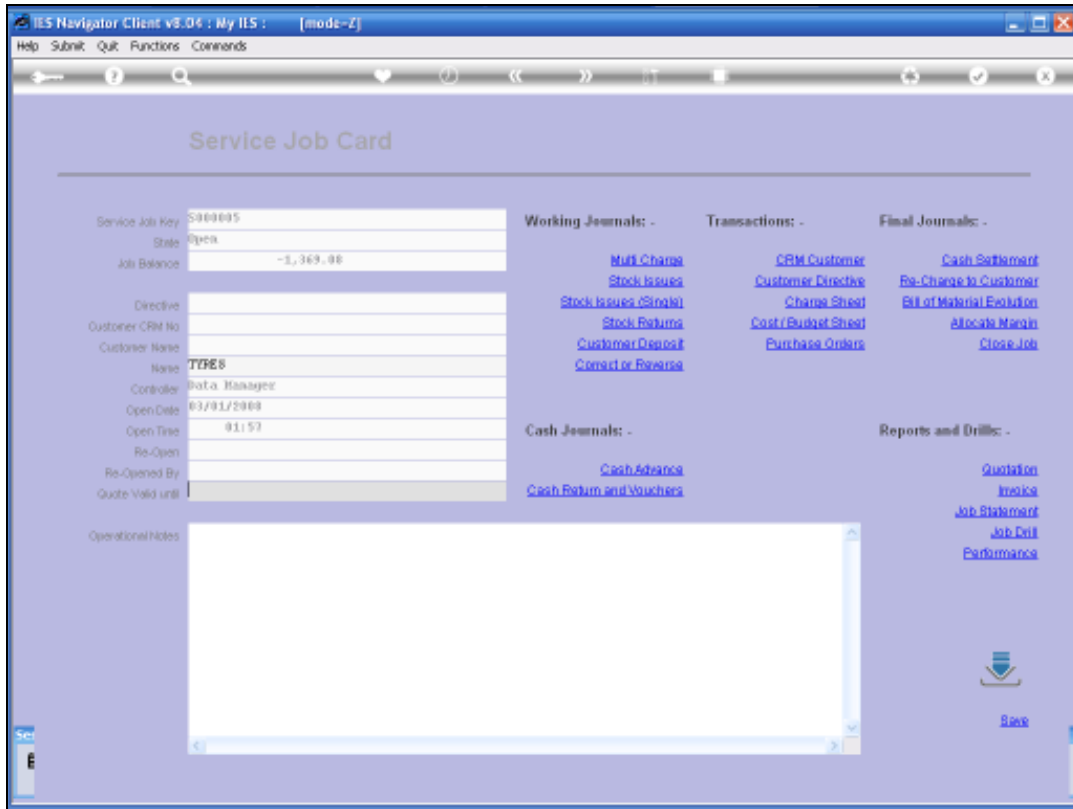
The Customer Settles the Amount.



Slide 44
Slide notes:

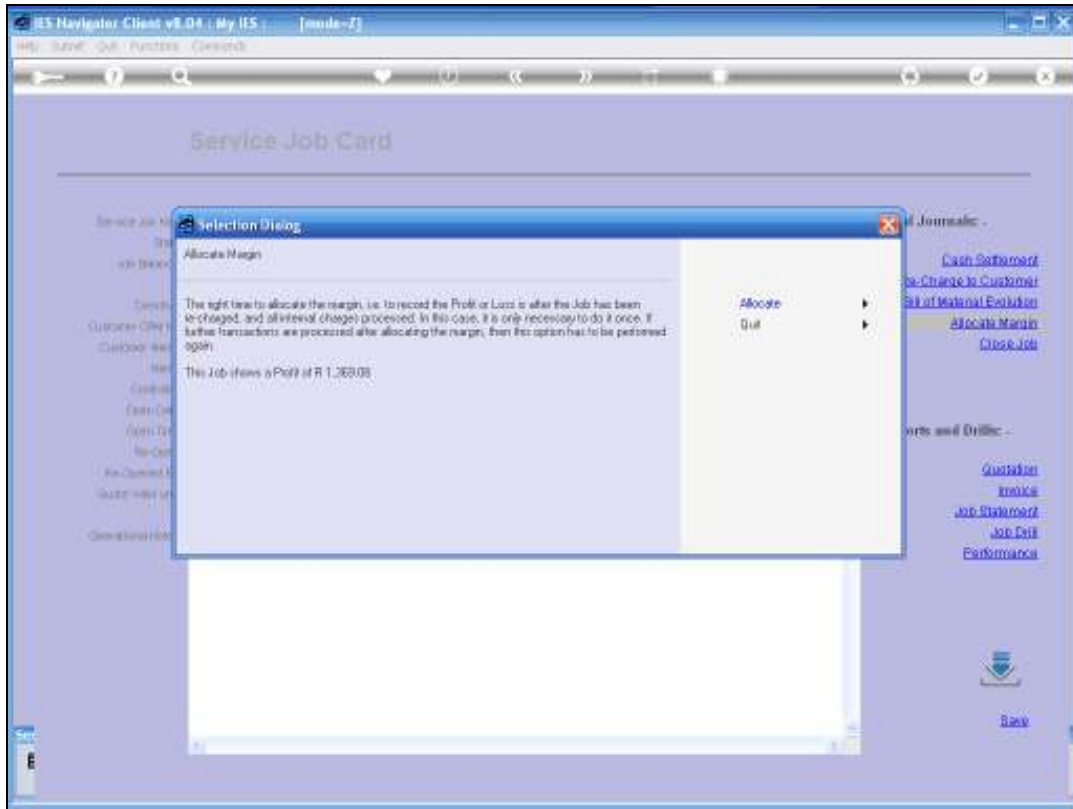


Slide 45
Slide notes:

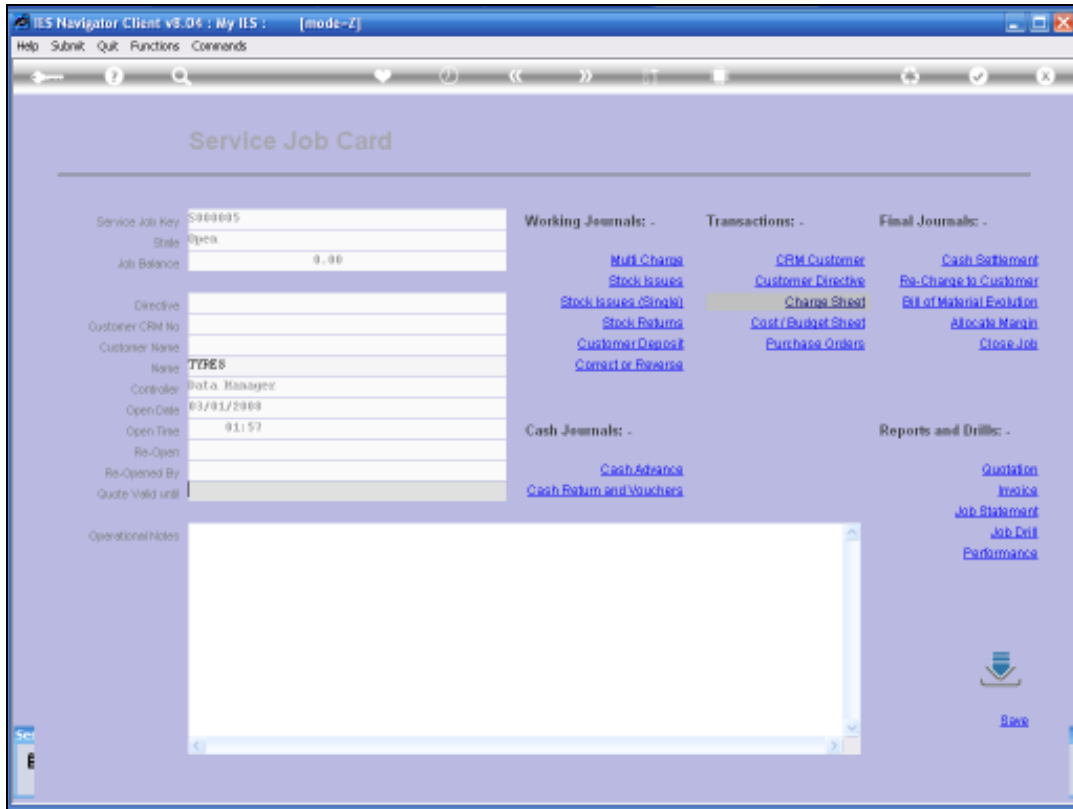


Slide 46
Slide notes:

We allocate the Margin.

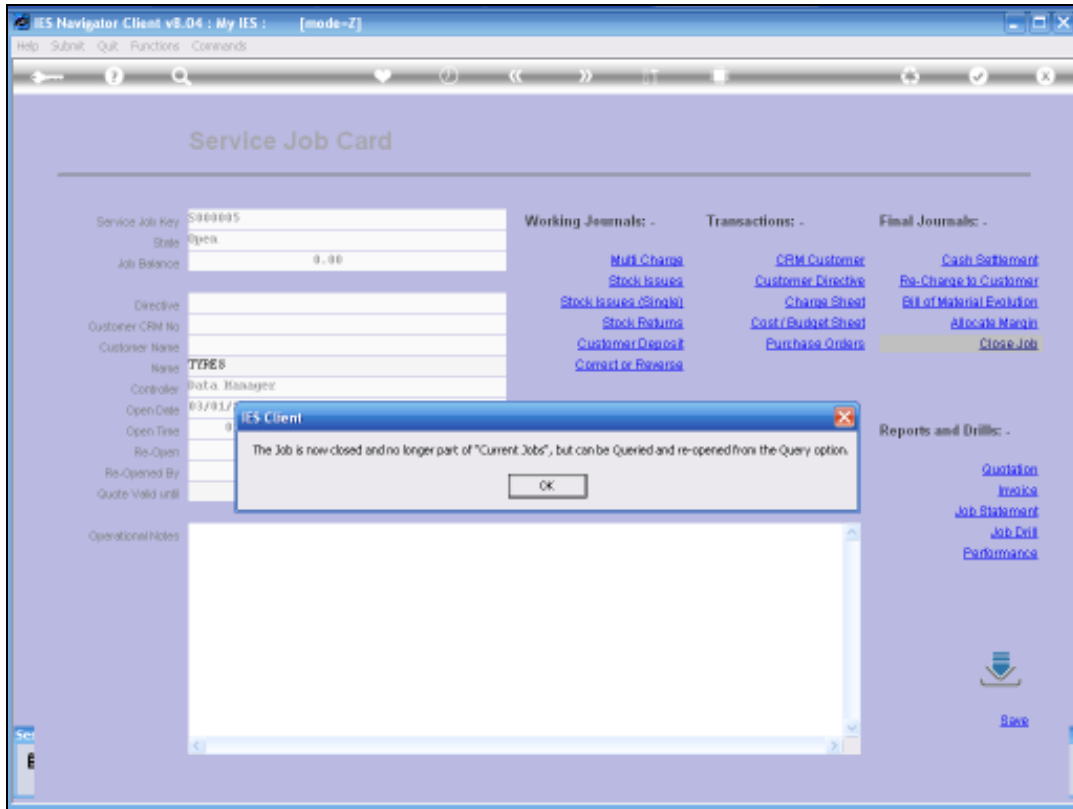


Slide 47
 Slide notes:



Slide 48
Slide notes:

And we close the Job.



Slide 49
Slide notes:

Now it is all done.



Slide 50
Slide notes:



Slide 51
Slide notes: