Dragon2000

Service Training Manual

Contents

Getting Started

Start DragonDMS from either your Desktop shortcut or the Programs Menu.

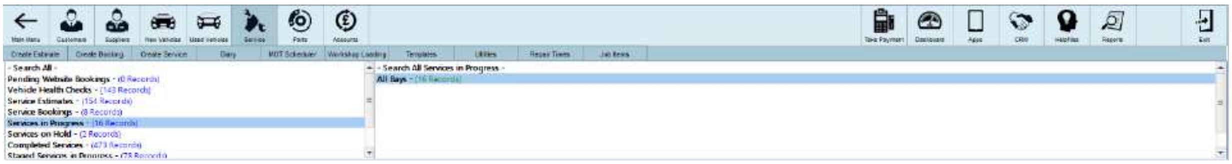
The Login screen will appear with the username of the last user. If the last user was not you, you must enter your username and fill in your password and click Login. You can also press the Enter key if you prefer. All passwords are case sensitive.

Main Menu Overview

Once you have successfully logged in the Main Menu will appear.

You will see all of the DragonDMS Module icons; however you will only be able to access the Modules that have been enabled on your user account.

Service Module



At the top of the Service Menu are the Action Tabs. From left to right they are:

Create Estimate – Add new Service Estimates

Create Booking – Add new Service Bookings

Create Service – Add new Service Jobs

Diary - Visual tool to see your current availability and book future jobs into the workshop

MOT Scheduler – Planning tool to schedule your MOT bookings

Workshop Loading – Visual tool to allocate jobs to specific bays and at specific times

Templates – Common jobs can be setup as templates, which can then be applied to multiple jobs saving time and maintaining consistency

Utilities – Allows Estimates, Bookings and Services in Progress to be deleted

Repair Times - Service Repair Times from Autodata are available for you to receive directly into your DragonDMS. For more information on this, please contact our Sales Team on 01327 222333 (option 2).

Job Items – Allows you to create and manage your Stock Oils, Non Stock Parts, Non Stock Oils and Extras.

The Information Summary appears below the Action Tabs. It groups jobs by the following:

- Pending Website Bookings – only available with a Dragon2000 hosted Website
- Vehicle Health Checks
- Service Estimates
- Service Bookings – this will show in red if you have any pending Job Card Requests
- Services in Progress
- Service on Hold
- Completed Services
- Works Orders

If you use the Staged Job feature you will also see Staged Services in Progress and Stages Complete.

Just click on any of the groups to view a full list of the jobs.

Customising Your Data

Searching

If you want to filter the any of the lists of jobs you can enter your search criteria into the search box. Multiple search criteria can be added, just make sure you have a space between each word.

To remove the search criteria click on the Clear button to the right of the search box.

Sorting

The lists can easily be sorted and ordered to help you organise your jobs. Decide which column you want to sort by, click on the column heading to sort the list Z to A, click on the column heading again to sort A to Z. If the column has numerical data it will sort highest to lowest first and then lowest to highest.

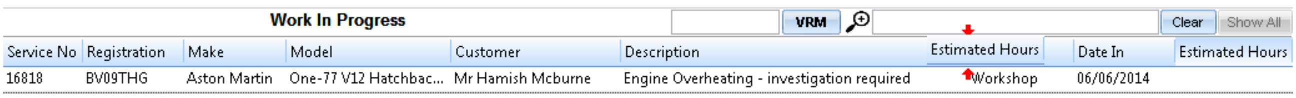
Re-Ordering

The order of the columns can be changed by dragging and dropping the column headings, allowing you to get the data the way you want it.

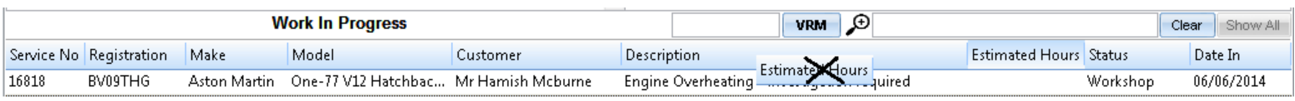
Click on a column heading and drag left or right until you see two red arrows where you want the column to be, and then drop the column heading.

Dragging and Dropping

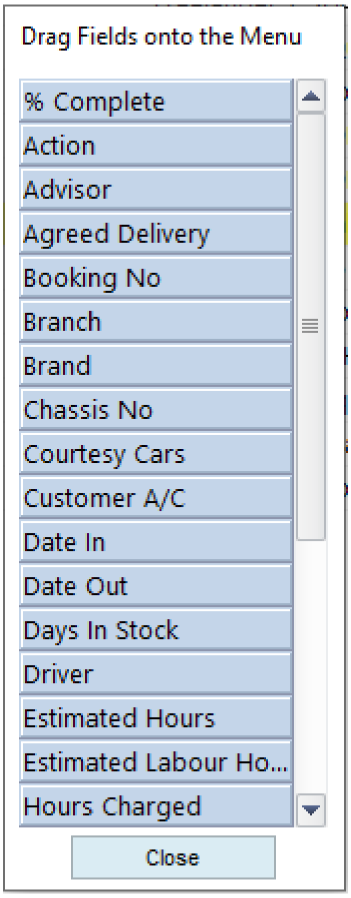
To 'drag' click and hold the left mouse button and at the same time move the mouse. When you get to the position you want you can 'drop' by releasing the left muse button.



If you drag a column heading up or down you will see a black cross, the column of data will be removed when you drop the column heading.



Extra columns of information or columns that have been removed can be added back to the list. Right click on any of the column headings and a list will appear showing the column headings available.



The list of fields available will vary depending on which list you are editing. Drag and drop these column headings to add them back into your lists.

After you have added or removed columns the new list layout will be saved and this layout will be displayed to each of your users when they login.

Custom Fields

Custom fields can be used to log any additional information that you require on the Service Record. You can create up to 20 Custom Fields by going to Settings > Service > Settings > Custom Fields. For each Custom Field, you can either create your own dropdown list of answers or leave it blank for free text entry.

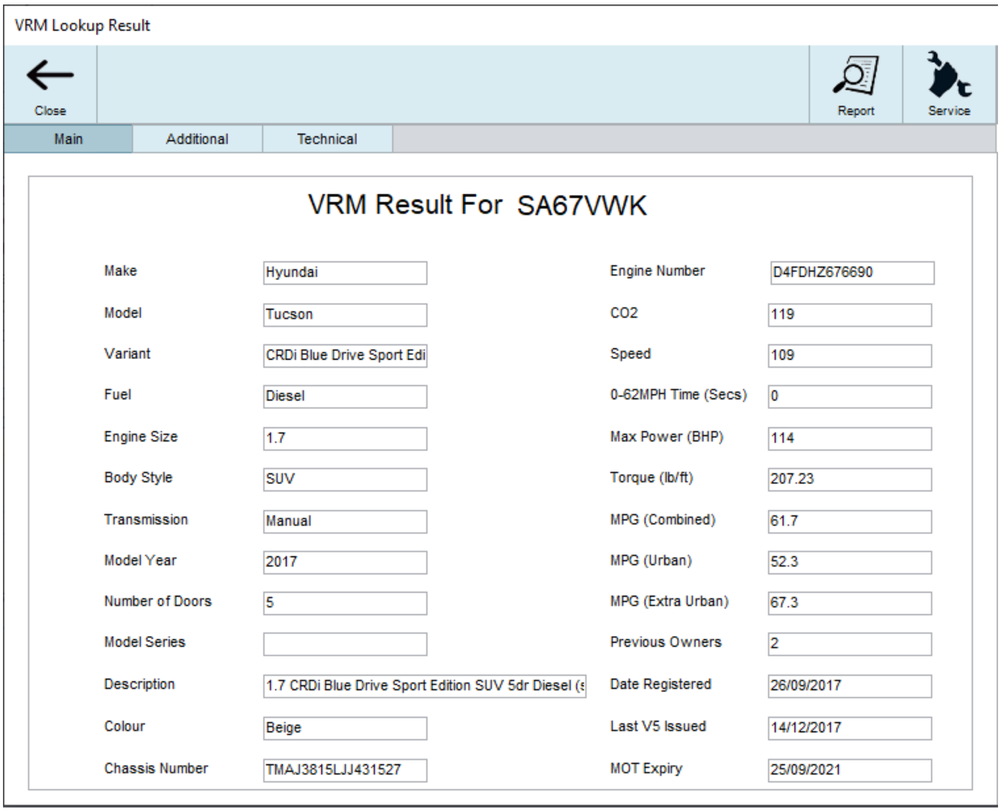
These Custom Fields can then be dragged and dropped to customise your data on the Service screen by right clicking on any of the column headings as per the process above.

Motor Trade Tools within DragonDMS

VRM

The VRM tool can be used to return full vehicle details, enter the vehicle registration into the box to the left of the search field and then click VRM.

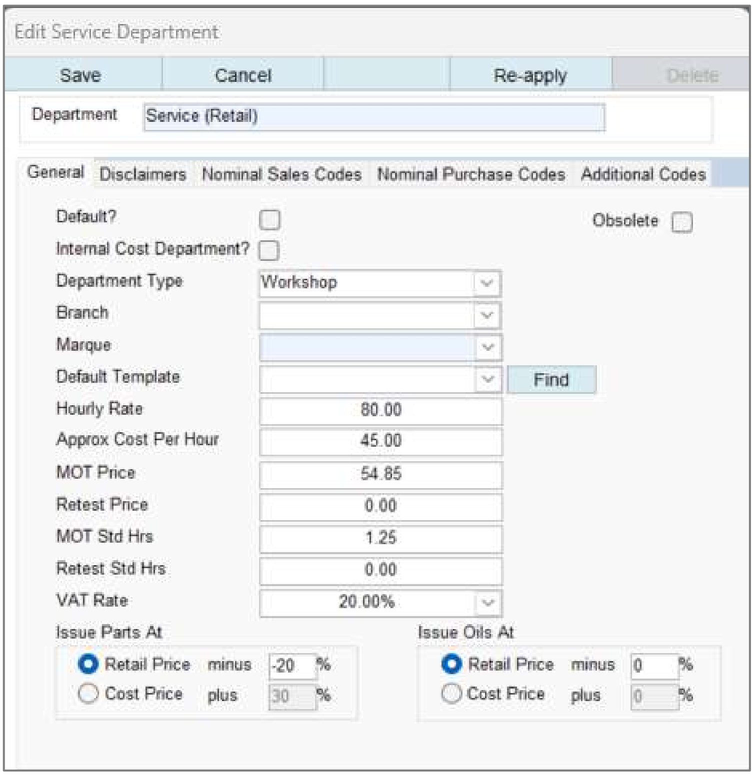
The details of the vehicle will be displayed on screen.



You can print a report of this information, or if you want to create a service record for this vehicle, click on Service, then select either Estimate, Booking or Service.

Service Departments

Service Departments are used to control a number of settings on a Service Job. To view the existing Service Department settings go to Settings > Service > Defaults> Departments. Double click the relevant Service Department to view the details.



Service Departments set the default values for the following:

Hourly Rate – This is the labour hourly rate. When a labour line is created with *'x'* hours charged, DragonDMS will use the hourly rate of the Service Department to calculate the Net Price for the labour line.

Approx. Cost Per Hour – This is the approximate cost per hour of your Technicians. When Technician actual time is added to a labour line, DragonDMS will use this cost per hour to calculate the cost of labour. This figure is used on the Job Analysis to determine service profit.

MOT Price – Enter the standard MOT fee that your charge.

Retest Price – Enter the standard MOT Retest fee that you change.

MOT Std Hrs – If you are an MOT Test Centre, enter the expected time taken to undertake an MOT by your Technicians. This value is used when calculating MOT efficiency.

Retest Std Hrs – If you are an MOT Test Centre, enter the expected time taken to undertake an MOT Retest by your Technicians. This value is used when calculating MOT Retest efficiency.

VAT Code – Internal Services are zero rated by default (code 0) and Retail Services are standard rate by default (code 1).

Parts / Oils Pricing – Set the default pricing structure for **Stock** Part and **Stock** Oils. Choose from Retail Minus x % or Cost Plus x %.

Disclaimers – Edit the standard Invoice, Job Card, Expanded Job Card and Estimate disclaimers.

Nominal Codes – Edit the standard Sales and Purchase Nominal Codes.

Obsolete – For any Service Departments that are no longer in use, they are can be marked as Obsolete. The department will still show in your list but will be moved to the bottom and marked as Obsolete. Once marked as Obsolete, the Service Department cannot be selected on a booking or service record.

Creating New Service Departments

Go to Settings > Service > Defaults > Departments and click on the New Department button. Enter a department name and edit all of the other settings as per the previous page.

When you name your Service Department, only use the word INTERNAL in the name if you want to use this new Service Department for vehicles in stock. This is because DragonDMS requires a stock ID for Service Departments with the text INTERNAL in the name.

Goodwill Service Departments

The value of Goodwill Services can be journaled directly to a Rectification Nominal Code in your Sage50 Accounts.

Go to Settings > Service > Defaults and either create a New Service Department, or edit an Existing Service Department. Tick the Internal Cost Department option. This will allow you to select a Rectification Nominal Code on the Nominal Purchase Codes tab.

Printing the invoice on a Goodwill job will display the Customer's details along with a **GOODWILL** reference in red.

A Customer copy can be printed. This will detail all the work undertaken on the vehicle along with a list of parts and oils, but will display no values.

After a Goodwill Service is invoiced and the Sage integration is run, the value of the job will be journaled to the Rectification Nominal Code selected on the service goodwill department.

No	Type	Nominal	Details	Date	Ref	Net	Tax	T/C	Paid	Amount Paid
23	JC	4081	Inv 26841:Job 25142:reg ABC123	12/07/2017	26841	114.50	0.00	T9	Y	114.50
22	JC	4071	Inv 26841:Job 25142:reg ABC123	12/07/2017	26841	30.75	0.00	T9	Y	30.75
21	JC	1003	Inv 26841:Job 25142:reg ABC123	12/07/2017	26841	145.25	0.00	T9	Y	145.25
20	JD	5310	Inv 26841:Job 25142:reg ABC123	12/07/2017	26841	145.25	0.00	T9	Y	145.25
19	JD	4091	Inv 26841:Job 25142:reg ABC123	12/07/2017	26841	145.25	0.00	T9	Y	145.25

Deleting Service Departments

Service Departments can only be deleted if no services have been created that use the Service Department. The name of the Service Department can be edited so you may wish to change the name to DO NOT USE, to stop users selecting this Service Department in the future.

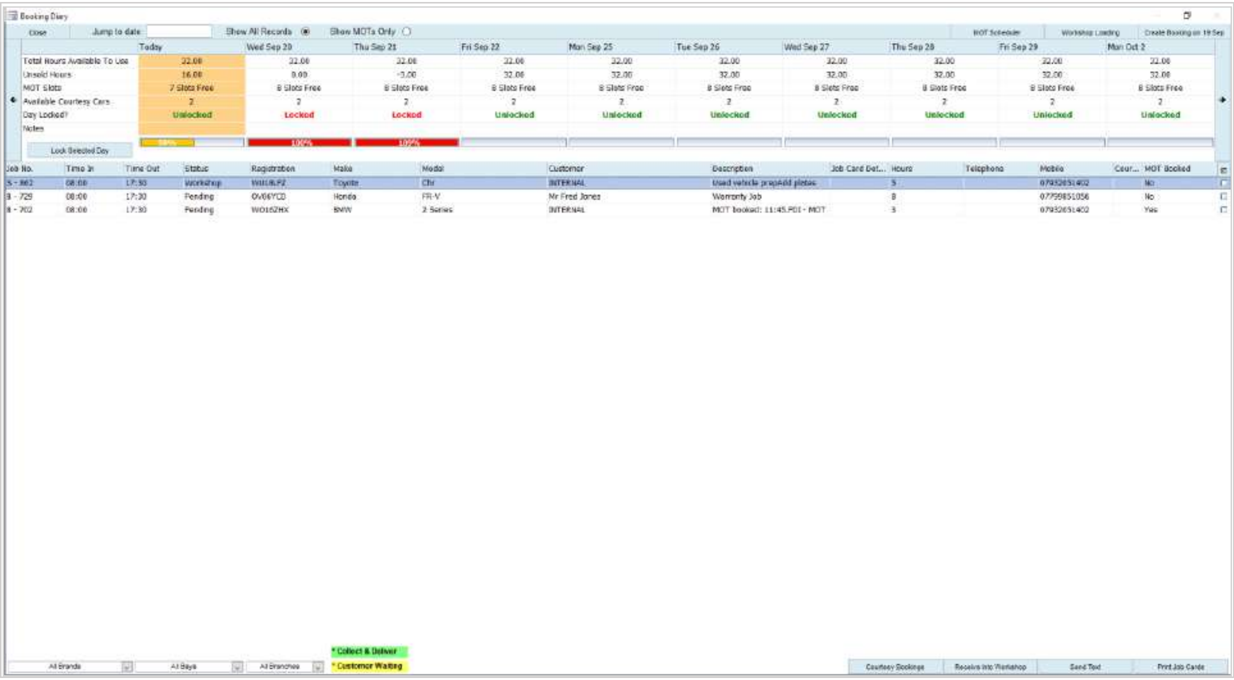
The Booking Diary

Click on the Diary Action Tab to view the Booking Diary. The Booking Diary shows the next '*x*' working days, as determined by you. To edit this go to Settings > Service > Workshop Loading > Workshop Loading Calendar Options.

For each day you can see the Total Hours Available, Unsold Hours and Number of Available Courtesy Cars. Each day has a visual colour bar to show at a glance the percentage availability. The diary is a tool to show availability, it will not stop you adding a booking if the availability is already 100%.

Unsold Hours are calculated by taking the hours available less any hours booked.

The Total Hours Available is calculated from the daily total Technician hours as setup in Settings > Service > Workshop Loading > Service Bays. In addition, any Technician holidays or overtime will be subtracted / added to this figure.



If you use Branches, you will be able to allocate a branch to each service bay created. In settings, you can choose if the Booking Diary is set to show the bookings for All Branches or the Employee Default. This will allow you to control which users can access the booking diary for each branch. To set your company default go to Settings > System > Defaults > Service Diary.

Navigating the Diary

You can use the scrollbar below the diary to move through the dates. The left and right arrow buttons will move the calendar dates forward and back by the pre-set number of days that you specified to show in the Diary in settings. If you want to view a specific date you can enter it into the Jump to date box and press enter.

Locking Dates on the Diary

Locking a date will stop any further bookings from being taken on these dates. This feature is often used to block off public holidays, or to lock dates that have existing bookings to prevent further bookings being taken on that date. The ability to lock and unlock dates on the booking diary is a user permission.

Sending Bulk Booking Text Reminders

You can send a pre-set text message to customers who are booked in that have provided you with their mobile phone number. Tick the box to the right of each booking and then click Send Text.

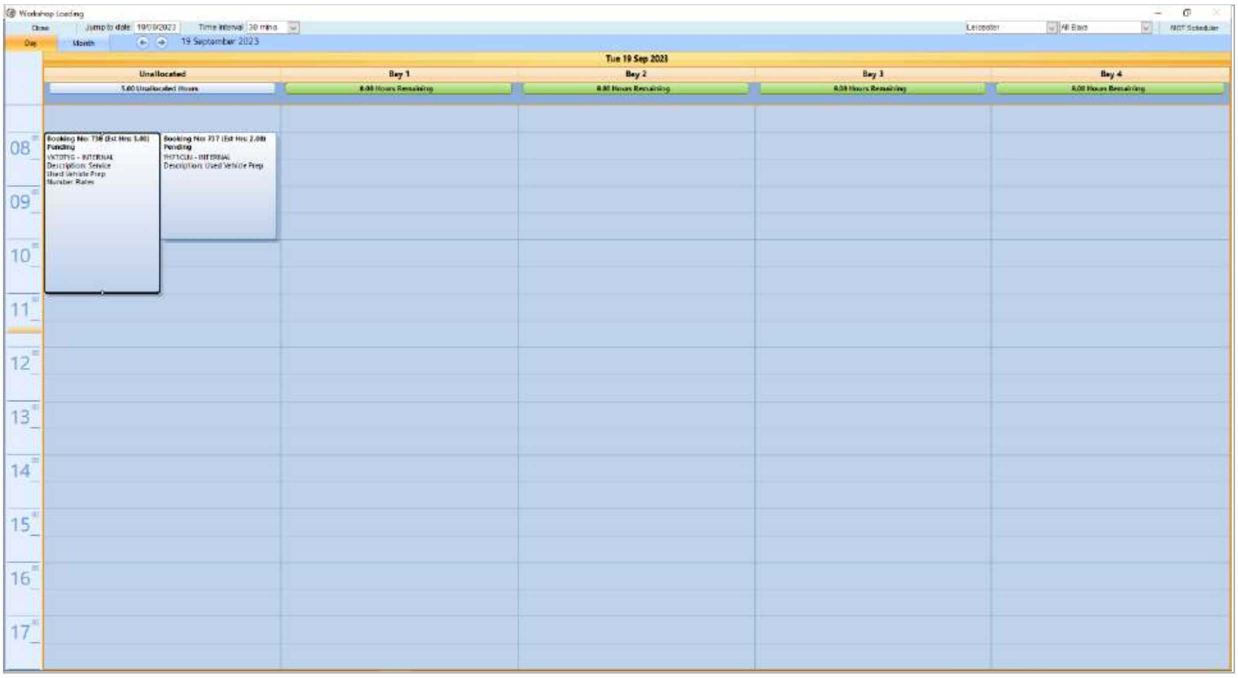
Pre-set text messages can be setup in Settings > System > Text Messaging > Alerts.

Printing Bulk Job Cards

Job cards can be printed off in advance for all of the bookings on a given date. Tick the box to the right of each booking and click Job Card. You will then get a message advising of the number of job cards that will be printed.

Workshop Loading Calendar

The Workshop Loading calendar is an alternative tool and is designed to be used by the Service Manager to schedule Service Jobs to different service bays. All bookings created that have not been allocated to a bay will show in the Unallocated column.



Jobs can be dragged from the Unallocated column into the relevant bay and moved from bay to bay. Adding jobs to a bay will update the hours remaining for that bay. The hours available is colour coded from green to orange to red.

Colour Coding Jobs

Jobs are colour coded based on the service status of the job. Service Statuses will automatically update when you receive in a booking, clock on and off a job, complete all labour lines and invoice the job.

You can edit the colours assigned to the service status in Settings > Service > Settings > Statuses.

Updating the Calendar

Service bookings and Technicians holiday can be added straight onto Workshop Loading by right clicking on the relevant day and time slot and selecting from the following:

- Create Booking – This will take you to the service booking form where all the details of the booking can be added (see page 13 for more information)
- Create Service – This will add the vehicle straight into the workshop and will skip the booking stage.
- Create Event – Add Technicians holiday, sickness etc to the diary. The hours will be deducted from the available hours for that bay.

Splitting Jobs across Multiple Days

For jobs that require different resources/technicians, you can split the job hours across multiple bays. Right click on the job and select Split. Enter the hours required for each split. Both splits of the job will show in the original bay and can then be dragged and dropped into a different bay. A job can be split multiple times if it is required in multiple bays.

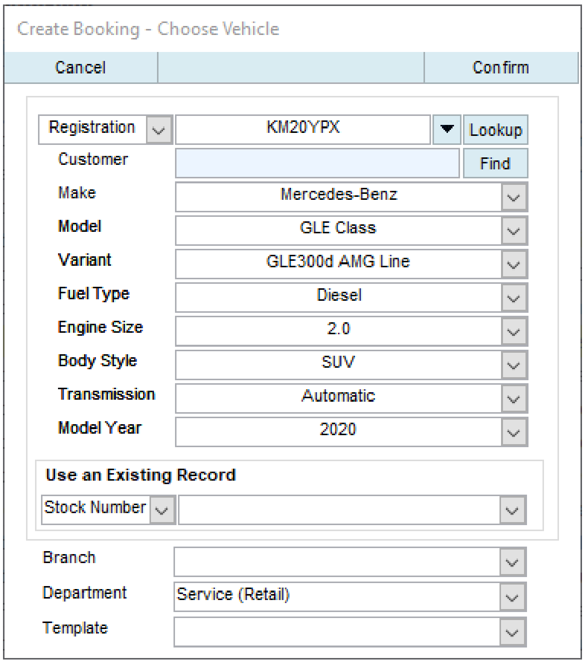
For more information on setting up Workshop Loading, click here: Using Workshop Loading – Knowledgebase (dragon2000.co.uk)

Creating a Service Booking

Creating a New Booking

From the Service Main Menu, click on the Create Booking action tab. Alternatively, if you are in the Diary you can click on the date that you wish to make the booking for, then click Create Booking on xx button in the top right hand corner.

Bookings can be created by entering either a Vehicle Registration or Chassis Number and press enter. If the vehicle has been serviced previously through DragonDMS, then the vehicle details will be populated using the details from the last service record for this vehicle. If the vehicle has not been serviced by you before you can click on the Lookup button to populate the vehicle details.



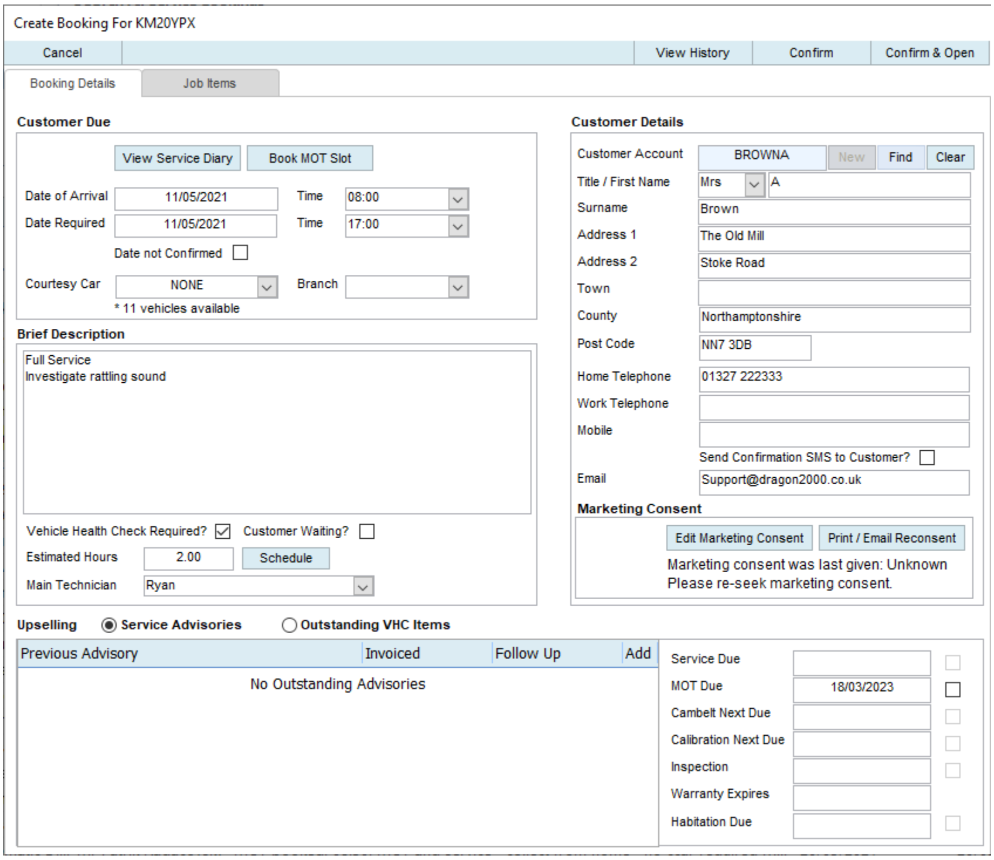
You can also create a booking by searching for an existing Customer's details. Click on the Find button and enter in your search criteria then click Search.

DragonDMS will return any matching Customers and you can see their vehicle details. Double click to select the correct Customer and this will return you to the Create Booking screen. Click Confirm to proceed.

If you use the Vehicle Sales module in DragonDMS, the system will automatically check the registration of the booking against all of the vehicles currently in stock. If a match is found, the booking will be created as an Internal Service. If no match is found, the booking will be created as a Retail Service.

On the Booking Details tab select the relevant dates, enter a brief description of the work, the estimated hours (this will then reduce the available hours in the booking diary for this day) and allocate a Courtesy Car if required. You can also select if a Vehicle Health Check is required by ticking the box.

If you know the Technician that the job will be assigned to the job, they can be selected from the Main Technician drop down list.

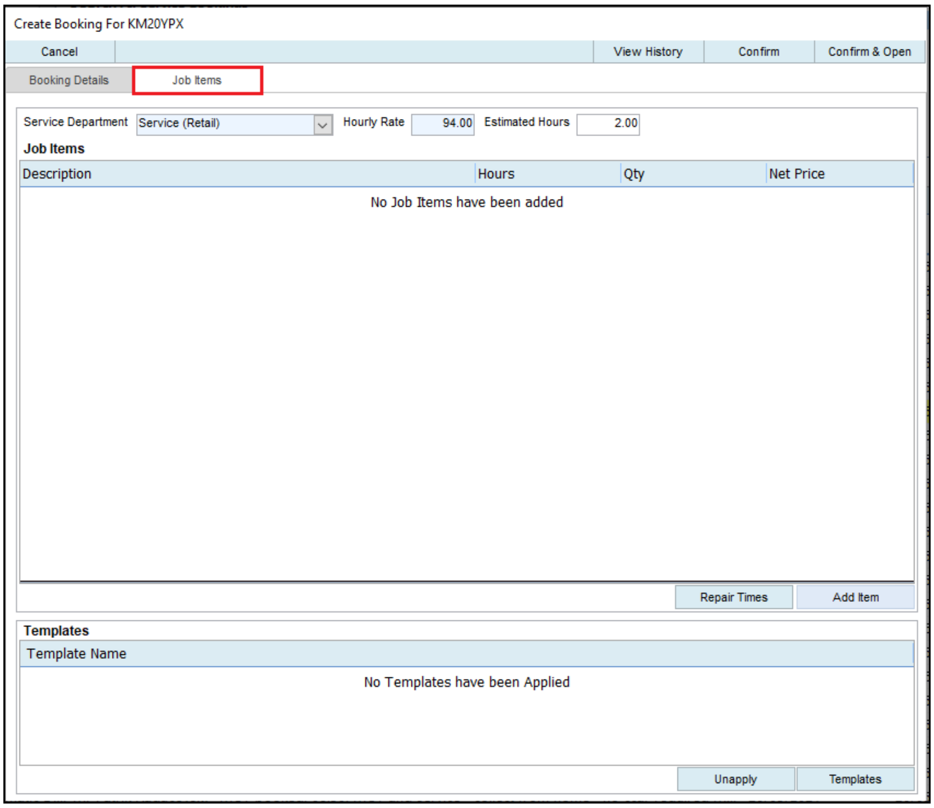


If you have seen the vehicle before and it has any outstanding advisories or outstanding VHC items, these will be shown in the Upselling section at the bottom of the booking form.

The Customer details can also be edited on this screen. It is useful to check contact numbers and any other additional details such as email addresses and mobile numbers that can be used to send future service and MOT reminders. Previously entered follow up dates are displayed at the bottom of the screen.

Adding Job Items to a Booking

If you know the components that need to be added to the job, this can also be done at the booking stage by clicking on the Job Items tab.



Click on Add Item to build up the job and add the relevant Labour, Parts, Oils, Extra's and any Costs. Work your way through the tabs to enter the details.

If you have multiple labour lines, parts or oils to add, click Add Another after each one has been entered. Once all of the items have been entered, click Save.

If you use the Templates features and would like to add a template to the booking, this can be done by clicking the Templates option. Select the relevant template from your list and all elements of the template will be applied to the booking record.

For more information on creating Templates, please refer to the Template section of the manual on Page 46.

Once all of the job items have been added, return to the Booking Details tab. Click Confirm once all of the details have been entered to save the booking or click Confirm and Open to open the Booking Record.

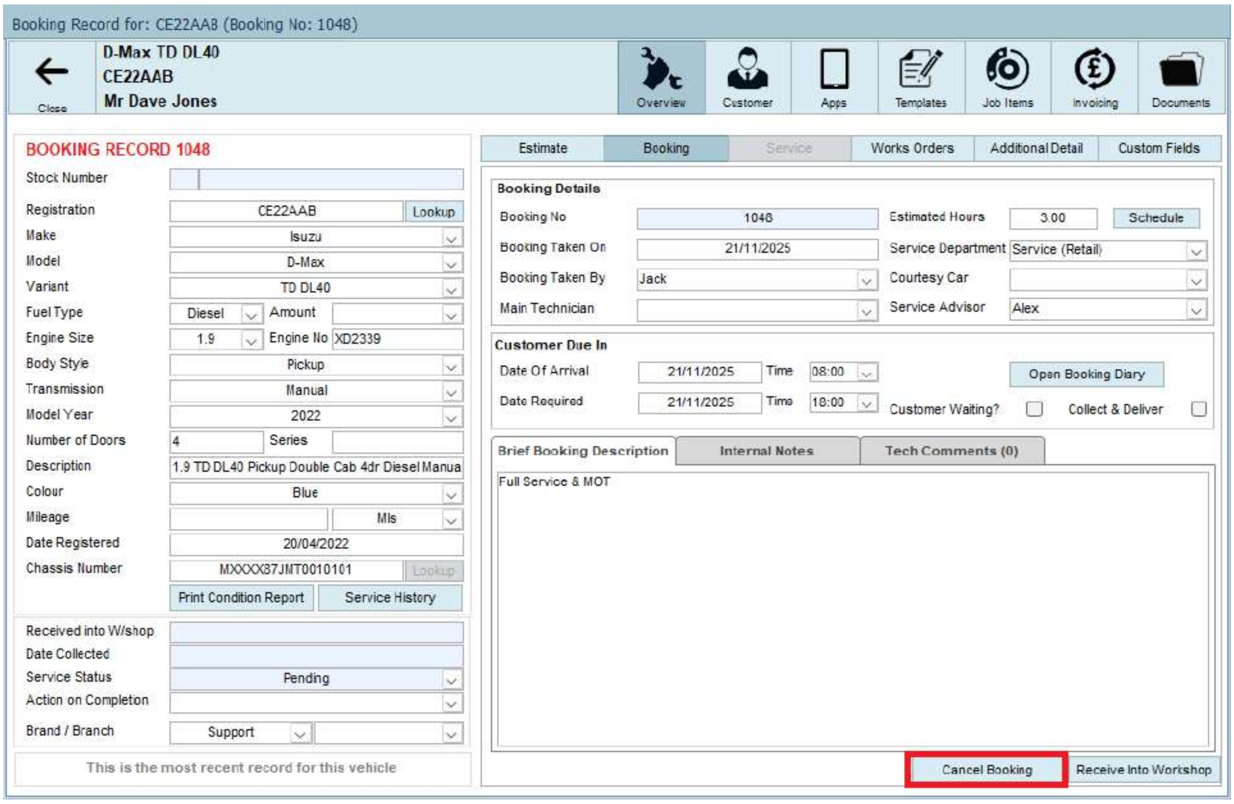
The Repair Times feature allows you to capture repair times for the work required through an integration with Autodata. If you would like more information on this feature, please contact our Sales Team on 01327 222 333 (option 2).

Editing a Booking

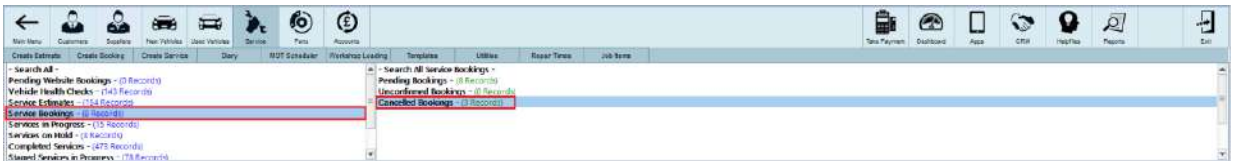
Once a booking has been created none of the fields are locked. This means you can edit any aspect of the booking. When the booking date is changed any courtesy car booking will be removed so double check the availably of courtesy cars on the new booking date and then reallocate a courtesy car to the booking.

Cancelling a Booking

Open the Booking Record and on the Overview> Booking screen click on the Cancel Booking button.



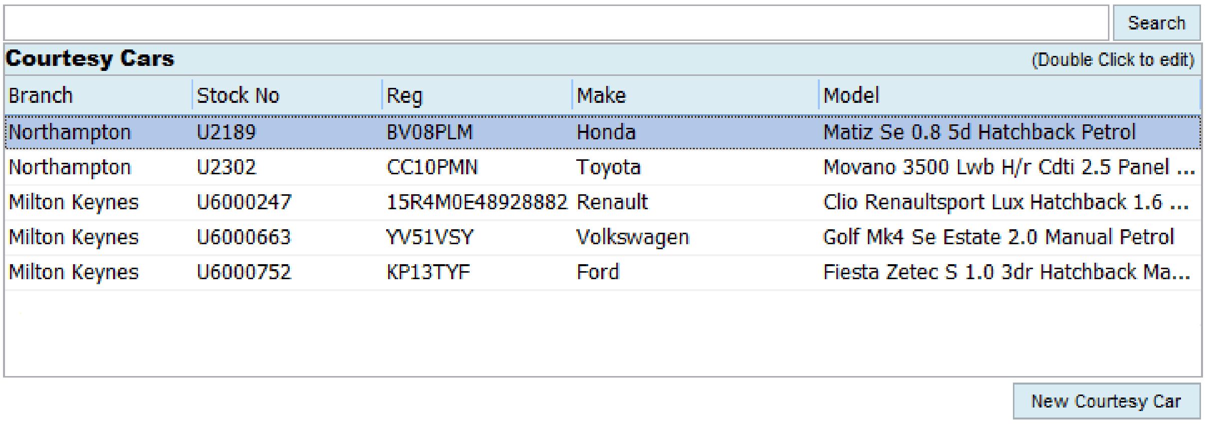
A list of all cancelled bookings can be found from the Service Main Menu. Click on Service Bookings and then on Cancelled Bookings on the right hand side.



By double clicking on a cancelled booking you will have the option to revive it. Click the Revive Booking button at the bottom right of the record.

Courtesy Cars

To add a list of Courtesy Cars that you use, go to Settings > Service > Courtesy Cars.



Branch	Stock No	Reg	Make	Model
Northampton	U2189	BV08PLM	Honda	Matiz Se 0.8 5d Hatchback Petrol
Northampton	U2302	CC10PMN	Toyota	Movano 3500 Lwb H/r Cdti 2.5 Panel ...
Milton Keynes	U6000247	15R4M0E48928882	Renault	Clio Renaultsport Lux Hatchback 1.6 ...
Milton Keynes	U6000663	YV51VSY	Volkswagen	Golf Mk4 Se Estate 2.0 Manual Petrol
Milton Keynes	U6000752	KP13TYF	Ford	Fiesta Zetec S 1.0 3dr Hatchback Ma...

To add a new vehicle, click on the New Courtesy Car button and enter the vehicle details. Each vehicle will be allocated a stock number. If you use Branches, you will also be able to specify which car is available at which branch. This allows you to control the courtesy cars the users have access too.

> Be aware that if you also use the Vehicles Sales module in DragonDMS, these Courtesy Cars will show in the Vehicles in Stock list with a status of Courtesy Car.
>
> If you don't want your courtesy cars to be visible to your sales staff you can remove the employee access right called 'Can View Courtesy Cars'.

Job Card Requests from Sales Department

The Job Card Request feature allows the Sales Department to identify work to be carried out on the vehicle and send the request through to the Service Department. You can have multiple job card requests for a sales vehicle, for example you may have an initial PDI request, followed by any remedial work, or the fitting of extras sold during the sales process.

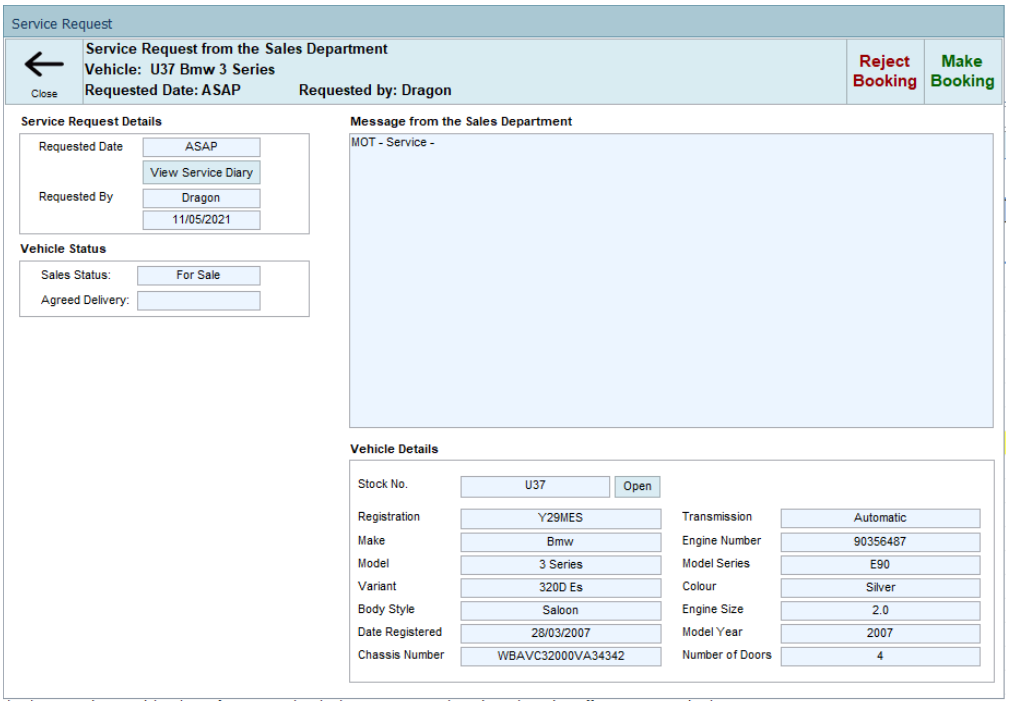
All Job Card Requests that have been sent will show in the Service Bookings menu list with a sub-heading of Job Card Requests from the Sales Department.

The Service Bookings will show in red if there are any Pending Job Card Requests.

Email notifications can also be setup for the Service Department to notify when a Job Card Request has been raised by Sales. To set this up go to Settings > Service > Settings > Record Creation and enter the email address in the Job Card Request Email section.

Double clicking on the request will open the request form that the Sales Department have completed. This will show any information they have included about the work to be done and a requested date for when they would like the work to be done.

The request will also show the currect Sales Status of the vehicle and the Agreed Delivery date if applicable. This will help users to plan the urgency of when the work will need to be completed by.



From within the request there are two options: Reject Booking which would remove the request from the Service Bookings list or Make Booking which would open the booking form to be completed.

At each stage of the job, the Sales Department will be able to see the status to keep track of the progress:

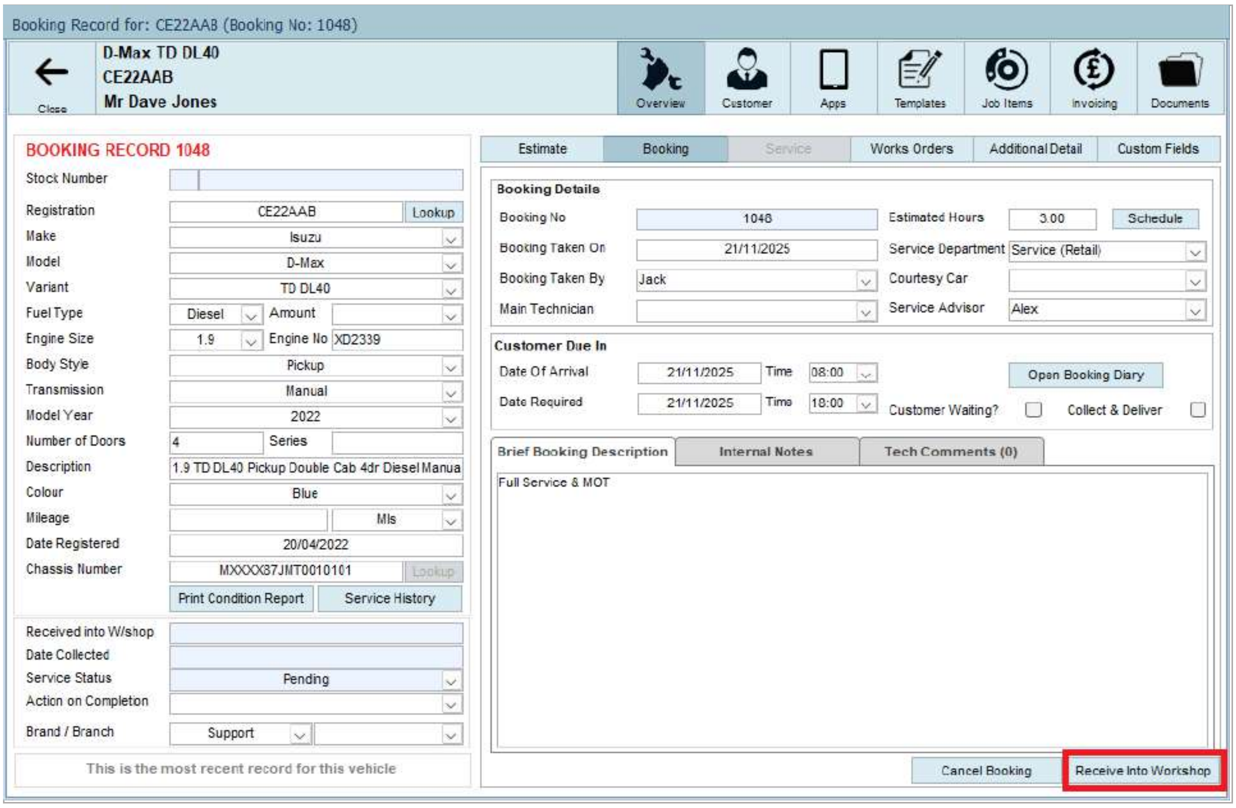
- Rejected - The job has been declined by the service department
- Pending - The request is awaiting approval
- Booked in - The job has been booked in for a future date
- Workshop - The job has been received into the workshop to start work
- Finished - The job has been completed

In Vehicle Sales there is a list of Job Card Requests showing all job card requests and the current Status of the request.

Receiving Bookings into the Workshop

When a booked vehicle arrives at the workshop it needs to be received into the workshop. This action changes the record from a Booking Record to a Service Record. The Service Record will now show in the list of Services in Progress from the Service Main Menu.

We recommend using the Diary to receive your jobs into the workshop as this will give you a list of all the vehicles due in on a given day. Double click on the booking. It will open on the Overview Menu showing the Booking details. Take this opportunity to double check the Customers contact details and update the booking with any additional customer requests or job in the Brief Booking Description, then click on Receive into Workshop.



Brief Booking Description

Be aware that any information that you enter into the Brief Booking Description will show on the Customers printed invoice.

If you wish to add information about the booking for internal use only, then use the Job Card Details. This can be done by clicking the Job Items button and entering the information under Job Card Details.

Printing Job Cards

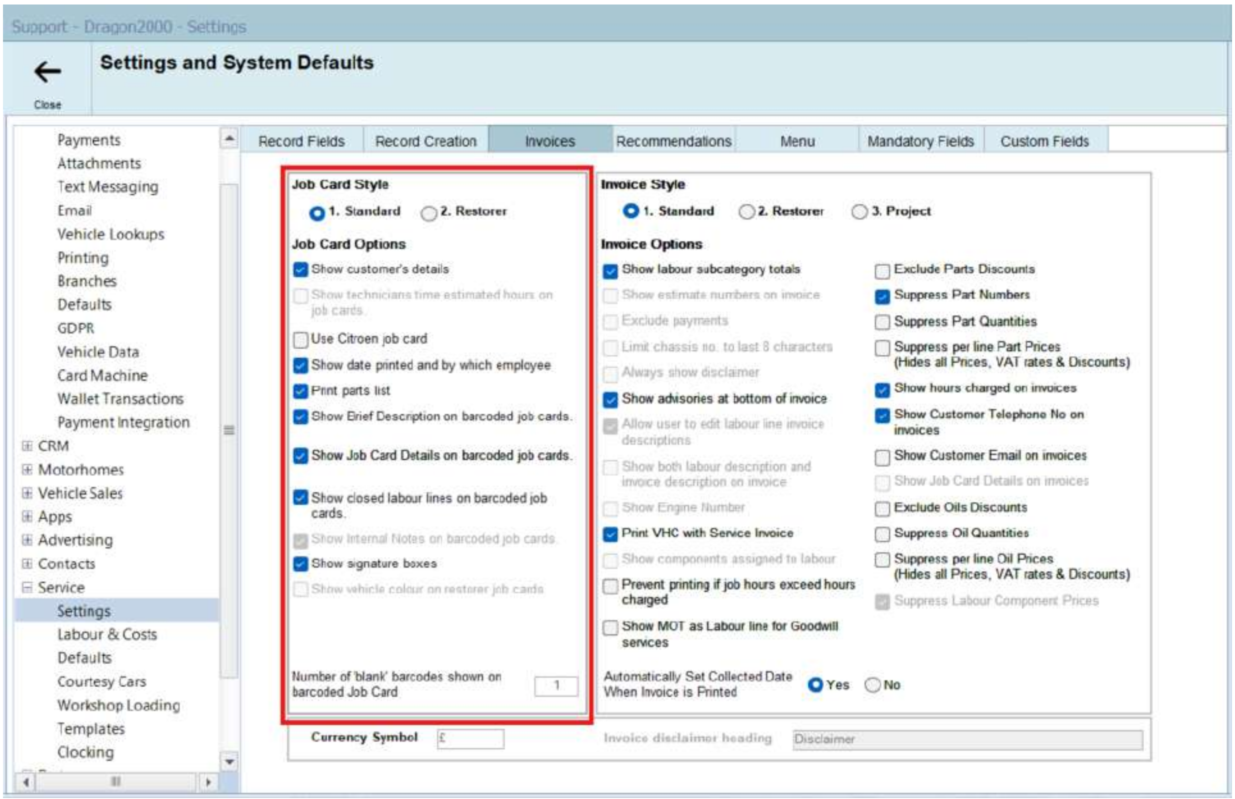
The Technician should use the Job Card as a working document to write up the work undertaken on the vehicle, parts added, oils added, current mileage, actual Technician time taken and where possible next MOT due and Service due dates.

To print Job Cards, open the Service Record, click on the Job Items section and then click on the Job Card tab. Click the Job Card button for a Standard Job Card, or click the Barcoded button for a Job Card that breaks out each labour line.

Once the work has been completed by the Technician the customers invoice can then be created and the service record updated.

Job Card Options

There are a number of options that you can activate on the Job Card. To do this go to Settings > Service > Settings > Invoices.



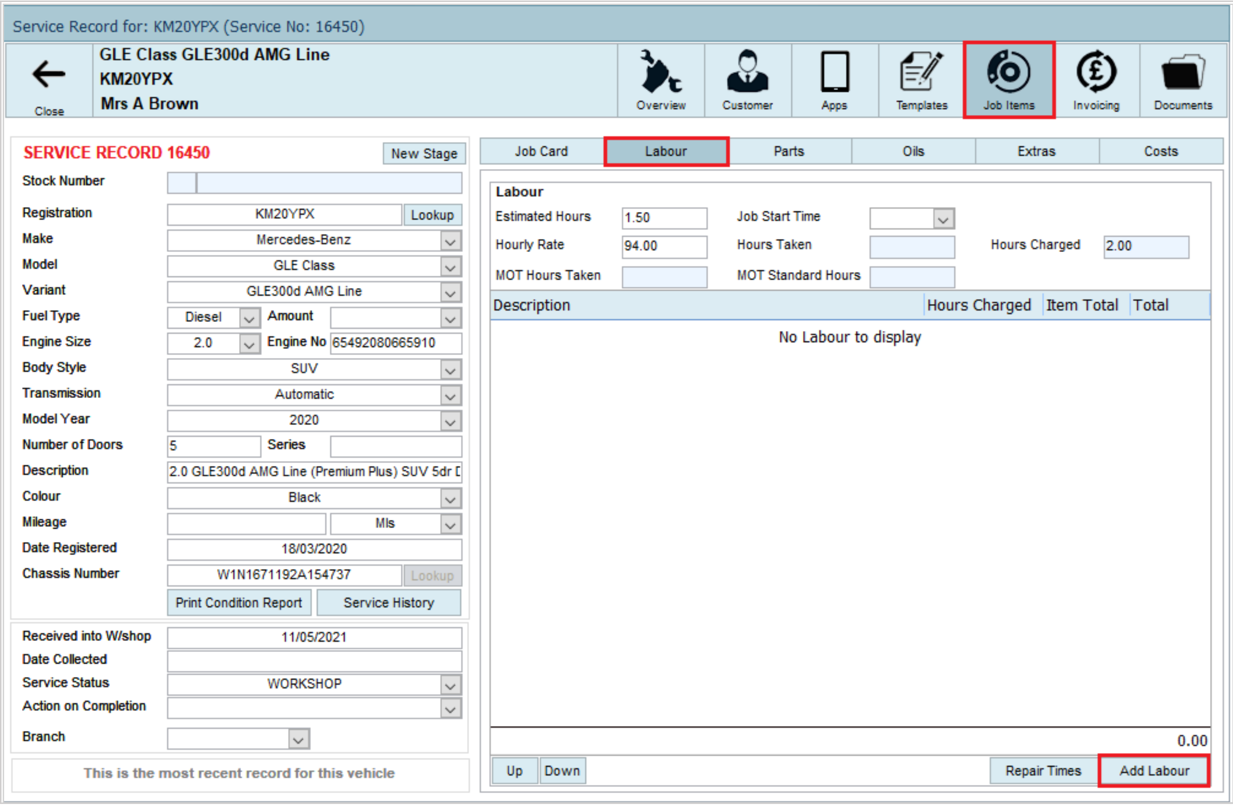
If you use the Barcoded Job Card, you can also set the number of blank barcodes to be shown on the printed job card.

Adding Labour to a Service

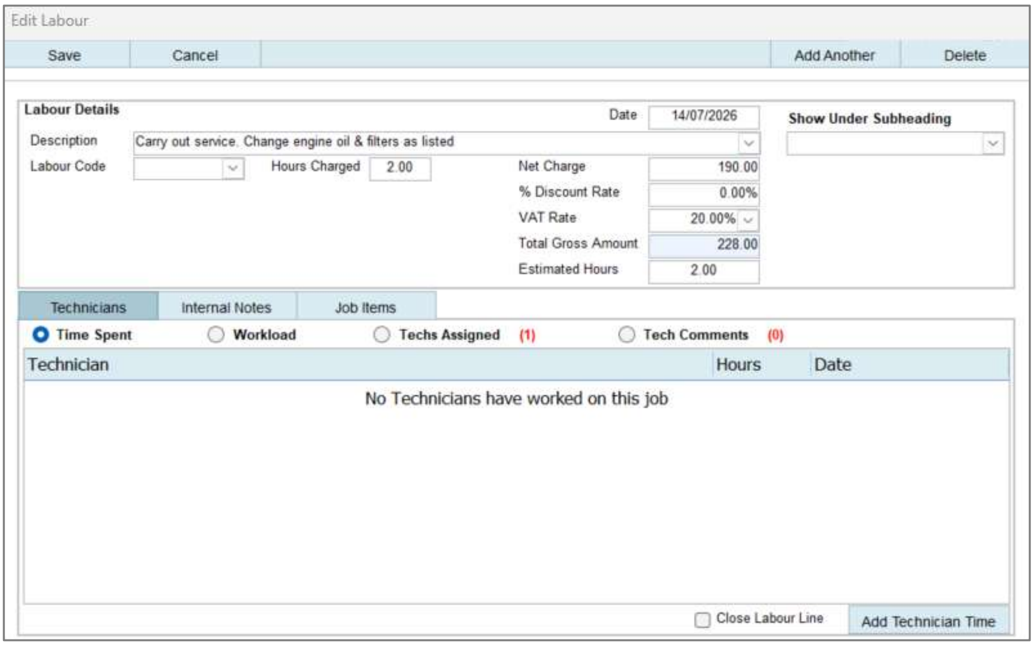
Labour should be used for all work undertaken by your technicians. If work is undertaken by 3rd parties, i.e. bodywork, this should be added to the job as an Extra.

Adding Labour Lines

From the Service Booking Record, click the Job Items tab and then Labour to open the Labour Details screen. Click on Add Labour button.



Start typing the Labour Line description. If the Labour Line has been used before and saved the system will pick this up. If not you can free type the Labour Description.



Enter the hours to be charged and the system will work out the Net charge based on the hourly rate setup for this job (see service departments for how to setup up hourly rates).

Click on Save to Save and Close this form. If you have additional Labour Lines to add you can click on Add Another to save this and create another Labour Line.

When you save a new Labour Line the system will ask if you want to save the details for future use.

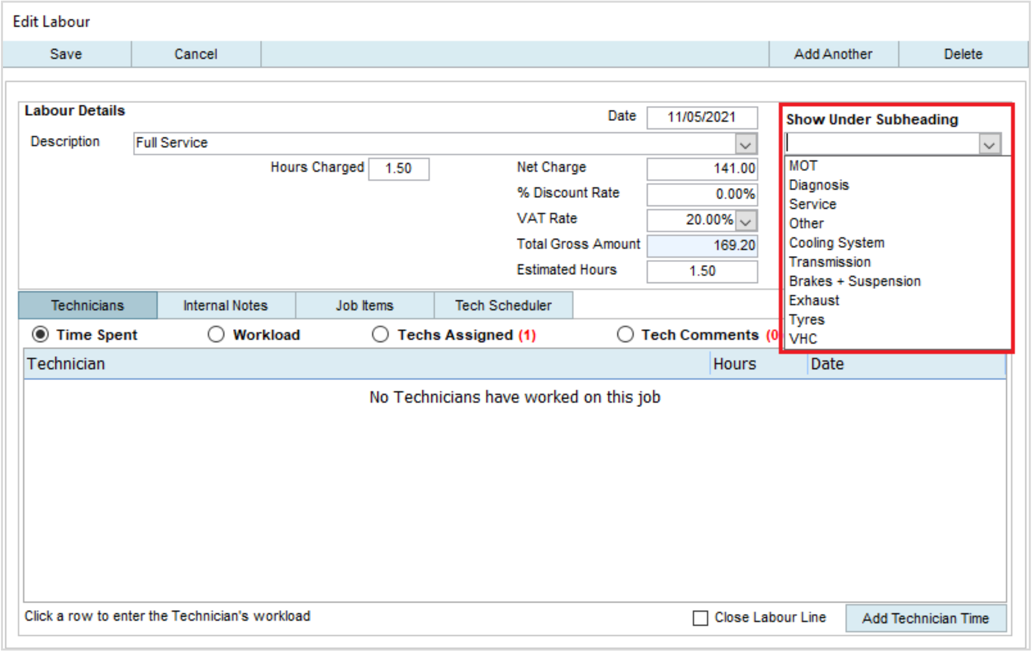
If you wish to create lots of Labour Lines for future use you can do this by going to Settings > Service > Labour & Costs > Labour, click on the New Labour Line button.

To remove a Labour Line double click on the Labour Line and click the Delete button.

Once labour lines have been added, you can reorder the lines using the Up and Down buttons at the bottom of the screen. Select the labour line you wish to move and then use the buttons to reorder the labour line.

Adding Labour Subheadings

Labour lines can be grouped under subheadings such as Mechanical, Bodywork etc. To add a labour line to a subheading just select the relevant subheading (on the right hand side of the form) when setting up the labour line.

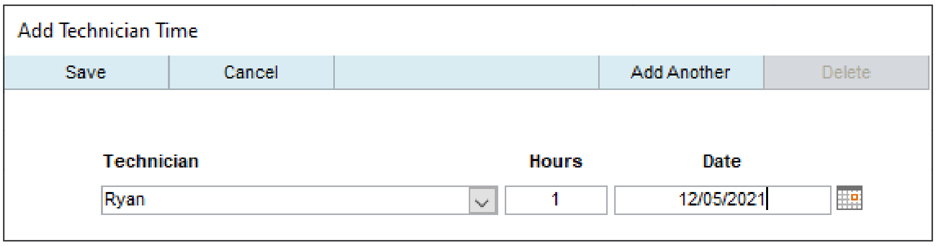


By default there will be no subheadings setup. You can add your own list of Labour Subheadings by going to Settings > Service > Labour & Costs > Labour. Once Subheadings have been created you can decide the default order that they will show on Customer's invoices. Select the Subheading and use the up and down arrows to adjust the order.

Adding Technician Times to Labour Lines

You can manually add the time a Technician has spent on a Labour Line. Recording this information will give you the option to run Technician Efficiency Reports.

Open the Service Record and go to Job Items > Labour and double click on the Labour Line. Click on Add Technician Time.

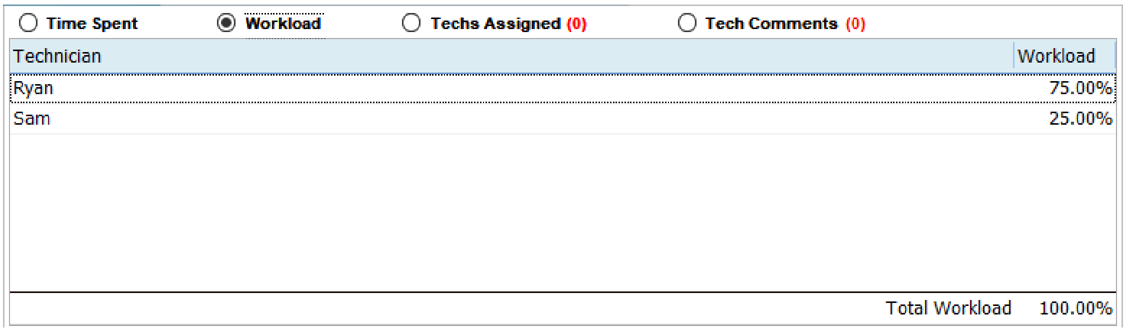


Select the Technician and enter their actual hours and the date the work was undertaken. If you have multiple Technicians working on a single Labour Line, click on Add Another and log the time taken for the second technician.

For a Technician's name to appear in the Technician drop down list, they will need to be added as a Technician in the Employee Settings. To do this go to Settings > System > Employees. Find the employee and tick the Show as Technician box.

Allocating Technician Estimated Times to Multiple Technicians

If you have multiple technicians working on a single labour line you have the option to allocate a percentage split of the Estimated Hours between the technicians. Once you have added the Time Spent, Click on Workload and enter the workload percentage.



This will then allow you to run efficiency reports based on their split of the estimated hours. If you don't enter a percentage workload split then DragonDMS will defaut to split the estimated hours equally between the number of technicians on the job.

Run the Service Efficiency Technicians Lines report to see the efficiency by technician.

Adding Parts to a Service

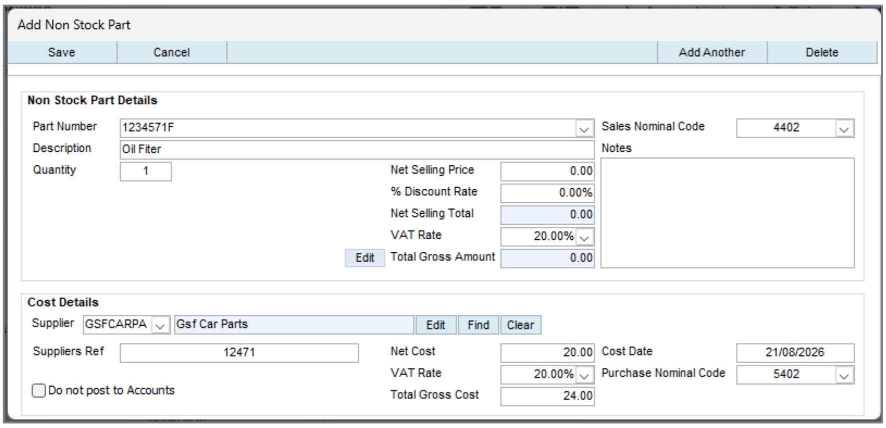
DragonDMS gives you the option to add either Non Stock Parts or Stock Parts to a Service job.

Stock Parts can only be used if you are using the Parts Module within DragonDMS to manage the Parts you have in stock, creating Parts Orders from your Suppliers and receiving the Parts into stock. Using the Parts Module will give you a full audit trail of the purchase and sales history of the Parts, and includes options to return and credit them.

Non Stock Parts is designed to be used where parts are not held in stock, but purchased specifically for a particular Service Job. The Part will arrive and be fitted to the vehicle straightaway. There is no option to raise Supplier returns as no order has been created.

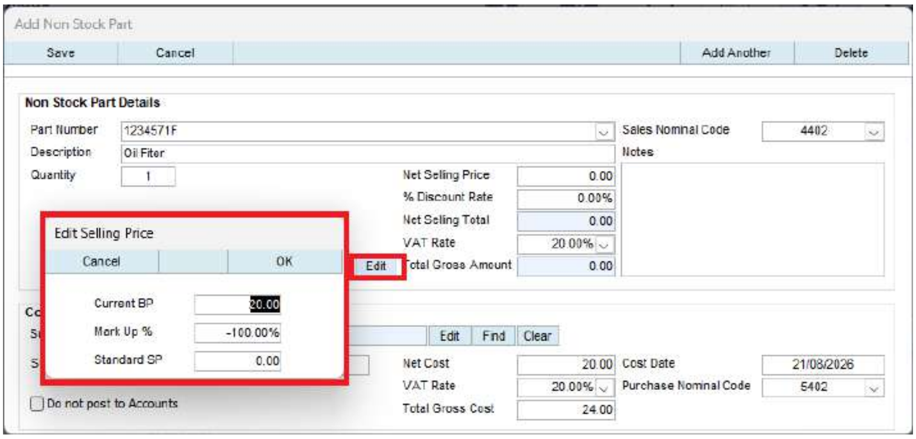
Adding a Non Stock Part

From the Service Record click the Job Items button and select the Parts tab. Click the Add Non Stock Parts button and enter the Part Details and Net price.



You can also add the Cost and Supplier of the Part. If you use the Sage Integration you can setup the cost details to post to Sage50 for you. This will reduce the amount of manual entry of Supplier Invoices. Adding the cost also allows you to work out overall profit on a Service Job.

Use the Edit button to apply a selling markup to the cost.



Click Save to save and close the form or click Add Another to save and add another Non Stock Part.

Removing Non Stock Parts

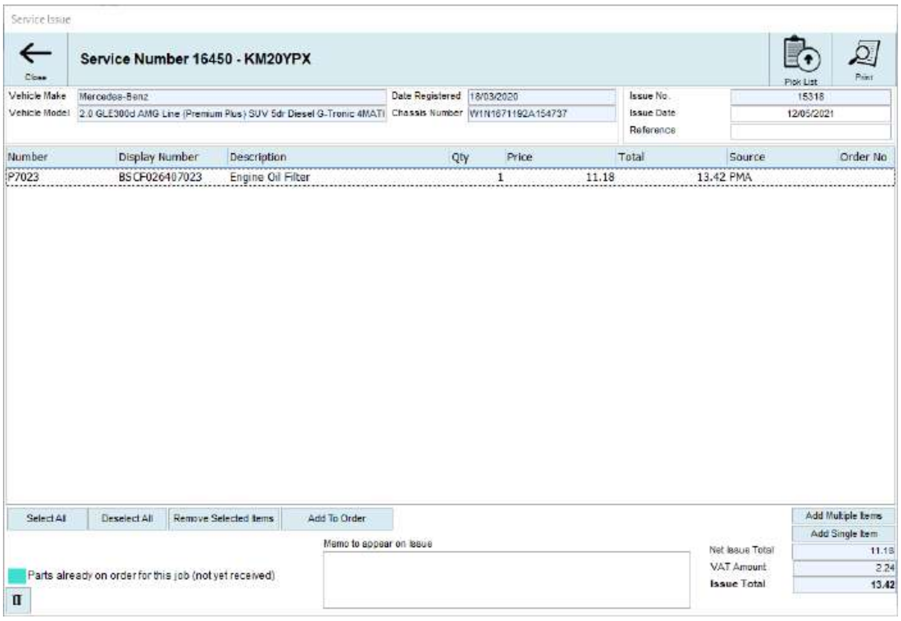
To remove a Non Stock Part, double click on the Part Line and click the Delete button.

Adding a Stock Part

In the Service Record go to the Job Items option and click on the Parts tab, then click Add Stock Parts. Search for the Part by Part Number or Description. Select the Part from the list on the left and click Confirm Selected to allocate the Part to the right hand side. Repeat this process for all required parts.

You can use the + / - buttons to increase or decrease the quantity of Stock Parts issued to the job. When you have all the Parts selected click on Issue to Job.

The parts issue screen is displayed where you can edit quantities or the selling price of Parts for this job by double clicking on a Part Line and editing the details. Click Close to issue parts to the service and return to the service record.



Cost of Stock Parts

There is no requirement to log cost details for Stock Parts as the system will look at the current Stock levels and will apply FIFO (First in, First Out) to determine the buying price.

Removing Stock Parts

To remove a Stock Part, double click on the Part Line to open the Parts Issue screen. Select the part(s) that you want to remove and click on Remove Selected Items and then click Close to return to the Service Record.

Stock Parts Status

The Parts Status has been designed to give a visual indicator to the user to let them know if the Parts issued to the Booking/Service are in stock, on order or out of stock.

Booking No	Registration	Make	Model	Customer	Description	Date In	Date Out	Time In	Time Out	Parts Status
453	OV57AAX	Nissan	Cabstar xc 34.11 Swb Shr Pu ...	Miss Kate Richards	service and mot	15/09/2017	15/09/2017	08:00	17:30	
451	PE65KMV	Audi	A3 Tdi S Line Hatchback 1.6 M...	Mr Brian Jones	Full Service and Replace Cambelt MOT	14/08/2017	14/08/2017	08:00	17:30	
450	AU60XCO	Mazda	Mazda 3 Takuya Hatchback 1....	INTERNAL	STD INTERNAL	29/01/2018	29/01/2018	08:00	17:30	
446	GW66PLK	Audi	A4 2.4 Estate 2.4 Manual Petrol	INTERNAL	Used Car Prep & Valet	14/07/2017	14/07/2017	08:00	17:30	
444	WF16FMY	Mercedes	C Class C220 D Se Saloon 2.1 ...	INTERNAL	DAF conversin 6x2 to 8x2, Mini Service	12/03/2018	12/03/2018	08:00	17:30	
442	ABC123	Ford	Fiesta	Mr Reg	Replace exhaust	06/03/2018	06/03/2018			
438	ABC123	Ford	Fiesta Freestyle 1.25 16V Hatc...	INTERNAL	Used Car Prep & Valet	12/03/2018	12/03/2018	08:00	17:30	
436	MV09AXN	Volkswagen	Beetle 8V Convertible 2.0 Aut...	Mr John Smith	test	26/06/2017	26/06/2017	09:00	17:30	

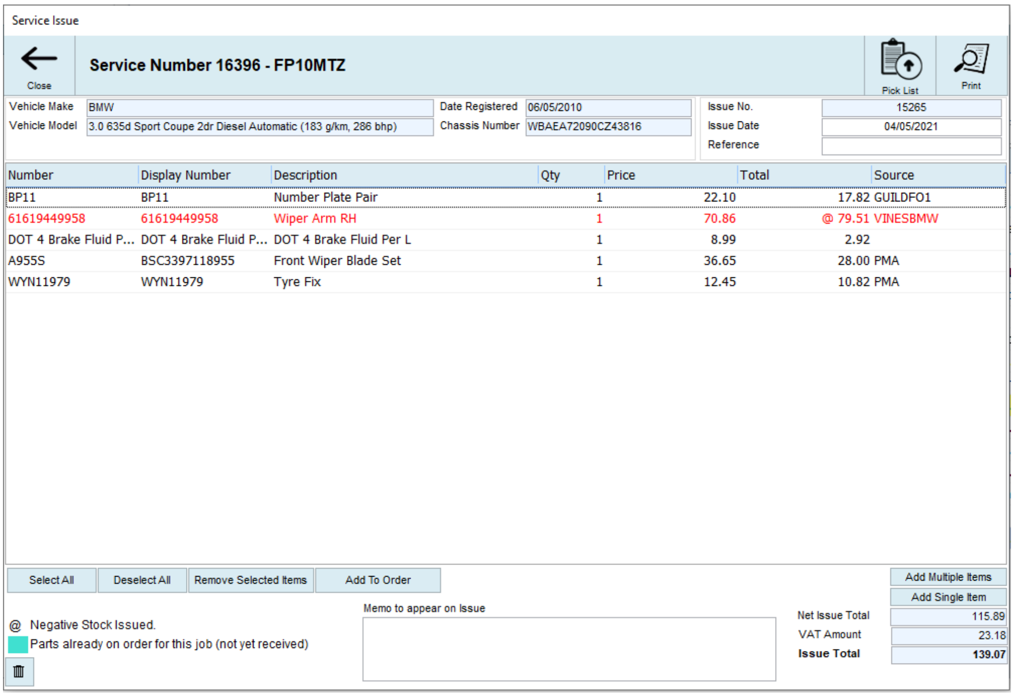
The three colour statuses are:

Green – All parts issued to the Booking/Service are currently in stock
Turquoise – At least one Part is currently not in stock but is on order
Red – At least one Part is currently not in stock or on order

The Parts Status only applies to Stock Parts that are issued to a Booking/Service job.

Creating a Parts Order from a Booking/Service Record

Open the Booking or Service Record, click on Job Items > Parts and double click on any of the Stock Parts to open the Parts Issue screen.



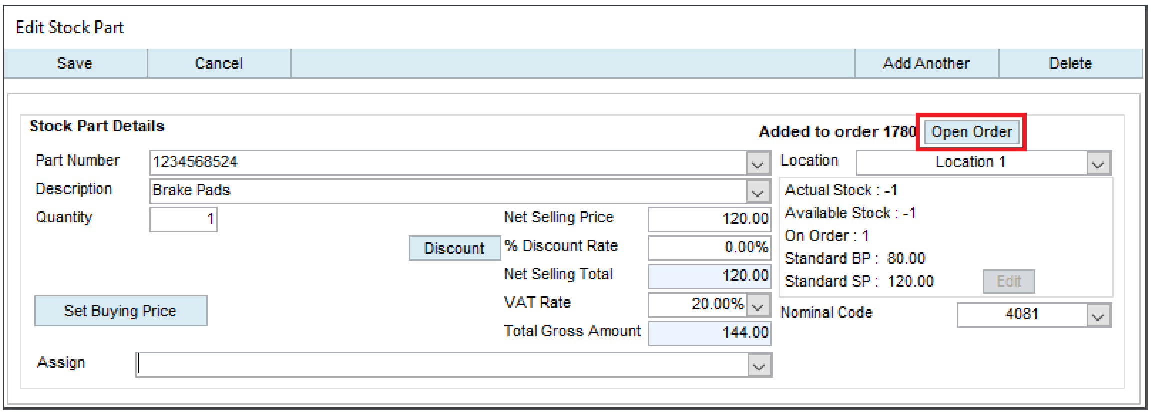
Parts not currently in stock will show in **Red**. To create an order for items on the issue screen, select the Part Lines and click on Add to Order.

Choose if you want to add the Parts to a New Order or to an Existing Order.

After the Parts Order has been created the issue screen will show the Part as still out of stock (text in red) but highlighted in **Turquoise** with the Order Number displayed.

Viewing the Order

The Parts Order can be viewed by double clicking on the Part Line and clicking Open next to the Order Number.



When the Parts Order is received into stock the Parts Status for the job will update to **Green** as all Parts will then be in stock.

A list of parts that have been allocated to service bookings or jobs that are not currently in stock can also be viewed from the Parts Module of Dragon. From the Parts Module click on Orders > Suggested Orders – Components on Jobs Not in Stock. This will show you all of the parts that have been allocated to jobs that are Out of Stock and have not yet been ordered.

Adding Oils to a Service

DragonDMS gives you the option to add either Non Stock Oils or Stock Oils to a service job.

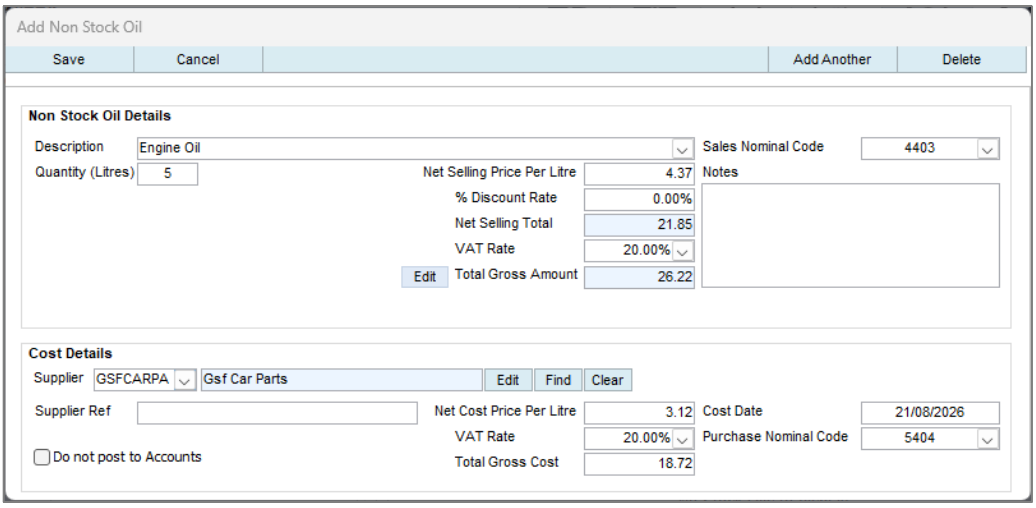
Stock Oils can only be used if you are using the Stock Oils Manager tool to manage the oils you have in stock by creating orders from your suppliers and receiving the oils into stock. This option is therefore used by those who hold oils in stock.

Non stock oils is used where oils are not held in stock, but purchased specifically for a particular service job. The oil will arrive and be added to the vehicle straightaway.

Oils should be used for any liquid / item that you want to add in litres, so it can be used for brake fluid, antifreeze etc.

Adding a Non Stock Oil

From the Job Items option click on the Oils tab, then click Add Non Stock Oil. Enter the Part details and Net price. You can also add the cost and supplier of the oil.



If you use the Sage integration you can set up the cost details to post to Sage50 for you. This will reduce the amount of manual entry of supplier invoices. Adding the cost also allows you to work out overall profit on a Service Job.

Click Save to save and close the form or click Add Another to save and add another Non Stock Oil.

Removing Non Stock Oil

To remove a Non Stock Oil, double click on the Part Line and click the Delete button.

Adding a Stock Oil

In the Service Record go to the Job Items option and click on the Oils tab, then click Add Stock Oil. Similar to adding Stock Parts, search for the Oil by Oil Number or Description. Select the Oil from the list on the left and click Confirm Selected to allocate the Oil to the right hand side. Repeat this process for all required parts.

You can use the + / - buttons to increase or decrease the quantity of litres issued to the job. When you have all the Oils selected click on Issue to Job.

The oils issue screen is displayed where you can edit quantities or the selling price of Oil for this job by double clicking on a Oil Line and editing the details. Click Close to issue oils to the service and return to the service record.

Cost of Stock oils

There is no requirement to log cost details for Stock Oils as the system will look at the current stock levels and apply FIFO (First In First Out) to determine the buying price of the selected Oils.

Removing Stock Oils

To remove a Stock Oil, double click on the Oil Line to open the Oils Issue screen. Select the oil(s) that you want to remove and click on Remove Selected Items and then click Close to return to the Service Record.

Adding an Extra

Anything that you wish to charge to your customer that is not your Technicians Labour, Parts or Oils should be added as an Extra.

From the Job Items option of the Service Record click on the Extra tab, then click Add Extra. Either type in the description or select using the drop down list, enter the quantity and selling price.

Click Save to save and close the form, or click Add Another to save and add another stock oil.

Cost of Extras

In some cases like Sundries, which is made up of a bit of grease, plastic gloves, rags etc, there may be no direct cost for this charge, i.e there will be no single invoice from a Supplier that relates to this Extra.

Removing Extras

To remove an Extra, double click on the extras line, then click Delete.

Adding Costs

There may be instances where a cost has been incurred on a job that can't be charged back to the customer. This can be logged as a stand-alone cost. Click on the Add Cost button and enter the details.

The costs screen will log and group all costs that have been added to the job.

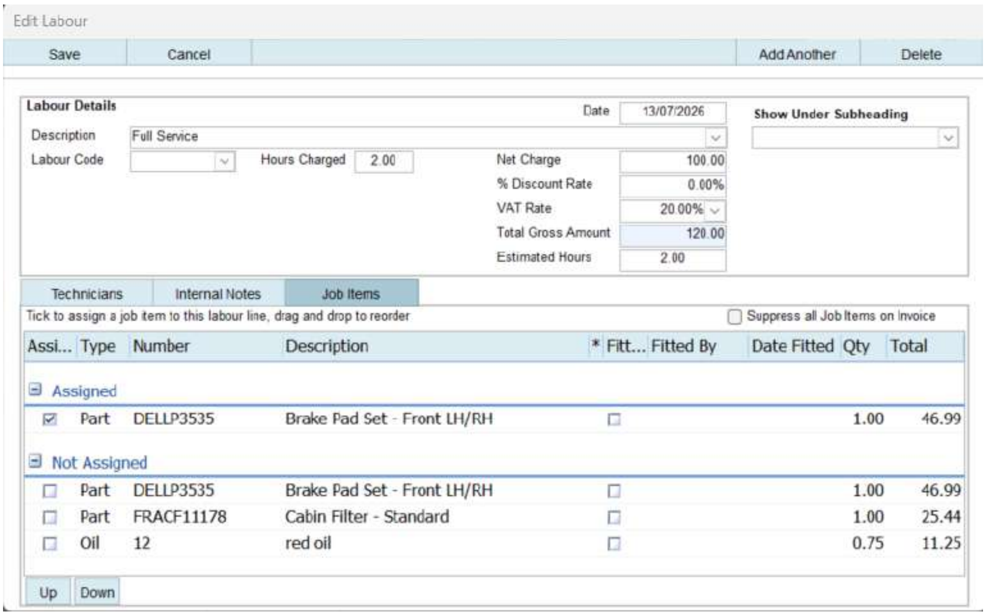
Editing Costs

If you are posting your costs to Sage50, you will be unable to edit the details of a cost if it has already been posted to Sage. You can tell if a cost has been posted to sage as it will display a Sage Reference.

Linking Job Items to Labour Lines

Job Items can be linked to Labour Lines which will then show under that particular Labour Line on the Service Invoice. Any un-assigned items will show under the relevant section on the Service Invoice (parts, oils, extras).

To link items to a labour line, create your Service as you normally would and add on any Labour Lines and job items needed. Double click on a Labour Line, then click on the Job Items tab:



You will then see a list of items you have added to the job that are Not Assigned to a Labour Line. Tick the Assign box next to the relevant items that you want to link to that particular labour line. They will then show under an Assigned heading:

When you have finished linking items to that particular labour line, click Save. You can then open the next Labour Line and assign any relevant items as above.

Please note that you do not need to link all job items to Labour Line if you do not wish too.

When you print your Service Proforma**,** Invoice or Estimate, it will have the linked items showing under the relevant Labour Lines, and any 'Un-assigned' Parts showing under their relevant section (parts, oils, extras).

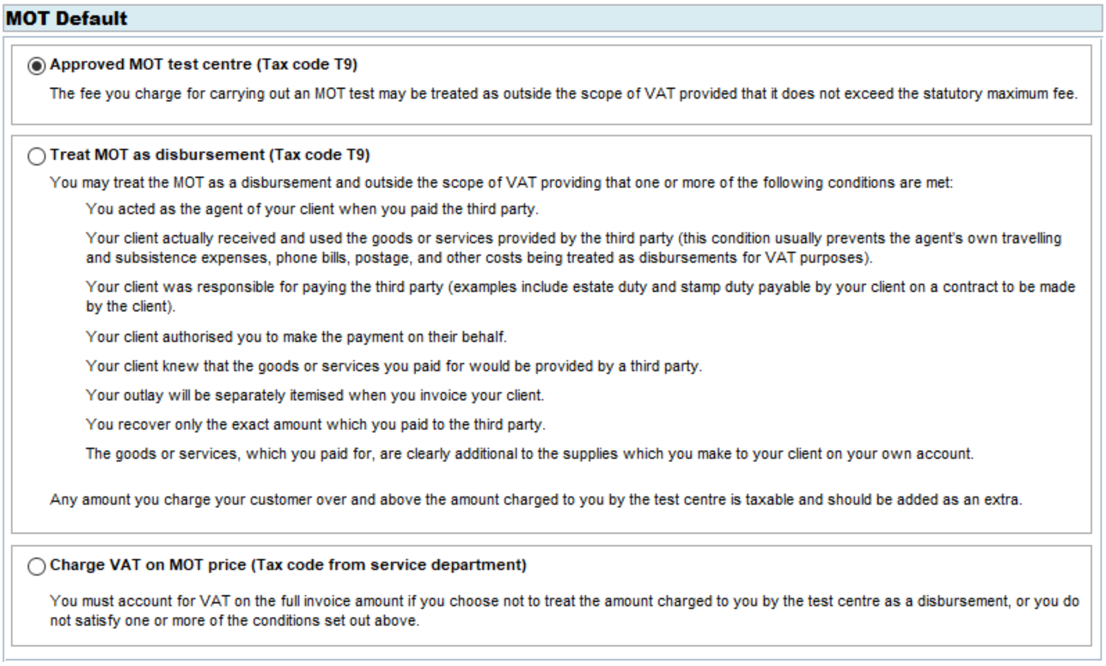
The invoice will show the cost of the labour and then the individual prices for the job items linked to that labour line.

If you wish to suppress per line job item prices on Service Proforma, Invoices and Estimates, there is a setting which allows this. Click on the Settings button, then Service > Settings > Invoices and tick Suppress per line Part Prices (Hides all Prices, VAT rates & Discounts).

Once ticked, this will group the cost of the labour and job items linked to that labour line into one total cost rather than showing the individual costs.

Adding an MOT

Before adding an MOT to a service job, ensure that you have the correct MOT defaults setup, go to Settings > Service > Defaults > MOT Options. Read through the options and select the one that reflects your business.


MOT Default

◉ **Approved MOT test centre (Tax code T9)**

The fee you charge for carrying out an MOT test may be treated as outside the scope of VAT provided that it does not exceed the statutory maximum fee.

○ **Treat MOT as disbursement (Tax code T9)**

You may treat the MOT as a disbursement and outside the scope of VAT providing that one or more of the following conditions are met:

You acted as the agent of your client when you paid the third party.

Your client actually received and used the goods or services provided by the third party (this condition usually prevents the agent's own travelling and subsistence expenses, phone bills, postage, and other costs being treated as disbursements for VAT purposes).

Your client was responsible for paying the third party (examples include estate duty and stamp duty payable by your client on a contract to be made by the client).

Your client authorised you to make the payment on their behalf.

Your client knew that the goods or services you paid for would be provided by a third party.

Your outlay will be separately itemised when you invoice your client.

You recover only the exact amount which you paid to the third party.

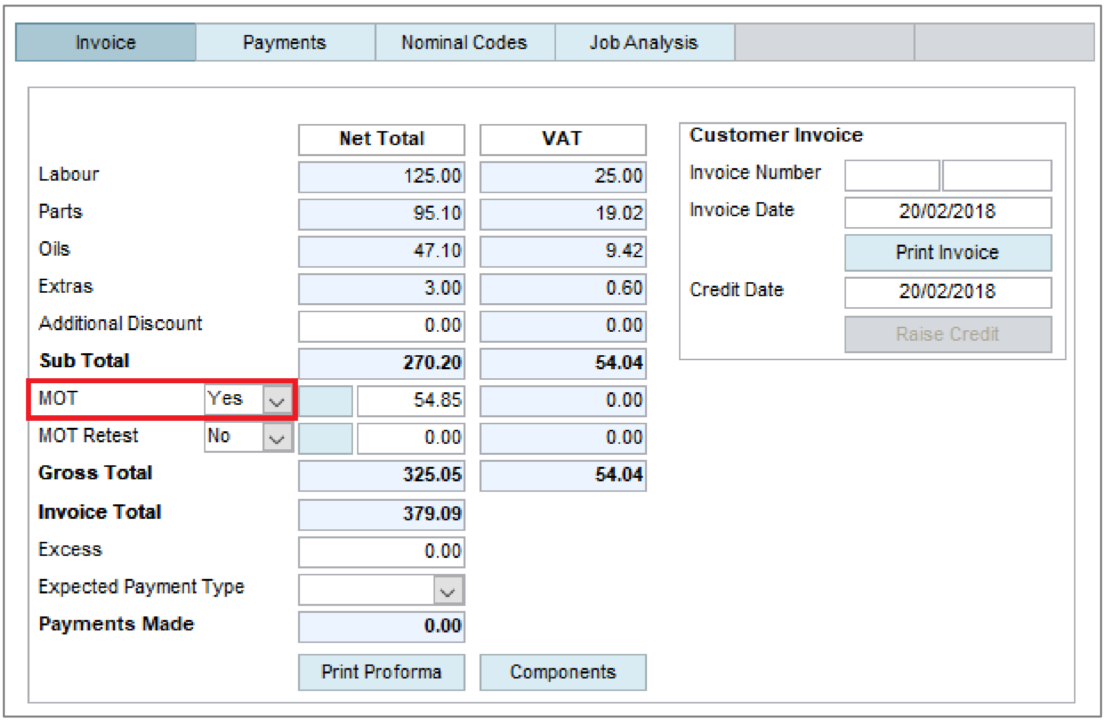
The goods or services, which you paid for, are clearly additional to the supplies which you make to your client on your own account.

Any amount you charge your customer over and above the amount charged to you by the test centre is taxable and should be added as an extra.

○ **Charge VAT on MOT price (Tax code from service department)**

You must account for VAT on the full invoice amount if you choose not to treat the amount charged to you by the test centre as a disbursement, or you do not satisfy one or more of the conditions set out above.

Having applied the correct MOT option in settings, go back to the service record, click on the Invoicing menu and then on Invoice. Use the dropdown list next to MOT and select Yes.


Invoice | Payments | Nominal Codes | Job Analysis

		Net Total	VAT
Labour		125.00	25.00
Parts		95.10	19.02
Oils		47.10	9.42
Extras		3.00	0.60
Additional Discount		0.00	0.00
Sub Total		**270.20**	**54.04**
MOT	Yes	54.85	0.00
MOT Retest	No	0.00	0.00
Gross Total		**325.05**	**54.04**
Invoice Total		**379.09**	
Excess		0.00	
Expected Payment Type			
Payments Made		**0.00**	

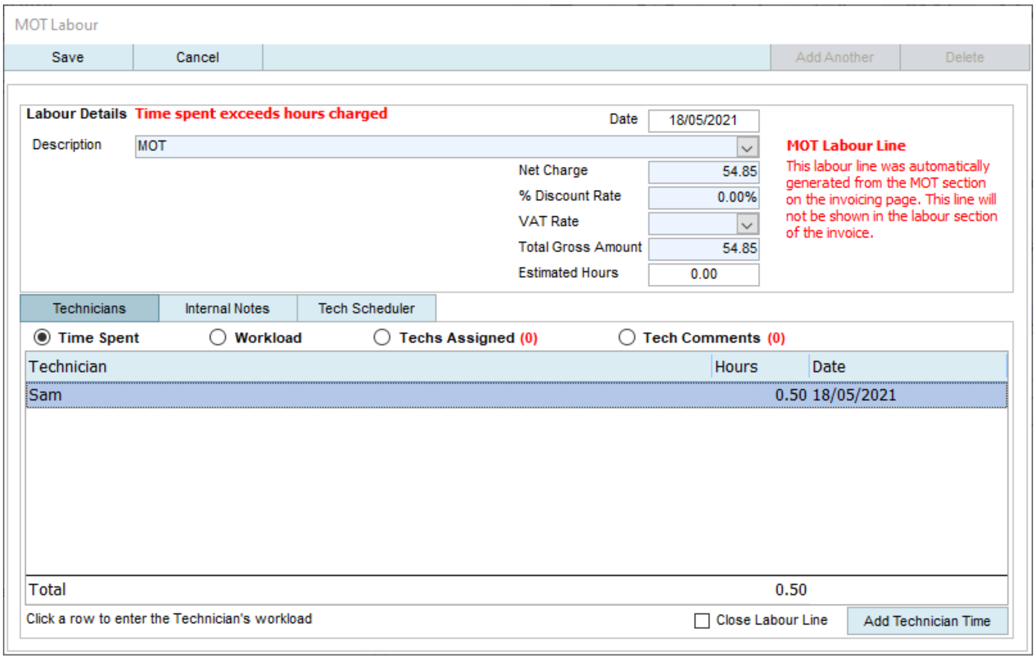
Print Proforma | Components

Customer Invoice

Invoice Number	
Invoice Date	20/02/2018
	Print Invoice
Credit Date	20/02/2018
	Raise Credit

Doing this it will mark the job as having had an MOT and will automatically update the next MOT due date to be 52 weeks from the date of invoice. It will also populates the MOT fee (this figure is taken from the default Service Department settings).

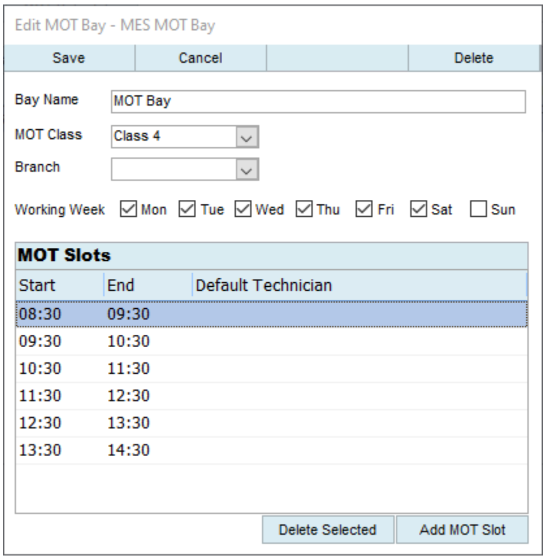
If you have selected the setting to confirm you are an MOT Test Centre, when you select MOT Yes on the invoicing screen, it will automatically add an MOT labour line onto the service record. This labour line will not show on the invoice but will allow you to record the time your Technician has spent.



MOT Scheduler

The MOT Scheduler allows you to manage your MOT bookings by creating MOT slots and allocating them to services or bookings.

Before you can use the MOT Scheduler, you will need to set up your MOT bays and slots. Go to Settings > Service > Workshop Loading > Mot Scheduler and click on the Add Mot Bay button.



Bay Name – Enter the name of your bay, i.e. MOT Bay 1

MOT Class – Select the class of MOT to be carried out in this particular bay

Branch – If you have different branches, you can assign the MOT Bay to the relevant branch. This allows you to control which users can view/book MOT's for this bay.

Working Week – Select the days that MOTs can be carried out

Once completed, click the Add MOT Slot Button and you will then be able to select the start and end time for each MOT Slot and also add a Default Technician if you wish. You will then see a list of your available slots with your new bay.

Booking an MOT

From the Service Module, click on the MOT Scheduler tab and you will be taken to a calendar showing all of your MOT Bays and Slots that you have set up in Settings. Free MOT Slots will show in Green and booked slots will show in Blue.

You can add an MOT directly by double clicking on a free MOT Slot and creating a booking. Double clicking on a booked MOT Slot will take you to the Job Card.

You can also book an MOT from an existing Service or Booking Record. Open the Record and click on Job Items. At the bottom you will see the MOT Scheduler tab. Click on Book Mot Slot and this will take you to the Mot Scheduler Calendar. Double click on the relevant date and time slot to add the Record.

Changing booked MOT Slots

Booked MOT Slots change be changed, swapped or removed directly on the MOT Scheduler or from within the Service Record > Job Items > MOT Scheduler.

Double click on a booked slot and you will see the following options:

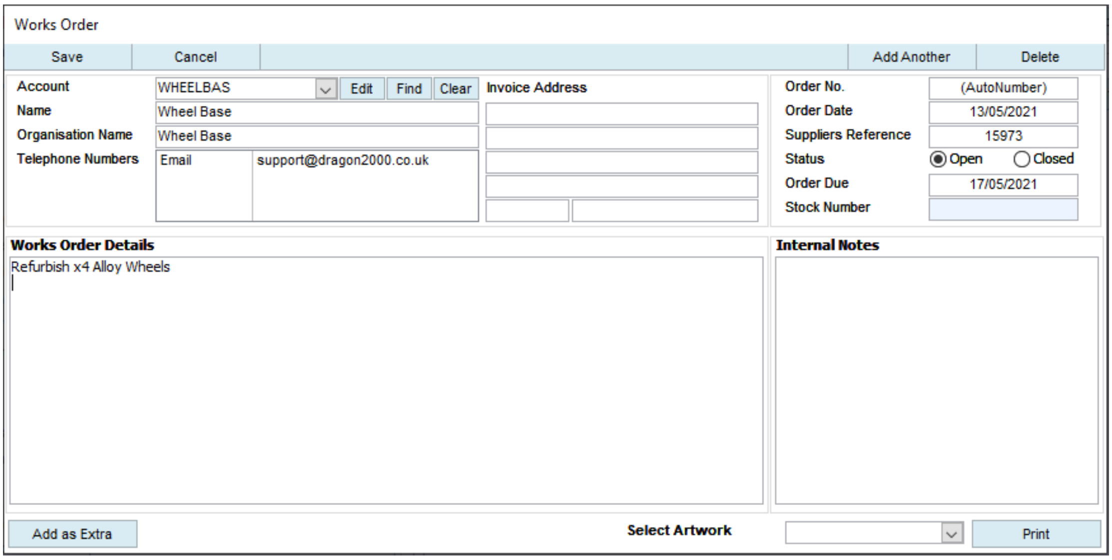
- Change to a free MOT slot
- Swap with a booked MOT slot
- Remove MOT slot from service
- Open the service record

Creating a Works Order

Works Orders can be added to service jobs and have been designed to be used to track vehicle parts that go offsite to be reconditioned.

To add a Works Order go to the Overview tab of the service record and click on Works Orders and then Add Works Order. Select a Supplier, enter the Works Order details, the suppliers' reference and the date the order is due back.

The Works Order can be printed and sent to your supplier. DragonDMS will allocate an Order Number.



Any information that you want to record, but you don't want to show on the printed Works Order can be entered in the Internal Notes section.

A list of all Works Orders can be viewed on the main Service screen by selecting the Works Orders list. Works Orders due in the next week will show in Orange and those due today or overdue will show in Red.

Closing a Works Order

When a works order has been completed, the order should be marked as Closed and the amount to be charged to the customer added as an extra with the cost to the business logged.

Invoicing

When a Service Job has been completed it is good practice to print a Proforma Invoice in the first instance. The Proforma is exactly the same layout and content as the Service Invoice, the only difference is that the Proforma has no invoice number and as such will not lock the Service Record on printing.

Proforma Invoice

The Proforma can be used to check the details of the invoice and it can also be used to show to the customer prior to printing their invoice. If any changes are required they can be made very easily, however if the service invoice had been printed the invoice would have to be credited in order to make any changes.

To print a proforma invoice go to the Invoicing menu and click on the Invoice tab, then on the Print Proforma button.

Service Invoice

The Service Invoice should only be printed when you have gone through the pricing with the customer. Printing the Service Invoice will allocate the invoice number and will lock the Service Record so that no amendments can be made.

There are 3 exceptions:

1. Adding Payments – Payments can be added after the invoice has been printed.

2. Adding Costs – Invoices for Parts or other services may not arrive until after the Service Invoice has been printed. You can keep adding costs to a Service Record once printed.

3. Adding Technician Time – The time taken by the Technician on Labour Lines can be added to the Service Record after the invoice has been printed.

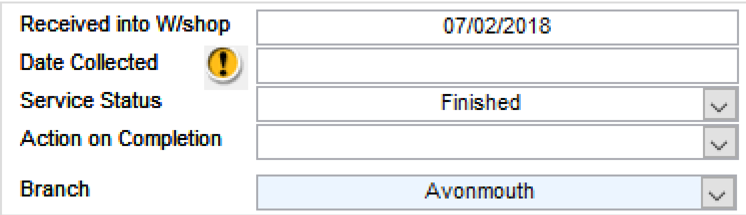
Sage Postings

If you are using the Sage 50 integration, the action of printing the Service Record in DragonDMS will mark the invoice as ready to be posted to Sage 50. The invoice will then post to Sage 50 the next time the Sage integration is run.

When you preview the Proforma or Invoice you have a couple of options. Closing the print preview (red cross) will not mark the invoice as printed, but an invoice number will be allocated to the invoice and it state the Invoice has been previewed.

Choosing to Print, Email or PDF will create the relevant output and mark the invoice as printed. Email can only be used if you have full Microsoft Outlook installed on your computer, Outlook must be open in order for the DragonDMS to create the Email.

Printing a Service Invoice will automatically update the Service Status to Finished. You will see a warning symbol next to the Date Collected.

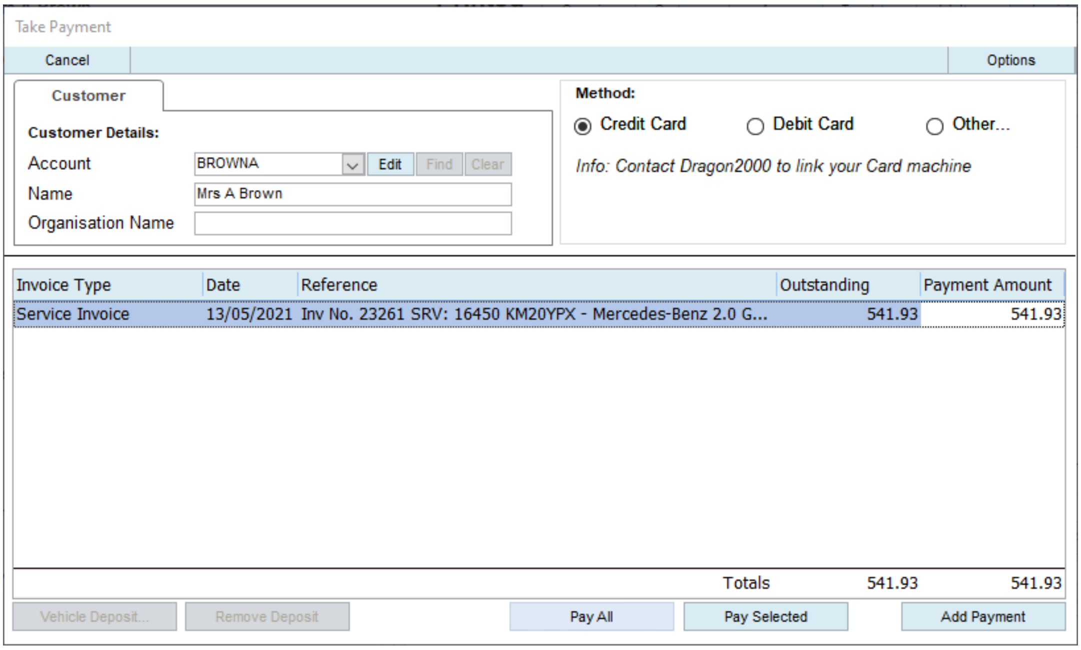


The Date Collected should be filled in when the customer has picked up the vehicle and the vehicle is no longer on your site. Entering a date collected will move the Service Record from the list of Services in Progress to the Completed Services list.

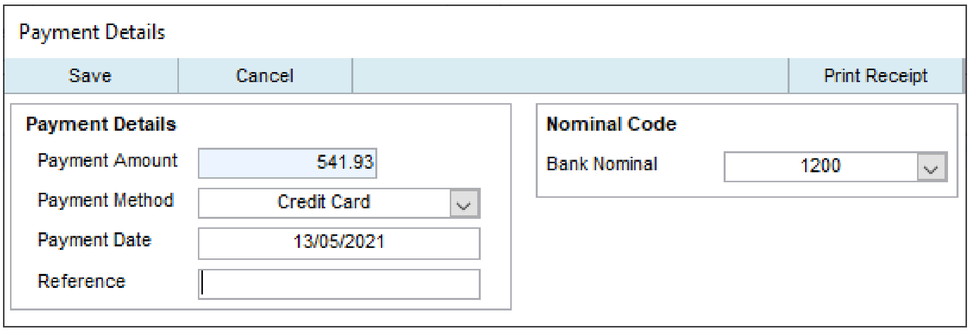
Recording a Payment

Any payments taken prior to the Service being printed will be recorded as a Deposit payment. Once the invoice has been printed, any payments will be Balance payments.

To log a payment go to the Invoicing menu, click on the Payments tab, click on Add Payment (or Add Deposit). Enter the deposit or payment amount to be paid or if the whole invoice is being paid, click Pay All. Click Add Payment once the Payment Amount has been entered.



Select the payment method that is being used and enter a reference number if applicable. A receipt of the payment can be printed by clicking on Print Receipt. Click Save once completed.



A log of any payments made will then be recorded under Payments Made and also in the Transaction Log of the Customer Record.

Sage Postings

You can choose if you wish to post payments to Sage 50. When a payment is posted to Sage 50 it will automatically be assigned to the correct invoice and mark the invoice as paid. This setting can be changed in the Accounts Module on Dragon.

Crediting an Invoice

To raise a credit go to the Invoicing menu, click on the Invoice tab, click on Raise Credit. Raising a credit will unlock the Service Record and allow any changes to be made.

The Credit Note will have the same information as the original Service Invoice with a heading in red Service Credit Note.

You can view a full history of all invoices & credits for a Service Record by going to the Customer menu, then Transaction tab. Double click to view the full details of the invoice / credit.

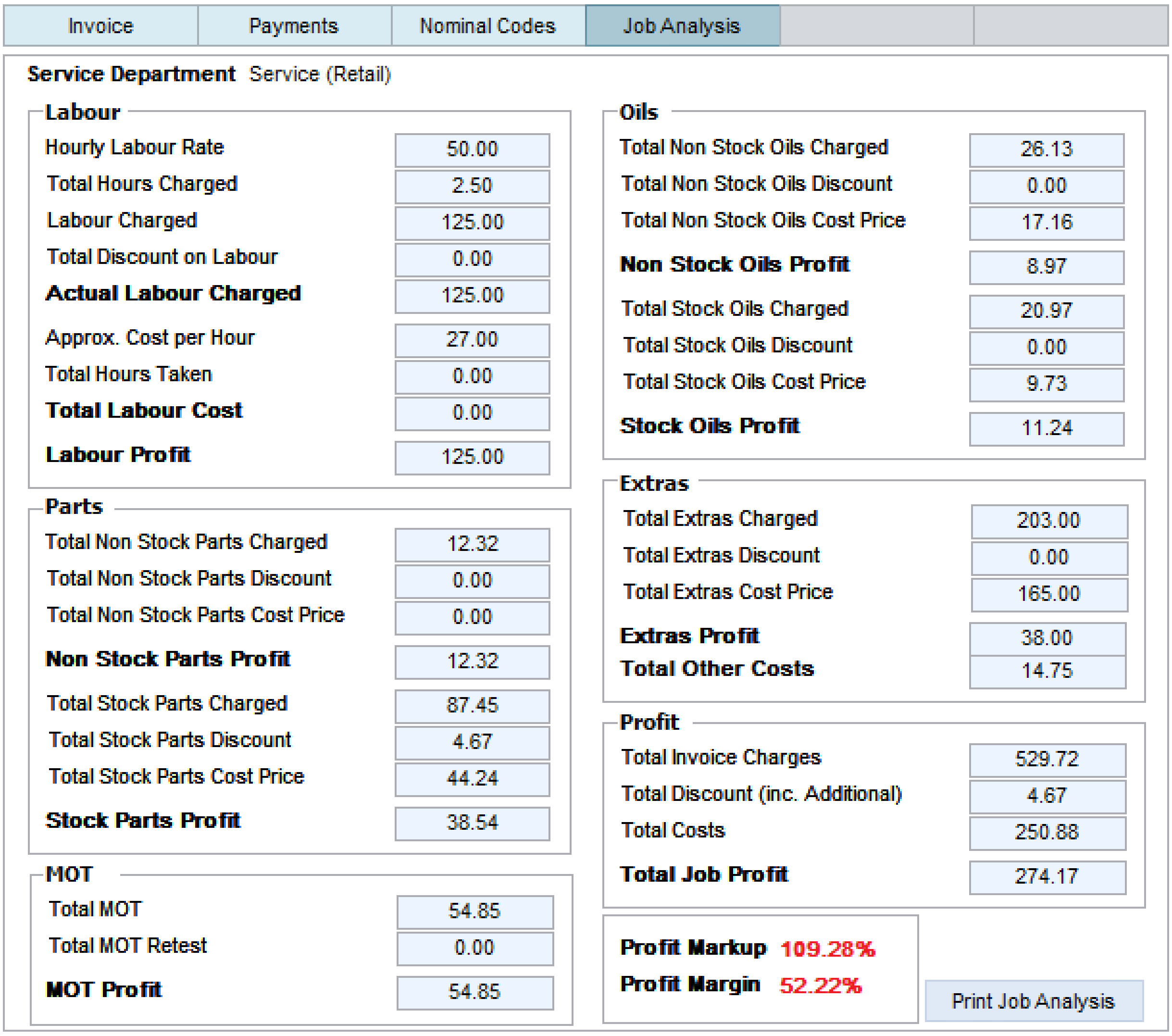
User Access Rights

Only users who have been given the permission to print credit notes will be able to do so. Your DragonDMS administrator will be able to edit your user settings, Settings > System > Employees > Access Rights.

Job Analysis

The Job Analysis screen will show you the full breakdown of charges to the customer and the costs to the business, giving you a total job profit figure.

To view the Job Analysis for a Service Record click on the Invoicing tab and then Job Analysis.



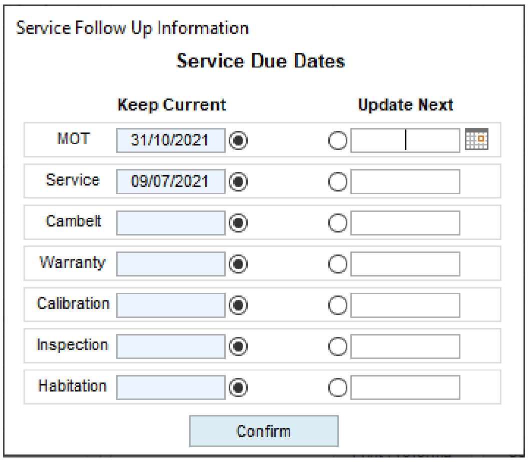
Labour Costs

Labour costs can only be calculated if you enter the actual time the technicians have spent on each labour line and as long as you have set an approx. cost per hour within the Service Department settings. Settings > Service > Defaults > Departments (See setting up Service Departments).

Follow Up Dates

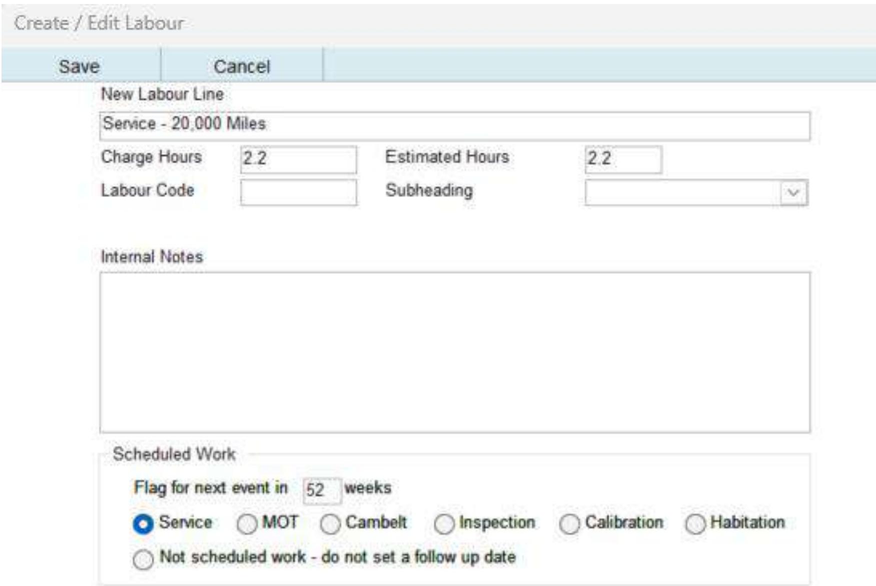
When a Service Job has been completed it is good practice to enter in some follow up dates. By doing this you will then be able to take advantage of the CRM Mailshot and reminders tools to contact your customers and remind them that their MOT / Service is due.

When you print the Service Invoice you will be prompted to enter the next Follow Up dates. These can also be entered on the Overview page of the Service Record and then click Additional Details, and enter the relevant follow up dates.



Setting up Standard Labour Lines with Follow-Up Dates

When you create a new Labour Line you are given the option to Add to the list. If you choose to add the Labour Line you can then flag the Labour Line to be scheduled in *x* number of weeks.

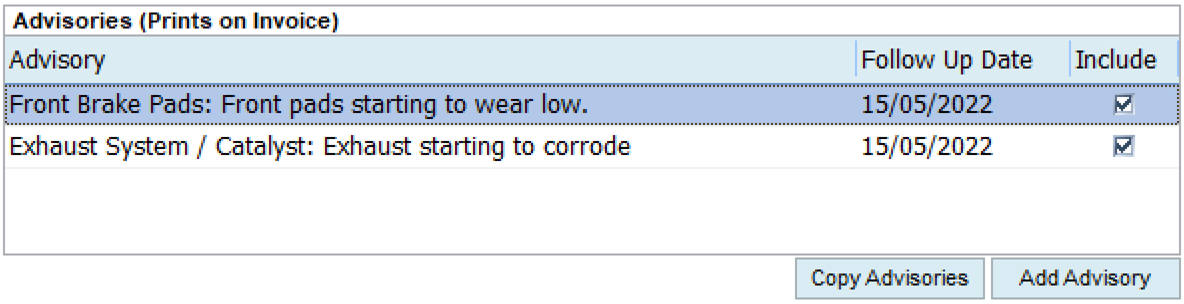


Select the number of weeks and the type of follow up (Service, MOT, Cambelt, inspection or Calibration).

This Labour Line will now be added to your list of Labour Lines and can be used in any Service Record. When this Labour Line is used the pre-set follow-up date will be automatically added to the Service Record.

Adding Advisory Notes with Follow-Up Dates

Advisory Notes can be added to the customers invoice. Go to the Invoicing menu in a Service or Booking Record and select the Invoice tab.



Notes can be added here and will show on the customer invoice. If you wish to mark the Advisory Note with a follow up date, click in the follow up date box and select a date. Advisories with follow up dates will then show in the CRM mailshot tool which allows you to send reminder letters, emails or text to customers.

If you do not wish to include the Advisory on the customer invoice, untick the Include box.

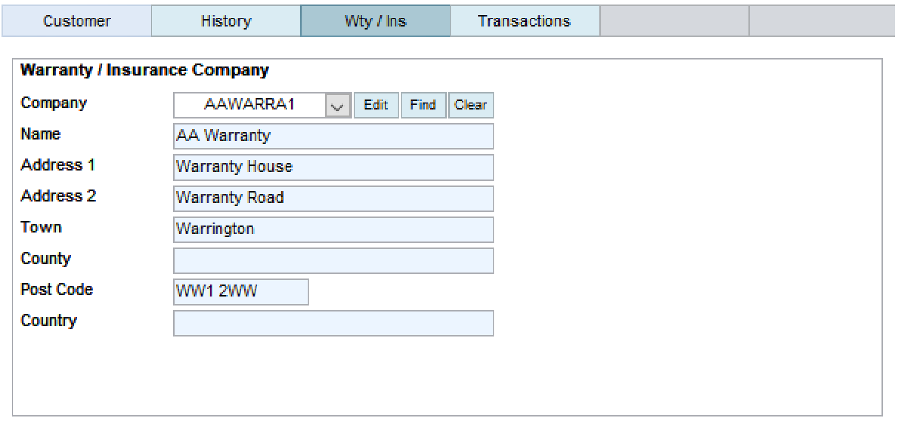
You can customise the colour and font used for Advisory Notices in settings. Settings > Service > Settings > Recommendations. Make sure you remove the tick 'Disable Advisory Formatting' if you want to apply your own formatting.

Booking Process – Highlighting Follow Up Dates

You can also colour code follow up dates to show on the booking record in either Amber or Red when the follow up date is approaching. This can be done from Settings > Service > Settings > Record Creation. From here you can select the relevant number of days for the follow up to be highlighted.

Warranty and Insurance Invoices

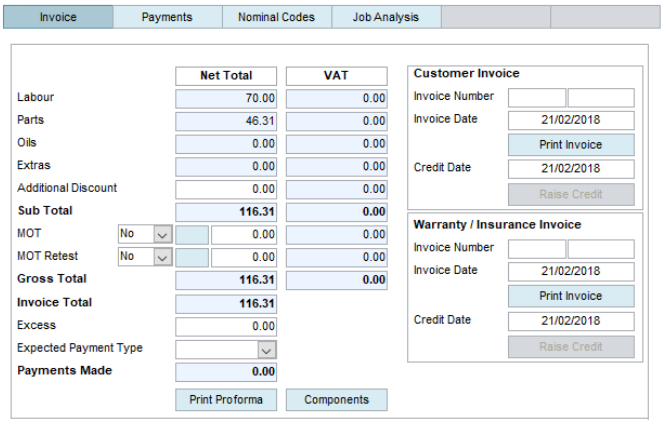
To print an invoice for a Warranty or Insurance Company you will need to add a Warranty or Insurance Company to the Service Record. To do this click the Customer menu, then go to the Wty / Ins tab.



You can select the Warranty or Insurance Company from the drop down list (provided they have been previously added as a contact).

If you have a specific Service Department for Warranty work with different hourly rates and parts / oils pricing you can change the Service Department within the job by going to the Overview menu, then clicking on the Service tab and selecting the Service Department from the dropdown list.

On the invoicing screen there are two sections, Customer Invoice and Warranty / Insurance Invoice.



By default all of the jobs and total costs will show on the Warranty / Insurance Invoice and the Customer Invoice will show all the work and parts added to the invoice but the amount due will be £0.00.

It is important that both the customer invoice and the Warranty / Insurance Invoice are printed.

Customer Excess

Any Insurance Excess should be entered in the Excess field on the main invoicing screen. The value of the excess will be added to the Customers Invoice and deducted from the Warranty / Insurance invoice.

Vat Registered Customers

Customers who are VAT registered will have the VAT element of the job added to the Customers Invoice and deducted from the Warranty / Insurance Invoice. To mark a customer as VAT registered you must enter their VAT number on their contact record.

Internal Work

When you create a Booking or Service Record for a vehicle that is 'in stock', DragonDMS will automatically set the Service Department to Internal. This means that the customer will automatically default to Car Sales Department.

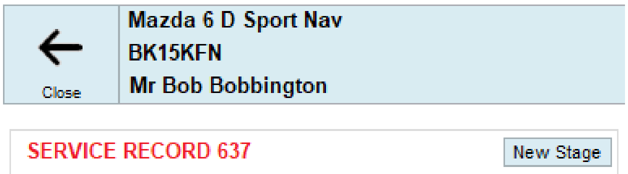
You still need to print a copy of the invoice upon completion as this will then post the value of the service as a cost to the Vehicle Record.

Once the invoice has been printed, you will also have the option to print a Customer copy of the invoice. This will have all of the work detailed but will not display any costs.

Staged Jobs

Service jobs can be separated into different stages and each stage has its own invoice. Stages are often used for long term work where interim payments are required or they can also be used when there are two or more parties paying towards the work.

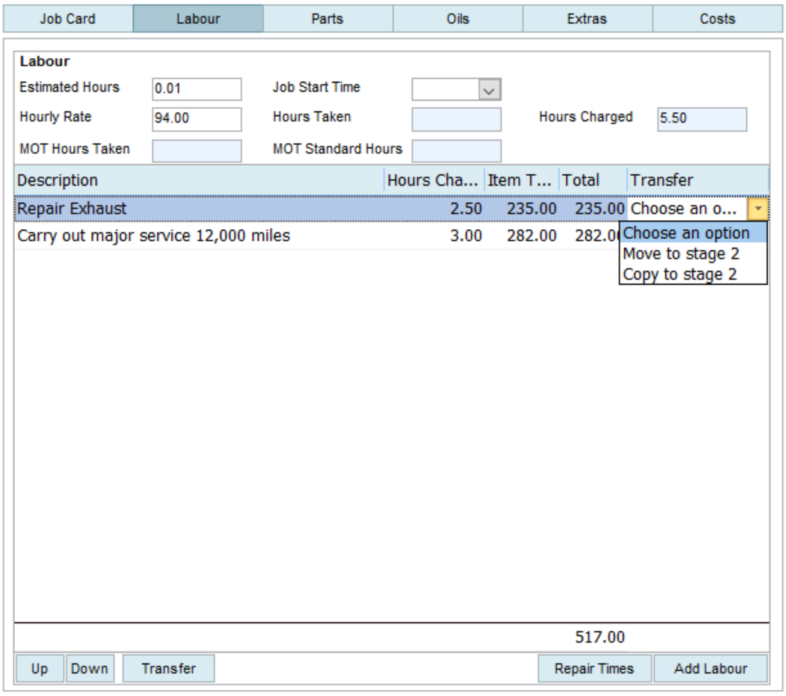
Once a Service Job has been created the option to create a New Stage is available just below the blue band at the top of the Service Record.



You can create as many stages as required. Once created you can assign a stage to the different customers (if required) and assign different Service Departments (if required).

You can create a stage before the invoice components have been assigned to the job, therefore you can have blank stages that are waiting for you to add the required details. Alternatively, you can add the invoicing components onto the service job and then create a new stage when you know what work is to be charged to each stage.

Labour, Parts, Oils and Extras can be transferred from one stage to another.



Select the component that you wish to transfer and select the Transfer option using the dropdown list and then click on the Transfer button. A message will then be displayed to say Transfer Successful.

Service Templates

Service Templates can add any number of Parts, Labour lines, Oils, Extras and Costs to a Service Record in one activity. Service Records can be created from a template, and templates can be used to add a part AND its fitting in one go.

Once items have been added to your job from a template you can alter and remove those items like any other.

The template feature is very flexible and can provide the following facilities in DragonDMS:

- Standard House Charges and procedures on every job such as Service Wash, Post Work Inspection etc.
- Barebones Scheduled Service templates to set the most common procedures
- Common service procedures predefined for specific models
- Part and Labour for it's fitting added in one go
- Categorise your templates and relate them to specific Make and Model categories
- Templates linked to your marketing activities to speed the booking process. For example, Winter Check Offer.

Creating Service Templates

You can create a Service Template from an existing Service Record which is either In Progress or Completed. In the Service Record go to the Templates and click Create From Service.

A list of all the components that have been added to that service job will be displayed. All items will be added to the template as default but you can decide which items, if any, you want to omit from the template.

You will need to specify a name for your template. Once it has been created you can edit the template to remove or add components.

The vehicle details form the Service Job will show on the template so if you are creating a generic template you should remove these specific fields of information. You may choose to select a Category, Make and/or Model for this template. Each of these pieces of information will assist your users when they are looking for a template to use.

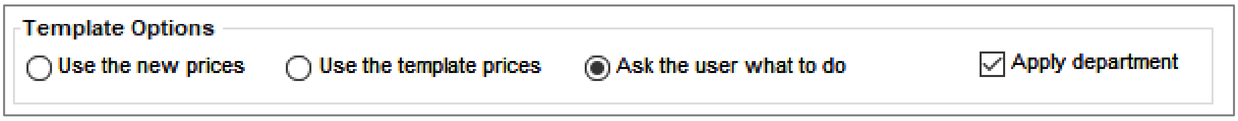
Editing Templates

To edit your templates go to Settings > Service > Templates. Select the template you wish to edit and double click to view. You can add to the template, delete or alter lines as you would a live service job. By assigning Parts to a template, you will not alter your Parts Stock in any way.

When you apply a template you can decide how you wish the pricing to be handled. The template will have the prices that were valid at the time that the template was created.

By default, when a template is added to a Service Job you will be asked if you wish to recalculate the template prices (Labour Rates, Parts / Oil Retail Pricing). You can change this in settings.

In Settings > Service > Templates you can specify if you would like to always use new pricing, always use template pricing or ask the user each time what to do.



If a template has been setup as a Fixed Price Template the price of the template will always be applied to the service regardless of the template options.

If you need to update the labour rate or stock parts/oils prices on multiple templates go to Settings > Service > Templates > Update Templates

Using Service Templates

Templates can be applied to an Estimate, Booking or Service. If your selected template includes stock Parts, they will affect your Parts Stock in the following situations:

- If added to an Estimate there is no effect on stock.
- If parts are added to a booking, stock parts are allocated to the booking as soon as the booking is created.
- If parts are added to a job they are physically taken from stock when the job is created.

From within an Estimate, Booking or Service Record click on the Templates > Templates and search for the template you wish to use. Double click on the template and a list of all the components on the template will be displayed, you can click OK if you want all the items, or deselect various items that you don't require and then tick OK. You can add as many templates to a job as required.

Default Templates for Specific Service Departments

If you have a template which is to be used for all jobs created for a specific Service Department (such as Service (Retail) or Service (Bodyshop) for example) you can assign each department a default template as follows:

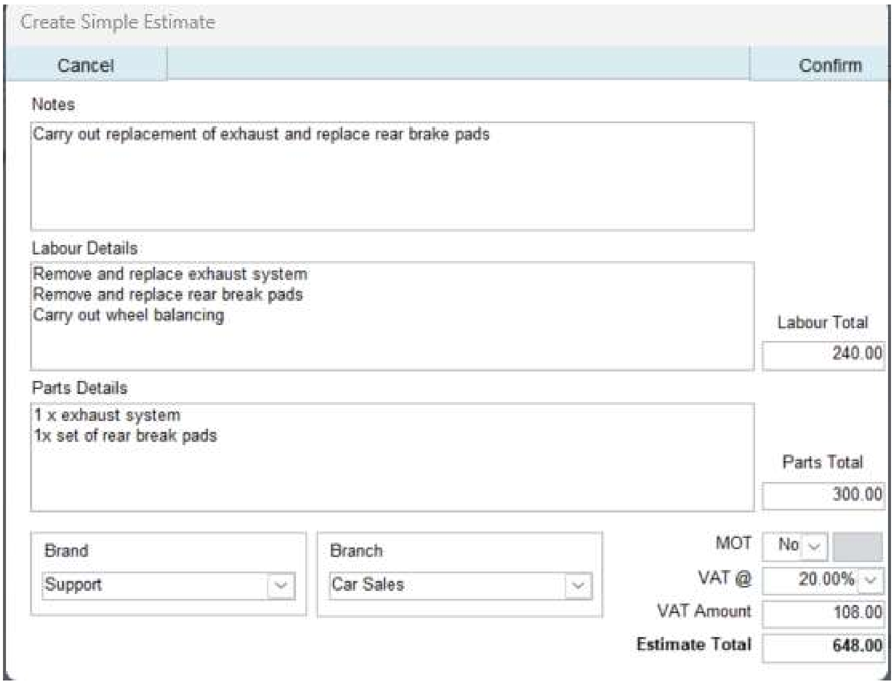
Go to Settings > Service > Defaults, select the department that requires a default template on the General tab select the default template using the drop down list. Any new services created using this service department will automatically have the selected template applied.

Service Estimates

Estimates are designed to give you a way to record your customer requirements and your estimate of the work and parts required. There are two types of estimates that you can create in DragonDMS.

Simple Estimates

Minimal information is required for these estimates, there is no allocation of job components, simply write the information of the labour and parts and enter the values for each.

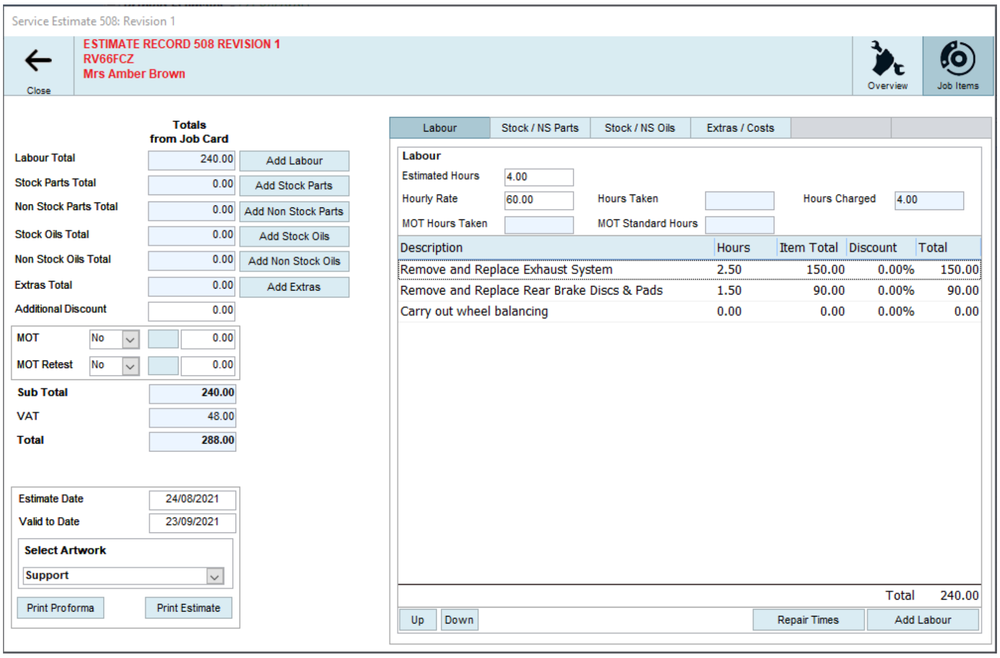


You will be prompted to enter the customer details when you click on Confirm, you can then print and save the simple estimate.

Simple Estimates as the name suggests are quick and easy to create and give you the benefit of having the estimate saved in DragonDMS for future reference. Simple Estimates cannot be edited or revised. Simple estimates cannot be transferred to a booking or service record as they are not made up of job components.

Detailed Estimate

Detailed Estimates are created very much like a booking or service record, the vehicle details are required along with the customer details, and the estimate is then built by adding job components.



A Detailed Estimate will have one of the following statuses:

Open – the estimate can be edited.

Printed – the estimate is locked at the point of printing to ensure that the saved information in DragonDMS matches the customers printed copy. If changes are required the estimate needs to be revised.

Approved – the estimate has been approved and is now either a booking or service in progress record.

Declined – the estimate has been declined.

Revising a Detailed Estimate

From the Printed Estimates list, open the record and on the overview screen, double click to open the printed estimate.

At the bottom right of the Overview screen click on the Revise Estimate button. A new copy of the estimate is created which is unlocked and components can be added, removed or edited.

The original estimate created will now show a status of Revised to show that a revision has been created.

Approving a Detailed Estimate

Only the current estimate can be approved. Open the relevant estimate and at the bottom left of the Overview screen you have the following options:

Create New Booking – This will create a booking record for the customer with all of the work detailed on the estimate included.

Create New Service – This will create a service record for that customer with all of the work detailed on the estimate included and will show on your Service in Progress list.

Add to Existing – This option will only be available if you already have an existing booking or service record created for that customer. This will give you the option to add the estimated work straight onto the booking or service record that has already been created. If the service is already in progress, you will also have the option to add the estimated work as a new stage.

Estimate for Emerging Work

If you want to create an estimate for a vehicle that is currently in the workshop, you can create an emerging work estimate. Within the service record of the job in progress click on the Overview menu and then on the Estimate tab, click on the New Estimate button at the bottom right of the screen, then create the estimate as normal.

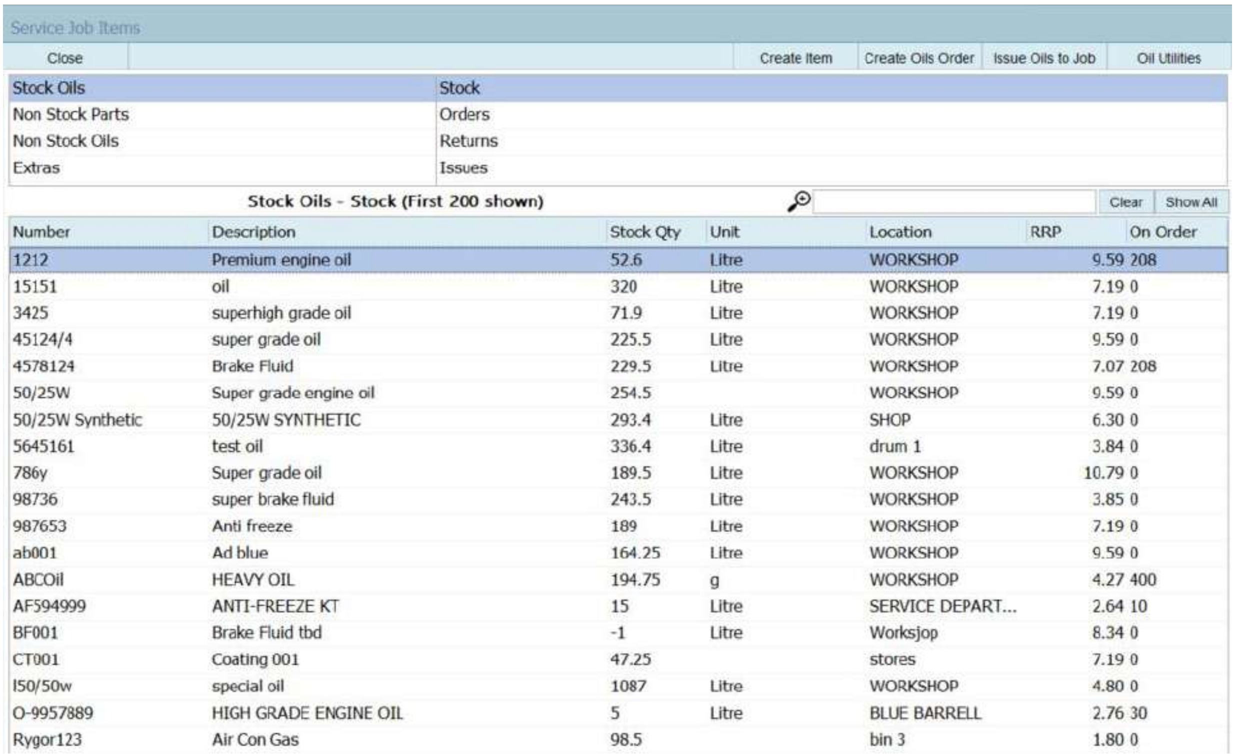
After printing the estimate you will have the options of Create New Booking (if the customer wants the work undertaken at a date in the future), Create New Service or Add to Existing (this adds the estimate to a current in progress job).

Stock Parts
Stock parts allocated to an Estimate or Booking will be allocated in stock but will not be taken out of stock until the Estimate / Booking is received.

Stock Oils Management

From the Service Module main menu click on the Job Items action tab.

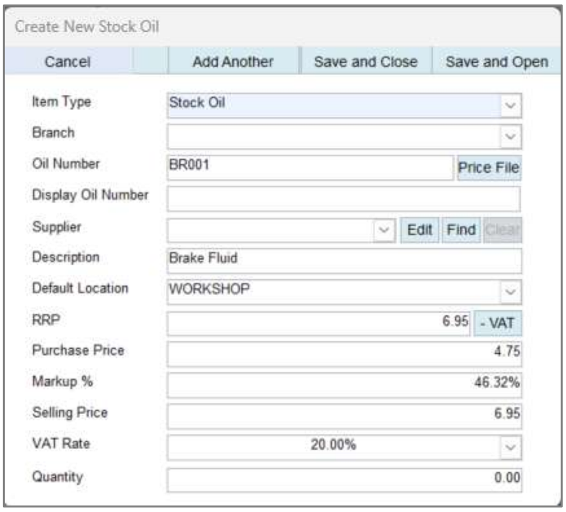
Within Job Items you can manage your stock oils by creating orders from your suppliers and receiving the oils into stock. Stock Oils should be used for any liquid / item that you want to add in litres, so it can be used for brake fluid, antifreeze etc. in addition to standard oils.



Number	Description	Stock Qty	Unit	Location	RRP	On Order
1212	Premium engine oil	52.6	Litre	WORKSHOP	9.59	208
15151	oil	320	Litre	WORKSHOP	7.19	0
3425	superhigh grade oil	71.9	Litre	WORKSHOP	7.19	0
45124/4	super grade oil	225.5	Litre	WORKSHOP	9.59	0
4578124	Brake Fluid	229.5	Litre	WORKSHOP	7.07	208
50/25W	Super grade engine oil	254.5		WORKSHOP	9.59	0
50/25W Synthetic	50/25W SYNTHETIC	293.4	Litre	SHOP	6.30	0
5645161	test oil	336.4	Litre	drum 1	3.84	0
786y	Super grade oil	189.5	Litre	WORKSHOP	10.79	0
98736	super brake fluid	243.5	Litre	WORKSHOP	3.85	0
987653	Anti freeze	189	Litre	WORKSHOP	7.19	0
ab001	Ad blue	164.25	Litre	WORKSHOP	9.59	0
ABCOil	HEAVY OIL	194.75	g	WORKSHOP	4.27	400
AF594999	ANTI-FREEZE KT	15	Litre	SERVICE DEPART...	2.64	10
BF001	Brake Fluid tbd	-1	Litre	Worksjop	8.34	0
CT001	Coating 001	47.25		stores	7.19	0
I50/50w	special oil	1087	Litre	WORKSHOP	4.80	0
O-9957889	HIGH GRADE ENGINE OIL	5	Litre	BLUE BARRELL	2.76	30
Rygor123	Air Con Gas	98.5		bin 3	1.80	0

Adding a New Oil Record

Click on the Create Item button, select Stock Oil and enter the details. Note that the default unit of measure is Litres and the RRP and Purchase prices are per litre and the prices are Net.

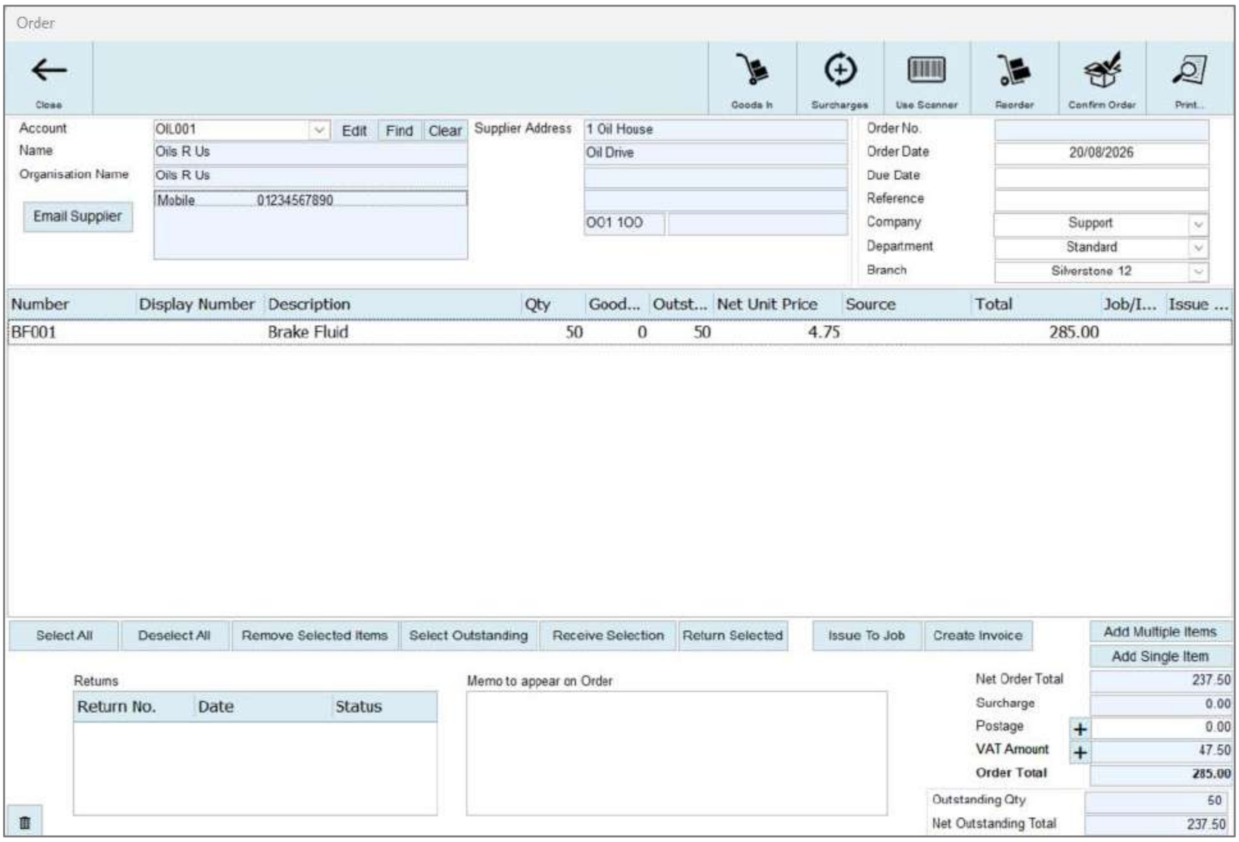


Stock Quantity – if you already have this oil in stock you can enter the current stock quantity in litres, if you are going to order the oil in for the first time you should leave the stock quantity as 0 and then create an order for the new stock

When you have filled in all of the details click Save and Open to confirm all of the details. If you wish to create additional records click on the Add Another button and a new record will be displayed.

Creating an Oils Order

Click on Create Oils Order and search for the Oil/s you are wanting to order. Select the oil and click on the Confirm button. Quantities can be adjusted on the right hand side by using the +/- buttons. If you want to do bulk increases, select the Oils and enter a value into the Amend Quantity by box. Once you have selected all of the oils, click on Create Order.



Enter the Supplier details by either clicking on New to create a new supplier or Find, to search for an existing supplier. Enter the suppliers invoice number into the Reference box.

Additional oils can be added by clicking on either Add Multiple Items or Add Single Item.

Confirm Order

Pressing the Confirm Order button will allocate an Order Number and will lock the order. Once the order is locked, no changes can be made.

Print Options

When selecting Print, you will have the option to print the following:

Order Form – Printing an order form will lock the order and no changes can be made.

Proforma – Printing a Proforma Order will allocate an Order Number but the order will not be locked. These means items can still be added, removed or edited.

Delivery Note – A print out of the items and quantities that have been ordered.

Received Summary – A summary of all items on the order that have been received.

Receiving an Oils Order

From the Job Items menu click on Stock Oils > Orders. This will show a list of all orders that have been created.

Open the relevant order and if all items have been received and there have been no alterations to the pricing, click Select Outstanding to highlight all items with outstanding quantities and then click Receive Selection. DragonDMS will bring the items selected into stock and the outstanding column will now be 0, showing that all the items have been received.

If you have received part of an Order, select the lines of the items received and check that the quantity matches the number of items received. Click Receive Selection. DragonDMS will bring only the items selected into stock.

If you have ordered an item that has arrived at a different quantity than you have ordered, double click the relevant Oil on the Order. Click Receive and you can enter the actual received quantity and/or received price. Click OK to save and close the record. The outstanding items will remain on the order.

Oils Purchase Invoice in Sage 50
If you are posting received oils orders to Sage 50 using DragonDMS sage integration, the purchase invoice will use the received date to post the purchase invoice.

Marking an Oils Order as 'Goods In'

Alternatively to receiving the oils in, the oils may have arrived, but you have not yet received the invoiced. This could cause issues as you are unable to receive them into stock as the final price is not yet known but the workshop needs to know that the oils are now on site and available to use.

Within the order you can select the goods in button along the top when the oils arrive onsite and enter the quantity of good that have been delivered. This doesn't receive the order meaning pricing can still be edited when the invoice is received.

When the suppliers invoice is received, you can go into the part order and edit the unit prices to match the suppliers' invoice. Then, as before, highlight all the lines on the order and click on the Receive Selected button.

Returning an Oils Order

Oils can only be returned to the original supplier via the original Order. Highlight the oil that you wish to return and click on Return Selected. If you are not returning all of the oils on the order, a Partial Return will be created. When the return note is displayed, you can edit the quantity that is being returned by double clicking on the oil.

When you are happy the return details are correct, click Print. A return number will be allocated and the oil will be removed from stock

Work in Progress

When a service job has been received into the workshop, it becomes 'In Progress', job components that are added to the job automatically become work in progress and increase the invoice value of the job.

If you are using the Sage 50 Integration you have the option to include or exclude Work In Progress (WIP) journals from the Sage Integration.

If you choose to include WIP journals in your integration then each time an integration is run a work in progress figure will be posted to Sage 50 for each 'in progress' job. This figure is then reversed when the invoice has been printed. The date used to post the work in progress figure is taken from the received date of the service job, the date used for the reversal of the work in progress figure is taken from the invoice date.

For most businesses service jobs are received in and completed / invoiced off within one or two days, and the posting of Work in Progress is not an issue.

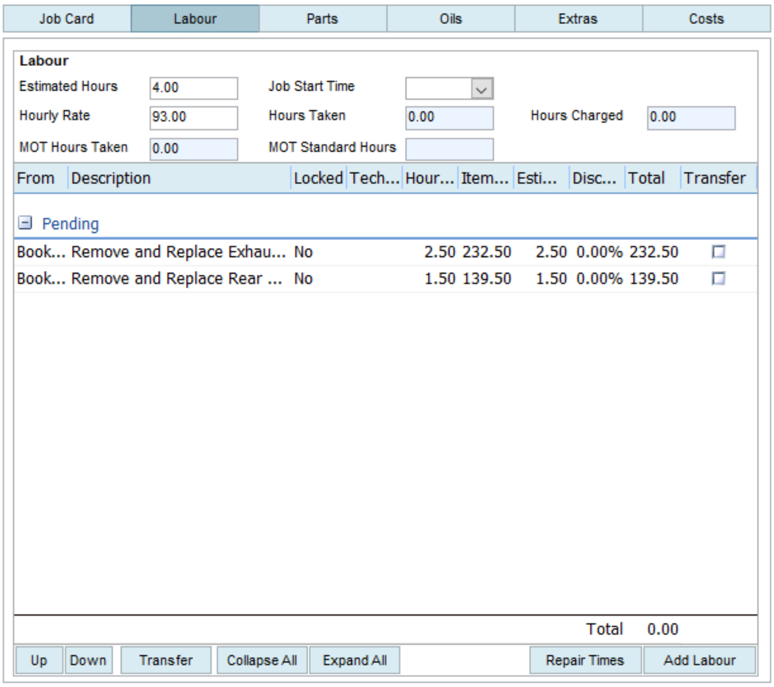
For businesses that undertake long term service jobs where the vehicles are In progress for days / weeks even months, they may wish the invoice value of the job to reflect the actual work that has been undertaken and the actual parts that have been fitted. This is especially the case if you have created an Estimate / booking that has all of the components on the job, in this scenario, when you receive the Estimate / Booking into the workshop the job would automatically have the value of all the components as the work in progress figure.

The default setting in DragonDMS is: Add Job items to Work in Progress automatically

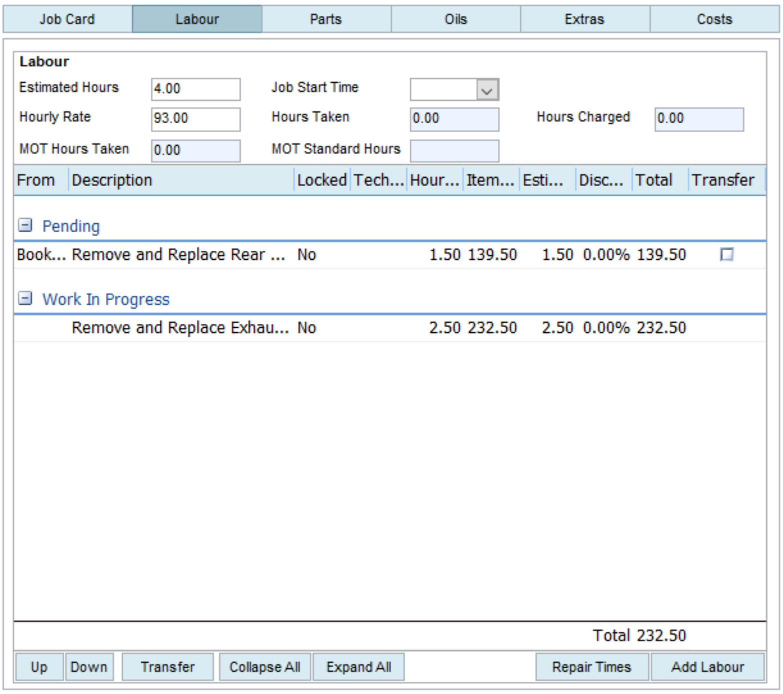
If you want to control what components are deemed Work in Progress Contact Support at Dragon2000 and request that we change your setup to use the Manually add job items to Work In Progress Work In Progress option.

How to Manually Mark a Component as Work in Progress

When a service job is received into the workshop, all of the components from the Booking / estimate will show as Pending, and there will be no invoice value.



To add components to work in progress, tick each of the components that you want to add to Work in Progress then click on Transfer.



The selected components will move from the Pending section to the Work in progress and the value of the work in progress components will make up the invoice value, this is the figure that will be posted to Sage50 as Work in Progress.

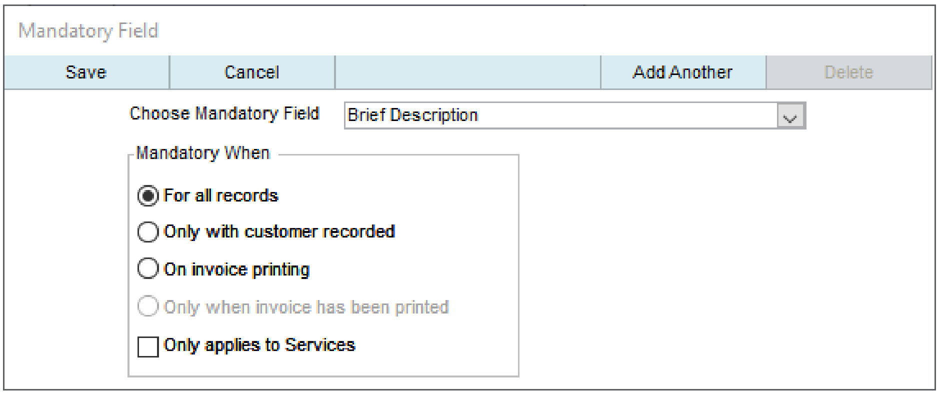
Mandatory Fields

You may wish to make sure that certain fields within the service record are added by all employees, you can do this by making a field mandatory.

If a mandatory field is set you will be unable to close the record if the field has not been populated, you will be advised of the field that needs to be entered.

To create a mandatory field go to Settings > Service > Settings > Mandatory Fields

By default there are no mandatory fields, if you wish to create one, click on the New Mandatory Field button, using the dropdown list select the data field, then select the condition (i.e. when this field should be mandatory).



Conditions explained:

For all records – field will be mandatory when you close the record.

Only with customer recorded – field will be mandatory when you close a record if the customer has been added.

On invoice Printing – field will be mandatory when you click to print the invoice, the invoice will not print if the field has not been populated.

Only when invoice has been printed – field will be mandatory when you close a record if the service invoice has been printed.

Only applies to Services – field will be mandatory for service records only

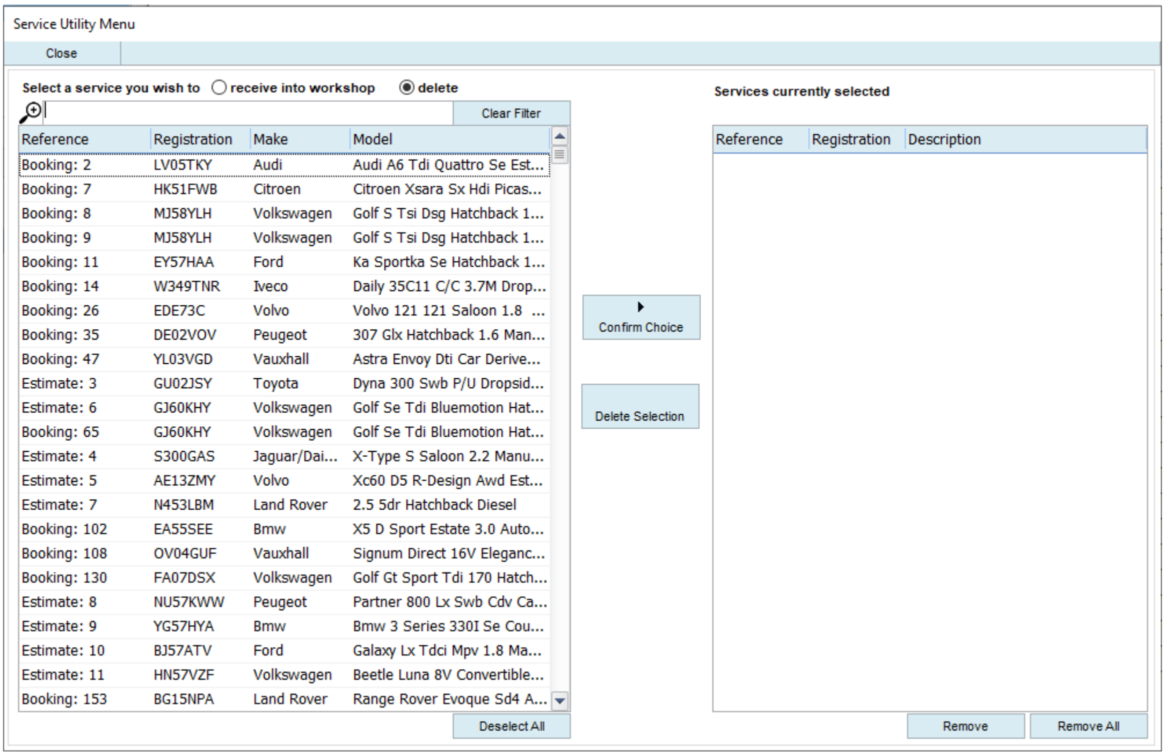
Use of Mandatory Fields

It is recommended that you use mandatory fields sparingly, if you make too many fields mandatory you run the risk of users entering 'rubbish' information just to allow them to close the record.

Utilities Menu

From the Service module click the Utilities action button. There are 2 actions that you can do within Utilities.

1. Receive bulk bookings into the workshop
2. Delete estimates, bookings or service jobs


Service Utility Menu

Close

Select a service you wish to ○ receive into workshop ◉ delete

Clear Filter

Reference	Registration	Make	Model
Booking: 2	LV05TKY	Audi	Audi A6 Tdi Quattro Se Est...
Booking: 7	HK51FWB	Citroen	Citroen Xsara Sx Hdi Picas...
Booking: 8	MJ58YLH	Volkswagen	Golf S Tsi Dsg Hatchback 1...
Booking: 9	MJ58YLH	Volkswagen	Golf S Tsi Dsg Hatchback 1...
Booking: 11	EY57HAA	Ford	Ka Sportka Se Hatchback 1...
Booking: 14	W349TNR	Iveco	Daily 35C11 C/C 3.7M Drop...
Booking: 26	EDE73C	Volvo	Volvo 121 121 Saloon 1.8 ...
Booking: 35	DE02VOV	Peugeot	307 Glx Hatchback 1.6 Man...
Booking: 47	YL03VGD	Vauxhall	Astra Envoy Dti Car Derive...
Estimate: 3	GU02JSY	Toyota	Dyna 300 Swb P/U Dropsid...
Estimate: 6	GJ60KHY	Volkswagen	Golf Se Tdi Bluemotion Hat...
Booking: 65	GJ60KHY	Volkswagen	Golf Se Tdi Bluemotion Hat...
Estimate: 4	S300GAS	Jaguar/Dai...	X-Type S Saloon 2.2 Manu...
Estimate: 5	AE13ZMY	Volvo	Xc60 D5 R-Design Awd Est...
Estimate: 7	N453LBM	Land Rover	2.5 5dr Hatchback Diesel
Booking: 102	EA55SEE	Bmw	X5 D Sport Estate 3.0 Auto...
Booking: 108	OV04GUF	Vauxhall	Signum Direct 16V Eleganc...
Booking: 130	FA07DSX	Volkswagen	Golf Gt Sport Tdi 170 Hatch...
Estimate: 8	NU57KWW	Peugeot	Partner 800 Lx Swb Cdv Ca...
Estimate: 9	YG57HYA	Bmw	Bmw 3 Series 330I Se Cou...
Estimate: 10	BJ57ATV	Ford	Galaxy Lx Tdci Mpv 1.8 Ma...
Estimate: 11	HN57VZF	Volkswagen	Beetle Luna 8V Convertible...
Booking: 153	BG15NPA	Land Rover	Range Rover Evoque Sd4 A...

Deselect All

Confirm Choice

Delete Selection

Services currently selected

Reference	Registration	Description

Remove

Remove All

Receive Into Workshop

Select this option at the top of the form, then select the bookings that you wish to receive from the list on the left hand side then click the Confirm Choice button, this will transfer all of the selected bookings to the list on the right hand side. To receive these bookings click on the Receive Selection button.

Deleting Service Records

The delete utility is designed to remove Estimates, Bookings or Service jobs that have been cancelled or added in error. Select the Delete option at the top of the form, then select the records that you wish to delete from the list on the left hand side then click the Confirm Choice button, this will transfer all of the selected records to the list on the right hand side. To delete these records click on the Delete Selection button.

Staged jobs

You can only delete stage 1 of a staged service job, once all the other stages on the job have been deleted

Customer Relationship Management (CRM)

The Customer Relationship Management (CRM) tool can be used to keep in touch with your customer base to reminder them of future MOT, Service, Cambelt changes, in addition to this you can send reminders to customers who had advisories on their invoices. All of this depends on the follow-up dates being added to the service records and the correct Marketing Preferences being updated for your customer.

Template Manager

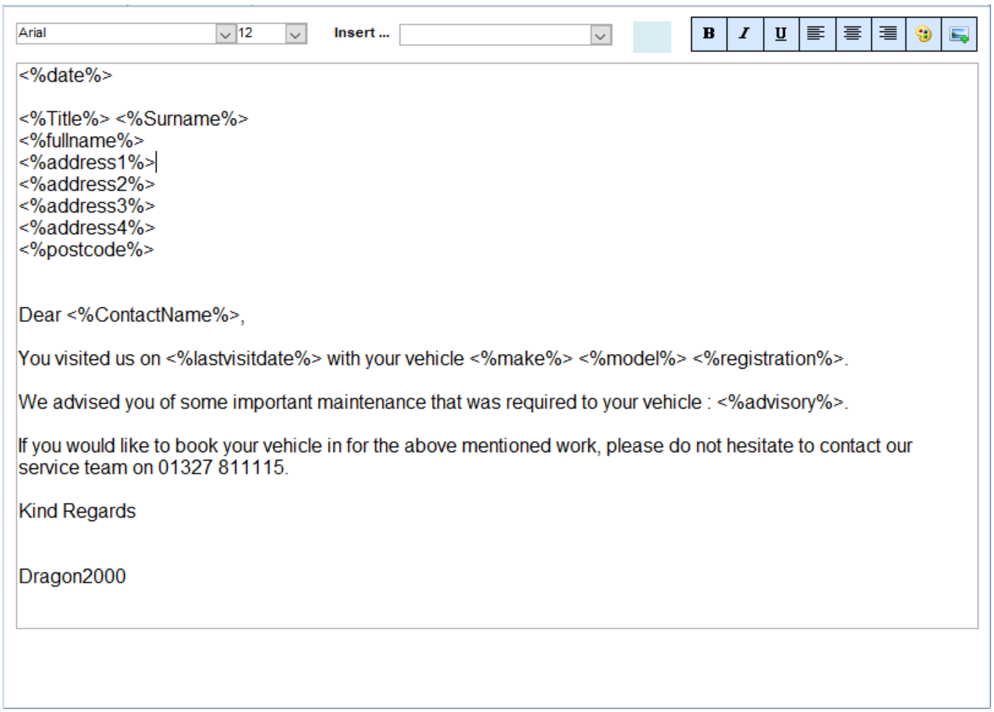
Standard letters, emails and text messages can be setup within the Template Manager, saving time and ensuring consistency to your communications. To get the most out this tool you should personalise the messages as much as possible, so that the customer's details and vehicle details appear in the communication.

Creating a Template

From within the CRM module click on the Template Manager action button, a list of saved templates is displayed.

Click on the New button and select the type of templates (Letter, Text message or Email), then select the department (Either Vehicle sales or Service) then select the type (Either Custom or Standard, you can then only use the template in the relevant mailshot sections). Click Continue and you can now compose your Letter, Text Message or Email.

Use the Insert fields to personalise the message. Any text that you see which looks like this <%xxxx%> is an insert field and will be populated with the correct information for each customer at the point of printing the mailshot.



For any email templates, if you select Unsubscribe Message from the list it will insert the following line to the bottom of the email: *'To unsubscribe, please replay with "Unsubscribe"'*

Click on Save to save and close the template. When creating new templates you can also choose to copy from an existing saved template.

Standard Follow-ups

The following have been setup in DragonDMS as standard follow-ups:

Contacts Due – Service follow-ups added to Customer Records that fall into the date range.

Advisory Due – Advisories added to finished service jobs where a follow-up date has been entered.

MOT & Service Due – Customers that have both an MOT and service due at the same time.

MOT Due – Service Records with an MOT due follow-up date.

Service Due– Service Records with a service due follow-up date.

Cambelt Due – Service Records with a Cambelt due follow-up date.

Warranty Expired – Service Records with a warranty expiry date.

Inspection Due - Service Records with an inspection due date.

Habitation Due – Service Records with a habitation due date.

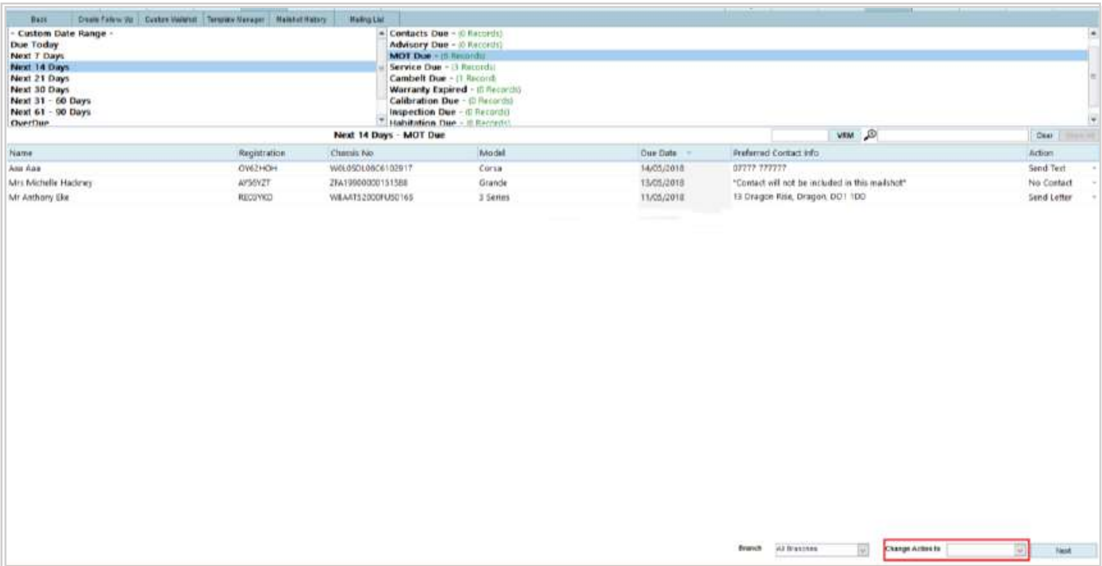
Standard Follow ups can be sent to customers that have due dates that fall into the following ranges:

- Next 7 Days
- Next 14 Days
- Next 21 Days
- Next 30 Days
- Next 31-60 Days
- Next 60-90 Days

The customer results that match each of the time frames are dynamic, that means that over time a follow-up will flow down from Next 60 – 90 days into Next 31 – 60 days and so on until the due date of the follow up is overdue.

Running a Standard Mailshot

Select the time frame and follow - up type (In the example below the timeframe is Next 14 days and the follow–up type is MOT Due.)

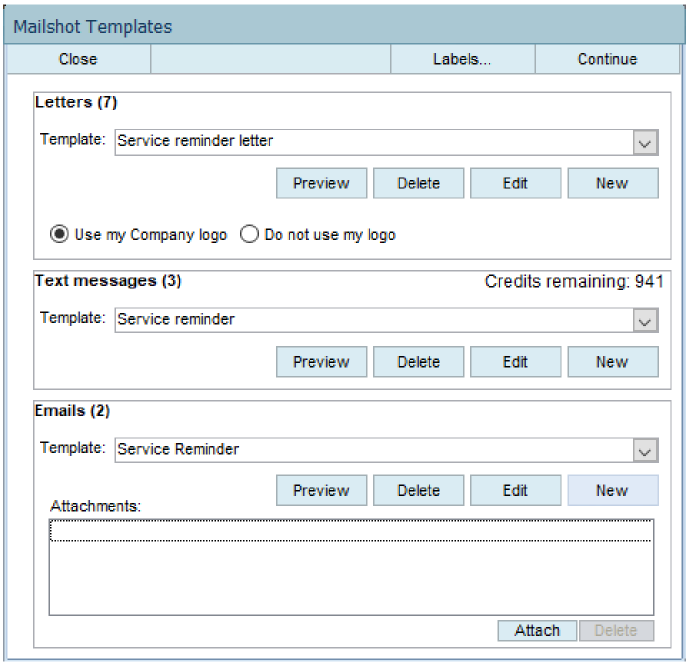


The default mailshot action is taken from the preferred contact method selected on the contact record. If a preferred contact method is not selected it will default to Letter.

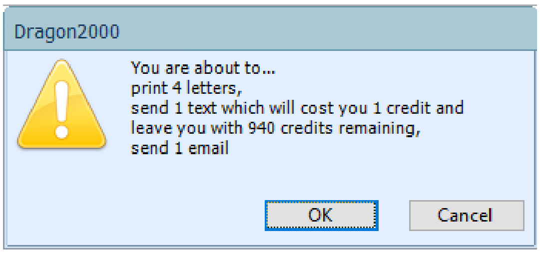
The default action can be changed on each contact by just clicking on the Action type and selecting an option from the drop down list (Letter, Email, Text Message, No Contact, Move Due Date). You can also change the Action for all of the contacts by selecting Change Action To.

DragonDMS will check that the Customer Record has the relevant information for the selected action (If text message is selected, DragonDMS will check for a mobile number, if Email is selected, DragonDMS will check for an email address). It will also look at the customers marketing preferences. For examples, if a customer has opted out of receiving marketing emails, you will not be able to select email as a contact method.

Once the relevant Actions have been selected, click on Next. Select the template that you want to use for each of your selected mailshot methods. The dropdown list of templates will only show Standard Service Templates for each mailshot method. (New templates can be setup in the Template Manager). Each of the mailshot methods should be previewed to ensure the correct template has been selected and the letters, emails, text populated correctly, then click Continue.



Click OK to print / send follow ups. If you are sending emails you will need to have Microsoft Outlook open, if you are sending text messages you will need to have enough text credits.



All follow ups sent from within the CRM module will automatically create a correspondence log on the Customer's Record. (Go to the Customer record, click on the Contact menu and then on the Activity tab.)

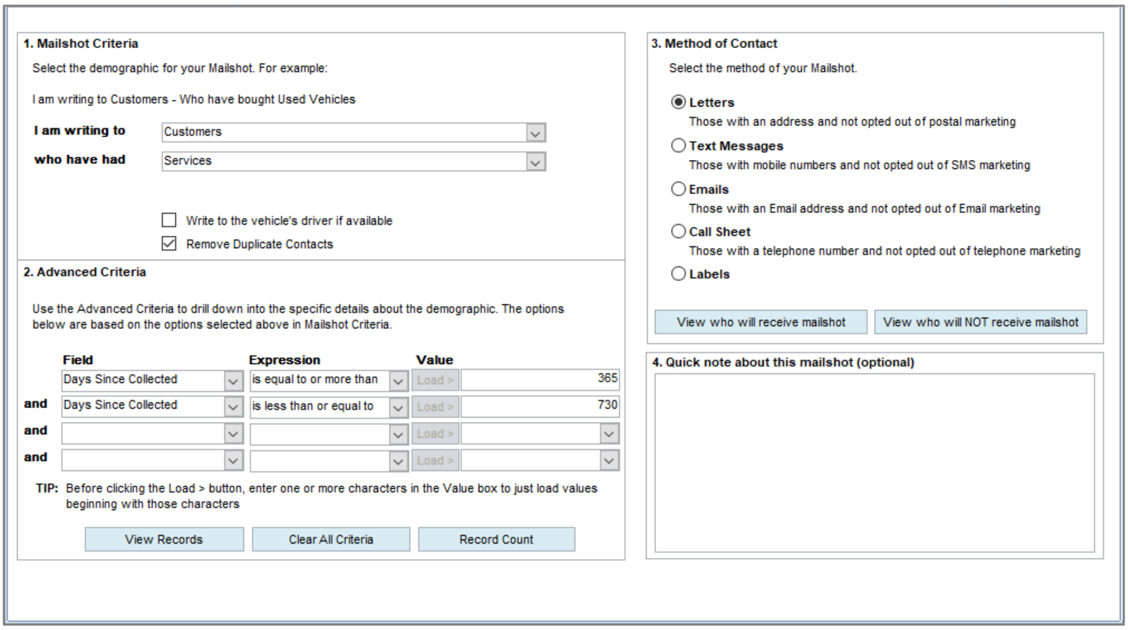
Awaiting Response

When a follow up has been printed / sent the follow up then moves into the Awaiting response list. This will have a combination of all the follow ups sent. When you create a service booking for a customer that has been sent a follow up you will be asked if the booking is in response to the mailshot that has been sent. Clicking Yes will remove the contact from the Awaiting Response list.

Custom Mailshots

Custom Mailshots can be used to create a mailshot (letter, email or text message) to a custom dataset of customers. Examples may be all customers who all have a specific make and model of car for a product recall, or all lapsed customers who have not been to the service department for over 1 year.

From the CRM module click on Custom Mailshots, and click on the New button at the bottom of the screen. On the next screen select the Mailshot Criteria, Advanced Criteria and Method of Contact.



Click on Continue, and select the template that you wish to use. If the template has not been setup you can click on New to create a new template.

If you want to save this mailshot for future use click on the Save button and give your mailshot a name.

Mailshot History

A log of all Mailshots sent from the CRM is displayed in Mailshot History. Mailshots can be reverted by selecting the mailshot and clicking on the Undo Mailshot button. This is useful if a mailshot is printed with the wrong letter template. By reverting the mailshot the affected records will be removed from the awaiting response list and appear back in their original follow-up list, allowing you to run the mailshot again.

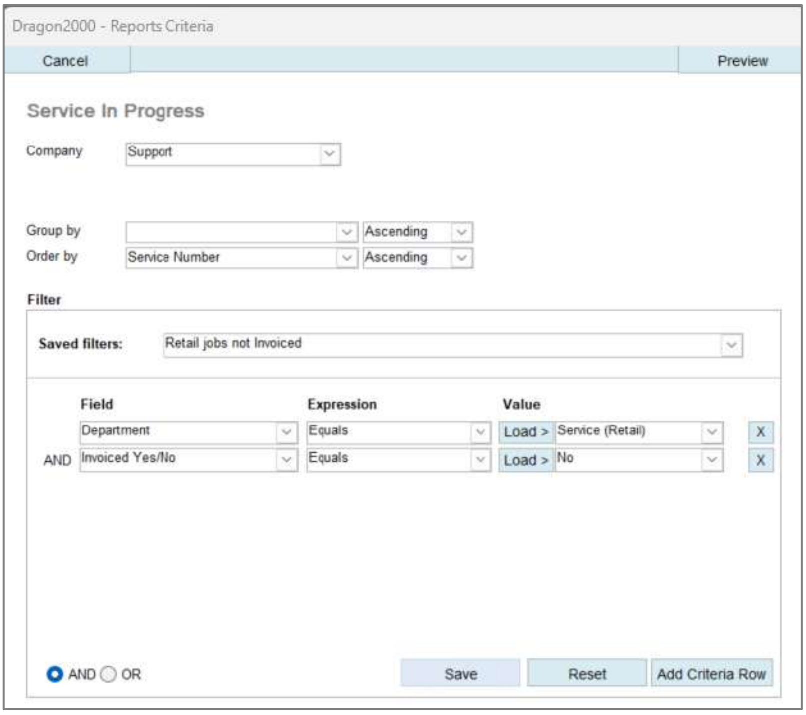
Reports

The Reports that are displayed are controlled by the level of access given to the User. To view all reports the User must have access to Management Reports.

Select the Report you want to run and double click, this will display the Report Criteria. The details on this screen will change depending on which Report you are running, generally you can enter the date range that you wish to report on.

Report Filters

Select the Report you want to run and double click, the Report Criteria will be displayed. The details on this screen will change depending on which Report you are running, generally you can enter the date range that you wish to report on.



The Fields options allows you to add Criteria to filter the report data. You can add more filters by clicking on the Add Criteria Row button. You can also decide if you wish the additional filters to be 'AND' (a filter in addition to the other filters) or an 'OR' (a filter that either meets one of the filters or the others).

Click Preview to view the Report. Once the Report is on the screen you can view each of the pages (if there are more than one) by clicking on the arrow next to the page number at the bottom left of the screen. To zoom in and out of the Report simply click the mouse on the Report pages.

Printing Reports

To print the Report click the Print Options button at the top left of the screen. You can choose to print, email (If you use Microsoft Outlook) or PDF the Report. If you do not wish to print the Report at this time then click the Close Print Preview button to return to the Reports Menu.

Most Popular - Standard Reports

Service Sales

Daily Sales - Needs Job Status as 'Finished' and requires specific 'Collected' date for this report.

Service In Progress

Service in Progress – Displays jobs not collected, showing current amounts for Labour, Parts, Oils & Extras added to the service.
Service in Progress List – Shows the list of jobs from the Work in Progress screen, including Customer Name, Brief Description of Work and Status.
Service in progress – Cost Summary – Cost on open jobs.
Open Jobs with Deposits – All open Bookings and un-invoiced Services that have deposit payments.

Oils & Parts

Oils Orders – Shows oils that have been ordered within the given dates.
Oils Orders Received - Shows oils that have been received within the given dates
Oils Stock – Current oils and stock value.

Services Received

Services Received – All services ever received between two given dates.
Service Calendar – Events – Lists all calandar events affecting available workshop loading.
Service Bookings – All vehicles booked in to the workshop that are due to arrive between the given dates, showing Customer, Registration and Chassis Number.
Deleted Services – Shows details of all services deleted, date and time it was deleted and who it was deleted by.

Service History

Service History – Requires Registration Number of Chassis Number and shows all instances of Service Work to this vehicle regardless of owner.

Most Popular - Management Reports

Attendance

Time on Site Analysis – Compares the daily hours onsite with the total Productive Hours and Non Productive Hours to give a figure for unaccounted hours.

Service Efficiency

Service Efficiency Detailed – Compares individual labour line Hours Charged and Hours Taken to calculate labour efficiency for Service Jobs. Shows all Service Jobs where the date received is between the two dates entered.

Technician Times Detailed – Details Technicians hours against individual labour lines where Date of Work is between the two dates entered. The report is grouped by technician.

Technician Non Productive Time - Details Technicians hours against non productive clocking's between the two dates entered. The report is grouped by technician.

Technician Times CSV Report – Contains Technician clocking details between the selected dates.

Service Sales

Daily Sales – Payment Types – Service invoice totals for chosen date grouped by payment type. Does not include internal invoices.

Invoice Log – Totals– Hours taken, hours charged and breakdown of Service invoice amounts. Calculates approximate workshop profit taking time taken and approximate labour costs into account.

Service Credits

Credit Note Log – All credit notes issued between two given dates. Only shows those that have been printed.

Job Card Reports

Service Job Card Report – Includes all Services which have been allocated an invoice number, whether printed or not.

Service Job Card Report – Not Invoiced – Includes all Services which have been collected but not invoiced.