

Quick Start Guide – Authorisation

The Authorise Costings Screen

The purpose of the Authorise Costings Screen is to enable the user to authorise or dismiss additional work that has been identified by the Technician. The screen also provides the users with quick links back to other screens such as Parts and Labour Costing. The image below demonstrates how the Authorise Costings Screen is divided. Each section of this screen is displayed in the paragraphs below.

The screenshot shows the 'Whole Authorise' screen. At the top, there's a header bar with a car icon and the text 'Whole Authorise'. Below this is a form containing customer details: Make: CITROEN, Model: PICASSO, Reg. No.: CA15NUP, JC.No: 56423, VIN: SALVA2AG0EH897137, Customer Name: Mr R Hughes, Telephone No: 01270539894, and Service Advisor: Select. Below the form are four tables: 'Unauthorised Work', 'Assigned parts', 'Authorised Work', and 'Option parts'. The 'Unauthorised Work' table has columns: Item Desc, Net, VAT, T.Price (Inc. VAT), and Discount. It lists items like Left Bush, Front Brakes, N2 Rear Tyre, and Mandatory Lights Rear (external). The 'Assigned parts' table has columns: Part Desc, Part No, Price, Qty, and Discount. The 'Authorised Work' table has the same columns as 'Unauthorised Work'. The 'Option parts' table has the same columns as 'Assigned parts'. At the bottom, there's a summary table with columns: Ident. Discount (Exc. Vat), Identified, Identified (Inc. Vat), Auth. Discount (Exc. Vat), Authorised, Authorised (Inc. Vat), Agreed Estimate, and Total (Inc. Vat). The summary table shows values for each column. At the bottom right, there's a 'Page loaded in 282 ms.' message and a 'Print' button.

Customer Details

The upper section of the Authorise Costings Screen contains all necessary information about the VHC. The information displayed in this section is read-only and with the exception of the Service Advisor dropdown menu, cannot be edited. There is also a print preview button to view/print the VHC.

The screenshot shows the 'Customer Details' section. It contains a form with the following fields: Make: CITROEN, Model: PICASSO, Reg. No.: CA15NUP, JC.No: 56423, VIN: SALVA2AG0EH897137, Customer Name: Mr R Hughes, Telephone No: 01270539894, and Service Advisor: S Advisor1. There is a 'Print' button at the bottom right.

When a Service Advisor is intending to authorise or dismiss work, it is essential that they select their name or initials from the Service Advisor dropdown menu. This will mean that any values authorised or dismissed will be credited to the correct Service Advisor.

Additional Work Section

The large section displayed to the left of the screen and split into two tables, is by far the most important section on this screen. When first entering the Authorise Costings screen, all of the additionally identified items (if applicable) will appear in the top table under the heading 'un-authorised work'.

The colour of each item in the table reflects the state given to the item by the Technician. For example, if the Technician marked a vehicle's brake pads as AMBER then the item would appear AMBER in the table. This applies to both the unauthorised and authorised tables.

For every item that is identified by the Technician, a single line will appear in the table. The headings above each column give the user more information about the line. See image below:

<input type="checkbox"/>	Left Bush	...	£ 0	£ 0.00	0	£ 0.00
<input type="checkbox"/>	Front Brakes	...	£ 1426.16	£ 285.73	1711.89	£ 0.00

A user can see additional information regarding the item by ticking the item, the additional information will appear below under the header VHC item details.

VHC item details		Status	Follow up date	Fitted price inc VAT
Left Bush		Amber	01/11/2016	0
Comments		Marketing message		
Requires further investigation				

To authorise or unauthorise a line simply tick the item and click the relevant option.

Unauthorised Work

☐ Authorise

Item Desc	Net	VAT	T.Price (inc VAT)	Discount
<input type="checkbox"/> O/S Front Tyre	£ 70	£ 14.70	84.7	£ 0.00
<input checked="" type="checkbox"/> Front Brakes	£ 1038.08	£ 208.12	1246.2	£ 0.00

Authorised Work

☐ Unauthorise

Item Desc	Net	VAT	T.Price (inc VAT)	Discount
<input checked="" type="checkbox"/> Left Bush	0	£ 0.00	0	£ 0.00

Assigned/Option Parts

When multiple parts are added to a VHC Item they will appear in the assigned parts list. When the line is authorised all parts in the assigned parts will be authorised. To switch a part from assigned to option click on the Move to option button and move to assigned to switch it back.

Assigned parts

☐ Move to option

Part Desc	Part No	Price	Qty	Discount
<input type="checkbox"/> ALTERNATOR	LR028121	£ 388.08	1	0.00
<input type="checkbox"/> Brakes	55	£ 50.00	1	0.00

Option parts

☐ Move to assigned

Item Desc	Part No	Price	Qty	Discount
<input checked="" type="checkbox"/> ALTERNATOR	LR028121	£ 388.08	1	0.00

Tyre Options Section

When a tyre item is ticket the Tyre Options Section will appear in the Authorise Costings Screen to the right-hand side. The section is made up of a table, listing the different tyre options, two buttons (up and down) and a tyre details section which displays the details of the currently fitted tyre. Once a tyre has been selected within the Additional Work Section, the tyre options provided by the parts department will be displayed in the table to the right hand side.

Tyre Option A will always be the tyre quoted in the Authorise Costings Screen. To move Tyre Option B up to Tyre Option A select Option B.

Tyre Options		
Option	Make	Price
<input checked="" type="radio"/> A	AVON	£ 70 ▲
<input type="radio"/> B	BUDGET	£ 60

Authorise Costings Left Click Menu

Left clicking will show the available actions for a VHC item. The following section describes each of the available actions.

View Tyres/Parts - Provides the user with a quick link to the Price Tyres or Parts Screen

View VHC Item - Provides the user with a small screen that displays additional information about the specific VHC item

Snooze - All VHC items that are not Authorised or Dismissed will automatically go into the autoVHC Follow up system. Depending on the status of the VHC item (RED / AMBER), will depend on what date the VHC item will be put into the autoVHC Follow up system. As a default all RED work will be put into the follow up system in three days and all Amber work will be put into the system in three months. These default values can be altered in the Manager / Admin tab by a Manager.

A user would select this function if the automatic follow up date was not suitable. For example, a tyre rated at 3.5mm on the vehicle of a low mileage driver would not need following up in three months. Therefore a user could snooze the item for a more suitable date.

Add/Edit Discount - This option lets the user apply a discount to either the parts, labour or total price of a single VHC Item.

Dismiss - This marks the VHC item as dismissed. A user must only dismiss an item if the customer does not want or need to be followed up or reminded in the future. Therefore, a dismissed item will not appear in the autoVHC Follow up work and will be removed from the Authorise Costings Screen. For example, a user would dismiss an item(s) if the customer was due to sell their car and therefore not wishing to be followed up.