



## Settings Guide

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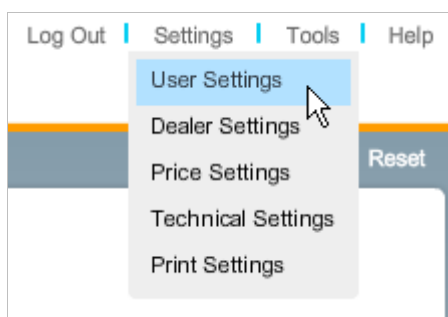
## Introduction

To ensure Superservice Menus delivers the maximum benefits to your dealership you will need to configure your settings, such as pricing for labour, sundries and parts.

This guide is divided into the following sections:

- User Settings
- Dealer Settings
- Price Settings
- Technical Settings
- Print Settings

To access a settings screen, select the screen name from the **Settings** menu.



- ▶ For assistance with the setup of Superservice Menus, contact Customer Service.

## User Settings

The User Settings screen contains settings that allow you to customise the display and layout of Superservice Menus.

The main settings in the User Settings screen are:

- Style Sheet: Allows you to customise the colour scheme, if available.
- Language: Allows you to select your language.
- Date Format: Allows you to customise the date format.
- Time Format: Allows you to customise the time format.
- Drive Filtering: Allows you to select Right Hand Drive (RHD) or Left Hand Drive (LHD) according to your region, if available.

You must click **Save** to save the changes.



The screenshot shows the 'User Settings' dialog box. It has a title bar with 'User Settings' on the left and a 'Close' button on the right. The main area is divided into two columns. The left column contains five settings, each with a label and a dropdown menu: 'Style Sheet' (set to 'SSM Silver Blue'), 'Language' (set to 'English UK'), 'Date Format' (set to 'DD/MM/YYYY'), 'Time Format' (set to '12 Hour'), and 'Number Format' (set to '00.0'). The right column contains one setting, 'Drive Filtering', with a dropdown menu set to 'LHD'. A 'Save' button is located at the bottom right of the dialog box.

## Dealer Settings

The Dealer Settings screen contains information about your dealership, such as contact details and employee records.

Dealer Settings

Close

Dealer Details

Employees

**Dealership**

Dealer Code

7

Dealer Name

Infomedia Motors

VAT Code

Company Number

6789 6789

Telephone No.

1234 1234

Fax No.

1234 1235

Contact Name

Service Counter

Email

service@infomedia.com.au

www

infomedia.com.au

**Site Address**

Street

Warringah Road

City

Frenchs Forest

Postal Code

2086

County

Country

Australia

**Postal Address**

☒ Same as Site Address

Street

Warringah Road

City

Frenchs Forest

Postal Code

2086

County

Country

Australia

Undo

Save

## Dealer Details

The Dealer Details tab allows you to customise Superservice Menus to your dealership. This information will be used when creating quotes, repair orders and invoices.

To set up your dealer details:

- 1 Type the relevant dealer details into the corresponding fields.
- 2 Ensure an email address has been entered into the **Email** field.
- 3 Type the site and postal address of the dealership into the corresponding fields.

If the postal address and the site address are the same, select the **Same as Site Address** checkbox.

The screenshot shows a web form titled "Dealer Settings" with a "Close" button in the top right corner. The form has two tabs: "Dealer Details" (selected) and "Employees".

**Dealership Section:**

- Dealer Code: 7
- Dealer Name: Infomedia Motors
- VAT Code: (empty)
- Company Number: 6789 6789
- Telephone No.: 1234 1234
- Fax No.: 1234 1235
- Contact Name: Service Counter
- Email: service@infomedia.com.au
- www: infomedia.com.au

**Site Address Section:**

- Street: Warringah Road
- City: Frenchs Forest
- Postal Code: 2086
- County: (empty)
- Country: Australia

**Postal Address Section:**

- ☒ Same as Site Address
- Street: Warringah Road
- City: Frenchs Forest
- Postal Code: 2086
- County: (empty)
- Country: Australia

At the bottom right of the form are two buttons: "Undo" and "Save".

- 4 Click **Save**.

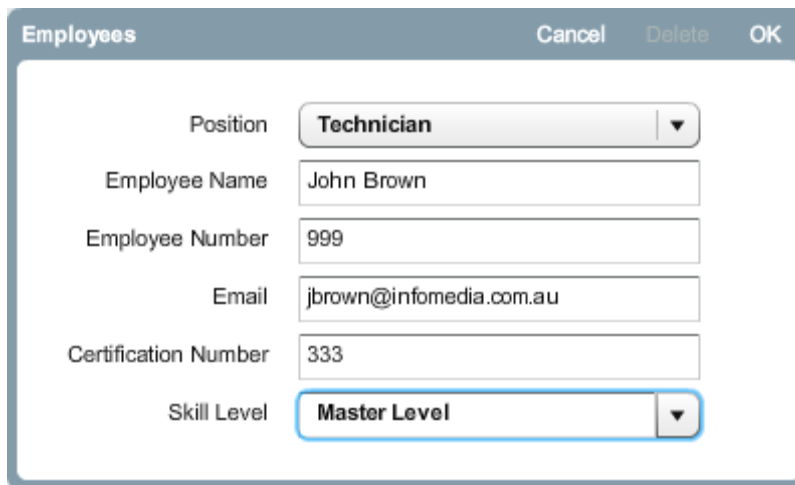
► To update your dealer details, edit the details and click **Save**.

## Employees

The Employees tab allows you to add and modify employee records for service advisors and technicians.

To add a new employee record:

- 1 Click **Add** in the **Employees** tab.
- 2 Select the **Position** from the drop-down list.
- 3 Type the details into the corresponding fields.
- 4 Select the **Skill Level** from the drop-down list.



The screenshot shows a dialog box titled "Employees" with buttons for "Cancel", "Delete", and "OK". Inside the dialog, there are six fields with labels to their left: "Position" (a dropdown menu showing "Technician"), "Employee Name" (a text box with "John Brown"), "Employee Number" (a text box with "999"), "Email" (a text box with "jbrown@infomedia.com.au"), "Certification Number" (a text box with "333"), and "Skill Level" (a dropdown menu showing "Master Level").

- 5 Click **OK**.
- 6 Click **Save**.

- ▶ To update an employee record, select an employee and edit the details, then click **OK**.

## Price Settings

The Price Settings screen contains settings that allow you to customise the pricing of labour, sundries and parts to ensure that quotes, repair orders and invoices are accurate.

Price Settings

Close

Labour Rates

Labour Times

Fluids and Sundries

Sundry Rates

Parts Pricing

Tax

Upsell Recommendations

Miscellaneous

| Labour Rate Name | DMS Code | Calculation Type | Price per hour | Labour Taxable | Fluids and Sundries Taxable | Default |
|------------------|----------|------------------|----------------|----------------|-----------------------------|---------|
| COST             | 0        | Flat             | 90.00          | ✓              | ✓                           | ✗       |
| FLEET            | 0        | Flat             | 100.00         | ✓              | ✓                           | ✗       |
| INTERNAL         | 0        | Flat             | 95.00          | ✓              | ✓                           | ✗       |
| RETAIL           | 0        | Flat             | 150.00         | ✓              | ✓                           | ✓       |
| TRADE            | 0        | Flat             | 80.00          | ✓              | ✓                           | ✗       |
| WARRANTY         | 0        | Flat             | 100.00         | ✓              | ✓                           | ✗       |

Add

Undo

Save



## Labour Rates

The Labour Rates tab allows you to customise the pricing of existing labour rates and add new labour rates.

There are two methods for calculating the labour rate price:

- Flat: Allows you to apply a flat rate per hour to labour.
- Matrix: Allows you to mark pricing up or down according to the exact amount of labour hours (in 6 minute intervals). The matrix needs to be completed manually.

| Price Settings   |              |                     |                |                                     |                                     |                                     | Close         |
|------------------|--------------|---------------------|----------------|-------------------------------------|-------------------------------------|-------------------------------------|---------------|
| Labour Rates     | Labour Times | Fluids and Sundries | Sundry Rates   | Parts Pricing                       | Tax                                 | Upsell Recommendations              | Miscellaneous |
| Labour Rate Name | DMS Code     | Calculation Type    | Price per hour | Labour Taxable                      | Fluids and Sundries Taxable         | Default                             |               |
| COST             | 0            | Flat                | 90.00          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |               |
| FLEET            | 0            | Flat                | 100.00         | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |               |
| INTERNAL         | 0            | Flat                | 95.00          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |               |
| RETAIL           | 0            | Matrix              | 150.00         | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |               |
| TRADE            | 0            | Flat                | 80.00          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |               |
| WARRANTY         | 0            | Flat                | 100.00         | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |               |

Add Undo Save

To apply a flat price to a labour rate:

- 1 Select a labour rate.
- 2 If you want to link with your DMS, type the DMS Code into the DMS Code field.
- 3 Type the price into the **Price per hour** field.
- 4 Select the **Labour Taxable** checkbox to apply tax to the labour rate.
- 5 Select the **Fluids and Sundries Taxable** checkbox to apply tax to the sundries.

Labour Rate

Cancel Delete OK

Labour Rate Name

RETAIL

Reset

DMS Code

123

Price per hour

\$150.00

Labour Taxable

☒

Fluids and Sundries Taxable

☒

Calculation Type

☒ Flat ☐ Matrix

- 6 Select **Flat** as the **Calculation Type**.
- 7 Click **OK**.
- 8 Repeat these steps for each labour rate.

To create a pricing matrix for a labour rate:

- 1 Select a labour rate.
- 2 If you want to link with your DMS, type the DMS Code into the DMS Code field.
- 3 Select the **Labour Taxable** checkbox to apply tax to the labour rate.
- 4 Select the **Fluids and Sundries Taxable** checkbox to apply tax to the sundries.
- 5 Select **Matrix** as the **Calculation Type**.
- 6 Type a labour price into each cell.

You can use the **Tab** key to move to the next cell in the row. All cells in the matrix must be completed.

Labour Rate

Cancel Delete OK

Labour Rate Name: RETAIL Reset

DMS Code: 123

Price per hour: \$150.00

Labour Taxable: ☒

Fluids and Sundries Taxable: ☒







Calculation Type: ☐ Flat ☒ Matrix

Labour Price Matrix

| Hour | + 0.0  | + 0.1  | + 0.2  | + 0.3  | + 0.4  | + 0.5  | + 0.6 | + 0.7 | + 0.8 | + 0.9 |
|------|--------|--------|--------|--------|--------|--------|-------|-------|-------|-------|
| 0.0  | 0.00   | 10.00  | 20.00  | 30.00  | 40.00  | 50.00  | 60.00 | 70.00 | 80.00 | 90.00 |
| 1.0  | 100.00 | 110.00 | 120.00 | 130.00 | 140.00 | 150.00 | 0.00  | 0.00  | 0.00  | 0.00  |
| 2.0  | 0.00   | 0.00   | 0.00   | 0.00   | 0.00   | 0.00   | 0.00  | 0.00  | 0.00  | 0.00  |
| 3.0  | 0.00   | 0.00   | 0.00   | 0.00   | 0.00   | 0.00   | 0.00  | 0.00  | 0.00  | 0.00  |

The price entered into each cell will be used for the quoted labour time in an operation. For example, the price entered into the **1.0** row and the **+0.5** column will be applied when the total labour charged is 1.5 hours.

- 7 Click **OK**.

- ▶ In the **Default** column, the  icon identifies the default labour rate. To change the default labour rate, enable the  icon.
- ▶ Click the  icon or the  icon to switch between enabled and disabled.  
 Enabled     Disabled

To add a new labour rate:

- 1 Click **Add** in the **Labour Rates** tab.
- 2 Select **Flat** or **Matrix** as the **Calculation Type**.
- 3 Type the details into the corresponding fields.
- 4 Select the **Labour Taxable** checkbox to apply tax to the labour rate.
- 5 Select the **Fluids and Sundries Taxable** checkbox to apply tax to the sundries.
- 6 Click **OK**.

- ▶ To update a labour rate, select a labour rate and edit the details, then click **OK**.

## Labour Times

The Labour Times tab allows you to customise the labour times specified by the manufacturer. The default manufacturer labour times can be increased or decreased by a fixed amount or by a percentage.

This functionality may not be available in your region.

Price Settings Close

Labour Rates Labour Times Fluids and Sundries Sundry Rates Parts Pricing Tax Upsell Recommendations Miscellaneous

| Category         | Adjustment Type | COST  | Adjust | Adjust IST | FLEET | Adjust OEM | Adjust IST | INTERNAL | Adjust OEM | Adjust IST | RETAIL |
|------------------|-----------------|-------|--------|------------|-------|------------|------------|----------|------------|------------|--------|
| Accessories      | Numeric (hrs)   | 10.00 |        |            | 8.00  |            |            | 9.00     |            |            | 0.00   |
| Repair / Replace | Numeric (hrs)   | 10.00 |        |            | 8.00  |            |            | 0.00     |            |            | 0.00   |
| Service          | Numeric (hrs)   | 10.00 |        |            | 8.00  |            |            | 0.00     |            |            | 0.00   |

Labour Time Settings

Display Industry Standard Labour Time by default

Display OEM Labour Time by default

Undo Save

To adjust the labour times:

- 1 Select the adjustment type in the **Adjustment Type** column.

To switch between adjustment types, click **Numeric (hrs)** or **Percentage (%)**.

| Category         | Adjustment Type |
|------------------|-----------------|
| Accessories      | Numeric (hrs)   |
| Repair / Replace | Numeric (hrs)   |
| Service          | Numeric (hrs)   |

- 2 Type the amount of the adjustment into each labour level column.

To apply each adjustment, enable the icon in the **Adjust** column.

In regions where additional labour times are available, select which labour times you want the adjustment to be applied to. For example, Adjust OEM (Original Equipment Manufacturer) or Adjust IST (Adjust Industry Standard Time).

- 3 Click **Save**.

## Fluids and Sundries

The Fluids and Sundries tab allows you to customise the details of existing sundries and add new sundries. The sundries can be set up according to the needs of your dealership.

Price Settings Close

Labour Rates   Labour Times   **Fluids and Sundries**   Sundry Rates   Parts Pricing   Tax   Upsell Recommendations   Miscellaneous

| Sundry Code ▲ | System Sundry Name                     | Custom Sundry Code | Custom Sundry Name | Alternate Part Number | Alternate Part Price | Parts Pricing | Part Capacity | DMS Code |
|---------------|--|--------------------|--------------------|-----------------------|----------------------|---------------|---------------|----------|
| AF1           | Auto Trans-Fluid (Dexron II)           |                    |                    |                       |                      |               | 1             |          |
| AF11          | Auto Trans-Fluid (ATF SP-III)          |                    |                    |                       |                      |               | 1             |          |
| AF16          | Auto Trans-Fluid (Esso JWS 3314)       |                    |                    |                       |                      |               | 1             |          |
| AF2           | Auto Trans-Fluid (Dexron III)          |                    |                    |                       |                      |               | 1             |          |
| AF27          | Auto Trans-Fluid (Kia Apoll Oil P/N)   |                    |                    |                       |                      |               | 1             |          |
| AF30          | Auto Trans-Fluid (Kia P/N)             |                    |                    |                       |                      |               | 1             |          |
| AF33          | Auto Trans-Fluid (Apoll Oil Red 1-K)   |                    |                    |                       |                      |               | 1             |          |
| AF36          | Auto Trans-Fluid (Apoll Oil ATF Red-1) |                    |                    |                       |                      |               | 1             |          |
| AF40          | Auto Trans-Fluid (ATF SP-IV)           |                    |                    |                       |                      |               | 1             |          |
| AF50          | Auto Trans-Fluid (Mobil D-II)          |                    |                    |                       |                      |               | 1             |          |
| AF9           | Auto Trans-Fluid (ATF SP-II M)         |                    |                    |                       |                      |               | 1             |          |
| BF            | Brake Fluid                            |                    |                    |                       |                      |               | 1             |          |
| CF1           | Clutch Fluid (Dot 3 & 4)               |                    |                    |                       |                      |               | 1             |          |
| EC1           | Environmental Charge                   |                    |                    |                       |                      |               | 1             |          |
| FD1           | Front Differential Oil (GL5)           |                    |                    |                       |                      |               | 1             |          |
| GO2           | Gearbox Oil (GL4)                      |                    |                    |                       |                      |               | 1             |          |
| KC            | Key Cutting                            |                    |                    |                       |                      |               | 1             |          |

Add   Undo   Save

To modify an existing sundry:

- 1 Select a sundry.
- 2 Change the details as required.
- 3 If you want to specify a part number substitute, select the **Apply Alternate Part Number** checkbox. Type the part number into the **Alternate Part Number** field and click **Validate**.
- 4 Click **OK**.
- 5 Click **Save**.

To add a new sundry:

- 1 Click **Add** in the **Fluids and Sundries** tab.
- 2 Type the sundry code and the sundry name into the corresponding fields.  
If you want to link with your DMS, type the DMS Code into the **DMS Code** field.
- 3 If you want to specify a part number substitute, select the **Apply Alternate Part Number** checkbox. Type the part number into the **Alternate Part Number** field and click **Validate**.

- 4 To apply the sundry to a specific operation, select the corresponding checkbox.

Fluids and Sundries Cancel Delete OK

Sundry Code BRFL

Sundry Name BRAKE FLUID

DMS Code

☐ Export this Sundry as a Part

☐ Apply Alternate Part Number

Alternate Part Number Validate

Part Capacity 1 Litres per package

Parts Pricing Retail ExTax

Price 0.00

☐ Override Price £0.00

Apply this sundry to the following operation categories

☐ All Operations

☒ Service Operations

☒ Repair Operations

☐ Accessory Operations

☐ Dealer Menus

- 5 Click **OK**.
- 6 Click **Save**.

## Sundry Rates

The Sundry Rates tab allows you to add pricing for all sundries used in your dealership. The sundries are priced according to the labour levels that are set up in the Labour Rates tab (e.g. fleet, internal, retail).

Price Settings Print Close

Labour Rates Labour Times Fluids and Sundries **Sundry Rates** Parts Pricing Tax Upsell Recommendations Miscellaneous

| Sundry Code | Sundry Name                          | Rate Type | ODC | ExNPW | FLEET | On | Min Value | Max Value | INTERNAL |
|-------------|--------------------------------------|-----------|-----|-------|-------|----|-----------|-----------|----------|
| AF17        | Auto Trans-Fluid (Esso LT 71141)     | \$        | ✕   | ✕     | 2.00  | ✓  | -         | -         | 2.00     |
| AF2         | Auto Trans-Fluid (Dexron III)        | \$        | ✕   | ✕     | 1.00  | ✓  | -         | -         | 1.00     |
| AF22        | Auto Trans-Fluid (Esso JWS 3309)     | \$        | ✕   | ✕     | 2.00  | ✓  | -         | -         | 2.00     |
| AF42        | Auto Trans-Fluid (Shell ATF M1375.4) | \$        | ✕   | ✕     | 1.00  | ✓  | -         | -         | 1.00     |
| AF43        | Auto Trans-Fluid (Texaco N402)       | \$        | ✕   | ✕     | 2.00  | ✓  | -         | -         | 2.00     |
| AF68        | Auto Trans-Fluid (Nippon AW-1 ATF)   | \$        | ✕   | ✕     | 2.00  | ✓  | -         | -         | 2.00     |
| BF          | Brake Fluid                          | \$        | ✕   | ✕     | 3.00  | ✓  | -         | -         | 3.00     |

**Oil Disposal Rate Type**  
Fixed Rate

NOTE: Sundry Rates specified per Labour Rate, is the price per item or per ONE litre (for fluids). To switch OFF or hide a sundry item, please untick 'On' field for a particular Labour Rate - a sundry will not be displayed for that Labour Rate.  
% Cost of Sundry is calculated at specified percentage of Labour or Parts or Totals Cost per operation

Copy Column Undo Save

To apply a price to a sundry:

- 1 Select a sundry.
- 2 Type the price into each labour level column and press **Enter** on the keyboard.

| Sundry Code | Sundry Name                          | Rate Type | ODC | ExNPW | FLEET | On | Min Value | Max Value | INTERNAL |
|-------------|--------------------------------------|-----------|-----|-------|-------|----|-----------|-----------|----------|
| AF17        | Auto Trans-Fluid (Esso LT 71141)     | \$        | ✕   | ✕     | 2.00  | ✓  | -         | -         | 2.00     |
| AF2         | Auto Trans-Fluid (Dexron III)        | \$        | ✕   | ✕     | 1.00  | ✓  | -         | -         | 1.00     |
| AF22        | Auto Trans-Fluid (Esso JWS 3309)     | \$        | ✕   | ✕     | 5.00  | ✓  | -         | -         | 2.00     |
| AF42        | Auto Trans-Fluid (Shell ATF M1375.4) | \$        | ✕   | ✕     | 0.00  | ✓  | -         | -         | 0.00     |

- 3 Repeat these steps for each labour level for all sundries used in your dealership.
- 4 Click **Save**.

- ▶ **Rate Type:** The sundry rate can be set as a fixed amount or as a percentage of the operation labour cost. To set the sundry rate as a percentage, ensure that the % icon is displayed in the **Rate Type** column and enter a percentage in the labour level column.
- ▶ **ODC:** The Oil Disposal Calculation (ODC) column is only applicable when the **Oil Disposal Rate Type** is set to Variable Rate.
- ▶ **ExNPW:** The Exclude No Pricing Warning (ExNPW) column allows you to activate or deactivate a warning that displays at the time of quoting if a sundry does not have a price. To deactivate the No Pricing Warning for a sundry, enable the ✓ icon.
- ▶ **On:** The **On** column allows you to choose which sundries are included in a quote. Sundries with a ✓ icon will be included for that labour level. Sundries with a ✕ icon will not be included for that labour level.

## Oil Disposal Rate Type

The Oil Disposal Rate Type setting allows you to customise the calculation method of the oil disposal sundry.

The oil disposal rate types are:

- **Fixed Rate:** The oil disposal rate is the amount entered into each labour level column.
- **Variable Rate:** The oil disposal rate is calculated using the total volume of selected fluids multiplied by the value entered into each labour level column of the Oil Disposal sundry.


To apply a fixed oil disposal rate:

- 1 Select **Fixed Rate** from the **Oil Disposal Rate Type** drop-down list.
- 2 Select the **Oil Disposal** sundry.
- 3 Type the price into each labour level column and press **Enter** on the keyboard.

| Sundry Code | Sundry Name                       | Rate Type | ODC | ExNPW | Fleet | On | Internal | On | RETAIL | On |
|-------------|-----------------------------------|-----------|-----|-------|-------|----|----------|----|--------|----|
| MO6         | Engine Oil (ACEA A1)              | £         | ✕   | ✕     | 1.00  | ✓  | 1.00     | ✓  | 9.50   | ✓  |
| MO67        | Engine Oil (WSS-M2C925-A)         | £         | ✕   | ✕     | 0.00  | ✓  | 0.00     | ✓  | 0.00   | ✓  |
| OD          | Oil Disposal                      | £         | ✕   | ✕     | 10.00 | ✓  | 1.00     | ✓  | 10.00  | ✓  |
| PA          | Painting                          | £         | ✕   | ✕     | 1.00  | ✓  | 1.00     | ✓  | 1.00   | ✕  |
| PS18        | Power Steering Fluid (Dexron IID) | £         | ✕   | ✕     | 1.00  | ✓  | 1.00     | ✓  | 9.00   | ✓  |

- 4 Click **Save**.

To apply a variable oil disposal rate:

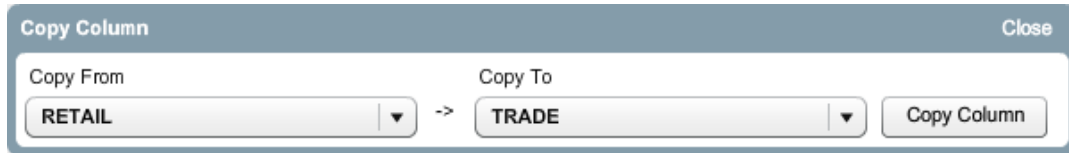
- 1 Select **Variable Rate** from the **Oil Disposal Rate Type** drop-down list.
- 2 Enable the  icon in the **ODC** column for each fluid you want to include in the **Oil Disposal** calculation.
- 3 Select the **Oil Disposal** sundry.
- 4 Type the price into each labour level column and press **Enter** on the keyboard.

| Sundry Code | Sundry Name                       | Rate Type | ODC | ExNPW | Fleet | On | Internal | On | RETAIL | On |
|-------------|-----------------------------------|-----------|-----|-------|-------|----|----------|----|--------|----|
| MO6         | Engine Oil (ACEA A1)              | £         | ✓   | ✕     | 1.00  | ✓  | 1.00     | ✓  | 9.50   | ✓  |
| MO67        | Engine Oil (WSS-M2C925-A)         | £         | ✓   | ✕     | 1.00  | ✓  | 1.00     | ✓  | 1.00   | ✓  |
| OD          | Oil Disposal                      | £         | ✕   | ✕     | 10.00 | ✓  | 1.00     | ✓  | 10.00  | ✓  |
| PA          | Painting                          | £         | ✕   | ✕     | 1.00  | ✓  | 1.00     | ✓  | 1.00   | ✕  |
| PS18        | Power Steering Fluid (Dexron IID) | £         | ✕   | ✕     | 1.00  | ✓  | 1.00     | ✓  | 9.00   | ✓  |

- 5 Click **Save**.

To copy all rates from one column to another column:

- 1 Click **Copy Column** in the **Sundry Rates** tab.
- 2 Select the column you want to copy rates from using the **Copy From** drop-down list.
- 3 Select the column you want to copy rates to from the **Copy To** drop-down list.
- 4 Click **Copy Column**.



The screenshot shows a 'Copy Column' dialog box. It has a title bar with the text 'Copy Column' and a 'Close' button on the right. The main area contains two drop-down menus. The first is labeled 'Copy From' and has 'RETAIL' selected. The second is labeled 'Copy To' and has 'TRADE' selected. A right-pointing arrow is positioned between the two menus. To the right of the 'Copy To' menu is a button labeled 'Copy Column'.

- 5 Click **Close**.
- 6 Click **Save**.



## Parts Pricing


The Parts Pricing tab allows you to add customised parts price levels that reflect your current pricing structure.

There are two methods for adjusting the price of parts:

- **Flat:** Allows you to mark pricing up or down by the same percentage for all parts.
- **Matrix:** Allows you to mark pricing up or down by different percentages based on the price range of parts.

| Price Settings   |                  |              |                 |            |         |              |                  |         |
|--|------------------|--------------|-----------------|------------|---------|--------------|------------------|---------|
| Close  |                  |              |                 |            |         |              |                  |         |
| Labour Rates   Labour Times   Fluids and Sundries   Sundry Rates <b>Parts Pricing</b> Tax   Upsell Recommendations   Miscellaneous |                  |              |                 |            |         |              |                  |         |
| Price Level Name   | Price Level Code | Base Price   | Adjustment Type | Adjustment | Taxable | Manufacturer | Display Discount | Default |
| Retail ExTax   |                  |              | Flat            |            | ✓       | ✓            | ✕                | ✕       |
| (None)   |                  |              | Flat            |            | ✕       | ✓            | ✕                | ✓       |
| new  |                  | Retail ExTax | Flat            | 20.00%     | ✕       | ✕            | ✕                | ✕       |
| Add   Undo   Save  |                  |              |                 |            |         |              |                  |         |

To add a parts price level:

- 1 Click **Add** in the **Parts Pricing** tab.
- 2 Type the price level name and the price level code into the corresponding fields.
- 3 Select a base price from the **Base Price** drop-down list.
- 4 Select the **Taxable** checkbox to apply tax to the parts price level.
- 5 Select **Flat** as the **Adjustment Type**.
- 6 Adjust the percentage using the arrows .

Parts Price Levels

Cancel   Delete   OK

Price Level Name

New

Price Level Code

N

Base Price

Retail ExTax

Taxable

☒

Adjustment Type

✓ Flat

✕ Matrix

Adjustment

↑ ↓

%

Display Discount



☐

- 7 Click **OK**.

- To update a parts price level, select a price level and edit the details, then click **OK**.

To create a pricing matrix for parts:

- 1 Click **Add**.
- 2 Type the price level name and the price level code into the corresponding fields.
- 3 Select the base price from the **Base Price** drop-down list.
- 4 Select the **Taxable** checkbox to apply tax to the parts price.
- 5 Select **Matrix** as the **Adjustment Type**.
- 6 Click **Add** and complete the following fields for each line:
  - **Line No:** Type a line number.
  - **Low Price:** Type the lowest price of the price range.
  - **High Price:** Type the highest price of the price range.
  - **Percentage:** Type the adjustment percentage.

You can click the  and  icons to toggle between mark up (+) and mark down (-).

Parts Price Levels Cancel Delete OK

Price Level Name:

Price Level Code:

Base Price:





Taxable: ☒

Adjustment Type: ☒ Flat ☒ Matrix

Adjustment:  %



Display Discount: ☐

Parts Price Matrix

| Line No. | Low Price (\$)                    | High Price (\$) | +/-   | Percentage (%) |
|----------|-----------------------------------|-----------------|---|----------------|
| 1        | 0.00                              | 9.99            |  | 300.00         |
| 2        | 10.00                             | 49.99           |  | 150.00         |
| 3        | 50.00                             | 499.99          |  | 25.00          |
| 4        | <input type="text" value="0.00"/> | 0.00            |  | 0.00           |

Add Delete

- 7 Click **Add** and continue to enter as many price ranges as required.
- 8 Click **OK**.

- ▶ In the **Default** column, the  icon identifies the default parts price level. To change the default parts price level, enable the  icon.

## Tax

The Tax tab allows you to set up and modify tax levels.

Price Settings Close


Labour Rates Labour Times Fluids and Sundries Sundry Rates Parts Pricing **Tax** Upsell Recommendations Miscellaneous

**Tax Levels**

| Tax Code | Tax Level Name | Percentage (%) | Default |
|----------|----------------|----------------|---------|
| TAX      | Tax            | 10.00%         | ✓       |

Add Undo Save


To add a tax level:



- 1 Click **Add** in the **Tax** tab.
- 2 Type the tax code and tax level name into the corresponding fields.
- 3 Adjust the percentage using the arrows .

**Sales Tax** Cancel Delete **OK**

Tax Code

Tax Level Name

Percentage (%)  

- 4 Click **OK**.
  - 5 Click **Save**.
- ▶ To update a tax level, select a tax level and edit the details, then click **OK**.
  - ▶ In the **Default** column, the  icon identifies the default tax level. To change the default tax level, enable the  icon.

## Upsell Recommendations

The Upsell Recommendations tab allows you to add upsell recommendations that will prompt the sale of a range of operations when a quote is prepared.

Price Settings

Close

Labour Rates Labour Times Fluids and Sundries Sundry Rates Parts Pricing Tax Upsell Recommendations Miscellaneous

Section

Body

Operation

| Section                      | Operation                                       |
|------------------------------|---|
| Air-Conditioning             | RCOAC: Supply & Fit Change Over A/C Compressor. |
| Audio, Video & Communication | AMCS: Supply & Fit Multimedia Cinema System.    |
| Audio, Video & Communication | AADVD: Supply & Fit DVD Player.                 |
| Brakes                       | RHA: Adjust Handbrake.                          |
| Tow Bars                     | ATBDET: Supply & Fit Tow Bar, Detachable.       |

Suggest Upsell Recommendations on the following operation categories

☐ All Operations

☒ Service Operations

☒ Repair Operations

☐ Accessory Operations

☐ Dealer Menu

☐ Automatically prompt user with Upsell Recommendations.

☐ Automatically select all available Upsell Recommendations.

Add new

Delete Undo Save

To add an upsell recommendation:

- 1 Select a section from the **Section** drop-down list.
- 2 Select an operation from the **Operation** list.
- 3 Click **Add new**.

The operation is displayed in the right pane.

- 4 Select the checkboxes which correspond to the operations you want to apply the upsell recommendation to.
- 5 Select the checkboxes which correspond to your preferred automatic settings.
- 6 Click **Save**.

## Miscellaneous

The Miscellaneous tab allows you to customise price information for sundries, parts and labour.

The main settings in the Miscellaneous tab are:

- Life Time Service CPI Value: Allows you to adjust the Consumer Price Index (CPI) value that is applied to prices when calculating the Life Time Service.
- Currency: Allows you to set the currency of pricing.
- Price Rounding: Allows you to set the rounding that is applied to prices.

You must click **Save** to save the changes.



The screenshot shows the 'Price Settings' window with the 'Miscellaneous' tab selected. The window has a title bar 'Price Settings' and a 'Close' button. The tabs are: Labour Rates, Labour Times, Fluids and Sundries, Sundry Rates, Parts Pricing, Tax, Upsell Recommendations, and Miscellaneous. The 'Miscellaneous' tab contains three settings:

- Life Time Service CPI Value:** A text input field with '0.00' and a percentage sign to its right.
- Currency:** A dropdown menu showing '\$1,234.00'.
- Price Rounding:** A dropdown menu showing 'None'.

A 'Save' button is located at the bottom right of the form area.

## Technical Settings

The Technical Settings screen allows you to customise Superservice Menus according to your needs. The DMS settings can be configured to link Superservice Menus with your DMS.

The main settings in the Technical Settings screen are:

- **Auto Advance Navigation:** Allows you to automatically advance to the next screen during a search, where applicable.
- **Enable Part Supersession:** Allows you to enable part supersessions.
- **Enable No Pricing Warning:** Allows you to display a warning when a sundry or part is not priced.
- **Daily Check for Expiring Quotes:** Allows you to perform a daily check for quotes that are due to expire.
- **Export Settings:** Allows you to set the export format when linking with your DMS.

You must click **Save** to save the changes.

The screenshot shows the 'Technical Settings' window with a 'Close' button in the top right corner. The window has two tabs: 'Technical Settings' (active) and 'Integration Settings'. The 'Technical Settings' tab is divided into two columns. The left column, titled 'Navigation and Other Settings', contains a list of checkboxes: 'Auto Advance Navigation (recommended)' (checked), 'Enable Duplicate Parts in Quote Warning' (checked), 'Enable Part Supersession' (checked), 'Enable No Pricing Warning' (checked), 'Disable Unpriced Supersessions' (unchecked), 'Daily Check for Expiring Quotes' (checked), 'Enable Exit Superservice Menus Warning' (checked), 'Enable Importing Operation Details Into Dealer Menus' (checked), 'Display OEM alternate parts by default' (unchecked), 'Display Group Variant' (unchecked), and 'Display complete variant descriptions' (unchecked). The right column, titled 'Export Settings', contains a 'Text' dropdown menu and a 'Quote Number Format' dropdown menu set to 'nnn (001)'. At the bottom right of the window are 'Undo' and 'Save' buttons.

## Print Settings

The Print Settings screen allows you to customise the printouts of quotes, repair orders and invoices.

The main settings in the Print Settings screen are:

- **Margin Settings:** Allows you to adjust the size of the margins on printouts.
- **Dealer Details:** Allows you to customise the display of the dealer details on printouts.
- **Customer Authorisation Disclaimer:** Allows you to add a disclaimer to printouts.
- **Dealer Footnote:** Allows you to add a footnote to printouts.

You must click **Save** to save the changes.

The screenshot shows the 'Print Settings' window with a 'Close' button in the top right corner. The window is divided into several sections:

- Margin Settings:** Contains four spinners for 'Top (mm)', 'Left (mm)', 'Right (mm)', and 'Bottom (mm)', all set to 5.
- Dealer Details:** Includes a checked checkbox for 'Print Dealer Details', an 'Alignment' dropdown menu set to 'Left', and two checked checkboxes for 'Print Dealer Footnote' and 'Print Manufacturer Letterhead'.
- Customer Authorization Disclaimer:** A large text area for entering a disclaimer, with 'Reset' and 'Clear' buttons at the bottom right.
- Dealer Footnote:** A text area containing the text 'Service with a smile.', with 'Preview', 'Undo', and 'Save' buttons at the bottom right.

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