



SUPERSERVICE AUTHOR

User Guide

SUPERSERVICE™
Author

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Introduction

Superservice Author is a companion product to Superservice Menus which offers more flexibility and an enhanced ability to customise the content and pricing of service operations and menus. This can help to increase efficiencies within your dealership and also simplify the service process and pricing for your staff and customers.

You can set up discounts and substitutions that are based on the vehicle age, selected models or vehicle categories. You also have the ability to set up fixed commercial prices for certain operations and easily refer to price comparisons between vehicle attributes.

The application works as an administration tool for Superservice Menus and extends its capabilities to better suit market or dealership requirements. The application supports the following levels of customisation: Infomedia, Manufacturer, Distributor and Dealer. The Infomedia and manufacturer levels are classified as the higher levels of the hierarchy and the dealer is the lower level of the hierarchy. Customisations created at the higher levels filter through to the lower levels.

Permissions can be set to allow or restrict access to certain settings and modules, and rules can be created at each of the customisation levels. Therefore, a user's access will vary depending on the security permissions that have been set up for their user level.

The following sections are covered:

- Application Settings
- Primary Configuration
- Menu Customisation and Authoring
- Pricing and Comparison Features
- External Systems

Settings

The Settings screen is customised specifically for each user based on the security permissions that have been applied within the application and their product subscription offerings.

To access the Settings screen, select the  icon.

To navigate through the Settings screens, use the following buttons:

- **Edit:** Allows you to edit the page content.
- **Save:** Saves the changes.
- **Cancel:** Does not save the changes.
- **Back:** Takes you back a screen.
- **Home:** Sends you back to the main Settings screen.
- **Delete:** Deletes the content.

Difficulty Levels

The Difficulty Levels screen allows you to view the difficulty level names that have been set up in the application. For example, Technician, Master Technician and Diagnostic Technician. You can use the existing difficulty levels, edit them or create new difficulty levels that are relevant for your dealership.

To add a difficulty level:

- 1 Click **Add**.
- 2 Enter a difficulty level name.
- 3 Enter a difficulty level code.
- 4 Click **Save**.

Labour Times

The Labour Times screen allows you to view the various labour time names that have been set up in the application. You can use the existing labour time names, edit them or create new labour times that are relevant for your dealership.

To add a labour time:

- 1 Click **Add**.
- 2 Enter a labour time name in the **Name** field.
- 3 Confirm the Enable Editing switch is set to **Yes** (if applicable).
The Enable Editing switch allows dealers or users at a lower level to edit the rule.
- 4 Click **Save**.

- ▶ To update, click **Edit**, modify the name, then click **Save**.


Dealer Regions

The Dealer Regions screen allows you to create regions and assign dealers to them. Here you can also enable dealer comparisons that are displayed in the Pricing Matrix screen.

To configure dealer settings and regions:

- 1 Click **Edit**.
- 2 Select **Yes** or **No** for the following options:
 - **Enable Dealer Regions:** Allows the dealer regions to display for all users in your market.
 - **Enable Dealer Comparisons:** Allows dealers to compare prices to the average prices of other dealers.
- 3 Click **Add**.
- 4 Enter a name in the field.
- 5 Continue to add names for each additional region.
- 6 Click **Save**.

To add a dealer to a region:

- 1 Click **Edit**.
- 2 Assign dealers to a region:
 - **Search:** Enter a dealer name in the search field, then click the  icon.
 - **Unassigned:** Select a region for a dealer from the drop-down list.
- 3 Continue to assign a region for each dealer.
- 4 Click **Save**.

- ▶ To update Dealer Regions, click **Edit**, modify the details, then click **Save**.

Employee Groups

The Employee Groups screen allows you to create employee groups and allocate licenced users to groups. The creation of employee groups is important for the allocation of security permissions.

To create a new group and add users:

- 1 Click **Add**.
- 2 Enter a name in the **Group Name** field.
- 3 Click in the **Members** field and select the employees from the drop-down list.
- 4 Click **Save**.

Security

The Security screen allows you to set the access level for Employee Groups at the same level and lower levels of the hierarchy within your region. For example, you can turn off access to the Pricing Matrix screen for Service Advisors.

The main areas in the Security screen are:

- **Pricing Features:** Enable access to the pricing options such as pricing rules and the pricing matrix.
- **Menus Features:** Enable access to labour times in the Operation and Quote tab.
- **Customisation and Authoring:** Enable access to the content customisation screens such as upsell recommendations.
- **Miscellaneous:** Enable access to screens used to set up external systems or vehicle categories.
- **Settings:** Enable access to the settings screens.

To configure the security settings:

- 1 Click **Edit**.
- 2 Select the checkboxes to apply permissions to each employee group.
- 3 Click **Save**.

- ▶ Any changes to the Security settings will require the application to be relaunched.
- ▶ To check the permissions for a user, click the drop-down and select a name from the list.
- ▶ To update, click **Edit**, modify the details, then click **Save**.

Feature Access

The Feature Access screen allows you to set access levels for users at a lower level of the hierarchy. For example, a manufacturer can disable features for their distributors and dealers, or a distributor can disable features for their dealers.

The main areas in the Feature Access screen are:

- **Pricing Features:** Enable access to the pricing options such as pricing rules and the pricing matrix.
- **Customisation and Authoring:** Enable access to the content customisation screens such as upsell recommendations.
- **Miscellaneous:** Enable access to screens used to set up external systems or vehicle categories.
- **Settings:** Enable access to the settings screens.

To configure the feature access settings:

- 1 Click **Edit**.
- 2 Select the checkboxes to enable features.
- 3 Click **Save**.

Comparison Thresholds

The Comparison Thresholds screen allows you to set the percentage above and below other dealers for commercial and technical price comparison. When thresholds are entered, an indicator will be displayed in the Pricing Matrix if the percentage falls above ▼ or below ▲ the threshold.

This setting is only available for dealers.

To set a comparison threshold:

- 1 Click **Edit**.
 - 2 Enter a number in the **Percentage** fields.
 - Above and below the commercial price.
 - Above and below the technical price.
 - 3 Click **Save**.
- ▶ This screen is visible when the higher level of the hierarchy has set the **Enable Dealer Comparisons** switch to **Yes** in the Dealer Regions settings.
 - ▶ To update Comparison Thresholds, click **Edit**, modify the details, then click **Save**.

Labour Rates

The Labour Rates screen allows you to create labour rates to suit the needs of your dealership. The labour rates can be defined by country, region and area type (if applicable).

There are different ways of calculating the labour price for an operation:

- **Flat Rate:** Set up a flat rate per hour for the labour price.
 - **Multiple Rates:** Set up multiple rates for a labour price level that is based on the exact amount of labour time.
 - **Pricing Matrix:** Set up a customised matrix to price labour that is based on the difficulty level of an operation and specified vehicle categories.
- ▶ The Pricing Matrix is an optional subscription feature and may not be available for all users.


To add a labour price level with a flat rate:

- 1 Click **Add**.
- 2 Enter a labour rate name in the **Name** field.
- 3 If you want to link with an external system, enter the code in the **Third Party Code** field.
- 4 Enter the labour rate in the **Hourly Rate** field.
You need to ensure the Hours field is blank and only add the Hourly Rate.
- 5 Click in the **Regions** field and select from the drop-down list.
You can apply the rate to all or multiple regions (if available).
- 6 Click in the **Area Types** field and select from the drop-down list.
You can apply the rate to all or multiple areas (if available).
- 7 If you want to apply tax to the labour rate, select from the **Tax Rate** drop-down list.
- 8 If you want to apply tax to sundries, select from the **Sundry Tax Rate** drop-down list.
- 9 Select **Yes** or **No** for the following options:
 - **Default Rate:** Allows you to set this labour rate as the default used for calculating technical prices in the Pricing Matrix screen.
 - **Enable Editing:** Allows dealers or users at a lower level to edit the labour rate.
 - **Region Rate:** Allows dealers or users at a lower level in the defined region to use the labour rate for quoting. This will be used if a default labour rate has not been set in the Menus Settings screen.
 - **Visible on Quote:** Allows the labour rate to be used and displayed in quotes. If set to No, the Region Rate must also be set to No.
- 10 Click **Save**.

To add a labour price level with multiple rates:

- 1 Click **Add**.
- 2 Enter a labour rate name in the **Name** field.
- 3 If you want to link with an external system, enter the code in the **Third Party Code** field.
- 4 Enter the number of hours in the **Hours** field.
- 5 Enter the labour rate in the **Hourly Rate** field.
- 6 Continue to add the hours and hourly rates for each additional level you require.
When adding the last level, ensure the Hours field is blank and only add the Hourly Rate.
- 7 Click in the **Regions** field and select from the drop-down list.
You can apply the rate to all or multiple regions (if applicable).
- 8 Click in the **Area Types** field and select from the drop-down list.
You can apply the rate to all or multiple areas (if available).
- 9 If you want to apply tax to the labour rate, select from the **Tax Rate** drop-down list.
- 10 If you want to apply tax to sundries, select from the **Sundry Tax Rate** drop-down list.
- 11 Select **Yes** or **No** for the following options:
 - **Default Rate:** Allows you to set this labour rate as the default used for calculating technical prices in the Pricing Matrix screen.
 - **Enable Editing:** Allows dealers or users at a lower level to edit the labour rate.
 - **Region Rate:** Allows dealers or users at a lower level to use the labour rate for quoting in the defined region. This will be used if a default labour rate has not been set in the Menus Settings screen.
 - **Visible on Quote:** Allows the labour rate to be used and displayed in quotes. If set to No, the Region Rate must also be set to No.
- 12 Click **Save**.

To set up a pricing matrix for the labour price level:

- 1 Click the  icon to open a labour price level.
- 2 Select the **Use Pricing Matrix** checkbox.
- 3 Click the **Set Pricing** link.

This displays the difficulty levels and vehicle categories that are customised for your dealership.

- 4 Configure a flat rate or multiple rates for the price level:
 - **Flat Rate:** Enter a flat rate into the **Rates** field. You need to ensure the Hours field is blank and only add the Hourly Rate.
 - **Multiple Rates:** Enter an hour amount and the hourly rate in the corresponding fields. When adding the last level, ensure the Hours field is blank and only add the Hourly Rate.
- 5 Click **Save**.

- ▶ To update Labour Rates, click , modify the details, then click **Save**.

Parts Pricing

The Parts Pricing screen allows you to add customised parts price levels that reflect your current pricing structure. You can also view price files for parts that have been set up by the manufacturer.

There are two methods for adjusting the price of parts:

- **Flat Rate:** Allows you to mark pricing up or down by the same percentage for all parts.
- **Multiple Rates:** Allows you to mark pricing up or down by setting up different percentage rates based on the price range of parts.

To add a parts price level with a flat rate:

- 1 Click **Add**.
- 2 Enter the parts price **Name** and **Code** in the corresponding fields.
- 4 If you want to link with an external system, enter the code in the **Third Party Code** field.
- 5 Select a base price from the **Base Price** drop-down list.
- 6 Enter a rate in the **Percentage** field.
- 7 If you want tax to be applied to this parts price level, select the **Taxable** checkbox.
- 8 If you want to set this parts price level as the default used for calculating technical prices in the Pricing Matrix screen, select the **Default** checkbox.
- 9 If you want to set the parts price level to display on quotes for dealers or users at a lower level, select the **Visible on Quote** checkbox.
- 10 Click **Save**.

To add a part price level with multiple rates:

- 1 Click **Add**.
- 3 Enter the parts price **Name** and **Code** in the corresponding fields.
- 2 If you want to link with an external system, enter the code in the **Third Party Code** field.
- 3 Select the base price from the **Base Price** drop-down list.
- 4 Enter the highest price of the part price level in the **Price Range** field.
- 5 Enter a rate in the **Percentage** field.
- 6 Continue to add the parts price range and percentage for each additional level.
When adding the last level, ensure the Price Range field is blank and only add the percentage.
- 7 If you want tax to be applied to this parts price level, select the **Taxable** checkbox.
- 8 If you want to set this parts price level as the default used for calculating technical prices in the Pricing Matrix screen, select the **Default** checkbox.
- 9 If you want to set the parts price level to display on quotes for dealers or users at a lower level, select the **Visible on Quote** checkbox.
- 10 Click **Save**.

Tax Rates

The Tax Rates screen allows you to add new tax rates or modify existing tax rates. Tax can then be applied to labour, sundries and parts when pricing operations. You can set up multiple individual tax rates.

There is also the ability to set up tax groups. This is useful for regions that require more than one tax rate to be applied to goods and services. When setting up tax groups, create your individual tax rates first, and then add a tax group and assign the relevant tax rates to the group.

In this screen, you can also set up a default tax rate that is applied to the price of parts.

To add a new tax rate:

- 1 Click **Add**.
- 2 Enter a tax rate **Name** and **Code** in the corresponding fields.
- 3 Enter the tax rate in the **Percentage (%)** field.
- 4 Click in the **Regions** field and select from the drop-down list.
You can apply the tax rate to all or multiple regions (if applicable).
- 5 Select the **Enable Editing** checkbox (if applicable).
The checkbox allows dealers or users at a lower level to edit the tax rate.
- 6 Repeat these steps for additional tax rates.
- 7 Click **Save**.

To add a tax group:

- 1 Click **Edit**.
- 2 Select **Yes** to enable multiple tax levels.
- 3 Click **Add Tax Group**.
- 4 Enter a **Tax Group Name** and **Tax Group Code** in the corresponding fields.
- 5 Click in the **Tax Rates** field and select one or more rates from the drop-down list.
- 6 Click in the **Regions** field and select from the drop-down list.
You can apply the tax rate to all or multiple regions (if applicable).
- 7 Select the **Enable Editing** checkbox (if applicable).
The checkbox allows dealers or users at a lower level to edit the tax rate.
- 8 Repeat these steps for additional tax groups.
- 9 Click **Save**.

- ▶ To set up a parts tax rate, select a rate from the **Parts tax default rate** drop-down list and in the Parts Pricing screen select the **Taxable** checkbox.

Sundries


The Sundries screen allows you to price all the sundries that are used in your dealership, customise sundries and add new sundries. The sundries are priced according to the labour levels that have been set up in the Labour Rates screen. E.g. Fleet, Retail.

The Price Options include the ability to set the type of pricing for the sundries as fixed or variable. The Rate Options include entering the actual sundry rate and applying that rate to a quote.


There are two main methods to calculate the price for sundries:

- Flat Rate (\$): Allows you to apply a flat sundry rate for each labour price level.
- Percentage Rate (%): Allows you to set the sundry rate for each labour price level as a percentage, and specify maximum and minimum values. The percentage can be based on the operation cost of labour, parts or labour and parts combined.

To add a sundry based on a flat rate (\$):

- 1 Click the  icon to expand the sundry details.
 - 2 Enter a sundry code in the **Custom Code** field.
 - 3 Enter a sundry name in the **Custom Name** field.
 - 4 If you want to link with an external system, enter the code in the **Third Party Code** field.
 - 5 If you want to set the sundry as a part, select the **Use sundry as a part** checkbox. If selected, this sundry will be displayed in the parts list within a quote.
 - 6 Configure the **Price Options**:
 - Select the currency symbol (\$) from the **Type** drop-down list.
 - To add an oil disposal charge for a sundry, based on a rate per unit, select the **Include in oil disposal calculation** checkbox.
 - 7 Configure the **Rate Options**:
 - Enter a sundry rate for each labour level in the **Rates** field.
 - Use the default tax rate that was selected in the Labour Rates screen or select a different rate from the drop-down list.
 - Select the **Apply** checkbox to enable the price to be displayed in the quote.
 - 8 Click **Save**.
- ▶ If you want to add alternate part options, enter the part number and details under **Substitution Options**.
 - ▶ To apply a sundry to specific parts, select the corresponding parts from the drop-down list in **Parts Options**.

To add a sundry with a percentage rate (%):

- 1 Click the  icon to expand the sundry details.
- 2 Enter a sundry code in the **Custom Code** field.
- 3 Enter a sundry name in the **Custom Name** field.
- 4 If you want to link with an external system, enter the code in the **Third Party Code** field.
- 5 If you want to set the sundry as a part, select the **Use sundry as a part** checkbox. If selected, this sundry will be displayed in the parts list within a quote.
- 6 Configure the **Price Options**:
 - Select the percentage symbol (%) from the Type drop-down list.
 - Select an option from the **Percentage based on following rate** drop-down list.
 - To add an oil disposal charge for a sundry, based on a rate per unit, select the **Include in oil disposal calculation** checkbox.
- 7 Configure the **Rate Options**:
 - Enter a percentage rate for each labour level in the **Percentage (%)** fields.
 - Enter a minimum and maximum value for the operation cost in the corresponding fields.
 - Use the default tax rate that was selected in the Labour Rates screen or select a different rate from the drop-down list.
 - Select the **Apply** checkbox to enable the price to be displayed in the quote.
- 8 Click **Save**.

To add a new sundry:

- 1 Click **Add**.
 - 2 Enter a sundry code and name, and press **Enter** on the keyboard.
 - 3 If you want to link with an external system, enter the code in the **Third Party Code** field.
 - 4 Configure the **Price Options** and **Rate Options** based on your requirements.
 - 5 Select operations from the **Apply to these operations** drop-down list, and then click **Add**.
 - 6 Click **Save**.
- ▶ To copy sundry rates, click **Copy**, select the checkbox you want to copy rates to, then click **Copy Rates**.
 - ▶ To enter a sundry rate directly into the Sundries screen, you can enter the sundry rate in the cell and press **Enter** on the keyboard.

Market Settings

The Market Settings screen allows the higher levels of the hierarchy to enable Pricing and Menu Features that are displayed in Superservice Menus for your market. The settings are applied to all users.

To enable or disable Pricing and Menu Features:

Select the **On** or **Off** switch for the following options:

- **Show Technical Price:** Allows you to display or hide the Show Technical Price hyperlink for menus where a commercial price has been set.
 - **Show Labour Times:** Allows you to display the labour times on the Quote.
 - **Edit Sundries:** Allows you to edit the sundries in Menus.
 - **Enable Dealership Logo:** Allows the dealer to upload their own dealership logo when printing.
 - **Edit Customer Details:** Allows you to edit the customer details in Menus.
 - **Edit Vehicle Details:** Allows you to edit the vehicle details in Menus.
- ▶ The options displayed in the Settings screen may differ based on your subscription.

Primary Configuration

Superservice Author offers the ability to set up and customise the Vehicle Categories and Section Framework modules. These two modules are configured first, as they provide a framework for customisation and authoring, and they are also used in other areas of the application.

Vehicle Categories

The Vehicle Categories module allows you to create vehicle groups by vehicle attribute or model and assign vehicles to these customised groups. For example, Diesel, Gasoline, Turbo, Hybrid or 4WD.

It is recommended that vehicles are only allocated to a single category.

When you create vehicle categories, they will appear as a drop-down selection in the Discount Rules, Part and Sundry Substitution and Pricing Matrix screens.

The screenshot displays the 'Vehicle Categories' management interface in the INFOMEDIA system. The interface is divided into two main sections: 'Vehicle Categories' and 'Vehicles'.

Vehicle Categories Table:

Category Name	Labour Pricing	Filter
Diesel	<input type="checkbox"/>	<input type="checkbox"/>
Petrol	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Turbo	<input type="checkbox"/>	<input type="checkbox"/>
Hybrid	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4WD	<input type="checkbox"/>	<input type="checkbox"/>
Electric	<input type="checkbox"/>	<input type="checkbox"/>

Vehicles List:

Vehicles	Categories
> A 450 Sedan (2020-)	Hybrid
> B 450 Sedan (1994-2000)	Petrol
> C 450 Sedan (2000-2005)	Petrol
> D 450 Sedan (2005-2012)	Turbo
> E 450 Sedan (2012-2020)	Hybrid
> A 300 Sports (2020-)	Hybrid
> B 300 Sports (1999-2002)	Turbo
> C 300 Sports (2002-2006)	Turbo
> D 300 Sports (2006-2012)	Turbo
> E 300 Sports (2012-2020)	Turbo
> A 280 Hatch (2021-)	Hybrid
> B 280 Hatch (2005-2009)	Petrol
> C 280 Hatch (2009-2015)	Petrol
> D 280 Hatch (2015-2018)	Petrol
> E 280 Hatch (2018-2021)	Hybrid

- ▶ Vehicle categories created by users at higher levels of the hierarchy cannot be edited by users at lower levels of the hierarchy.

To set up vehicle categories by vehicle attribute:

- 1 Click the **Vehicle Categories** tile.
- 2 Click **Add Category**.
- 3 Enter a **Category Name** in the field.
- 4 Select **Vehicle Attribute** from the **Applicable To** drop-down list.
- 5 Enter the **Category Code** in the field (if applicable).
- 6 Click the icon to enable or disable the following options:
 - **Enable Editing:** Allows dealers or users at a lower level to edit the rule.
 - **Enable Labour Price:** Allows the category to be displayed in the labour rates pricing matrix.
 - **Enable Commercial Price:** Allows the commercial price to be displayed in the Pricing Matrix.
- 7 Select an option from the **Vehicle Type, Fuel Type, Transmission, Engine Code** and **Drive** drop-down lists.
- 8 Select the checkbox for the required vehicles:
 - **Vehicles:** The checkbox applies the vehicle category to all vehicles.
 - **Model:** The checkbox next to each model name applies the vehicle category to the required model. By default, the selection is applied to all vehicles within the selected model.
 - **Series:** Click the **>** icon next to a model name to display the series and apply the vehicle category to the required series. By default, the selection is applied to all vehicles within the selected series.

- 9 Click **Save**.

- ▶ If you want to reset the vehicle attribute filters, click the icon.

To set up vehicle categories by vehicle model:

- 1 Click the **Vehicle Categories** tile.
- 2 Click **Add Category**.
- 3 Enter a **Category Name** in the field.
- 4 Select **Vehicle Model** from the **Applicable To** drop-down list.
- 5 Enter the **Category Code** in the field (if applicable).
- 6 Click the icon to enable or disable the editing, labour price and commercial price options.
- 7 Click **Select**.
- 8 Select the checkbox for the required vehicles:
 - **Model:** The checkbox applies the vehicle category to all vehicles.
 - **Model Name:** The checkbox next to each model name applies the vehicle category to the required model. By default, the selection is applied to all vehicles within the selected model.
 - **Series:** Click on a model name to display the series and apply the vehicle category to the required series. By default, the selection is applied to all vehicles within the selected series.
 - **Description:** Click on a model and series name to display the vehicle descriptions and apply the vehicle category to the required description(s).
- 9 Click **OK**.

Category Name*
Hybrid

Applicable To
Vehicle Model

Created By
jsparres@ifm.com

Category Code
HYB-1

Enable Editing Enable Labour Price Enable Commercial Price

Vehicles Select ^

1. All vehicles in: A 450 Sedan (2020 -)
2. All vehicles in: A 300 Sports (05/2015 -) ABC271R
3. 12345 - HIJ10K - ABCDEF - A 280 Hatch 1.0L 5 Speed Automatic

- 10 Click **Save**.

▶ To update Vehicle Categories, click , modify the details, then click **Save**.

Section Framework

The Section Framework module allows you to add categories and their corresponding sections to the menus hierarchy. Customising the Section Framework is useful for offering common repairs to customers.

A category is the top level of the hierarchy and may include Accessories and Repairs. The sections are the next level of the hierarchy and may include Scheduled Services or Maintenance.

New categories are only visible to users from the same level. Each category or section requires a code and a name, which is prefixed with these IDs.

User	Prefix	Description
Manufacturer	CCO	Custom category at the manufacturer level
National Distributor	CCN	Custom category at the national level
Dealer	CCD	Custom category at the dealer level

To create a new category:


- 1 Click the **Section Framework** tile.
- 2 Click **+ Add Category**.
- 3 Enter a **Code** and a **Description** in the corresponding fields.
- 4 Click **Add** or press **Enter** on the keyboard.

To add a new section to a category:

- 1 Click on a new category name.
This displays the **+ Add Section** icon.
- 2 Click **+ Add Section**.
- 3 Enter a **Code** and a **Description** in the corresponding fields.
- 4 Click **Add** or press **Enter** on the keyboard.

To add a new operation to a section:



- 1 Click on a new section name.
This displays the **+ Add Operation** icon.
- 2 Click **+ Add Operation**.
- 3 Enter a **Code** in the field.
The operation code must match the code for an existing operation.
- 4 Click **Add** or press **Enter** on the keyboard.

- ▶ To delete an item, expand the category or section and select the  icon, then click **Yes**.
- ▶ To enable or disable a Category, Section or Operation, click the **On** or **Off** switch.

Time Adjustment

The Time Adjustment screen allows you to modify the standard labour time to create an adjusted labour time that can be applied to vehicles and operations.

The adjusted labour time is displayed in Superservice Menus under the Quote and Operation tabs when an operation has been selected. Dealers have the ability to apply the OEM labour time or the adjusted labour time by clicking the icons.

Icon	Description
	Displays the adjusted labour time.
	Displays the OEM time.

To add a labour time adjustment:

- 1 Click the **Time Adjustment** tile.
- 2 Click **Add**.
- 3 Select an option from the **Applicable To** drop-down list.
 - **All Vehicles:** Apply the time adjustment to all vehicles.
 - **Vehicle Model:** Select the required checkbox in the Vehicles column.
 - **Vehicle Category:** Click in the field and select from the drop-down list.
- 4 Click the Operations **+** icon and select a category or a specific section and operation.
- 5 Click **Add**.
- 6 Select the **Adjustment Type** from the drop-down list.
 - **Hours:** Enter the number of hours in the field to add or subtract from the standard labour time.
 - **Percentage:** Enter a percentage in the field to add or subtract from the standard labour time. This can also be entered as a decimal.
 - **Value:** Enter a whole number in the field. This overrides the OEM labour time. E.g. a value of 4 would mean 4 hours of labour time.
- 7 Click **Preview**.

The top 50 records will display in alphabetical order. To filter the records, enter the text in the field, and press **Enter** on the keyboard.
- 8 Click **Save**.

- ▶ To update Time Adjustment, click  , modify the details, then click **Save**.

Customisation and Authoring

This section details how to set up discount and substitution rules, and the order in which they are applied when pricing an operation.

The rules and operations that are set up at the higher levels of the hierarchy filter down to the lower levels of the hierarchy. Users have the permission to edit rules and operations created at their level of the hierarchy. You can also set up whether users at lower levels of the hierarchy are allowed to make modifications.

When an operation is priced the application considers the discount or substitution rules in the order in which they are listed on the screen. You can reorder rules by dragging them into the desired position.

Discount Rules

The Discount Rules module allows you to define discount rules based on attributes such as the vehicle age, the vehicle model or vehicle category. The discounts can be applied to labour, parts and sundries. The discounts can be applied to all or specific Part Function Codes (PFCs), part numbers and sundries. When entering discount values, you cannot enter negatives or decimals.

When an operation is priced, the application starts from the first discount rule and evaluates if the rule applies to the selected vehicle and then applies any labour, parts or sundry discounts. When applying rules for parts, PFC rules are applied first and if no PFC rules are available, the application will look for part number discounts. The application will then continue to evaluate the next rule.




The rules are listed in the Discount Rules screen with the following information.

Column	Description
Discount Type	Displays the type of discount such as vehicle age, vehicle model and vehicle category.
Applicable To	Displays the criteria for the rule applicability, such as the vehicle registration date, the vehicle model or category.
Discount Period	Displays the validity of the discount rule.
Operations	Displays the operations the discount applies to.
Labour Discount	Displays the discount percentage for labour.
Parts/PFCs Discount	Displays the discount percentage for parts and shows whether the discount will be applied to all or to specific PFCs or part numbers.
Sundry Discount	Displays the percentage discount for sundries and details whether the discount will be applied to all or some sundries.

To configure a discount rule based on the vehicle age:

- 1 Click the **Discount Rules** tile.
- 2 Click **Add Rule**.
- 3 Select **Vehicle Age** from the drop-down list.
- 4 Confirm the Enable Editing switch is set to **Yes**.
The Enable Editing switch allows dealers or users at a lower level to edit the rule.
- 5 Set the vehicle age using the registration date or the number of months.
- 6 If you want to specify a date range for the discount rule, set the dates using the calendar.
- 7 If you want to apply a discount rule to operations, click the **+** icon. Then select from the drop-down lists and click **Add**.
- 8 Configure the discounts to be applied:
 - **Labour Discount:** Enter an amount in the Labour Discount **%** field.
 - **Parts/PFCs Discount:** Enter an amount in the Parts/PFCs Discount **%** field.
 - **Apply discount to these PFCs:** The default selection is All PFCs. Click in the field to select specific PFCs from the drop-down list.
 - **Apply discount to these parts:** The default selection is All Parts. Click in the field to select specific parts from the drop-down list.
 - **Sundry Discount:** Enter an amount in the Sundry Discount **%** field.
 - **Apply discount to these sundries:** The default selection is All Sundries. Click in the field to select specific sundries from the drop-down list.
- 9 Click **Save**.

To configure a discount rule based on the vehicle model:

- 1 Click **Add Rule**.
 - 2 Select **Vehicle Model** from the drop-down list.
 - 3 Confirm the Enable Editing switch is set to **Yes**.
The Enable Editing switch allows dealers or users at a lower level to edit the rule.
 - 4 If you want to specify a date range for the discount rule, set the dates using the calendar.
 - 5 If you want to apply a discount rule to operations, click the **+** icon. Then select from the drop-down lists and click **Add**.
 - 6 Configure the discounts to be applied:
 - **Labour Discount:** Enter an amount in the Labour Discount **%** field.
 - **Parts/PFCs Discount:** Enter an amount in the Parts/PFCs Discount **%** field.
 - **Apply discount to these PFCs:** The default selection is All PFCs. Click in the field to select specific PFCs from the drop-down list.
 - **Apply discount to these parts:** The default selection is All Parts. Click in the field to select specific parts from the drop-down list.
 - **Sundry Discount:** Enter an amount in the Sundry Discount **%** field.
 - **Apply discount to these sundries:** The default selection is All Sundries. Click in the field to select specific sundries from the drop-down list.
 - 7 Select the required checkbox in the **Vehicles** column:
 - **Model:** Apply the rule to all vehicles in the selected model. By default, the rule is applied to subsequent levels.
 - **Series:** Click the  icon to expand the model and apply the rule to the required series. By default, the rule is applied to subsequent levels.
 - **Description:** Click the  icon to expand the model and series and apply the rule to the required description.
 - 8 Click **Save**.
- ▶ You can also set up discounts based on customised vehicle categories.
- ▶ To update a rule, click , modify the details, then click **Save**.

Part and Sundry Substitution

The Part and Sundry Substitution module gives you the ability to define rules to replace selected parts and sundries. The substitution rules can then be applied based on the vehicle age, vehicle model or vehicle category. For example, you can set up rules for vehicles that are over five years old to always use alternate parts.

The substitution types include:

- Alternate parts: Allows you to always substitute alternate or manufacturer parts.
- Part: Allows you to substitute one part for another part.
- Sundry: Allows you to substitute one sundry for another sundry.
- Part instead of a sundry: Allows you to replace a sundry with a part.

When evaluating the items and pricing for an operation, the application starts from the first rule in the list, evaluating if the rule is applicable to the selected vehicle and applying the different substitution types. Then, it continues to evaluate the next rule in the list.

To create a substitution rule based on all vehicles:

- 1 Click the **Part and Sundry Substitution** tile.
- 2 Click **Add Rule**.
- 3 Select **All Vehicles** from the drop-down list.
- 4 Confirm the Enable Editing switch is set to **Yes**.
The Enable Editing switch allows dealers or users at a lower level to edit the rule.
- 5 If you want to specify a date range for the substitution rule, set the dates using the calendar.
- 6 If you want to apply a substitution rule to operations, click the **+** icon. Then select from the drop-down lists and click **Add**.
- 7 Click **Add** to include the rule in the substitution list.
- 8 Select the **Substitution Type** from the drop-down list and complete the corresponding fields.
- 9 Click the **✓** icon.
- 10 Click **Save**.


To create a substitution rule based on the vehicle age:

- 1 Click **Add Rule**.
- 2 Select **Vehicle Age** from the drop-down list.
- 3 Confirm the Enable Editing switch is set to **Yes**.
The Enable Editing switch allows dealers or users at a lower level to edit the rule.
- 4 Set the vehicle age using the registration date or the number of months.
- 5 If you want to specify a date range for the substitution rule, set the dates using the calendar.
- 6 If you want to apply a substitution rule to operations, click the **+** icon. Then select from the drop-down lists and click **Add**.
- 7 Click **Add** to include the rule in the substitution list.
- 8 Select the **Substitution Type** from the drop-down list and complete the corresponding fields.
- 9 Click the icon.
- 10 Click **Save**.

To create a substitution rule based on the vehicle model:

- 1 Click **Add Rule**.
- 2 Select **Vehicle Model** from the drop-down list.
- 3 Confirm the Enable Editing switch is set to **Yes**.
The Enable Editing switch allows dealers or users at a lower level to edit the rule.
- 4 If you want to specify a date range for the substitution rule, set the dates using the calendar.
- 5 If you want to apply a substitution rule to operations, click the **+** icon. Then select from the drop-down lists and click **Add**.
- 6 Click **Add** to include the rule in the substitution list.
- 7 Select the **Substitution Type** from the drop-down list and complete the corresponding fields.
- 8 Click the icon.
- 9 Click the **▶** icon to expand the vehicle model and series.
- 10 Select the required checkbox in the **Vehicles** column.
- 11 Click **Save**.

To create a substitution rule based on the vehicle category:

- 1 Click **Add Rule**.
 - 2 Select **Vehicle Category** from the drop-down list.
 - 3 Confirm the Enable Editing switch is set to **Yes**.
The Enable Editing switch allows dealers or users at a lower level to edit the rule.
 - 4 Click the **Vehicle Categories** field and select from the drop-down list.
You can apply the rule to multiple vehicle categories.
 - 5 If you want to specify a date range for the substitution rule, set the dates using the calendar.
 - 6 If you want to apply a substitution rule to operations, click the **+** icon. Then select from the drop-down lists and click **Add**.
 - 7 Click **Add** to include the rule in the substitution list.
 - 8 Select the **Substitution Type** from the drop-down list and complete the corresponding fields.
 - 9 Click the icon.
 - 10 Click **Save**.
- ▶ If you want to apply supersessions to a Part or Sundry instead of a part, select the **Apply to supersessions** checkbox when setting the substitution rule.
 - ▶ To update a substitution rule, click  , modify the details, then click **Save**.

Operation Authoring



The Operation Authoring screen allows you to create new operations or adjust existing operations to meet specific market or dealer requirements.

When customising operations, the commercial price can be set and published. If the commercial price is not set, the technical price will be calculated in Superservice Menus based on the labour, parts and sundry rates.

The options include:

- **New Operation:** Allows you to create new operations based on vehicle models or categories.
- **New Variant:** Allows you to create a variant of an existing operation for a single vehicle.
- **New Items to Operations:** Allows you to define items to add to one operation or to multiple operations at once.

You can add, edit or delete information such as the invoice lines, check sheet lines, labour times, parts and sundries.

Icon	Meaning
	Delete an item.
	Undo a deleted item.
	Reorder an item within the list.

Create a New Operation

You can add a new operation based on an existing operation or you can create a new operation completely from scratch. The new operations can be applied to vehicle models or vehicle categories.

The new operations are included in a new Dealer Menus category. This category displays in the Section Framework and under the Operation tab in Superservice Menus.


To create a new operation using an existing operation:

- 1 Click the **Operation Authoring** tile.
- 2 Click **Add** and select **New Operation**.
- 3 Confirm the Base on an existing operation switch is set to **Yes**.
- 4 Select a **Model**, **Series** and **Description** from the drop-down lists.
- 5 Click **Add**.
- 6 Select the **Category**, **Section** and **Operation** from the drop-down lists.
- 7 Click **Add**.

To configure the new operation details:

- 1 Select an option from the **Applicable To** drop-down list.
 - **All Vehicles**: Apply the new operation to all vehicles.
 - **Vehicle Model**: Select the required checkbox in the **Vehicles** column.
 - **Vehicle Category**: Click in the field and select from the drop-down list.
- 2 If you want to disable the technical price, click **Yes** and enter an amount in the **Fixed Commercial Price Inc. Tax** field.
- 3 The new operation is displayed in a default dealer category.

If you want to move the operation to an alternate section, click the Section **+** icon and select a category and section from the drop-down lists, then click **Add**. You have the option to delete the operation from the default category.
- 4 Enter a **Code** and confirm or edit the **Description** in the corresponding fields.
- 5 Confirm or edit the labour time in the **Time (hrs)** field.

Additional labour times can be configured.
- 6 Confirm or edit the **Warranty** and the **Difficulty Level** codes in the corresponding fields.
- 7 Add or edit **Invoice Lines**, **Check Sheet Lines**, **Parts** or **Sundries** in the corresponding fields.
- 8 Click **Save**.
- 9 Click the  icon to open the operation details and set the commercial price.

To set the commercial price:

- 1 Click the **Set Commercial Price** link.
 - 2 Select a commercial price from the **Type** drop-down list.
 - 3 Enter an amount in the **OEM** and **Alternate** price fields.
 - 4 If the commercial price includes tax, select the checkbox.
 - 5 Click **Save**.
 - 6 Click **Publish**.
 - 7 Click **Back**.
-
- ▶ If you enter a commercial price in the **Fixed Commercial Price Inc. Tax** field, there is no need to use the **Set Commercial Price** link.
 - ▶ To enter a new line, click in a description field and press **Enter** on the keyboard.
 - ▶ To create a new operation from scratch, select **No** for the Base on an existing operation switch and complete the corresponding fields.

Create a New Variant


You can create a new variant of an existing operation for a single vehicle. The operation details such as invoice and check sheet lines, part and sundry items can be modified.

The new variant is displayed in the corresponding category under the Operation tab in Superservice Menu.

To create a new variant of an existing operation:

- 1 Click **Add** and select **New Variant**.
The Base on an existing operation switch is set to **Yes** by default.
- 2 Select a **Model**, **Series** and **Description** from the drop-down lists.
- 3 Click **Add**.
- 4 Select the **Category**, **Section** and **Operation** from the drop-down lists.
- 5 Click **Add**.

To configure the new variant operation details:

- 1 If you want to hide the base operation in Superservice Menu, click **Yes**.
Only the customised variant will be displayed.
- 2 If you want to disable the technical price, click **Yes** and enter an amount in the **Fixed Commercial Price Inc. Tax** field.
- 3 Confirm or edit the **Description** and the **Time (hrs)** in the corresponding fields.
Additional labour times can be configured.
- 4 Confirm or edit the **Warranty** and the **Difficulty Level** codes in the corresponding fields.
- 5 Add or edit **Invoice Lines**, **Check Sheet Lines**, **Parts** or **Sundries** in the corresponding fields.
- 6 Click **Save**.
- 7 Click the  icon to open the operation details and set the commercial price.

To set the commercial price:

- 1 Click the **Set Commercial Price** link.
- 2 Select a commercial price from the **Type** drop-down list.
- 3 Enter an amount in the **OEM** and **Alternate** price fields.
- 4 If the commercial price includes tax, select the checkbox.
- 5 Click **Save**.
- 6 Click **Publish**.
- 7 Click **Back**.

Add New Items to Operations


This option allows you to add new items to one or more operations from the same category and section. Items such as invoice and check sheet lines, parts and sundries can be added to operations. The items can be applied to all vehicles, vehicle models or vehicle categories.

To add new items to operations:

- 1 Click **Add** and select **New Items to Operations**.
- 2 Select an option from the **Applicable To** drop-down list.
 - **All Vehicles**: Apply the new items to all vehicles.
 - **Vehicle Model**: Select the required checkbox in the **Vehicles** column.
 - **Vehicle Category**: Click in the field and select from the drop-down list.
- 3 Click the Operations **+** icon, select a category, section and operation.
- 4 Click **Add**.

If you want to exclude operations, select and add a category and section only. Click the Exclusions **+** icon, select from the drop-down list and click **Add**.

To add an item type and details:

- 1 Click **Add**.
 - 2 Select the **Item Type** from the drop-down list and complete the corresponding fields.
 - 3 Click the icon.
 - 4 Click **Save**.
- ▶ If a part or sundry already exists in the operation, you can ignore it by selecting the **Ignore if item already exists in operation** checkbox.
 - ▶ To update Operation Authoring, click  , modify the details, then click **Save**.

Upsell Recommendations

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

To add an upsell recommendation:

- 1 Click the **Upsell Recommendations** tile.
- 2 Click **Add Recommendation**.
- 3 Click the Operations **+** icon and select a category or a specific section and operation.
- 4 Click **Add**.
- 5 Click the Recommendations **+** icon.
- 6 Select a **Category**, **Section** and **Operation** from the drop-down lists.
- 7 Click **Add**.

To link the upsell recommendation to vehicles:

- 1 Select an option from the Vehicles drop-down list.
 - **All Vehicles:** Apply the upsell recommendation to all vehicles.
 - **Vehicle Model:** Select the required checkbox in the **Vehicles** column.
 - **Vehicles:** Apply the upsell recommendation to all vehicles.
 - **Model:** Apply the upsell recommendation to all vehicles in the selected model.
 - **Series:** Click the **▶** icon to expand the model and apply the upsell recommendation to the selected series.
 - **Description:** Click the **▶** icon to expand the model and series and apply the upsell recommendation to the selected description.
 - **Vehicle Category:** Click in the field and select from the drop-down list.
- 2 Click **Save**.

- ▶ To update Upsell Recommendations, click  , modify the details, then click **Save**.

Pricing and Comparison Features

This section provides details on how to set up pricing and dealer comparisons in Superservice Author. You can easily group operations into packages and give them a fixed commercial price. You can also apply price rounding rules to operations.

The Pricing Matrix module gives you the ability to view, track and set commercial prices. Using the Pricing Matrix module helps to align pricing and ensure commercial viability across operations.

The price types used in this section are detailed in the following table.

Term	Definition
Technical Price	The operation is priced using the calculated technical price. This calculated price is based on the prices that are configured for labour, parts and sundries in Superservice Menus.
Fixed Commercial Price	The operation is priced using the fixed price set by the dealer or distributor. Setting a commercial price means the menu acts as a fixed price menu.
Capped Commercial Price	The operation is priced using the calculated technical price, up to the maximum price that has been specified.

Price Rounding

Dealers may want to set up different price rounding rules for their operations. This module allows you to create specific price rounding rules, which can be applied to all or some of the menus and vehicle models. Price rounding is applied to technical prices which can then be displayed as commercial prices.

The rules can be customised to include such options as flat rate menus, popular repairs or service. They can also be applied to a specific operation for a vehicle.

To apply price rounding to all menus and vehicles:

- 1 Click the **Price Rounding** tile.
- 2 Click **Add Rule**.
- 3 Select the **Rounding Type** from the drop-down list.
- 4 Select **All technical prices for all vehicle models** from the drop-down list.
- 5 Click **Save**.

To apply price rounding to some menus and all vehicles:

- 1 Click **Add Rule**.
- 2 Select the **Rounding Type** from the drop-down list.
- 3 Select **Selected technical prices for all vehicle models** from the drop-down list.
- 4 Select the **Category, Section** and **Operation** from the drop-down lists.
- 5 Click **Add**.
- 6 Click **Save**.

To apply price rounding to some menus and some vehicles:

- 1 Click **Add Rule**.
- 2 Select the **Rounding Type** from the drop-down list.
- 3 Select **Selected technical prices for some vehicle models** from the drop-down list.
- 4 Select the **Category, Section** and **Operation** from the drop-down lists.
- 5 Click **Add**.
- 6 Select the checkbox for the required vehicles in the **Vehicles** column:
 - **Vehicles:** Apply the rule to all vehicles.
 - **Model:** Apply the rule to all vehicles in the selected model.
 - **Series:** Click the ▶ icon to expand the model and apply the rule to the selected series.
 - **Description:** Click the ▶ icon to expand the model and series and apply the rule to the selected description.
- 7 Click **Save**.

To apply price rounding to some menus for some vehicle categories:

- 1 Click **Add Rule**.
- 2 Select the **Rounding Type** from the drop-down list.
- 3 Select **Selected technical prices for some vehicle categories** from the drop-down list.
- 4 Click in the **Vehicle Categories** field and select from the drop-down list.
- 5 Select the **Category, Section** and **Operation** from the drop-down lists.
- 6 Click **Add**.
- 7 Click **Save**.

- ▶ To update Price Rounding, click  , modify the details, then click **Save**.

Operation Packages

This module allows you to combine two or more operations into a package and set the commercial price. The new package is displayed in the corresponding category under the Operation tab in Superservice Menus.

The package operation codes consist of a prefix starting with the letter P.

To create an operation package:

- 1 Click the **Operation Packages** tile.
- 2 Click **Add Package**.
- 3 Enter a **Code** and **Name** in the corresponding fields.
- 4 Select a **Category** and **Section** from the drop-down lists where this package will be saved.

To add content to a package:

- 1 Select a **Category**, **Section** and **Operation** from the drop-down lists.
- 2 Click **Add Operation**.
- 3 Confirm or edit the **Labour times** (if applicable).
- 4 Repeat these steps to add multiple operations to a package.

To link a vehicle to a package:

- 1 Select the checkbox for the required vehicles in the **Vehicles** column:
 - **Model:** Apply the package to all vehicles in the selected model.
 - **Series:** Click the ▶ icon to expand the model and apply the package to the selected series.
 - **Description:** Click the ▶ icon to expand the model and series and apply the package to the selected description.
- 2 Click **Save**.
- 3 Click the ▶ icons for the category and section and select the package name in order to set the commercial price.

To set the commercial price:

- 1 Click the **Set Commercial Price** link.
 - 2 Select a commercial price from the **Type** drop-down list.
 - 3 Enter an amount in the **OEM** and **Alternate** price fields.
 - 4 If the commercial price includes tax, select the checkbox.
 - 5 Click **Save**.
 - 6 Click **Publish**.
 - 7 Click **Back**.
- ▶ To update Operation Packages, click the ▶ icons, select the package name, modify the details, then click **Save**.

Pricing Matrix

The Pricing Matrix module allows you to view and compare the pricing of operations and packages. This is also where you can easily set, align and publish commercial prices.

The higher level of the hierarchy can create one or more matrixes that are published to the lower levels of the hierarchy. Only one matrix can be set as the default. Depending on your permissions, lower levels of the hierarchy may also have the ability to add a matrix.

The prices are displayed in a grid format, with the vehicle models or vehicle categories on the left and the operations at the top. You can select and configure which vehicles and operations are displayed in the matrix.

The matrix displays either a single price or a range of prices in each cell. If all prices are equal, a single price will be displayed. If there is a variation across the prices, then the minimum, maximum and mean prices will be shown.

This colour coding indicates the publication status of the commercial prices.

Colour	Condition
Green	All operations/vehicles have published commercial prices
Blue	All operations/vehicles have unpublished commercial prices
	A mix of published and unpublished commercial prices
Black	A mix of published and unpublished commercial prices at the description level
Amber	A mix of commercial and technical prices Only commercial prices are displayed
Red	All operations/vehicles have only technical prices
	No technical prices are displayed, just a "-" character










Create and configure the matrix display

You can add a matrix and select which vehicles and operations are displayed.

To add a matrix name:

- 1 Click the **Pricing Matrix** tile.
- 2 Click **Add**.
- 3 Enter a name in the field.
- 4 If you want to set the matrix as the default, click **Yes**.
Only one matrix can be set as the default.
- 5 Click **Save**.


To create a matrix display:

- 1 Click the  icon to open a matrix.
 - 2 Click the  icon in the **Vehicles** column and select an option from the drop-down list:
 - **Load Configuration:** Allows you to select an existing configuration.
 - **New Configuration:** Allows you to create a new configuration.
 - 3 Confirm the vehicle models are displayed in the **Vehicles** column.
If you want to display vehicle categories, click the  icon and select **Vehicle Categories** from the drop-down list.
 - 4 To enable the menu selection  icon, click the  icon and select an option from the drop-down list:
 - **Load Configuration:** Allows you to select an existing configuration.
 - **New Configuration:** Allows you to create a new configuration.
 - 5 Click the  icon at the top right of the screen.
 - 6 Select a **Category**, **Section** and **Operation** from the drop-down lists.
 - 7 Click **Add**.
 - 8 Repeat these steps to add columns to your matrix.
 - 9 Click **Save**.
- ▶ To reposition the columns, click the  icon and select **Reorder Sections**, click the  icon to move to a new position, then click the  icon and select **Sections Reordered**.




Operation Pricing

The Operation Pricing module is accessible from the Pricing Matrix. This module allows you to set and publish the commercial price of an operation or package one at a time. You can also compare prices for the same operation across different vehicles.




To set a commercial price based on the vehicle category:

- 1 Click the  icon to open a matrix.
- 2 Confirm the vehicle categories are displayed in the Vehicles column.
- 3 Click in a cell in the pricing matrix to open the Pricing screen.
- 4 Select a commercial price from the **Type** drop-down list.
- 5 Enter an amount in the **OEM** and **Alternate** price fields.
- 6 If the commercial price includes tax, select the checkbox.
- 7 Click **Save**.
- 8 Click **Publish**.
- 9 Click **Back** to return to the Pricing Matrix.

To set a commercial price based on the model or series:

- 1 Click the  icon to open a matrix.
 - 2 Select from the following options:
 - **Model:** Click in a cell in the pricing matrix to open the Pricing screen.
 - **Series:** Click the  icon to expand model and click in a series cell in the pricing matrix to open the Pricing screen.
 - 3 Select a commercial price from the **Type** drop-down list.
 - 4 Enter an amount in the **OEM** and **Alternate** price fields.
 - 5 If the commercial price includes tax, select the checkbox.
 - 6 Click **Save**.
 - 7 Click **Publish**.
 - 8 Click **Back** to return to the Pricing Matrix.
- ▶ To add model attributes, click the  icon in the **Vehicles** column, select **Add Model Attribute** and select a coloured box from the drop-down list.

To set a commercial price based on the description:

- 1 Click the  icon to open a matrix.
 - 2 Click the  icons to expand the model and series.
 - 3 Click in a description cell in the pricing matrix to open the Pricing screen.
 - 4 Click the  icon to expand the operation variant.
Variant lines are displayed below the operation code.
 - 5 Select a commercial price from the **Type** drop-down list.
 - 6 Enter an amount in the **OEM** and **Alternate** price fields.
 - 7 If the commercial price includes tax, select the checkbox.
 - 8 Repeat this process for any additional variant lines.
 - 9 Click **Save**.
 - 10 Click **Publish**.
 - 11 Click **Back** to return to the Pricing Matrix.
- ▶ To apply the same commercial price to all of the variant lines, enter the data in the first line. Click **Save** and **Publish**.

Compare Prices in the Pricing Matrix



You can compare prices across dealerships in your region. This comparison feature must be enabled in the Settings under Dealer Regions and configured by the dealer in Comparison Thresholds.

When you hover and hold your mouse over a cell, an information box will be displayed.





Field	Description
Commercial Price	The commercial price set by the user.
Commercial Price Average	The average price of other dealers.
Commercial vs Comparison %	The % difference between the commercial price and the average comparison price.

Commercial vs Comparison %

The Commercial vs Comparison % feature is only available for dealers when there are at least five or more dealers in the region. The price cells are colour coded within the pricing matrix to indicate the dealer comparison information. The colour coded cells are based on the configuration and rules that have been set up within Settings, under Dealer Regions and Comparison Thresholds.

Field	Description
	Above comparison price by % <i>defined</i>
	Below comparison price by % <i>defined</i>



To compare dealer prices:

- 1 Click the  icon to open a matrix.
- 2 Click the  icon and select **Vehicle Categories** from the drop-down list.
- 3 Hover and hold your mouse over a cell to view comparison information.
 -  The price is above the comparison price by the defined %.
 -  The price is below the comparison price by the defined %.
- 4 Continue to compare the prices across the grid.
- 5 Click **Save**.



Comparison Graphs

The Operation and Vehicle Comparison graphs allow you to compare the OEM and Alternate commercial prices against other operations or vehicles. The OEM and Alternate prices are displayed as individual bars in the graph with a single price or minimum and maximum value.


The selected operation or vehicle is displayed in orange.

	The minimum price
	The whole bar when there is no price difference or the difference between the minimum and maximum price

The operations or vehicles you are comparing against are displayed in blue.

	The minimum price
	The whole bar when there is no price difference or the difference between the minimum and maximum price


To view comparison graphs for a published price:

- 1 Click in a cell in the pricing matrix to open the Pricing screen.
- 2 Click the  icon to view the **Operation Comparison** or **Vehicle Comparison** graphs.
- 3 Compare the information.
- 4 Click **Back** to return to the pricing matrix.

Publish All Commercial Prices

While you are working on your pricing you can choose to leave the commercial prices as unpublished. When you have finished setting your prices, you can then publish all the prices at once.

To publish or unpublish all commercial prices:

- 1 Select your preferred commercial price option.
 - **Publish:** Publishes the new commercial price of the operation.
 - **Unpublish:** Removes the new commercial price that has been published.
 - 2 Select the checkboxes for the relevant columns.
 - 3 Click **Confirm**.
- ▶ As you publish prices, click the  icon next to the most recent date to see what you have published, as well as any price differences.

Part Price Mark-ups

The Part Price Mark-ups module allows dealers to create rules to increase the price of parts by a percentage. The mark-up rules are based on the part group and part family. Dealers create and maintain the rules, and users at higher levels of the hierarchy are only allowed to view the rules.

Once a rule is saved, the mark-up is applied to the part price in Superservice Menus. The mark-up percentage and value are not displayed in the application or on printouts.

To create part price mark-ups:

- 1 Click the **Part Price Mark-ups** tile.
- 2 Click **Add Rule**.
- 3 Select a **Group** from the drop-down list.
- 4 Click in the **Part Family** field and select from the drop-down list.
You can select one or multiple part families (if available).
- 5 Select the **Customer Type** from the drop-down list.
- 6 Click the Applicable To **+** icon and select a category or a specific section and operation.
If nothing is selected, the rule is applied to all operations.
- 7 Click **Add**.
- 8 Enter a percentage in the field.
- 9 Click **Save**.

- ▶ To update Part Price Mark-ups, click  , modify the details, then click **Save**.

Item Bundles

The Item Bundles module allows you to assemble bundles of parts, labour and sundries by vehicle category. The bundle can be sold as a fixed priced operation on its own or can be bundled with an existing operation. The bundle can then be applied based on the vehicle age or to all vehicles.

When evaluating the items and pricing for an operation, the application starts from the first rule in the list, evaluating if the rule is applicable to the selected vehicle category. Then it continues to inspect the operation identifying items that can be substituted with the bundle.

The bundle will be substituted only when there is no commercial price for the operation, or when the user selects the Show technical price link in Menus.

To add item bundles:

- 1 Click the **Item Bundles** tile.
- 2 Click **Add**.
- 3 Enter a name in the field.
- 4 Click the **Vehicle Category** drop-down and select from the list.
- 5 Select a **Category**, **Section** and **Operation** from the drop-down lists.
- 6 If the commercial price has been set, it will display in the **Commercial Price for Base Operation** field. Use this price or enter a price in the currency (\$) field.
- 7 Confirm the Enable Editing switch is set to **Yes** (if applicable).
The Enable Editing switch allows dealers or users at a lower level to edit the rule.
- 8 Click the **Applicable To** drop-down and select from the list.
 - **All Vehicles:** Applies the item bundle to all vehicles.
 - **Vehicle Age:** Set the vehicle age using the registration date or the number of months.
- 9 Click the **Bundle Labour Options** drop-down and select from the list.
 - **Set fixed price excluding labour:** Enter the price for the bundle in the currency (\$) field.
 - **Set labour time adjustment:** Enter the amount of labour time to deduct from the main operation in the (-) field.
 - **Use labour time from bundle:** The bundle labour time is applied to the main operation in Menus.
- 10 Click **Save**.

▶ To update Item Bundles, click  , modify the details, then click **Save**.

External Systems





The External Systems module allows you to map Infomedia dealer names to the unique dealer IDs that are referenced in external systems like the A2D system. The dealer identifier is known as the Global Unique ID (GUID). You only have to set this up in the application once.

This functionality allows an external system to request dealer-specific information via Web Services using only the dealer identifier known to that system, rather than the dealer identifier known to Infomedia.

To add a new external system name:

- 1 Click the **External Systems** tile.
- 2 Click **Add External System**.
- 3 Enter a name in the **External System** field.
- 4 Click **Add** or press **Enter** on the keyboard.

To add a global unique ID to a dealer:

- 1 Click the  icon to display the Dealership Address (if applicable).
 - 2 Click the  icon for a dealer.
 - 3 Enter the **Global Unique ID** (GUID) in the field.
 - 4 Press **Enter** on the keyboard.
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- ▶ To update an External System, click , modify the details, then press **Enter** on the keyboard.
 - ▶ To delete a Global Unique ID, click , highlight the GUID and press **Backspace**, then press **Enter** on the keyboard.

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