



SUPERSERVICE MENUS

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.


The options displayed in the Settings screen may differ based on your subscription.

This guide is divided into the following sections:

- Basic Settings
- Print Settings
- Advanced Settings

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.
-  : Sends you back to the main screen.

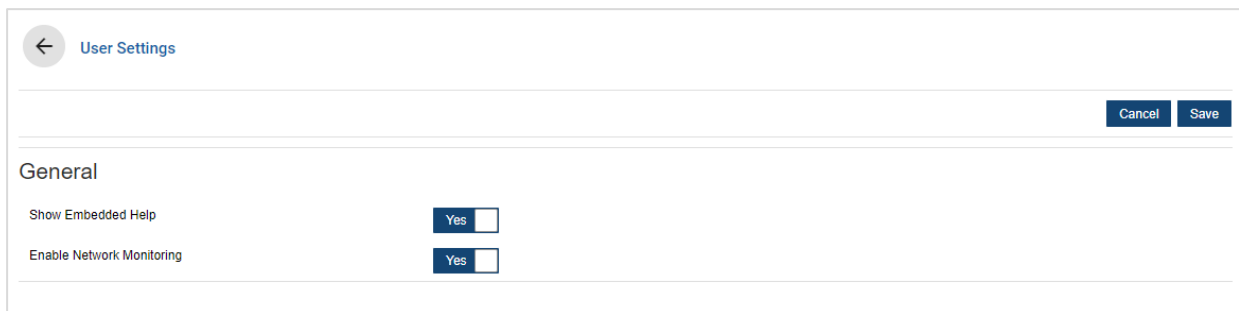
Basic Settings

The basic application settings allow you to customise user and dealer settings as well as set up employee groups and configure security permissions for each group.

User Settings

The User Settings screen gives you the ability to display the inline help, change the application theme and activate network monitoring.

The application theme will be set by default for your manufacturer. Network Monitoring is a system that continuously checks each user's internet connection and notifies users of any issues.



← User Settings

Cancel Save

General

Show Embedded Help Yes ☐

Enable Network Monitoring Yes ☐

To edit the user settings:

- 1 Click **Edit**.
- 2 Select **Yes** to show the embedded (inline) help.
- 3 Select **Yes** to enable network monitoring.
- 4 Click **Save**.

Dealer Settings

The Dealer Settings screen allows you to select your currency and specify your preferred quote number format. You can also select to filter search results by Right-Hand Drive (RHD) or Left-Hand Drive (LHD) according to your region.

Dealer Settings

Cancel Save

General

Currency
Dollar

Format
Number Only: nnn

Drive
RHD - Right-Hand Drive

Time Zone
(GMT +00:00) UTC

Stock Availability

Languages

Price Settings

Price Rounding
Rounding to: 0.05

☒ Show Kits by Default



Quote Settings

Technical Settings

To configure general settings:

- 1 Select the **Currency** from the drop-down list.
- 2 Select the quote number format from the **Format** drop-down list.
- 3 Select the filter type from the **Drive** drop-down list.
- 4 Select the **Time Zone** from the drop-down list.
- 5 Click in the **Languages** field and select from the drop-down list.
- 6 Enter the number of days the quote is valid for in the **Quote Settings** section.
- 7 Click **Save**.

To configure price and technical settings:

- 1 If you want to apply **Price Rounding** to the prices listed on quotes, select an option from the drop-down list.
Additional price settings may be available based on your subscription.
- 2 To display kits by default in the Operation Selection and Quote Details screens, click the  **Show Kits by Default** icon. A kit is a group of parts that are assembled to form a part.
- 3 To adjust the CPI % value that is applied when calculating the Lifetime Service costs, enter an amount in the **CPI %** field.
- 4 To apply a filter in the Operation Selection screen to only display the menus that have options specific to the VIN that has been entered, click the  **Enable Production Option Filtering (Best Match)** icon.
- 5 Click **Save**.

Stock Availability

The Stock Availability setting allows you to define the Stock On Hand (SOH) descriptions that can be assigned to parts in the Quote Details screen. In the Quote Details screen, you can click on a part line and select from the list of descriptions in the SOH field to apply the stock availability for a specific part number.

Depending on your dealership process, parts information in the Quote Details screen can be set up to populate automatically from your DMS or a parts price file. For example, the stock availability and Bin location. Additional work may be required by your DMS provider to set up this functionality.

The screenshot shows the 'Dealer Settings' screen. At the top left is a back arrow and the text 'Dealer Settings'. At the top right are 'Cancel' and 'Save' buttons. Below these are several expandable sections: 'General', 'Stock Availability', 'Languages', 'Price Settings', 'Quote Settings', and 'Technical Settings'. The 'Stock Availability' section is expanded, showing a toggle switch for 'Enable SOH and Bin Location' which is turned on. To the right of the toggle is a 'Descriptions' field with three buttons: 'In Stock', 'Not in Stock', and 'On Back Order'. Each button has a small 'x' icon. To the right of these buttons is a text input field with the placeholder 'Enter text here'.

To configure stock availability:

- 1 Click the **Enable SOH and Bin Location** icon.
The SOH and Bin location columns will display in the Quote Details screen.
- 2 Click in the **Descriptions** field and enter a stock on hand description, then press **Enter** on the keyboard.
- 3 Click **Save**.

Integration Settings

The Integration Settings screen allows you to set up integration types such as your DMS or a third party system. You can export a file that can then be imported into your DMS, or you can set up a direct transfer of data to your DMS using the Infomedia DMSi application.

There are more advanced options available for DMS integration that may require work by your DMS provider.

Integration Settings

Integration Type: DMSi

Integration Settings

New DMSi Application: Yes ☐

Integration Type: Local

Available Connections: DMS

Export Format: XML 1.2

Decimal Symbol: .

Test DMSi Connection Advanced

To set up a flat file export:

- 1 Click **Add DMS**.
- 2 Select **Flat File Export** from the **Integration Type** drop-down list.
- 3 Select the file format from the **Export Format** drop-down list.
- 4 Select the **Decimal Symbol** type from the drop-down list.
- 5 Click **Save**.

The file will be exported as XML or TXT.

To set up DMSi integration:

- 1 Click **Add DMS**.
- 2 Select **DMSi** from the **Integration Type** drop-down list.
- 3 Click **Yes** to enable the **New DMSi Application**.
- 4 Select **Local** from the **Integration Type** drop-down list.
- 5 Select your DMS connection from the **Available Connections** drop-down list.
- 6 Complete any additional settings or fields for your DMS connection.
- 7 Click **Test DMSi Connection** to ensure the system is connected.
- 8 Click **Save**.

To set up third party integration:

- 1 Click **Add Third Party**.
 - 2 Select the provider name from the **Integration Type** drop-down list.
 - 3 Enter the provider details in the corresponding fields.
 - 4 Click **Save**.
-
- ▶ Additional integration types may be available based on your subscription.
 - ▶ For more information on DMSi installation and DMS integration, check out the Media Hub.
<https://media.infomedia.com.au/?product=menus>
 - ▶ If you need assistance, please contact Customer Service.
<https://www.infomedia.com.au/contact/customer-support>

Employee Groups

The Employee Groups screen allows you to create employee groups, allocate users to groups and link an employee ID to a DMS or to a third party system. Three groups are added by default: Parts Advisors, Service Advisors and Technicians.

The screenshot shows two sections: 'Employee Groups' and 'Employees'. The 'Employee Groups' section has a table with 2 columns: 'Group Name' and 'Members'. It lists three groups: 'Parts Advisors' (Administration Bryan), 'Service Advisors' (Administration Bryan, Dealer), and 'Technicians' (Joe Spares, William Smith). Each row has an edit icon. The 'Employees' section has a table with 7 columns: 'Employee Name', 'Employee Number', 'Email Address', 'Certification Number', 'Skill Level', 'Source', and 'Groups'. It lists four employees: 'Administration Bryan' (Subscription, Parts Advisors, Service Advisors), 'Dealer' (Subscription, Service Advisors), 'Joe Spares' (Dealership, Technicians), and 'William Smith' (Dealership, Technicians). Each row has edit and delete icons.

Group Name	Members	
Parts Advisors	Administration Bryan	
Service Advisors	Administration Bryan, Dealer	
Technicians	Joe Spares, William Smith	

Employee Name	Employee Number	Email Address	Certification Number	Skill Level	Source	Groups	
Administration Bryan					Subscription	Parts Advisors, Service Advisors	
Dealer					Subscription	Service Advisors	
Joe Spares	1	jspares@ifm.com	123	Master	Dealership	Technicians	
William Smith	2	wsmith@ifm.com	1234	Certified	Dealership	Technicians	

To assign users to existing groups:

- 1 Click the icon to open a group name.
- 2 Click in the **Members** field and select the employees from the drop-down list.
- 3 If you want to link your employees to an external system, click **Add Third Party ID** and select from the drop-down list. Enter the employee ID in the corresponding field.
- 4 Click the icon.

To add a new user:

- 1 Click **Add** in the employee name section.
- 2 Enter the employee name, employee number, email and certification number in the corresponding fields.
- 3 Select a **Skill Level**.
- 4 Click in the **Groups** field and select from the drop-down list.
- 5 Click the icon.

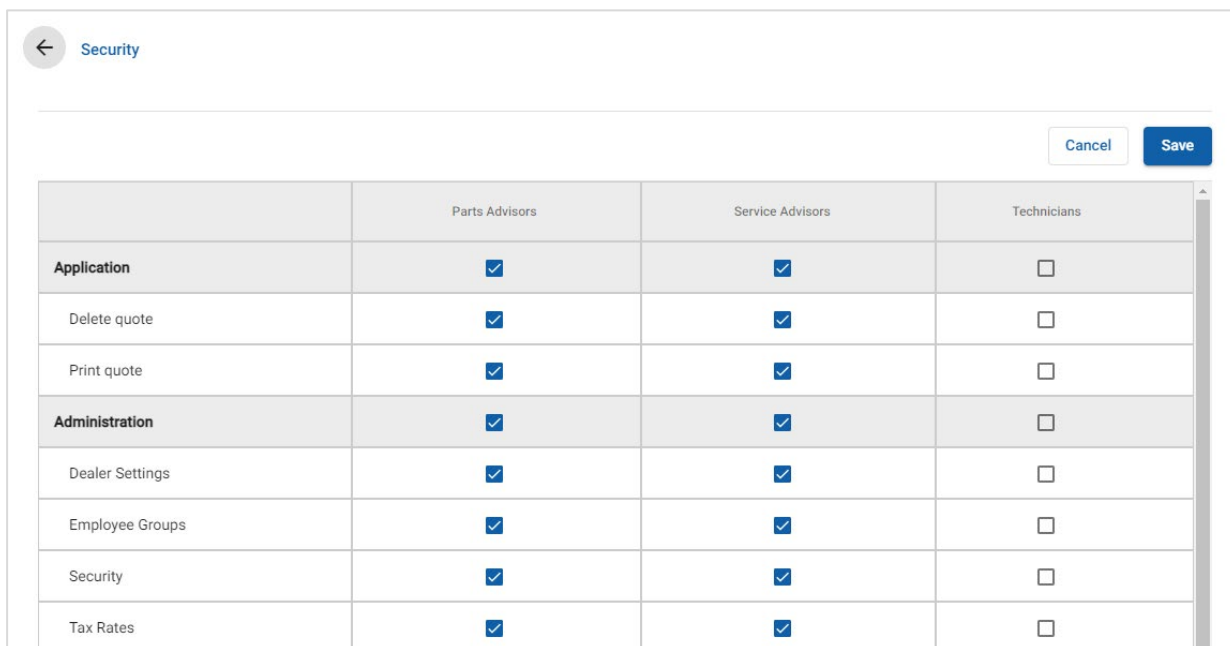
- ▶ When an employee is added to a group, the group name is automatically entered in the Groups field for the employee.

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 dealership.

The main areas in the Security screen are:

- **Application:** Enable or disable quote actions.
- **Administration:** Enable or disable access to the settings screens.



← Security

Cancel Save

	Parts Advisors	Service Advisors	Technicians
Application	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Delete quote	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Print quote	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Administration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Dealer Settings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee Groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Security	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tax Rates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

To configure the security settings:

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

- ▶ 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**.

Print Settings


The Print Settings screen allows you to create and format print profiles. The print profiles are used when printing from the Quote Actions menu.

You can add customised dealership information, headers, footers and also upload logos. You can even apply print templates, such as for a quote, repair order or check sheet.

The screenshot shows the 'Print Settings' interface for a 'Quote' profile. At the top, there's a navigation bar with a back arrow and 'Print Settings'. Below it, a sub-header shows '< Quote' and a '+' icon. The main form is divided into several sections:

- Profile Name***: A text field containing 'Quote'. To the right are 'Delete', 'Cancel', and 'Save' buttons.
- Dealership Details**: A section with multiple input fields:
 - Dealer Code: _____
 - Company Number: _____
 - Dealership Name: _____
 - IFM Menu Training 4: _____
 - Telephone: 1234567890, Fax: 0987654321
 - Contact Name: Joe Spares
 - Email: jspares@ifm.com
 - Website: _____, Tax Number: _____
 - Dealership Logo: [Upload Logo](#)
- Dealership Address**: A section with input fields:
 - Address: 1 Blank Street
 - City: Any City, Postcode: 1234
 - State: Any State, Country: Any Country
- Postal Address**: A section with a checkbox 'Same as dealership address' which is checked.
- Print Templates**: A section with four checkboxes:
 - ☐ Service quote without invoice lines
 - ☐ Repair Order
 - ☐ Service Check Sheet
 - ☒ Service Quote

To add a print profile name:

- 1 Click the  icon.
- 2 Enter a name in the field.
- 3 Click **Save**.

To configure a print profile:

- 1 Select the profile name from the banner.
 - 2 Enter the dealership's information into the corresponding fields.
E.g. Dealership name, address, phone, fax and email.
 - 3 Click **Upload Logo** and select your dealership logo.
 - 4 Select from the available checkboxes under **Print Templates**.
 - 5 Confirm the default margin settings or adjust them to your requirements.
 - 6 Add content into the **Header** and **Footer** fields, and format as required.
 - 7 Click **Save**.
- To update the Print Settings, click the profile name, modify the details, then click **Save**.

Email Settings

The Email Settings screen allows you to set up a Reply to email address and an email signature. This allows the customer to reply to quotes that are sent by email from the Quote Actions menu.

← Email Settings

Cancel Save

Reply to

jspares@fm.com service@fm.com

Send a copy to the Reply to email address ☒

Email Signature

Sans Serif B I U Normal x₂ x² A [icon] [icon] [icon] [icon] [icon]

Joe Spares
Future Motors

FUTURE MOTORS
<https://futuremotors.com>

To configure the email settings:

- 1 Use the default Reply to email address or enter a different email address in the **Reply to** field and press **Enter** on the keyboard.
Multiple email addresses can be added.
- 2 Confirm the ☒ **Send a copy to the Reply to email address** icon is enabled.
- 3 Enter the email signature details in the field and format as required.
The total size of the email signature, including all attachments, must not exceed 1MB.
- 4 Click **Save**.

Price Settings

To ensure the creation of accurate and consistent quotes, you need to complete your main price settings in Superservice Menus. Some of the customised price settings include configuring your tax, labour and sundry rates. You can also view and set up parts pricing.

- ▶ The options displayed in the Settings screen may differ based on your subscription.

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.

The screenshot displays the 'Tax Rates' configuration screen. At the top left is a back arrow and the title 'Tax Rates'. Below this is a table of existing tax rates. To the right of the table is an 'Add' button. Below the table is a 'Tax Groups' section with an 'Add Tax Group' button and a toggle for 'Enable multiple tax levels'. At the bottom is a 'Parts Tax Rate' section with a dropdown menu for 'Parts tax default rate'.

Name	Code	Percentage	Modified By	
Tax	Tax	10 %	Dealer	
BTW	BTW	20 %	Dealer	
Environmental Levy	EL	25 %	Dealer	

Tax Groups Add Tax Group

☐ Enable multiple tax levels

Parts Tax Rate

Parts tax default rate
Tax

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 the icon.

To add a tax group:

- 1 Click **Add Tax Group**.
- 2 Enter a **Tax Group Name** and **Tax Group Code** in the corresponding fields.
- 3 Click in the **Tax Rates** field and select one or more rates from the drop-down list.

The screenshot shows the 'Tax Groups' configuration interface. At the top right is an 'Add Tax Group' button. Below it is a toggle switch for 'Enable multiple tax levels'. The main area contains a table with the following structure:

Tax Group Name	Tax Group Code	Tax Rates	Modified By
Tax Group Name*	Tax Group Code*	Tax Rates	
Multiple Tax	BTW-T	Tax BTW	Dealer

At the bottom right of the table, there are icons for deleting (X) and saving (floppy disk) the entry. A mouse cursor is shown clicking the save icon.

- 4 Click the icon.

- ▶ To enable tax groups, click the **Enable multiple tax levels** icon.
- ▶ 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.

Labour Rates

The Labour Rates screen allows you to create labour rates to suit the needs of your dealership.

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.

← Labour Rates
Add

Labour Rate Name	Third Party Code	Rate Type	Hours	Hourly Rate	Tax Rate	Sundry Tax Rate	Default	Modified By	
Flat Rate	1234	Hourly Rate	0 - ∞	120	Tax	Tax	Yes	Dealer	
Multiple Rates	12345	Hourly Rate	0 - 1	110	Tax	Tax	No	Dealer	
			>1 - 2	120					
			>2 - ∞	0					
Pricing Matrix		Matrix Rate	<u>Set Pricing</u>		Tax	Tax	No	Dealer	

To add a labour price level with a flat rate:

- 1 Click **Add**.
- 2 Enter a **Labour Rate Name** in the field.
- 3 If you want to link with an external system, enter the code in the **Third Party Code** field.
- 4 Confirm **Hourly Rate** is selected from the **Rate Type** drop-down list.
- 5 Enter the labour rate in the **Hourly Rate** field.
You need to ensure the Hours field is blank and only add the Hourly Rate.
- 6 Select the **Tax Rate** and **Sundry Tax Rate** from the drop-down lists.
- 7 To set this labour price level as the default rate, select the **Default** checkbox.
- 8 Click the icon.


To add a labour price level with multiple rates:

- 1 Click **Add**.
- 2 Enter a **Labour Rate Name** in the field.
- 3 If you want to link with an external system, enter the code in the **Third Party Code** field.
- 4 Confirm **Hourly Rate** is selected from the **Rate Type** drop-down list.
- 5 Enter the number of hours in the **Hours** field.
- 6 Enter the labour rate in the **Hourly Rate** field.
- 7 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.
- 8 Select the **Tax Rate** and **Sundry Tax Rate** from the drop-down lists.

Labour Rate Name	Third Party Code	Rate Type	Hours	Hourly Rate	Tax Rate	Sundry Tax Rate	Default	Modified By
Enter labour rate name*	Enter code	Rate Type	0 - 1	120	Tax Rate	Sundry Tax Rate		
Multiple Rates	12345	Hourly Rate ▾	>1 - 2	125	Tax ▾	Tax ▾	<input checked="" type="checkbox"/>	Dealer
			🗑 >2 -	130				✕ 📄 Jim







- 9 To set this labour price level as the default rate, select the **Default** checkbox.
- 10 Click the 📄 icon.

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



- 1 Click **Add**.
- 2 Enter a **Labour Rate Name** in the field.
- 3 If you want to link with an external system, enter the code in the **Third Party Code** field.
- 4 Select **Matrix Rate** from the **Rate Type** drop-down list.
- 5 Select the **Tax Rate** and **Sundry Tax Rate** from the drop-down lists.
- 6 Click the  icon.
- 7 Click the **Set Pricing** link.
- 8 Select an option from the **Set Pricing** drop-down list (if applicable).
For example, Fuel Type or Vehicle Category.
- 9 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 Rates.
 - **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.

Pricing Matrix [Cancel](#) [Save](#)

Set Pricing Vehicle Category ▼

Difficulty Levels	4WD				Commercial				Fleet			
	Hours		Rates		Hours		Rates		Hours		Rates	
Technician - 1		0 -	<input type="text" value="120"/>		0 -	<input type="text" value="125"/>	0 -	<input type="text" value="130"/>				
Technician - 2		0 -	<input type="text" value="125"/>		0 -	<input type="text" value="130"/>	0 -	<input type="text" value="135"/>				
		>1 -	<input type="text" value="130"/>		>1 -	<input type="text" value="135"/>		>1 -	<input type="text" value="140"/>			


- 10 Click **Save**.

- ▶ When you select **Vehicle Category** from the **Set Pricing** drop-down list, the **Copy to all items in this row**  icon displays. Click the  icon to copy a flat rate or multiple rates to all vehicle categories for the applicable price level.


Sundries

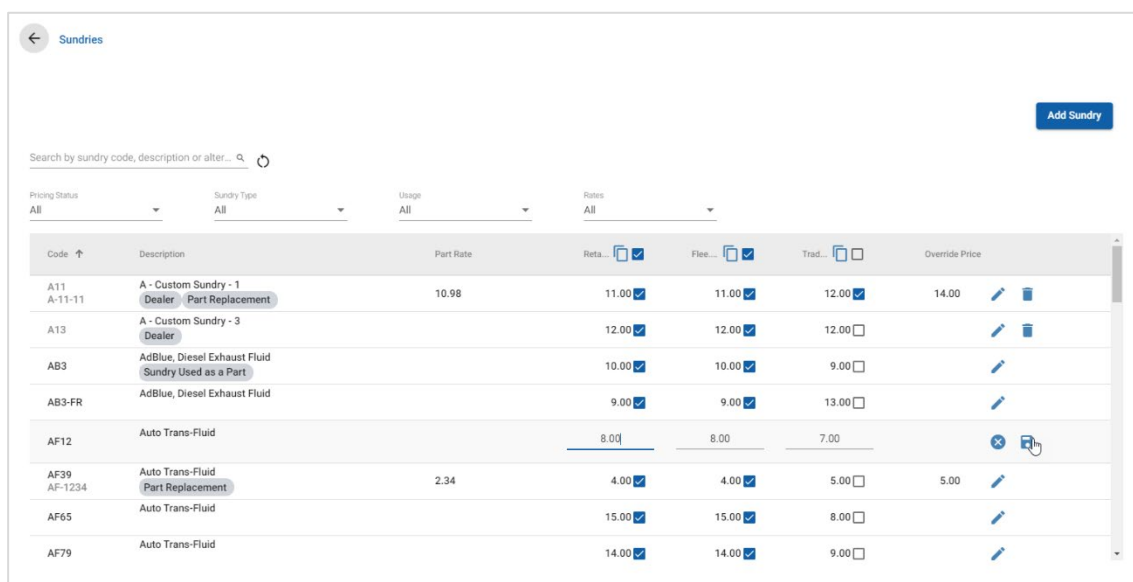
The Sundries screen allows you to price all the sundries that are used in your dealership, customise sundries and add new sundries. The sundries are priced according to the labour levels that have been set up in the Labour Rates screen. E.g. Fleet, Retail.












Sundries Screen


You can price the sundries from this screen based on a fixed amount. To access other pricing options click the  icon and edit the sundry.

To price a sundry based on a fixed amount:

- 1 Double click on a sundry line.
- 2 Enter a sundry price for each labour level.
- 3 Click the  icon.



Code	Description	Part Rate	Reta...	Flee...	Trad...	Override Price
A11 A-11-11	A - Custom Sundry - 1 Dealer Part Replacement	10.98	11.00 <input checked="" type="checkbox"/>	11.00 <input checked="" type="checkbox"/>	12.00 <input checked="" type="checkbox"/>	14.00  
A13	A - Custom Sundry - 3 Dealer		12.00 <input checked="" type="checkbox"/>	12.00 <input checked="" type="checkbox"/>	12.00 <input type="checkbox"/>	 
AB3	AdBlue, Diesel Exhaust Fluid Sundry Used as a Part		10.00 <input checked="" type="checkbox"/>	10.00 <input checked="" type="checkbox"/>	9.00 <input type="checkbox"/>	
AB3-FR	AdBlue, Diesel Exhaust Fluid		9.00 <input checked="" type="checkbox"/>	9.00 <input checked="" type="checkbox"/>	13.00 <input type="checkbox"/>	
AF12	Auto Trans-Fluid		8.00 <input type="checkbox"/>	8.00 <input type="checkbox"/>	7.00 <input type="checkbox"/>	 
AF39 AF-1234	Auto Trans-Fluid Part Replacement	2.34	4.00 <input checked="" type="checkbox"/>	4.00 <input checked="" type="checkbox"/>	5.00 <input type="checkbox"/>	5.00 
AF65	Auto Trans-Fluid		15.00 <input checked="" type="checkbox"/>	15.00 <input checked="" type="checkbox"/>	8.00 <input type="checkbox"/>	
AF79	Auto Trans-Fluid		14.00 <input checked="" type="checkbox"/>	14.00 <input checked="" type="checkbox"/>	9.00 <input type="checkbox"/>	



- ▶ To locate a sundry, use the search box, or filter by the drop-down lists.
- ▶ To copy sundry rates, click the  icon, select the checkbox you want to copy rates to, then click **Copy Rates**.
- ▶ Select the labour rate checkbox ☒ to make all sundries available for a labour rate, or the price checkbox to make individual sundries available for a labour rate.
- ▶ In some circumstances the distributor may lock certain sundry rates.




Add a New Sundry

You can add new sundries and configure the price options to suit the needs of your dealership.

The screenshot shows the 'Sundries' section of the Price Settings interface. At the top, there's a header with a back arrow, the text 'Sundries', and a 'New Sundry' button. Below this, there's a form with several sections: 'Preview', 'Custom Options', 'Pricing', 'Integration Options', and 'Additional Options'. The 'Pricing' section is expanded, showing options to 'Include in oil disposal calculation' and 'Exclude from unpriced sundry warning'. There's also a 'Show part substitution details' section with a 'Price Calculation Type' dropdown set to 'Amount'. Below this, there's a table with three rows: 'Retail', 'Fleet', and 'Trade'. Each row has a checkbox (all checked), an 'Amount' field (all set to 10), and a 'Tax Rate' dropdown (all set to 'Default tax rate').


To add a new sundry:

- 1 Click **Add Sundry**.
- 2 Enter a sundry code and description.
- 3 Click the  icon.
The edit sundry screen will display.
- 4 If you want to customise the sundry details, click **Custom Options** and enter a code and name.
 - If you want to set the sundry as a part, click the  **Use sundry as a part** icon.
If selected, this sundry will be displayed in the parts list within a quote.

- 5 Click **Pricing**.
 - Select **Amount** from the **Price Calculation Type** drop-down list.
 - To add an oil disposal charge for a sundry, based on a rate per unit, click the  **Include in oil disposal calculation** icon.
 - Enter a sundry price for each labour level in the **Amount** field.
 - Use the default tax rate that was selected in the **Labour Rates** screen or select a different rate from the drop-down list.
 - Click the  icon to enable the price to be displayed in the quote.
 - 6 If you want to link with an external system, click **Integration Options** and enter the code in the **Third Party Code** field.
 - 7 Click **Additional Options**.
 - If you want to apply the sundry to specific parts, enter the details in the field, then press **Enter** on the keyboard.
 - Select a Category, Section and Operation from the Apply to these operations drop-down lists and click **Apply**.
 - Continue to add the sundry to additional operations from the drop-down lists (if required).
 - 8 Confirm the changes in the **Preview** section.
 - 9 Click **Save**.
- ▶ If you want to reset a code or name, click the  icon and select an option from the list.

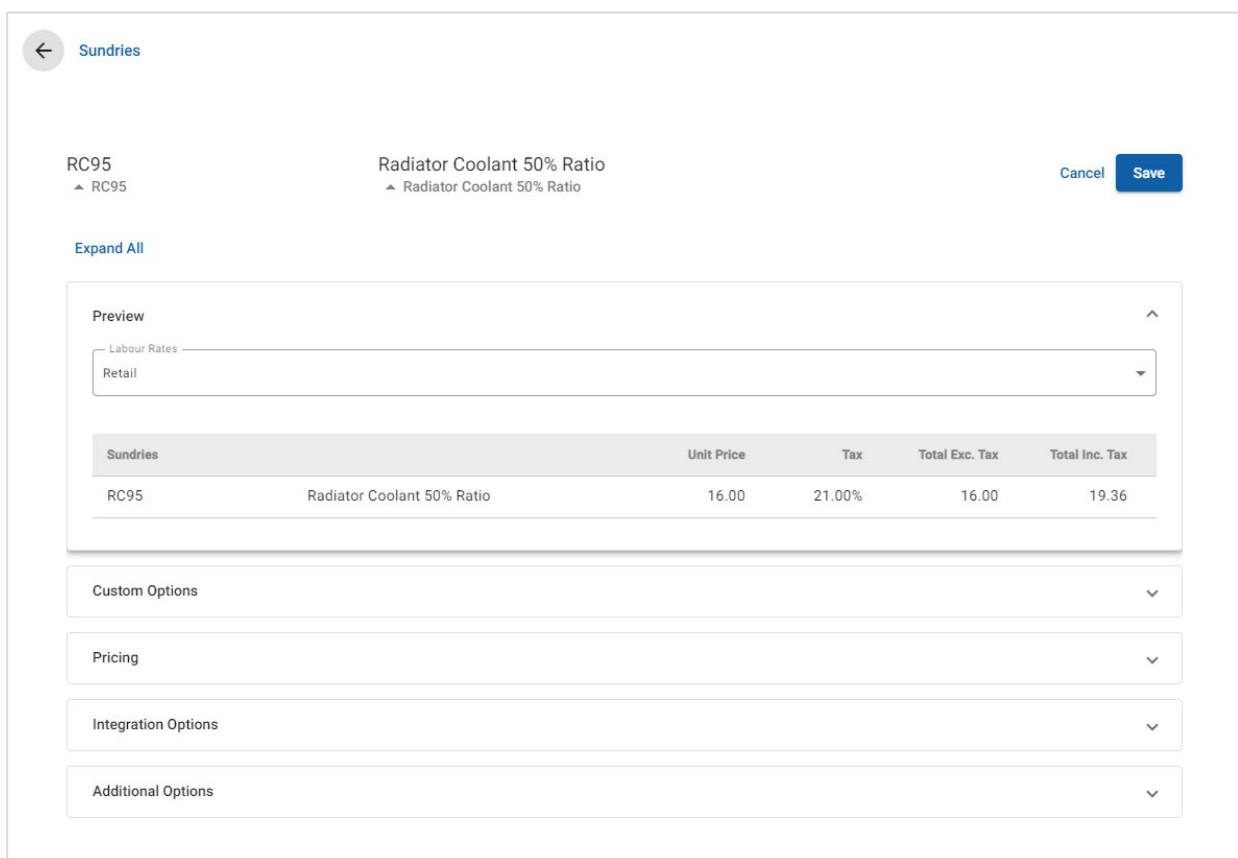
Edit a Sundry

The edit sundry screen provides options to preview and customise sundries.

To edit a sundry, find the sundry you want to edit and click the  icon.

The edit sundry screen provides quick access to the following sections:

- **Preview:** View a snapshot of how the sundry will display in the quote.
- **Custom Options:** Customise a sundry code or name.
- **Pricing:** Configure pricing options for the sundry.
- **Integration Options:** Enter a sundry code used in your third party system.
- **Additional Options:** Apply a sundry to specific parts.



← Sundries

RC95 Radiator Coolant 50% Ratio Cancel Save

▲ RC95 ▲ Radiator Coolant 50% Ratio

Expand All

Preview ^

Labour Rates

Retail ▾

Sundries	Unit Price	Tax	Total Exc. Tax	Total Inc. Tax
RC95 Radiator Coolant 50% Ratio	16.00	21.00%	16.00	19.36

Custom Options ▾

Pricing ▾

Integration Options ▾

Additional Options ▾

- ▶ To open a section, click the ▾ icon.
- ▶ To open all sections, click **Expand All**.




Sundry Pricing

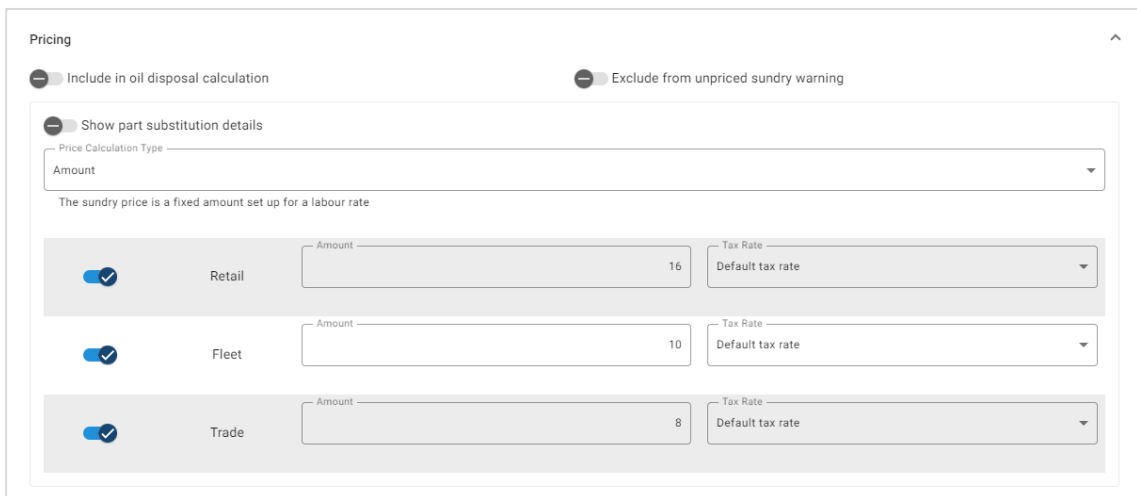
You can set the type of pricing as a fixed or variable amount. Then enter the details and enable that rate to display in the quote.

There are different ways to calculate the sundry price:

- **Amount:** Allows you to apply an amount for each labour price level.
- **Percentage:** Allows you to set the sundry rate for each labour price level as a percentage and specify maximum and minimum values.
- **Part Substitution:** Allows you to enable an option to retrieve an alternate part price.

To price a sundry based on a fixed amount:

- 1 Click the  icon to expand the sundry details.
- 2 Click **Pricing**.
 - Select **Amount** from the **Price Calculation Type** drop-down list.
 - To add an oil disposal charge for a sundry, based on a rate per unit, click the  **Include in oil disposal calculation** icon.
 - Enter a sundry price for each labour level in the **Amount** field.
 - Use the default tax rate that was selected in the **Labour Rates** screen or select a different rate from the drop-down list.
 - Click the  icon to enable the price to be displayed in the quote.



Pricing

☒ Include in oil disposal calculation ☐ Exclude from unpriced sundry warning

☒ Show part substitution details

Price Calculation Type: Amount




The sundry price is a fixed amount set up for a labour rate

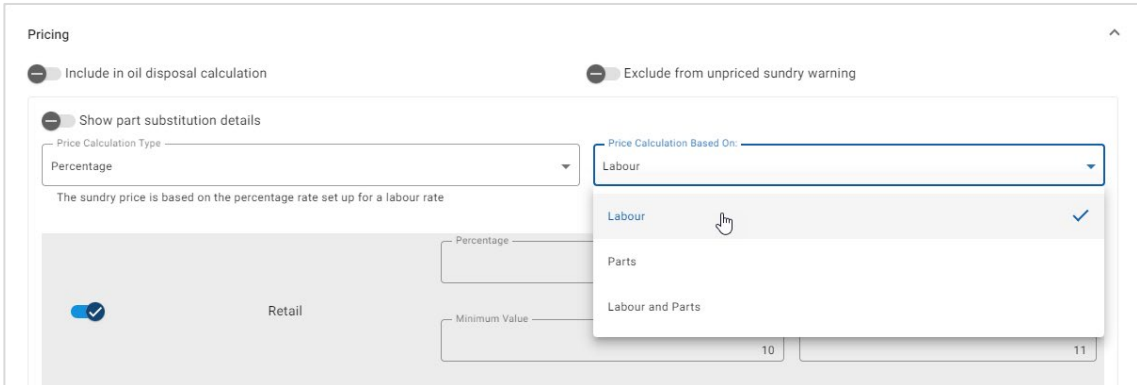
Labour Level	Amount	Tax Rate
<input checked="" type="checkbox"/> Retail	16	Default tax rate
<input checked="" type="checkbox"/> Fleet	10	Default tax rate
<input checked="" type="checkbox"/> Trade	8	Default tax rate

- 3 Confirm the changes in the **Preview** section.
- 4 Click **Save**.

- ▶ To apply a sundry to specific parts, select the corresponding parts from the drop-down list in **Additional Options**.


To price a sundry based on a percentage rate:

- 1 Click the  icon to expand the sundry details.
- 2 Click **Pricing**.
 - Select **Percentage** from the **Price Calculation Type** drop-down list.
 - Select an option from the **Price Calculation Based On** drop-down list.
 - To add an oil disposal charge for a sundry, based on a rate per unit, click the  **Include in oil disposal calculation** icon.
 - Enter a percentage rate for each labour level in the **Percentage** field.
 - 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.
 - Click the  icon to enable the price to be displayed in the quote.






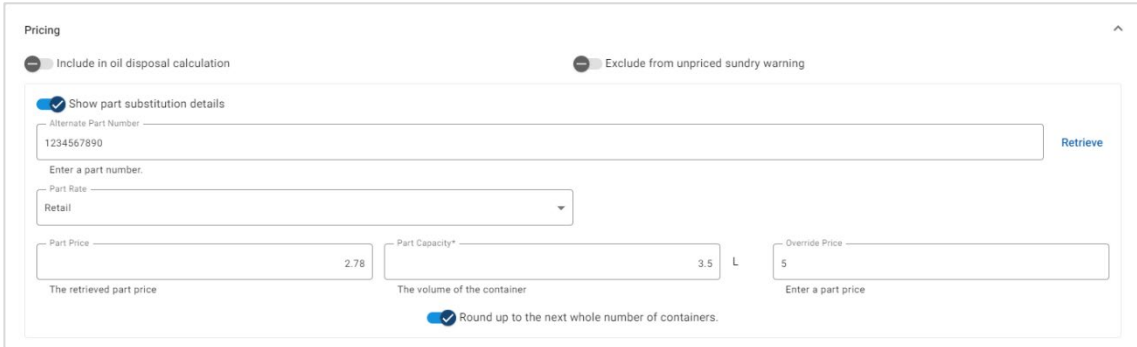
The screenshot shows the 'Pricing' configuration interface. At the top, there are three toggle switches: 'Include in oil disposal calculation' (checked), 'Exclude from unpriced sundry warning' (unchecked), and 'Show part substitution details' (unchecked). Below these, the 'Price Calculation Type' is set to 'Percentage'. A dropdown menu for 'Price Calculation Based On' is open, showing 'Labour' as the selected option, with 'Parts' and 'Labour and Parts' as other options. The 'Retail' section is visible with a checked toggle. The 'Percentage' field is empty. The 'Minimum Value' field is set to 10, and the 'Maximum Value' field is set to 11.

- 3 Confirm the changes in the **Preview** section.
- 4 Click **Save**.

- ▶ To disable the warning message that displays in the Operation Selection screen for any unpriced items, click the  **Exclude from unpriced sundry warning** icon.
- ▶ If you want to link with an external system, click **Integration Options** and enter the code in the **Third Party Code** field.


To price a sundry based on a part substitution:

- 1 Click the  icon to expand the sundry details.
- 2 Click **Pricing**.
- 3 Click the  **Show part substitution details** icon.
 - Enter an **Alternate Part Number** in the field and click **Retrieve**.
If there is a valid part in the system, the price field is populated from the default rate that is set in the Parts Pricing Settings. If there is no valid part, the price field displays a zero amount.
 - Enter an amount in the **Part Capacity** field.
 - If you want to view a different **Part Rate**, select an option from the drop-down list.
The price field will be updated based on the part rate. This is a reference only field that allows you to compare the price with other part rates.
 - If the price is zero or you want to override the price of a valid part, enter an amount in the **Override Price** field.
 - Click the  icon to round up the number of containers (if applicable).



The screenshot shows the 'Pricing' section of a software interface. At the top, there are two toggle switches: 'Include in oil disposal calculation' (disabled) and 'Exclude from unpriced sundry warning' (disabled). Below these is a section titled 'Show part substitution details' with a checked toggle. This section contains several input fields and a button:




- 'Alternate Part Number' field with the value '1234567890' and a 'Retrieve' button to its right.
- 'Enter a part number.' label below the first field.
- 'Part Rate' dropdown menu with 'Retail' selected.
- 'Part Price' field displaying '2.78' with the label 'The retrieved part price' below it.
- 'Part Capacity*' field displaying '3.5' with the label 'The volume of the container' below it.
- 'Override Price' field displaying '5' with the label 'Enter a part price' below it.
- A 'Round up to the next whole number of containers.' toggle switch at the bottom, which is checked.

- 4 Confirm the changes in the **Preview** section.
 - 5 Click **Save**.
- To reset the pricing, delete the **Alternate Part Number**, disable the  **Show part substitution details** icon, then click **Save**.

Shop Supplies

The Shop Supplies sundry can be applied as an amount or a percentage rate in the quote. The percentage rate can be applied based on the labour, parts, or the labour and parts.

To price the shop supplies sundry based on a fixed amount:

- 1 Click the  icon to expand the sundry details.
- 2 Click **Pricing**.
 - Select **Amount** from the **Price Calculation Type** drop-down list.
 - To add an oil disposal charge for a sundry, based on a rate per unit, click the  **Include in oil disposal calculation** icon.
 - Enter a sundry price for each labour level in the **Amount** field.
 - Use the default tax rate that was selected in the **Labour Rates** screen or select a different rate from the drop-down list.
 - Click the  icon to enable the price to be displayed in the quote.

Pricing

☒ Include in oil disposal calculation ☐ Exclude from unpriced sundry warning

☒ Show part substitution details

Price Calculation Type
Amount




The sundry price is a fixed amount set up for a labour rate

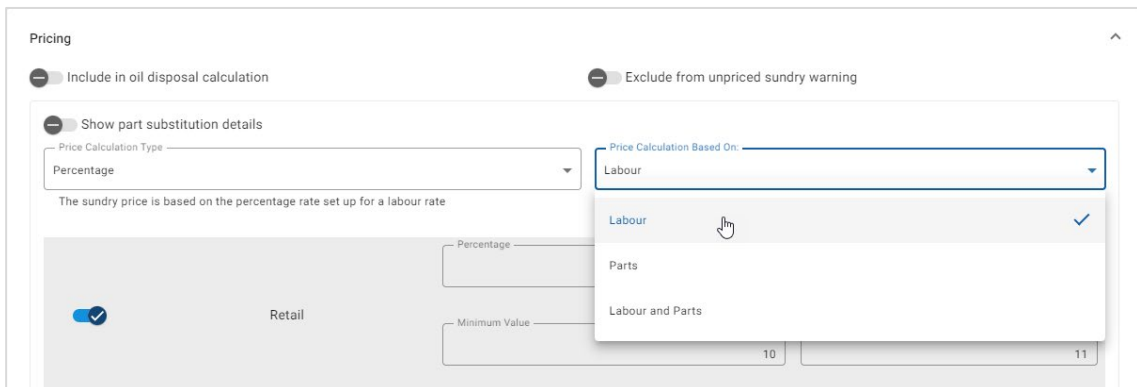
Labour Level	Amount	Tax Rate
<input checked="" type="checkbox"/> Retail	16	Default tax rate
<input checked="" type="checkbox"/> Fleet	10	Default tax rate
<input checked="" type="checkbox"/> Trade	8	Default tax rate

- 3 Confirm the changes in the **Preview** section.
- 4 Click **Save**.

- ▶ The options displayed in the Settings screen may differ based on your subscription.

To price the shop supplies sundry based on a percentage rate:

- 1 Click the  icon to expand the sundry details.
- 2 Click **Pricing**.
 - Select **Percentage** from the **Price Calculation Type** drop-down list.
 - Select an option from the **Price Calculation Based On** drop-down list.
 - To add an oil disposal charge for a sundry, based on a rate per unit, click the  **Include in oil disposal calculation** icon.
 - Enter a percentage rate for each labour level in the **Percentage** field.
 - 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.
 - Click the  icon to enable the price to be displayed in the quote.



The screenshot shows the 'Pricing' configuration interface. At the top, there are two toggle switches: 'Include in oil disposal calculation' (which is turned on) and 'Exclude from unpriced sundry warning' (which is turned off). Below these, there is a 'Show part substitution details' toggle (turned off). The main configuration area has two dropdown menus: 'Price Calculation Type' set to 'Percentage' and 'Price Calculation Based On' set to 'Labour'. A tooltip is visible over the 'Labour' option in the second dropdown, showing a checkmark. Below the dropdowns, there is a section for 'Retail' with a 'Percentage' field and 'Minimum Value' and 'Maximum Value' fields. The 'Minimum Value' field contains the number '10' and the 'Maximum Value' field contains the number '11'. There is also a 'Retail' toggle switch which is turned on.

- 3 Confirm the changes in the **Preview** section.
- 4 Click **Save**.



Oil Disposal

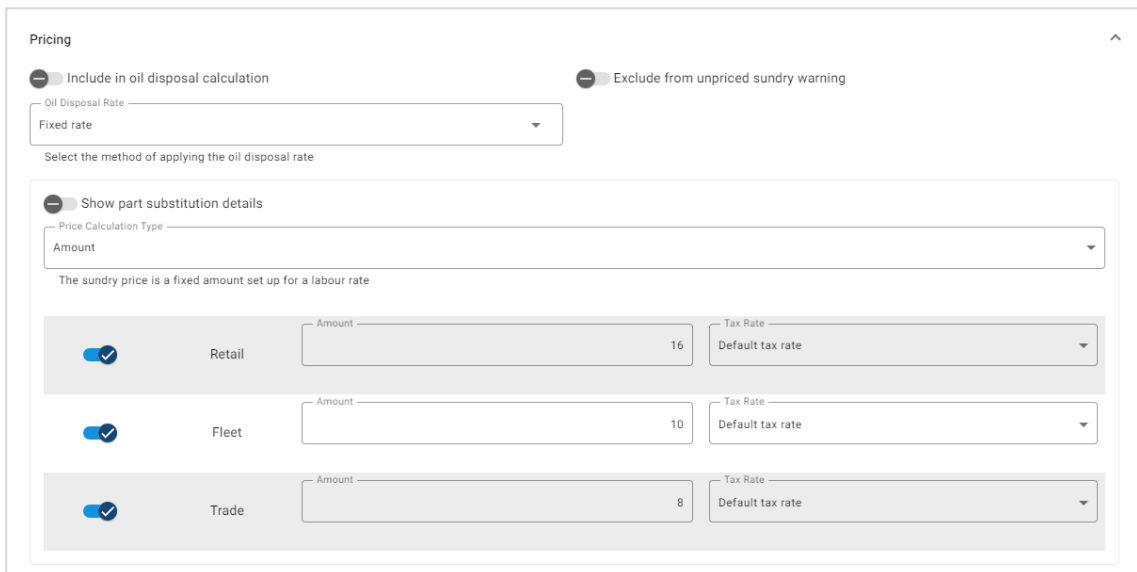
The Oil Disposal sundry allows you to customise the calculation method of the oil disposal sundry.

The oil disposal rate types are:

- **Fixed Rate:** The oil disposal rate is the amount entered into each labour level column.
- **Rate Per Unit:** The oil disposal rate is calculated by multiplying the total fluids volume by the rate entered into each labour level.

To apply a fixed rate to an oil disposal charge:

- 1 Click the  icon to expand the **Oil Disposal** sundry.
- 2 Click **Pricing**.
 - Select **Fixed Rate** from the **Oil Disposal Rate** drop-down list.
 - Select **Amount** from the **Price Calculation Type** drop-down list.
 - Enter an oil disposal rate for each labour level in the **Amount** field.
 - Use the default tax rate that was selected in the **Labour Rates** screen or select a different rate from the drop-down list.
 - Click the  icon to enable the price to be displayed in the quote.






The screenshot shows the 'Pricing' configuration screen for the 'Oil Disposal' sundry. It includes several sections:


- Include in oil disposal calculation:** A toggle switch that is currently turned on.
- Exclude from unpriced sundry warning:** A toggle switch that is currently turned off.
- Oil Disposal Rate:** A dropdown menu set to 'Fixed rate'.
- Show part substitution details:** A toggle switch that is currently turned on.
- Price Calculation Type:** A dropdown menu set to 'Amount'.
- The sundry price is a fixed amount set up for a labour rate:** A note indicating the calculation method.
- Labour Levels:** A table with three rows: 'Retail', 'Fleet', and 'Trade'. Each row has a toggle switch (all are turned on), an 'Amount' field (with values 16, 10, and 8 respectively), and a 'Tax Rate' dropdown menu (all are set to 'Default tax rate').

- 3 Confirm the changes in the **Preview** section.
- 4 Click **Save**.

To apply a rate per unit to an oil disposal charge:


- 1 Click the  icon to expand the **Oil Disposal** sundry.
- 2 Click **Pricing**.
 - Ensure the  **Include in oil disposal calculation** icon is enabled for each sundry you want to include in the disposal charge.
 - Select **Rate Per Unit** from the **Oil Disposal Rate** drop-down list.
 - Select **Amount** from the **Price Calculation Type** drop-down list.
 - Enter an oil disposal rate for each labour level in the **Amount** field.
 - Use the default tax rate that was selected in the **Labour Rates** screen or select a different rate from the drop-down list.
 - Click the  icon to enable the price to be displayed in the quote.

Pricing


 Include in oil disposal calculation

Oil Disposal Rate

Rate per unit

 Exclude from unpriced sundry warning




Select the method of applying the oil disposal rate

 Show part substitution details

Price Calculation Type

Amount

The sundry price is a fixed amount set up for a labour rate

	Retail	<div>Amount</div> <div>16</div>	<div>Tax Rate</div> <div>Default tax rate</div>
	Fleet	<div>Amount</div> <div>10</div>	<div>Tax Rate</div> <div>Default tax rate</div>
	Trade	<div>Amount</div> <div>8</div>	<div>Tax Rate</div> <div>Default tax rate</div>

- 3 Confirm the changes in the **Preview** section.
- 4 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.

Parts Pricing

Edit

Add

Name	Code	Third Party Code	Base Price	Price Range			Percentage	Default	Display Discount	Taxable	Modified By
Flat Rate	FLT	1234	EN	0	-	∞	10.00 %	No	No	Yes	Dealer
Multiple Rates	MLT	12345	EN	0	-	100.00	10.00 %	Yes	No	Yes	Dealer
				>100.00	-	200.00	8.00 %				
				>200.00	-	∞	6.00 %				

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.
 - 3 If you want to link with an external system, enter the code in the **Third Party Code** field.
 - 4 Select a base price from the **Base Price** drop-down list.
 - 5 Enter a rate in the **Percentage** field.
 - 6 To set this parts price level as the default rate, select the **Default** checkbox.
 - 7 If you want tax to be applied to this parts price level, select the **Taxable** checkbox.
 - 8 Click **Save**.
- To display the discount for parts in the Operation Selection and Quote Details screens, select the **Display Discount** checkbox.

To add a part price level with multiple rates:

- 1 Click **Add**.
- 2 Enter the parts price **Name** and **Code** in the corresponding fields.
- 3 If you want to link with an external system, enter the code in the **Third Party Code** field.
- 4 Select the base price from the **Base Price** drop-down list.
- 5 Enter the highest price of the part price level in the **Price Range** field.
- 6 Enter a rate in the **Percentage** field.
- 7 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.

The screenshot shows a form titled "Price Settings" with a table of price levels. The table has columns: Name, Code, Third Party Code, Base Price, Price Range, Percentage, Default, Display Discount, Taxable, and Modified By. The first row is a header. The second row shows a price level with a range from 0 to 100 and a percentage of 10%. The third row shows a price level with a range from >100.00 to 200 and a percentage of 8%. The fourth row shows a price level with a range from >200.00 to 0 and a percentage of 6%. The "Default" checkbox is checked for the first two rows, and the "Taxable" checkbox is checked for the third and fourth rows. The "Modified By" field is set to "Dealer" for the third and fourth rows.

Name	Code	Third Party Code	Base Price	Price Range	Percentage	Default	Display Discount	Taxable	Modified By
				0 - 100	10 %				
Multiple Rates	MLT	12345	EN	>100.00 - 200	8 %	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Dealer
				>200.00 - 0	6 %				

- 8 To set this parts price level as the default rate, select the **Default** checkbox.
- 9 If you want tax to be applied to this parts price level, select the **Taxable** checkbox.
- 10 Click **Save**.

- ▶ To update Parts Pricing, click **Edit**, modify the details, then click **Save**.

Price and Time Override

The Price and Time Override screen allows you to modify the standard labour time and price of an operation to create an adjusted labour time that can be applied to vehicles.

You can apply the price and time override by vehicle attributes or by model.

This functionality may not be available in your region.

← Price and Time Override

Cancel Save

Applicability

Operation

Category*

Service

Section*

Scheduled Service

Operation*

123456 - Year 1 - 10,000 KM

Vehicle

Applicable To*

Vehicle Attribute

Vehicle Type

Commercial

Engine

V6

Fuel Type

Hybrid

Transmission

Automatic

Price and Time Override

Time (hrs)

Time (hrs)

Total Exc. Tax

\$ 100

Labour Total Exc. Tax

\$ 25

☐ Taxable

Parts Total Exc. Tax

\$ 75

☐ Taxable

To set a price and time override by vehicle attribute:

- 1 Click **Add**.
- 2 Select a **Category**, **Section** and **Operation** from the drop-down lists.
- 3 Select **Vehicle Attribute** from the **Applicable To** drop-down list.
 - Apply the override to all vehicles, or select from the **Vehicle Type**, **Engine**, **Fuel Type** and **Transmission** drop-down lists.

4 Configure the price and time override options:

- **Time (hrs):** The amount of time to complete the operation.
- **Total Exc. Tax:** The total amount excluding tax.
- **Labour Total Exc. Tax:** The total labour amount excluding tax.
- **Parts Total Exc. Tax:** The total part amount excluding tax.

If you want to apply tax to the labour or part total, select the **Taxable** checkbox.

5 Click **Save**.

To set a price and time override by vehicle model:

- 1 Click **Add**.
- 2 Select a **Category**, **Section** and **Operation** from the drop-down lists.
- 3 Select **Vehicle Model** from the **Applicable To** drop-down list.
- 4 Click **Select**.
- 5 Select the checkbox for the required vehicles:
 - **Model**: The checkbox applies the price and time override to all vehicles.
 - **Model Name**: The checkbox next to each model name applies the price and time override 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 price and time override 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 price and time override to the required description(s).
- 6 Click **OK**.

Vehicle

Applicable To*

Vehicle Model

Model

Vehicles

1. All vehicles in: A 450 Sedan (2022 -)

2. All vehicles in: B 450 Sedan (05/2015 -) ABC271R

3. 12345 - HIJ10K - ABCDEF - C 450 Sedan 1.0L 5 Speed Manual

Select

- 7 Configure the price and time override options:
 - **Time (hrs)**: The amount of time to complete the operation.
 - **Total Exc. Tax**: The total amount excluding tax.
 - **Labour Total Exc. Tax**: The total labour amount excluding tax.
 - **Parts Total Exc. Tax**: The total part amount excluding tax.

If you want to apply tax to the labour or part total, select the **Taxable** checkbox.
- 8 Click **Save**.

- ▶ You can select more than one checkbox when applying a price and time override to a model name, series or description.

Labour Times

The Labour Times screen 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.

← Labour Times

Cancel Save

	Service		Flat Rate Menus		Popular Repairs	
	Adjustment Type		Adjustment Type		Adjustment Type	
	Hours		Percentage		Hours	
Labour Rate	Adjustment Value	Adjust	Adjustment Value	Adjust	Adjustment Value	Adjust
Retail	<input type="text" value="2.00"/>	<input checked="" type="checkbox"/>	<input type="text" value="10.00"/>	<input checked="" type="checkbox"/>	<input type="text" value="1.50"/>	<input checked="" type="checkbox"/>
Fleet	<input type="text" value="2.00"/>	<input checked="" type="checkbox"/>	<input type="text" value="6.00"/>	<input checked="" type="checkbox"/>	<input type="text" value="1.50"/>	<input checked="" type="checkbox"/>
Trade	<input type="text" value="2.00"/>	<input checked="" type="checkbox"/>	<input type="text" value="8.00"/>	<input checked="" type="checkbox"/>	<input type="text" value="1.50"/>	<input checked="" type="checkbox"/>

To adjust the labour times:

- 1 Click the **Adjustment Type** drop-down and select from the list.
- 2 Enter the amount of the adjustment into each labour level column.
- 3 Click the ☒ icon to apply the adjustment.

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).

- 4 Click **Save**.

- The options displayed in the Settings screen may differ based on your subscription.

Advanced Settings

Superservice Menus provides access to advanced settings that allow you to customise parts and sundries, edit operations and add upsell recommendations.

The advanced settings display in a new screen that includes the following modules:

- Vehicle Categories
- Part and Sundry Substitution
- Operation Authoring
- Upsell Recommendations

- ▶ Access to advanced settings is based on your subscription.

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 Part and Sundry Substitution, Operation Authoring and Upsell Recommendations screens.

The screenshot displays the 'Vehicle Categories' module in the INFOMEDIA system. The interface includes a navigation bar with 'Home' and 'Vehicle Categories' tabs. The main content area is divided into two sections: 'Vehicle Categories' and 'Vehicles'.

Vehicle Categories Table:



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

Vehicles Table:


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:

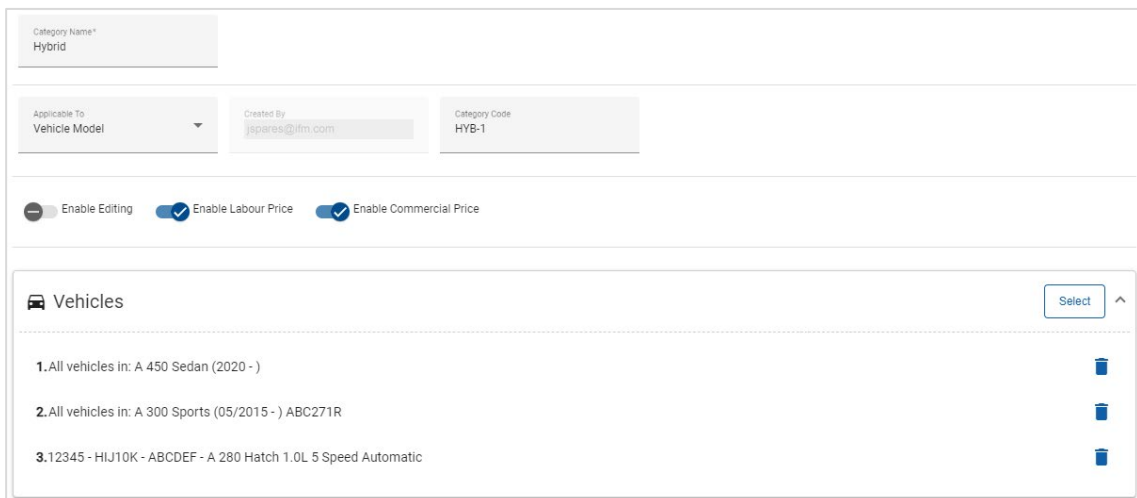
- 1 Click the **Vehicle Categories** tile.
- 2 Click **Add Category**.
- 3 Enter a **Category Name** in the field.
- 4 Select **Vehicle Attribute** from the **Applicable To** drop-down list.
- 5 Enter the **Category Code** in the field (if applicable).
- 6 Click the  icon to enable or disable the following 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
jsparis@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**.

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.

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 Selection tab in Superservice Menus.

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 Menus, 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**.

