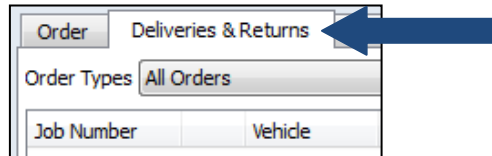
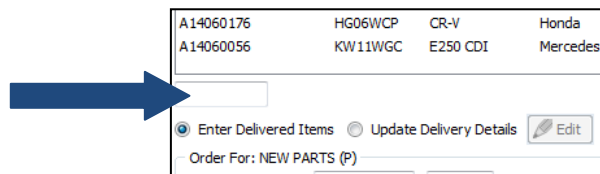


Booking Parts In

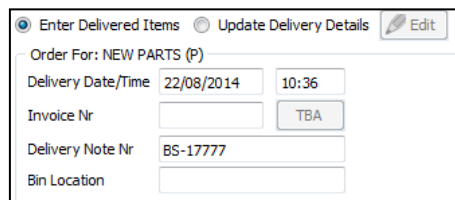
- Select Parts by clicking the Parts Button on the right hand side of the screen. 
- Ensure that the Deliveries and Returns Tab is selected. (Shown Below).



- Locate and highlight the required job/order. This can be done by clicking on the order in the list provided or by entering the Job Number or Purchase Order Number in the search box and pressing the tab key. (Shown Below).



- Insert the delivery date/time, Invoice Number, Delivery note number (if required, if not will default to user's ID), and storage Bin Location (where applicable). (Shown Below).



- Move to the lower half of the screen (where the parts are listed) and click onto the first item you wish to book in. Use the tab key to move through the fields, amending where necessary. Repeat for all parts received on the invoice supplied. (Shown Below).

Qty	Description	Stock Code	Del Bin	Retail	Trade	Ext'd	Surchg	Status	F	Buy %	Sell %	Sup	Del Note	Inv No
1	AIR CON CONDENSER 4465	92 11 000 01R	0	183.69	0.00	0.00	0.00	Ordered	<input type="checkbox"/>	100.00	8.00	<input type="checkbox"/>		

- If there are additional parts on the invoice that were not ordered, these **MUST** be added onto the job (even if you are going to send them back).

- A running total is provided in the bottom left corner to assist



- After booking in all the parts received, click the Accept key in the top left corner





Creating a New Job

Assuming the Jobs List is already displayed.

At the top of the screen, click the Job Wizard Button .

The Job Wizard box will be displayed

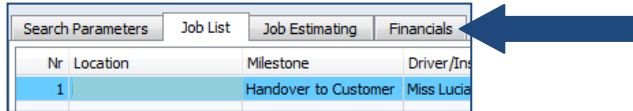
- Enter the Customer Shortname and press the tab key.
- Fill in the customer details and save them. Then click the next button to move to the Insurer Tab.
- If the job is NOT insured, click the next button OR insert a tick in the Insured Tick box and then complete the insurer details. Then click the next button to move to the Vehicle Tab.
- Enter the vehicle registration number and press the tab key. Select or create the vehicle as required. Then click the next button to move to the Recovery Tab.
- Complete the recovery tab as required – **Remember, if you choose Recovered or TP Recovery, you will have to enter a recovery date.** Then click the next button to move to the Replacement Vehicle tab.
- Specify whether a loan vehicle is required and then click the next button to move to the Dates Tab.
- Enter the relevant dates, and then click the next to move to the References Tab.
- Enter the relevant references. **Note – take care to enter the Estimator and Source Code (you won't be able to save the job otherwise).** Then click the next button to move to the notes tab.
- Enter any job notes that may be required.
- Click the Accept key at the bottom to save the job – the job number will then be displayed.



Invoicing a Job

Assuming the Jobs Screen is displayed.

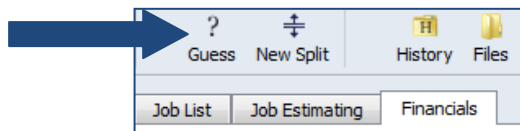
- Click onto the TRIM Details tab and ensure Workshop is complete and Estimator 's have checked the estimate prices prior to invoicing (The delivery does not have to be complete, as this may be completed after invoicing),
- Click on the Financials tab on the Job screen,



- Double check all the details are correct on the screen; Final Calculation, Labour Details, References, Job Details, and any other section. Edit if applicable. When a ? is beside a labour or parts description, this indicates something is not quite right and needs to be checked. Can click on the description with the ? and then the Job Estimating screen will appear which you can then edit/view prices and the labour hours,

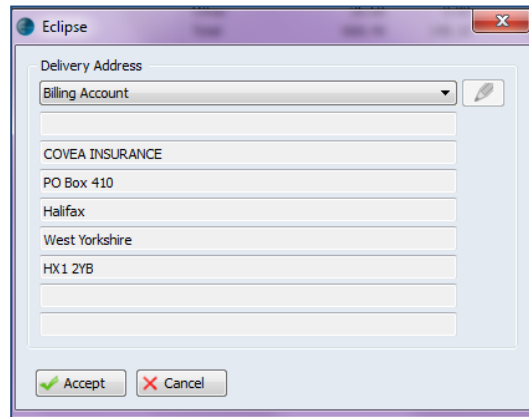
	Nett	VAT
Audatex	540.75	128.15
Job Total	668.49	133.70
Job Gross	840.15	
Invoiced	0.00	0.00
Net Invoiced	668.49	133.70

- If the information on the screen is correct click onto Guess,







- If the VAT liability in the Split Details section needs changing, click the "Bill To" section for the insurer/insured/driver, the following window will appear and edit the information accordingly (shown below),

- If the Billing Address in the Split Details section needs changing, click the “Billing Address” section for the insurer/insured/driver, the following window will appear and edit the information accordingly (shown below),



The screenshot shows a dialog box titled "Eclipse" with a "Delivery Address" section. It contains a "Billing Account" dropdown menu, a text input field, and several text boxes containing the following information: "COVEA INSURANCE", "PO Box 410", "Halifax", "West Yorkshire", and "HX1 2YB". At the bottom, there are "Accept" and "Cancel" buttons.

- It may be necessary to do more than a two way split of an invoice. This can be done using the New Split button ,
- If you are unhappy with the New Split of invoices, it is possible to click ,
- **ALWAYS** preview the invoice first to double check the details are correct by clicking ,
- Once everything has been checked and edited accordingly, click the commit button to produce the invoices ,
- The invoices will then appear in a PDF document to print off.



Linking to Audatex

Exporting an Eclipse Shell to Audatex

- Locate the job and click on it once.
- Click the drop down box on the right titled "Export Job" and select the Audatex option.
- Import the job into Audatex – you may need to look for the assessment it will be located in the following directory – **c:\bms\get\audatex**.

Importing an Audatex Assessment

Assuming the jobs screen is displayed

- Locate the job and click on it once.
- Initial Detail Tab
 - Ensure that the Audatex Assessment number is in the TP Ass Nr box (it will be if you have previously exported the shell to Audatex).
 - Set the Estimator Name
- Dates and Status Tab
 - Set the Scheduled Return Date
- Click the Accept key to save the changes.

In Audatex


- Locate the job and export it.

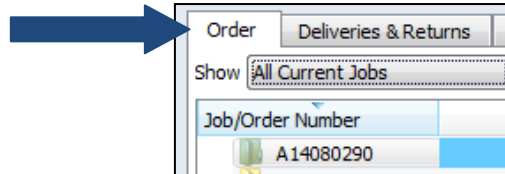
In Eclipse

- In the Jobs Screen, click the drop down box titled Import Assessment and select Audatex.
- The job will be imported and the import screen will be displayed.
- Place a tick in the tick box and click the accept key.
- Answer any questions that may come up.
- Go into Job Estimating and check that all items and times are in the correct place on the job.
- Print the Job Card
 - The first time you print the job card, you will be offered a number of different options – select the relevant one.

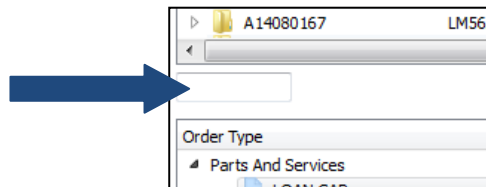


Ordering Parts

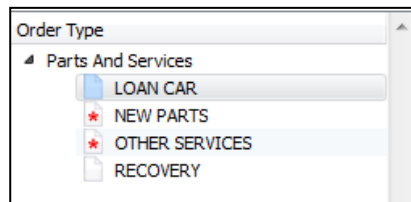
- Select Parts by clicking the Parts Button on the right hand side of the screen. 
- Ensure that the Order Tab is selected. (Shown Below).



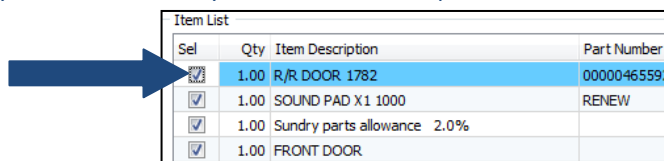
- Locate and highlight the required job/order. This can be done by clicking on the order in the list provided or by entering the Job Number or Registration Number in the search box and pressing the tab key. (Shown Below).



- After choosing the job, select whether you want to order parts or services by clicking on the relevant option in the lower half of the screen. (Shown Below).

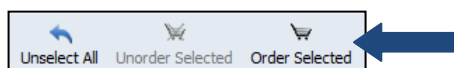


- Place a tick in the tick box to the left of each part that you to order. After selecting the first one, you will be asked if you wish to order all parts. Answer accordingly. (Shown Below).



Sel	Qty	Item Description	Part Number
<input type="checkbox"/>	1.00	R/R DOOR 1782	00000465592
<input checked="" type="checkbox"/>	1.00	SOUND PAD X1 1000	RENEW
<input checked="" type="checkbox"/>	1.00	Sundry parts allowance 2.0%	
<input checked="" type="checkbox"/>	1.00	FRONT DOOR	

- Click the order selected button at the top of the page. (Shown Below).





- The following screen will then be displayed:

The screenshot shows a window titled "Eclipse" with two main sections: "Supplier" and "References".

Supplier Section:

- Account Code:
- Short Name:
- T/P Account Nr:
- Trade Parts Specialists:
- P.O. Box 974:
- ST Albans:
- AL19GZ:

References Section:

- Order Ref1:
- Order Ref2:
- Order Date/Time: 09/09/2014 16:31
- Expected Date/Time: 09/09/2014 16:31

At the bottom, there are "Accept" and "Cancel" buttons.

- Enter the required supplier details. This can be done by inserting the Account code, Short name or T/P Account nr, press the tab key and where necessary double click to select the required supplier.
- Add any references as required and check/amend the expected delivery date and time where relevant. Then click the Accept key to save the details (shown below).

The screenshot shows the same "Eclipse" window, but now with data entered into the fields.

Supplier Section:

- Account Code: TPS01
- Short Name: TPS
- T/P Account Nr: TPS01
- Trade Parts Specialists:
- P.O. Box 974:
- ST Albans:
- AL19GZ:

References Section:

- Order Ref1:
- Order Ref2:
- Order Date/Time: 09/09/2014 16:31
- Expected Date/Time: 10/09/2014 16:31

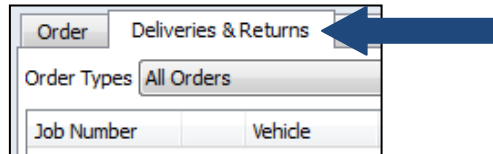
A blue arrow points to the "Accept" button at the bottom left.

- Click Accept again in the top left corner to save and produce the Purchase Order as a PDF.

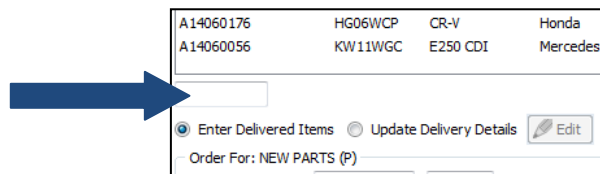


Returning Parts

- Select Parts by clicking the Parts Button on the right hand side of the screen. 
- Ensure that the Deliveries and Returns Tab is selected. (Shown Below).

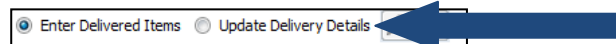


- Locate and highlight the required job/order. This can be done by clicking on the order in the list provide or by entering the Job Number or Purchase Order Number in the search box and pressing the tab key. (Shown Below).

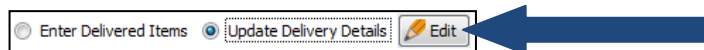


A14060176	HG06WCP	CR-V	Honda
A14060056	KW11WGC	E250 CDI	Mercedes

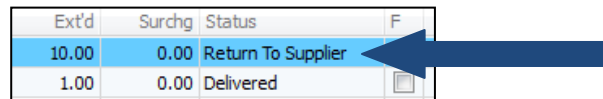
- Move the radio button over to the Update Delivery Details option in the middle of the screen.



- Click the Edit button. (Shown Below).

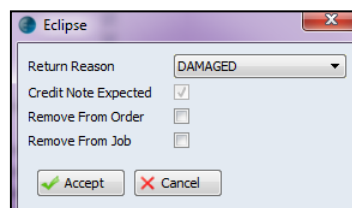


- Click onto the Status column of the part that you wish to return, and select Return to Supplier from the drop down box provided. (Shown Below).



Ext'd	Surchg	Status	F
10.00	0.00	Return To Supplier	
1.00	0.00	Delivered	

- You will be asked if you wish to return all delivered parts, answer accordingly. Select a return reason from the drop down box provided.



- If you expect the item to be replaced by the same supplier, leave the tick boxes empty.
- If the item is to be removed from the order (i.e. no replacement is expected), place a tick in the tick box.
- If the item is to be removed from the job (i.e. not to be charged), place a tick in the tick box.
- Click Accept to save the details.
- Click Accept again in the top left corner to save.
- A returns note will be produced which can printed if required.