
Volvo Information Technology AB

GDS Fusion v3.3

User Documentation



FUSION

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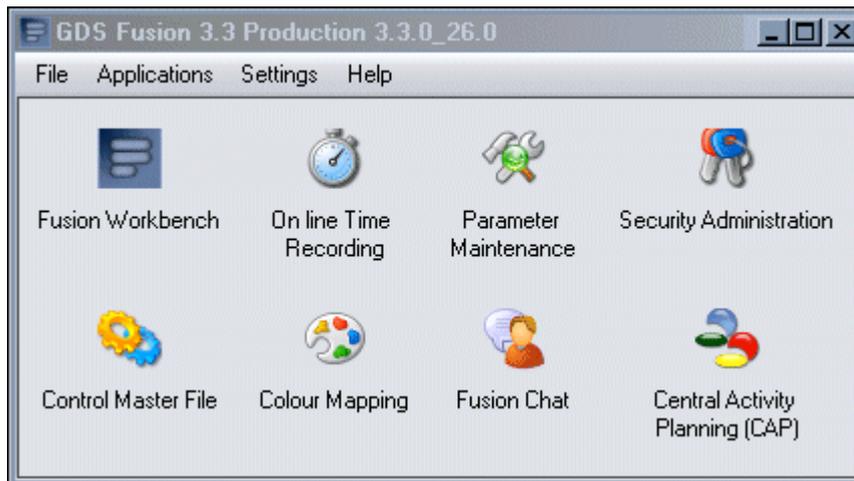
GDS – Fusion Introduction

About GDS – Fusion

Welcome to the GDS – Fusion User Documentation

This chapter will describe the Global Dealer System ‘GDS’ - Fusion system, discussing application standards and common aspects of the system that are visible via the windows which are presented in the application.

We will also present an overview of how to understand and use the applications printed (PDF) user guide and Online (html) help system. Together, this content should help the reader and system users to familiarise themselves with the working environment and how to locate assistance in relation to the applications functionality.



Subtopics here should include General system: History, version, scope, support, information.

About the Fusion Graphical User Interface

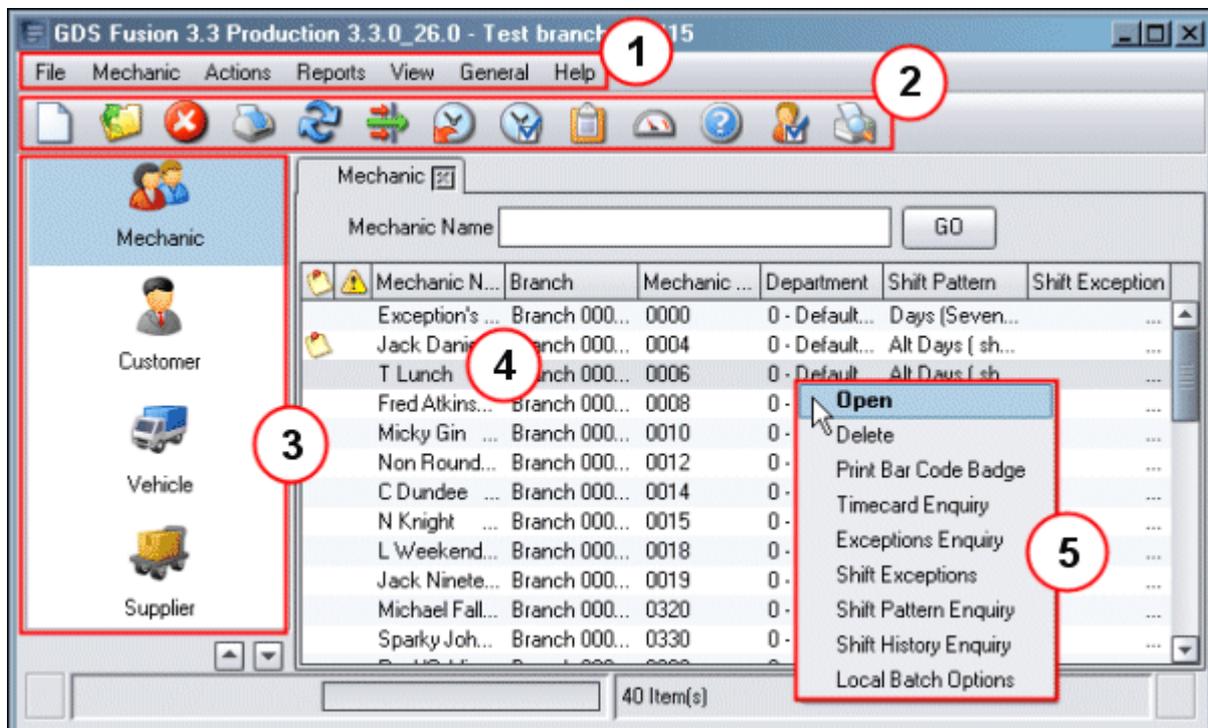
The Graphical User Interface or 'GUI', utilises standard Windows™ environment to present the application interface to the users.

Windows should be familiar to the majority of our users. However, users with little experience working in a windows environment should review Microsoft's documentation to gain an understanding of standard window design.

Note! The GUI presented within this section and it's sub-topics is based on the Windows XP Operating System. Windows and icons can appear different in other operating systems.

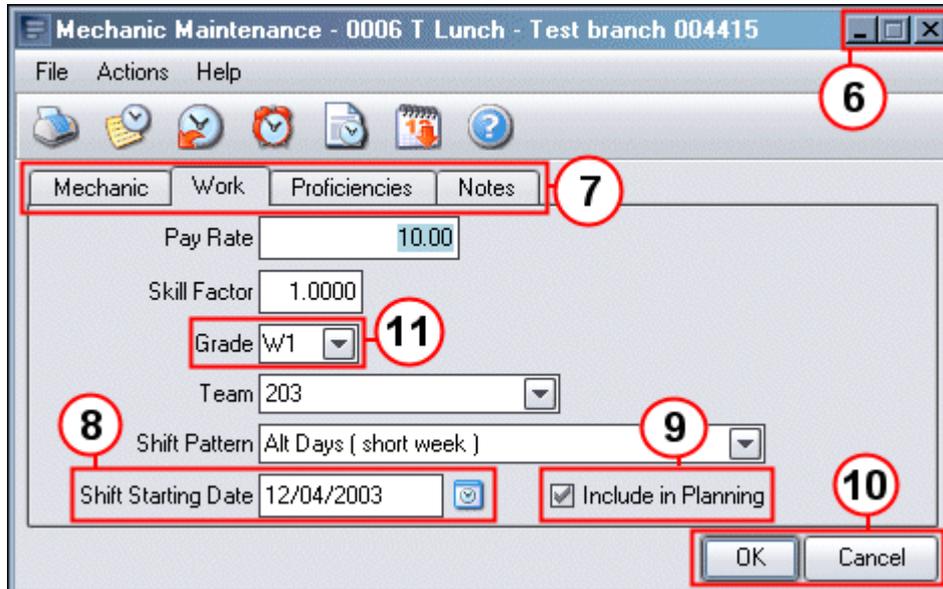
Fusion Window Standards

This topic provides documentation of the screen elements within the application. Refer to the screen shots and numbered texts to find descriptions.



- 1. Menubar:** This contains a horizontal list of Menu options directly beneath the title bar. The Menu options that are available will depend on the users location in the application.
- 2. Toolbar:** The toolbar contains buttons that may be used to perform functions. When grey, the function is not available. The buttons are explained in the topic "[Fusion Icons](#)" on page 5.
- 3. Entity Options:** The buttons here provide access to functions, they are listed in the topic "[Fusion Icons](#)" on page 5.
- 4. List View:** Fusion uses many types of display to present information. The list view is divided into Rows and Record Columns. A Row can be selected by clicking on it.

5. **Menu box:** The Menu boxes contain lists of options. This menu box is accessed by highlighting a row in the list view and then clicking the right mouse button. The options available refer to the highlighted row.
6. From left to right, the standard window controls are Minimise, Maximise and Close.

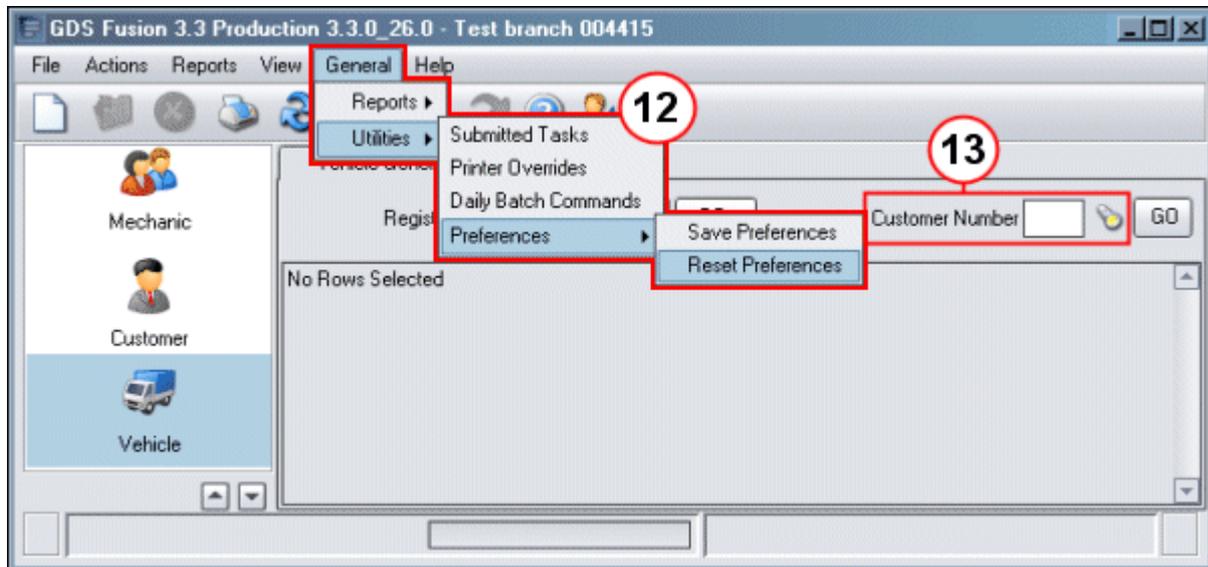


7. **Tabs:** Tabs are used when large amounts of information must be held on screen. As shown here, named tabs indicate that further information is available. Clicking the tab name will change the display.



8. **Date Input Fields:** Where dates are to be entered, the Calendar button  will also be available. Click the button to access the calendar where the date can be selected. Use the buttons to the upper right to change Year and Month. Use the centre button to move to the current Month. Click on a date to select it and copy it to the Date Input field.
9. **Check Box:** Check boxes present options that the user selects or clears. A tick appears in the box when it is selected.
10. **Command Buttons:** Command buttons are common to most windows and confirmation boxes. They provide commands like Yes, No, OK Cancel etc.
11. **Drop – Down List Box:** They provide a list of possible options for an input field. The user accesses them by clicking on the arrow button to the right of the field and then makes a selection from the list that appears.

- 12. Drop-Down Menu:** Drop-down menus contain Menu Items which can be selected by the user. Sub Menus may also be available for some items, these are indicated by the small black arrows and they expand automatically when the user moves the mouse over the item. When an item is grey it is not selectable.



- 13. Search button:** When a search is possible against a particular field then the touch icon or Search button  is available directly to the right of the field.

Fusion Buttons & Icons

The tables below provide images and descriptions of standard button functions and their icons. Many entities also give access to button functions, those are described in the beginning of each entity chapter.

 **Note!** These icons are often available as text only commands in menu's.

Toolbar Icons:

Icon	Purpose / Description
	New – Found on the Toolbar, when available this icon function as a button, allowing the user to enter new information.
	Open - Found on the Toolbar, when available, clicking this icon will allow the user to open selections.
	Delete - Found on the Toolbar, when available, clicking this icon will allow the user to delete selections.
	Print - Found on the Toolbar, when available, clicking this icon will allow the user to print information.
	Copy - Found on the Toolbar, when available, clicking this icon will allow the user to copy selected information.
	Paste - Found on the Toolbar, when available, clicking this icon will allow the user to paste copied information.
	Order Status – Click to access the Order Status information.
	Help – Used to access the online help system. See “ Fusion Online Help System ” on page 8.
	Invoice – When an order is ready to be charged to the customer, click to access the Invoice screens.
	Pick Slip – When the order is defined, click to create a picking slip.
	Filter – Click to access search filter functions.
	Delivery Note – When an order is ready for shipping, click to create a Delivery Note.
	Queued Prints – Click to access the queued printout screen.
	Magnifying Glass – This indicates that further details are available for the selection.
	Calendar – This icon appears next to date related fields. It provides access to a calendar for choosing dates.
	Claim Handling – Click to access the claim handling screen.
	Assign Credit to Claim – Click to begin assigning credit to a claim.
	View Re-assign Claim – Click to view a re-assigned claim.
	Re-assign Claim – Click to re-assign a claim.
	Workshop Order Summary – Click to access the Workshop Order Summary.

Order Status Icons:

The following icons are used to indicate the status of an order.

Icon	Purpose / Description
	Indicates that the order is open
	Indicates that the order has been picked
	Indicates that the order has been delivered
	Indicates that the order is open in Impact
	Indicates that the order has been batch invoiced
	Indicates that the order has been invoiced
	Indicates that the order is a quotation
	Indicates that the order has been cancelled

Claim Status Icons:

These icons are used to show the status of claims.

Icon	Purpose / Description
	Indicates that the claim is awaiting transmission.
	Indicates that the claim is awaiting reconciliation.
	Indicates that the claim has been accepted.
	Indicates that the claim has been partially accepted.
	Indicates that the claim has been rejected.

Fusion Chat Icons:

Icon	Purpose / Description
	This status star indicates that the user is free and available to chat.
	This status star indicates that the user is away from their desk.
	This status star indicates that the user is busy.
	This status star indicates that the user is off line.

Entity Icons:

Icon	Purpose / Description
	Parts – Used to access the Parts View.
	Parts Order – Used to access Parts Orders.
	Workshop Order – Used to access Workshop Orders.
	Mechanic – Used to access the Mechanic View.
	Customer – Used to access the Customer View.
	Vehicle – Used to access the Vehicle View.
	Vehicle Order – Used to access the Vehicle Orders View.
	Operation – Used to access Mechanic Time Recording.
	Fusion Control Files – Used to access the Fusion Control File View.
	Parameters – Used to access the Parameters View.
	Claims – Used to access the Claims View.

About the Fusion User Assistance Tools

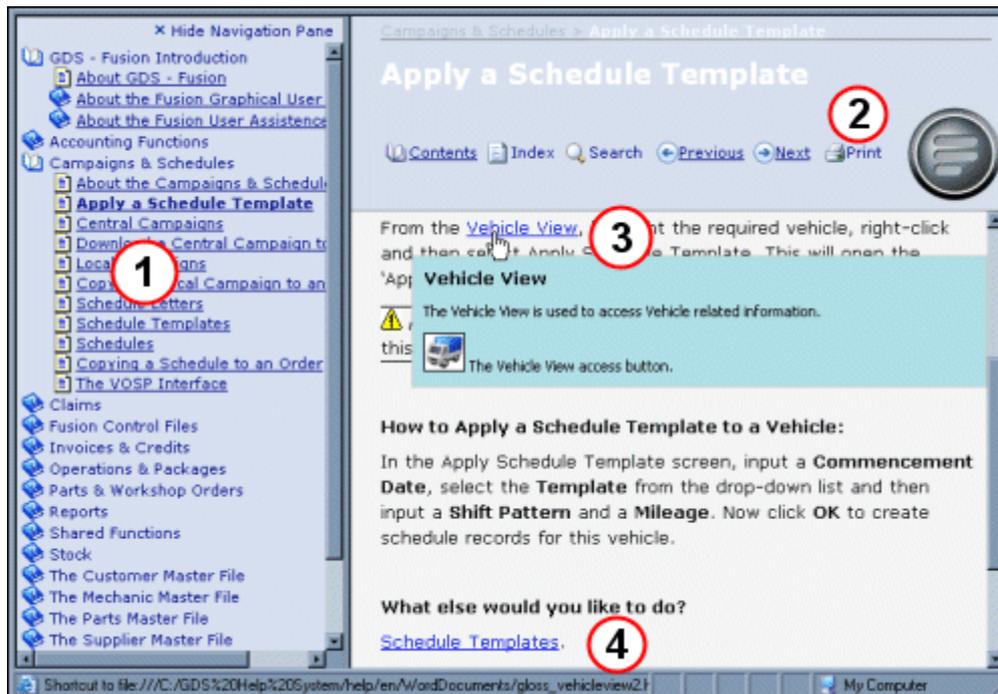
GDS - Fusion currently contains three levels of user assistance: Online Help, PDF User Guide and Hover Definitions each are described in the following topics.

Fusion Online Help System



The Help icon.

1. The left hand frame shows either the Contents, Index, or Search functions:
Contents: Content is shown by default, it subdivides the entire contents of the Help System. Chapters are indicated by clickable books at the far left of the hierarchy. Sections within chapters are indicated by books or pages (if they don't contain further topics). Clicking the books reveals the topics at the third level. Clicking the texts loads content into the right hand frame.



2. The right hand, re-sizeable frame is divided into a banner and content display area. The banner shows the name of the current section, topic or sub-topic. It also contains these clickable functions:
Bread Crumbs A clickable list of recently visited help topics.
Contents. Click to load the content menu into the left frame. The bold item in the content list indicates which help topic is currently active.
Index. Loads the Help system Index into the left frame.
Search. Loads the search function into the left frame.
Previous. Moves the user to the previous section or topic.
Next. Moves the user to the next section or topic in the content hierarchy.
Print. Allows the user to print the current help topic.
3. This shows a glossary term (Vehicle View). Clicking a term activates a popup dialog with the glossary terms definition.
4. The displayed texts can contain clickable links to other topics when necessary. Also, if a section or topic contains more layers of content, clickable links appear at the end of the content display.

Fusion Portable Document File (PDF)

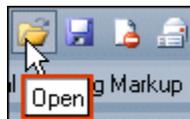


The PDF icon.

A PDF version of the GDS Fusion User Documentation is available via the following link.

[GDS Fusion 3.3 User Guide](#)

Fusion Hover Definitions



Hover Definition Example.

Hover Definitions appear when the cursor comes to rest over certain items on the screen. The definitions offer the user a simple text definition of the item beneath the mouse cursor.

Accounting Functions

About the Accounting Functions

GDS – Fusion Accounting Functions are documented within this chapter. This includes ‘setup’ and ‘how to’ information about:

- The Parts to Work in Progress Interface.
- Tax on Non Externals.
- The Accounting Interface.

Parts to Work in Progress Financial Interface

Why:

It is possible to send WIP transactions for Parts to the General Ledger Interface. This will require a strategic decision being taken for each Dealer as it requires changes to the Accounts Interface files, THF150 & THF152.

 **Note!** In an existing system it would be wise to make sure that there are no existing Parts to WIP prior to switching this functionality on. Also, any credit notes raised for prior invoices will require a manual journal to correct any accounts. So it will require strict control!

For new markets it will depend entirely on the prior system as to whether a manual journal will be required. This will require thorough testing prior to going live, including through to the 3rd Party Finance system, as changes may be required for the extract.

Where:

The following postings can be achieved in the Nominal Ledger:

When a Part is added to an order a transaction is sent to THF151, the general ledger interface file: CR Stock, DB WIP.

If a Part is deleted this transaction is reversed.



*The Parameter
Maintenance View button.*



*The Fusion Control
File View button.*

 **Note!** Since an invoice number does not exist at this point, only an order number will be written to the THF151 file. There are no postings to the THF164 Invoice Journal File.

When an Invoice is completed the following postings can be achieved: CR Parts Sales, DB (Sales) Ledger Control, CR WIP, DB Parts Cost of Sales.

When a Credit is completed the following postings can be achieved: DB Parts Sales, CR (Sales) Ledger Control, DB Stock and CR Parts Cost of Sales.

How:

As far as 3rd party accounts interface is concerned, postings follow the current rules as far as timing is concerned. Therefore, if a posting for an add has already occurred and this is subsequently deleted and re-added, then only an amended posting will occur with any price difference.

To maintain integrity, if this option is switched on Parts will not be allowed to be amended at line level. In that case, the part should be deleted and re-added.

Reiterating this function will require thorough testing setup prior to going live for any market thinking of using it, and cannot just be switched on whilst Users are logged on to the system. The test also has to include posting through to the 3rd party finance system, in case changes are required there.

Setup:

Parameter WIP 002 controls this functions. This requires Parameter 910 263 to be setup with an Analysis Code, e.g. PRTWIP and an entry in the THF General Ledger Other file. This can be by Branch & Product Code as necessary.



Analysis Codes	PRTWIP
Product	VOLVO
Debit Account	WIPVOLVO
Credit Account	STOCK
Description	Volvo Parts WIP

Parameter 910 264 also requires a FUTRAT description for THF151. e.g. WIPPARTS.

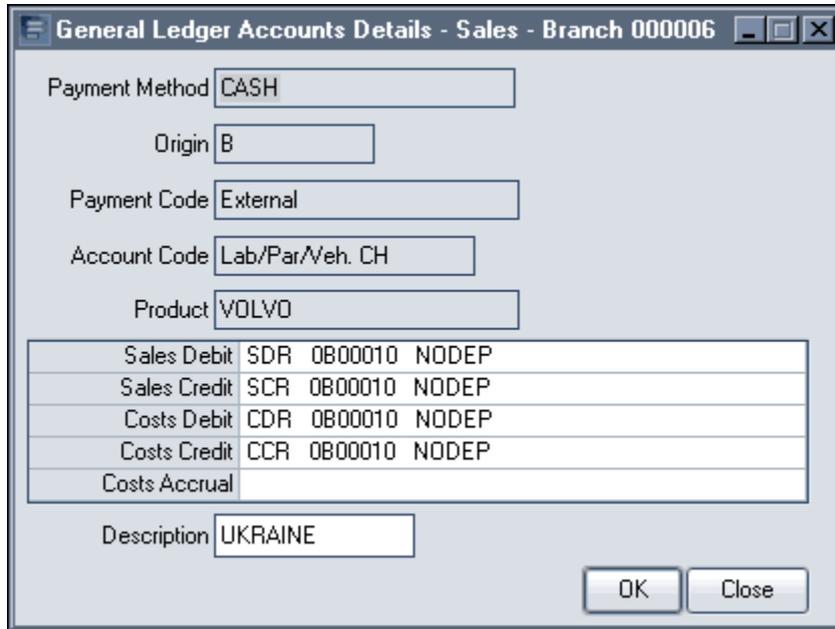
 **Note!** Only the first two digits of this are passed to Accounts interfaces as currently happens. So the first two digits need to be recognisable for that purpose.

Parameter RES 002 controls when the transaction is passed. If set to negative, it is sent immediately as it is added, if set to positive, it is sent when the Picking List is printed.

 **Note!** This is overwritten in the following circumstances. Kit Parts transactions are only sent when the Picking List option is ticked, and Package

Parts transactions are only sent when a Picking List is requested to confirm the parts.

This requires the requisite entries in THF150 General Ledger Sales file for all Parts strings (both B & P), for when an invoice is completed in order that the correct postings can be achieved:



Sales Debit	SDR	0B00010	NODEP
Sales Credit	SCR	0B00010	NODEP
Costs Debit	CDR	0B00010	NODEP
Costs Credit	CCR	0B00010	NODEP
Costs Accrual			

If a Credit note is produced, the WIP transaction does not take place, so only the relevant transactions are reversed. The pick action does not need to take place because once invoiced the WIP has already moved to COS. In order for this to happen the Cost Accrual account previously only used for Vehicle Administration purposes will be brought into use for the DB Stock Transaction, but only if WIP 002 is Positive.

So, if this is used, All Parts strings (both B & P) will require a value.

 **Note!** This does not affect the way that VA Cost Accrual works as they are S strings.

Tax on Non-Externals

Why:

It is now possible for certain markets to calculate tax on Non-Externals. For example; Warranty and Contract, print the tax on the (local) documents and pass the tax posting to a 3rd Party Finance System.

As far as all documents, TWS, TSA, UCHP and 3rd Party Finance Systems are concerned, this must be thoroughly tested prior to going live, as it is envisaged that changes may be required, both in GDS and in the 3rd Party system.

 **Note!** This functionality is only allowed if non-externals are on completely separate orders to externals, using a dedicated Customer Number for Warranty and Contract etc.

Those Customer Numbers should be setup with the correct VAT Code Number, which will allow VAT to be calculated in the same way that externals currently do. Thought should be given to the Exempt or Zero Rated flag, to ensure the correct fields are updated.

Setup:

The VAT control files will be used as they are. Parameter TAX016 must be set to POS and Parameter INV107 may now be set to the following:

INV107 = 0, 1, 2, 3 (new), 4 (new):

0 = No fiscal receipt.

1 = Single fiscal receipt.

2 = Fiscal receipt per payment category.

3 = No fiscal receipt, but tax on non-externals with no customer copy to be printed.

4 = As 3 above, but with a customer copy of the invoices.

In conjunction with Branch parameter **TNE001 = IWMS** (or combinations of these four characters where I = Internal, W = Warranty, M = Contract Maintenance and S = Service Contract).

 **Note!** This will only calculate tax if INV107 = 3 or 4.

When lines are added to the order VAT will be calculated (parameter TAX016 must also be POS) as per the setup.

Parameter 910203 will also determine if account code is used from the Order or Vehicle for Parts transactions.

 **Note!** The Order Summary screen and the Workshop Reports will be the subjects of a Future Release as regards the display of this non-external VAT.

The Accounting Interface

Why:

Transactions from Fusion applications are written to two interface files from which data can be extracted via a local program in order to feed a 3rd Party Accounting System.

File THF 164 is the Invoice Journal File. For each invoice or credit note created within Fusion, a single record is added to this file containing the data necessary to update the Sales Ledger.

File THF 151 is the General Ledger Analysis File. For each transaction created within Fusion, multiple records are added to this file containing the data necessary to update the General Ledger.

Information to drive these postings is setup in a number of different options within the Fusion Control File.

Where:

The Accounting Interface requires the setup of various Control File Parameters.



The Parameter Maintenance View button.



The Fusion Control File View button.

How:

There are several analysis components where, in combination with one another, can direct each separate line on an invoice to the nominal ledger account codes necessary to maintain correct double-entry book-keeping. These are as follows:

Branch: E.g. 01 = Branch 1. Normally represents a single site within a company.

Payment Method: E.g. 3 = External Credit. Represents the type of Customer to whom you are selling.

Department of Origin: E.g. B-Parts Back Counter. Represents the originating department.



Note! These values are hard-coded as follows. P = Parts Front Counter. B = Parts Back Counter. W = Labour Operations. S = Vehicle Sales. L = Trade-in Purchase Invoice. M = Sundry Invoicing.

Payment Code: E.g. 91 = Warranty. Represents the payment type for transaction.

Account Code: E.g. 01 = Part. Labour or Vehicle. Represents the type of goods being sold.

Department Code: E.g. 0 = Truck Workshop. Represents the department and is used where there is more than one workshop department in operation. Use of this component is optional and is controlled by Fusion parameter 910 204.

Product Code: E.g. 0 = Volvo. Represents the product range to which the sold item belongs.



Note! Combinations of codes are referred to as 'Account Strings' within Fusion.

A combination such as 01-3-B-91-01-0-0 would be setup as an Account String within the General Ledger Sales table and would represent the sale of a Volvo Warranty part, via the back counter, in branch 01, to an external customer.

All required permutations for these analysis components need to be setup in the General Ledger Sales table to control analysis of sales and cost-of-sale postings upon Fusion transactions. In addition, General Ledger codes need to be setup in the General Ledger Other table, in order to analyse other items that may appear on transactions, such as Tax, Discount, Parts Freight, Parts Extra charge and rounding adjustments (if used).

If non-productive labour costs and/or claim adjustments are posted to the General Ledger interface file, the Account Numbers for these postings are setup in the General Ledger Other table. Codes for used vehicle depreciation postings are also setup within this table.

For other non-invoice transactions such as parts stock adjustments, goods receiving and price updates, normal accounts are setup within the General Ledger Stock Adjustments table.

Clear-down of Interface Files THF164 & THF151:

Programs exist to archive/delete old records from the accounting interface files as follows:

THF164: Program THC 704 should be setup in Daily Batch to archive/delete records from THF164. Archiving is controlled by parameter ARC 008, which specifies the number of months after the posting date that records should be archived to the THF 110 file. Parameter ARC 009 specifies the number of months after the posting date that archived records should be deleted from THF 110.

THF 151: Program THR 731 should be setup in Daily Batch to delete records from THF 151. This is controlled by parameter ARC 019, which specifies the number of months after the posting date that records should be deleted from THF 151.

Setup:

Certain options on the Fusion Control File must be setup before the accounts setup can be completed and it is recommended that this be done in the order explained below.

 **Note!** In order to make support of the system easier on a global level, we recommend that markets adhere to certain standard codes as detailed for each option. These standard codes can, of course, be supplemented by other codes to satisfy local market requirements.

Branch – Branch Values – Payment Method – Payment Code – Account Code – Department – Product Code.

Once those options have been setup satisfactorily, the task of setting up the General Ledger options can commence. The contents of this file can vary by market to cater for the General Ledger layout of 3rd Party Suppliers. Please ensure that this layout has been discussed, designed and setup in conjunction with your interface program provider and with Axis personnel.

General Ledger Sales – General Ledger Other – General Ledger Stock Adjustments – Tax Rate.

Lastly, setup of the following two options should be considered before completing the account interface.

Customer Payment Code – Payment Terms.

Campaigns & Schedules

About the Campaigns & Schedules

GDS – Fusion Campaigns & Schedules functions are documented within this chapter. It covers information about:

- Local & Central Campaigns.
- Schedules, Schedule Templates & Schedule Letters.
- The VOSP Interface.

Apply a Schedule Template

Why:

Templates are set up with basic information such as week number, operation number and mileage (where required). When a template is applied to a vehicle a commencement date can be specified and the system will then check the VDA vehicle information and Impact System in order to apply the correct time for each operation based on the vehicle specification.

Where:



*The Vehicle View
button.*

From the Vehicle View, highlight the required vehicle, right-click and then select Apply Schedule Template. This will open the ‘Apply Schedule Template’ window.



Note! Refreshing the vehicle view will display an icon next to this vehicle to indicate that a schedule exists.

How to Apply a Schedule Template to a Vehicle:

In the Apply Schedule Template screen, input a **Commencement Date**, select the **Template** from the drop-down list and then input a **Shift Pattern** and a **Mileage**. Now click **OK** to create schedule records for this vehicle.

What else would you like to do?

“[Schedule Templates](#)” on page 27.

Related Topics:

“[Schedules](#)” on page 28.

“[The VOSP Interface](#)” on page 29.

Central Campaigns

Why:

In Fusion it is possible to view, print and action (download) a central campaign for a Volvo vehicle.

Where:

From the Workshop Order View, open an order for a Volvo vehicle with outstanding central campaigns. Click the Central Campaigns button to view the Central Campaign Headers window.



The Workshop Order View button.



The Central Campaigns button.

How to View and Print Vehicles Central Campaigns:

The Central Campaign Headers screen shows **Campaign Number**, **Description** and **Expiry Date**. This warning symbol  indicates campaigns which have passed their expiry date and the green tick symbol  indicates completed campaigns. Right click on a campaign and select **Open** to view the operations and parts associated with the campaign.

Select the **Print** option to print a list of all Campaigns along with their details.

What else would you like to do?

“[Download a Central Campaign to an Order](#)” on page 21.

Related Topics:

“[Local Campaigns](#)” on page 22.

Download a Central Campaign to an Order

Why:

It is possible to view, print, action and download a central campaign for a Volvo vehicle from within a workshop order.

Where:



The Workshop Order View button.



The Central Campaigns button.

From the Workshop Order View, open an order for a Volvo vehicle with outstanding central campaigns. Click the Central Campaigns button on the taskbar to view the Central Campaign Headers window. The Central Campaign Headers window shows Campaign Number, Description and Expiry Date. This warning symbol  indicates campaigns which have passed their expiry date.

How to Download Central Campaigns to Workshop Orders:

Right click on a campaign and select **Open** to view the operations and parts associated with the campaign. Select **Action** to download a text line with the campaign number and description on to the Workshop Order and to update the central campaign system with the vehicle details. This will record the fact that the campaign has been actioned and a green tick symbol will indicate that the campaign has been downloaded.

 **Note!** Operations and parts are not downloaded to the order for the central campaign. These can be viewed (via the open command) and printed on a separate report by selecting the print button.

How to Remove a Vehicle from a Central Campaign:

Select **De-Action** to remove the vehicle from the central campaign and thus indicate that the campaign work is still outstanding.

 **Note!** This can only be done on the order where the Campaign was originally downloaded. Any other order will display a message listing the original Branch and Order Number to which the campaign was first actioned.

What else would you like to do?

“[Central Campaigns](#)” on page 20.

Related Topics:

“[Local Campaigns](#)” on page 22.

Local Campaigns

Why:

In Fusion it is possible to create and maintain campaigns whether they are local or importer created campaigns.

When opening any repair order a message will be displayed in the 'Customer/Vehicle' tab to inform you of any outstanding local campaigns. This can also be used as an indicator to download an importer campaign (if the campaign has been copied into the Local Campaign File).

If the campaign is processed through the warranty system, Fusion will automatically write the repair order number to the campaign file. However, you must still confirm the local campaign completion.

 **Note!** When creating an order, if the check box is checked this will validate any outstanding importer campaigns and these will be displayed in a separate dialogue box.



The Vehicle View button.



The Workshop Order View button.

Where:

From the Vehicle View select **Actions > Local Campaigns**. This will display a Local Campaigns window that lists all local campaigns (including the total number of vehicles involved in the campaign).

Alternatively, from the Workshop Order View select **Order > Local Campaigns**. This will display a Local Campaigns window that lists only the local campaigns applicable to the selected vehicle.

How to Create a New Local Campaign:

The Local Campaigns window lists all campaigns currently held on the system.

If the campaign expiry date has passed then a red warning symbol  is displayed alongside the campaign number.

 **Note!** Expired campaigns are displayed in this window until deleted.

To create a new campaign select **File > New** from the Local Campaigns window. This will display a Create Local Campaign window where you will need to input a **Campaign Number**, **Description** and the **Start Date** and **Expiry Date**. Click **OK** to add the campaign to the list in the Local Campaigns window. Now **Open** the new campaign and select **File > New** to add details of the vehicles involved in the campaign. Input a single registration number or select **Multiple** to use the vehicle selector to add more than one vehicle. For each vehicle added to the campaign there is an **Order Number** field to hold the order which fulfils the campaign for that vehicle.

How to Copy Vehicle Details to a New Local Campaign:

To copy vehicle details to a new campaign, select the **Copy** icon from the **Local Campaigns** window. This will display a **Copy from Local Campaign** window where you can input the new **Campaign Number**, a **Description** (if required) and the **Start Date** and **Expiry Date** for the new campaign.

How to Change the Campaign Description and Dates:

To change the Campaign Description or the start or expiry dates, from the Local Campaigns window select the 'Header' icon.

How to Add or Remove Vehicles from a Campaign:

To add or remove vehicles from a campaign, select the **Details** icon from the Local Campaigns window.

How to Check a Campaigns Percentage Completed Status:

To check how complete a particular campaign is for a particular customer, highlight the campaign and select the % icon. This will display a screen listing the number of vehicles registered for this campaign by customer number, the number of vehicles for which the campaign has been carried out/outstanding and the percentage complete.

 **Note!** Completed campaigns have an order number registered against the vehicle record in the campaign. This can be seen in the Local Campaign Vehicle Details window.

How to Delete a Campaign:

To delete a campaign, highlight it and select the **Delete** icon.

 **Note!** This should only be done when a campaign is complete or has expired.

How to Send a Campaign Information Letter to a Customer:

If you want to send a letter to a customer to inform them about a campaign, highlight the campaign and select the **Letter** icon. Select the **Code** for the letter that you require and click **OK**. In the following window select the **Status**; where **Completed** refers to those vehicles that have an order number and **Outstanding** refers to those vehicles that don't have an order number. **Option** allows you to select whether the letter is printed per customer or per vehicle.

How to Copy a Local Campaign to an Order:

If the Local Campaigns window has been accessed from the Workshop Order view, the option 'Copy to Order' is available. This allows you to select a campaign and copy it to the selected order. Also see

How to Print Campaign Reports:

From the Campaign Details window you can print various campaign reports by selecting the **Print** icon.

How to Transfer Campaign Details to a PC:

As in GDS Classic, local campaign details can be transferred to a PC using the **Transfer Data to PC** button, which is available from the taskbar in the Local Campaigns window.

Where a campaign has been completed elsewhere for a particular vehicle, you can input the order number or a reference number by opening the campaign details window and double-clicking on the vehicle. If the campaign was completed via 'Work with Orders' then the order number is automatically updated when completing the order.

What else would you like to do?

Transfer Data to PC.

Related Topics:

[“Copying a Local Campaign to an Order”](#) on page 25.

Copying a Local Campaign to an Order

Why:

Any local campaigns can be copied to a workshop order.

Where:

From the Workshop Order View, open the order you want to work with and select **Order > Local Campaigns**. This will display the Local Campaigns screen.



*The Workshop Order
View button.*

How to Copy a Local Campaign to an Order:

Within the Local Campaigns screen, **highlight the Campaign** and select the **Copy to Order** icon. This will add a text line to the order 'root' that includes the campaign number and description.

 **Note!** Create a Local Campaign by using Vehicle > Actions > Local Campaigns function. See the related topic below.

What else would you like to do?

“[Download a Central Campaign to an Order](#)” on page 21.

Related Topics:

“[Local Campaigns](#)” on page 22.

Schedule Letters

Why:

Letters can be created in Fusion to inform customers as to which of their vehicles are due into the workshop, when and for what type of service.

Where:

From the Workshop Order View or Vehicle View, select **Actions > Schedules**. This will display a Scheduled Work window. Click the Letter button to access the Letter Processing window.



The Vehicle View button.



The Workshop Order View button.



The Letter button.

How to Define Letters:

In the Letter Processing window select the **Date Range** that you want to cover and the **Customer** that the letter is for. Select the **Letter type** that you want, as well as the **Branch Number** and **Format**. Selection of letter format allows for the printing of schedule letters per customer, per customer and vehicle or per schedule. For example, the selection of letter format per customer will print off one letter per customer where each letter may include details of more than one vehicle and scheduled operation.

How to Edit Letters:

Letters are edited by using the Letter Maintenance function. You will find this from the **Vehicle View > Actions > Letters**. This will display a letter maintenance window. To edit, if you right-click a letter I.D then this will open it for you to edit.

How to Transfer Letters to a PC:

Schedule letters can be transferred to PC by using the **Transfer to PC** checkbox within the Letter Processing window.

What else would you like to do?

Transfer Data to PC.

Related Topics:

[“Schedules”](#) on page 28.

Schedule Templates

Why:

Schedule Templates can be created in Fusion for each vehicle, for its contract term. They can then be used to create a schedule against a vehicle.

Templates are set up with basic information such as; week number, operation number and mileage (where required). When a template is applied to a vehicle a date can be specified for when the schedule is to commence and the system will then check the VDA vehicle information and TST file in order to apply the correct time for each operation based upon the vehicle specification.

Where:



The Workshop Order View button.



The Vehicle View button



The Schedule Templates button.

From the Workshop Order View or Vehicle Order screens, select **Actions > Schedules**. This will display the Scheduled Work window.

From the Vehicle View select **Actions > Schedule Templates**. This will display the Schedule Templates screen.

Select the Schedule Templates button to display the Schedule Templates screen.

How to Create a New Schedule Template:

The Schedule Templates window lists all templates that are currently set up within Fusion. To create a new template select **File > New**. This will display a Create Template window where you are to input the **Template Name, Schedule Week Number, Operation** and **Vehicle Mileage**.

How to Edit or Delete Schedule Templates:

Schedule Templates can be edited or deleted from the Schedule Templates window Existing templates can be opened and modified if required, as well as deleted. Schedules can only be deleted providing they have not yet been copied to an order or if the schedule has been complete.

What else would you like to do?

“[Apply a Schedule Template](#)” on page 19.

Related Topics:

“[Schedule Letters](#)” on page 25.

“[Schedules](#)” on page 28.

Schedules

Why:

Schedules can be created in Fusion for each vehicle for its contract term based on chassis series and number. The Workshop Loading Report can then be printed to identify which vehicles are due in and for what type of service. There is also a facility to print follow up letters to inform the customer which of their vehicles is due in, when and for what type of service.

Where:

From the Workshop Order View or Vehicle View screens, select **Actions > Schedules**. This will display the Scheduled Work screen.



The Workshop Order View button.



The Vehicle View button.

How to Create a New Schedule:

To create a new schedule, highlight the vehicle in the Vehicle Master File, right-click and select **Schedules**. This will display the Scheduled Work screen for the selected vehicle. Select **File > New** and input the schedule details.



Note! Before a schedule can be created for a vehicle, the vehicle record held in the Vehicle Master File must have a schedule branch selected.

When a workshop order is created, the schedule must be downloaded to the repair order. This is done by selecting Schedules from the list and finally selecting the **Copy to Order** option. The status of the schedule is then automatically updated to 'Open' and the order number will appear in the Scheduled Work window.

Once copied to an order, the schedule is displayed in the order lines section of the order lines section of the Order Details window and the status of the schedule is automatically updated to 'Open'. In the scheduled Work window the order number is now displayed alongside the schedule.

When the schedule has been completed and the invoice produced, the status column is automatically updated to indicate it is 'invoiced'. Completed schedules remain on the system to provide a record of schedules performed over the life of a vehicle.

How to Modify a Schedule:

The Scheduled Work window lists all vehicle schedules currently set up in Fusion or downloaded from VOSP. Any that have not been 'opened' (i.e. don't have an order number assigned) can be double-clicked and the details modified.

What else would you like to do?

[“Schedule Letters”](#) on page 25.

Related Topics:

[“Schedule Templates”](#) on page 27.

Extracting VOSP Data.

Copying a Schedule to an Order

Why:

Schedule records can be copied from the Schedule file to an order. This updates the order with the schedule operation.

Where:

From the Workshop Order View, open the order you want to work with and select **Order > Schedules** or click the Schedules button in the Taskbar. This will display a Scheduled Work screen.



The Workshop Order View button.



The Schedules button

How to Copy a Schedule to an Order:

In the Scheduled Work screen, highlight the required schedule and select the **Copy to Order** icon. The Impact Operation detail window will then be displayed where the user can click the Right mouse button and choose to add by **All, Group, Operation** or **Part**. The order number is then written to the Schedule File and the order is updated with the scheduled operation and parts where selected.



Note! This action is also available for Quotations.

What else would you like to do?

“[Schedule Letters](#)” on page 26.

Related Topics:

“[Schedule Templates](#)” on page 27

“[Schedules](#)” on page 28.

Impact Drag and Drop Interface to a Workshop or Part Order.

The VOSP Interface

Why:

Within VOSP, a service schedule can be created for a vehicle that can then be deposited in VIDB and extracted into a schedule file (THF 492) within Fusion.

As VOSP does not require shift patterns the Fusion Parameter 'Parameter SEC 003 determines the default shift code for schedules extracted from VOSP. That will update the file with a default shift. This can then be changed at a later date if required.

Where:

Schedules extracted from VOSP can be seen in the Scheduled Work screen accessed from the Vehicle View via the **Actions > Schedules** command.

Downloaded VOSP schedules are indicated with this icon .



*The Vehicle View
button.*

How Data is Extracted During VOSP Schedule Downloads:

Certain rules have been applied when extracting the data from VIDB into Fusion. These are:

- If the Chassis number is blank then the schedule is not copied (as the key to the schedule file is the Chassis ID-number).
- If any TST Operation numbers used with the VOSP module are not found in Fusion, then again the schedule is not copied. This is to prevent certain operations being overlooked and not carried out.
- Providing that the chassis number is not blank and all TST Operations are found, the schedule will be copied into Fusion and a report generated. This report will indicate whether the vehicle is found within The Vehicle Master File. If the vehicle is not found within The Vehicle Master File then you must add the vehicle and assign the correct scheduled branch against it. All listing, letter and enquiry functions may then be used.

What else would you like to do?

“[Schedule Letters](#)” on page 25.

Related Topics:

“[Schedule Templates](#)” on page 27.

Claims

About Claims

Why:

Claims are made by Dealers to the Importer or Supplier to recover payment for goods or services provided by the Dealer to a Customer.

There are various reasons as to why a claim is raised:

- A single-job vehicle warranty claim
- A multiple-job vehicle warranty claim
- A warranty claim that includes a repair, but needs no replacement parts
- A parts warranty claim
- An exchange of parts
- A repair or work covered by a current campaign or contract
- A service under contract combined with a warranty repair
- A breakdown call-out combined with a warranty repair

There are two ways that claims are created in Fusion. A claim is created automatically by Fusion if the payment code input against a line in an order indicates that a claim is required, or a claim can be created manually from the workshop order routine.

At any point in a claims 'history' it can be viewed, along with its current status. Reports can be run to analyse aged claims, pending claims, rejected claims and manually adjusted claims by Product code (Franchise).

Volvo credits are imported from the data bank and added (matched) to the credit items file. As a precaution, before the import happens, the orders associated with the new credits are checked against those already in the ledger. Any found in the ledger with the same number are removed.

Manual Credits can be added for other Franchise claims. Following the import or manual credit input, but as part of the same job, the automatic reconciliation is run to match credit values to claims within the claims ledger. Based upon whether a credit matches, partially matches, is completely rejected or is within predefined minimum variance, the status of a claim is changed to:

- Original Status = Pending
- Credit Matches = Paid (completely or within minimum variance)
- Partially matches = Outstanding
- All credit matches are zero = Rejected

Adjustment of a claim becomes necessary when its status has been changed to 'Outstanding'. This means the credit falls short of the amount claimed and is more than the minimum variance allowed. Similarly, adjustments may be necessary for a claim with a status of 'Rejected'.

Manual adjustment of a claim enables the balance to be accounted for and can be used to create a journal in the accounts system (otherwise a report is generated to be used for manual postings).

There are 5 types of credit transaction. The first is the Volvo credit extracted from the bank; the others are different types of adjustment:

- SCC (Goodwill) auto adjustment
- Manual adjustment
- Minimum Variance adjustment
- Volvo conversion adjustment

When manually adjusting a claim, you must choose a predefined adjustment category; for example, cost absorbed by parts department, service department, re-invoiced and clerical error etc.

Credit details that are extracted from the data bank that don't match up to any claim number within the claim ledger can be reassigned. They're categorised as 'Credit details in error' and can be manually matched to any outstanding claim for the same order (i.e. 'reassigned' to another claim). SCC claims (sometimes called manual or goodwill) are often outstanding, but are treated as a special case during claim reconciliation. These claims are automatically balanced with a SCC auto adjustment. This requirement prevents unnecessary maintenance.

Where:



The Claim View button.

The Claim View lists all claims currently outstanding in the system. The filter option  can be used to view specific claim types and/or Franchises (Product codes).

How to View Claims:

Each claim listed in the claim view can be opened and reprinted. When opened, summary details of the values in the claim are displayed, as well as any claim notes.

To see the claim in more detail, highlight the claim and right-click, then select Claim Detail. This will display all of the jobs within the claim. Each job can be 'opened' to display the parts and operations related to the selected job. Each operation or part line can be double-clicked to open a window containing details for the selected line.

What else would you like to do?

Work with Orders. See the chapter 'Parts & Workshop Orders'.

Related Topics:

Complementary Business.

["Adjusting/Manually Reconciling a Claim"](#) on page 31.

["Creating a Manual Claim"](#) on page 38.

["Extracting Credits from the Data Bank"](#) on page 39.

[“Manual Credit Note Reconciliation”](#) on page 40.

[“Print and Deposit Claims”](#) on page 41.

Set Up:

Various parameters affect claims:

CLM 008	CUR 009	CLM 002	CLM 008	CLM 004
CLM 005	PPP 014	PPP 023	PRC 001	PRC 002
ROR 001	RTP 508	TAX 013	TAX 015	TSA 001
TWS 001				

Adjusting/Manually Reconciling a Claim

Why:

Once credits have been extracted from the data bank, Fusion runs an automatic reconciliation process which matches the credits against the claims. A Credit Extraction Report is then produced which lists any claims that have been rejected or have only been partially paid (i.e. still have outstanding values).

If no further action can be taken with the importer then these claim values must be manually adjusted and either absorbed by the dealer or re-invoiced to the customer.

Where:



*The Claim View
button.*

From the Claim View, select the Filter Button  and change the view to ‘Outstanding Claims - All’ or ‘Rejected Claims - All’.

How to Adjust / Manually Reconcile Claims:

Highlight the record and right click then select '**Adjust**' to display the Adjust Claim window which shows the claimed and outstanding amounts. To adjust the remaining balance you can either select an adjustment reason and input some explanatory reason text or input the invoice number for the amount that has been re-charged.

What else would you like to do?

[“Manual Credit Note Reconciliation”](#) on page 40

Related Topics:

Adjustment Interface.

[“About Claims”](#) on page 31.

Minor Variance.

Manual Adjustments Report.

[“Reassigning a Claim”](#) on page 42.

Claim Handling

Why:

Claim handling allows information to be added to claims such as causal part, main operation and defect code, claim type and analysis as well as other details required by VTC or other franchises to validate the repair.

Where:

From the Workshop Order View, open the order you would like to work with. This will display the Order Details window. Select the Claim Handling Button to display the Claim Summary window.



The Workshop Order View button.



The Claim Handling button.

How to Use Claim Handling:

The Payment and Claim Summary window lists all the jobs within the claim as well as any chargeable lines.

Here, lines can be manipulated by using the drag-and-drop function. Right-clicking on a detail line will allow you to 'Change Payment Code', 'Move to Job' (existing) or 'Move to New Job'. Right click or double click on a claim summary job will open the 'Claim Validation Window' where further claim details can be added, such as the causal part number, main operation number, serial numbers and defect code etc.

Once each claim job is complete, select 'Validate'. Depending on a parameter setting, the claim will then either be validated within Fusion or via VCOM to UCHP.

Various validation messages will be displayed and depending on the severity will determine whether the order can be invoiced or not. Any message with this icon  are 'fatal' messages and will prevent an invoice and claim being produced. When creating any claim, the vehicle must be registered in the Vehicle Master File. This is because the vehicle information is used as part of the validation and also because Fusion keeps a history of all claims generated to the importer. If your market is UCHP compliant, claims will be submitted once the invoice is produced (except where UCH005 is set to POS). Alternatively, 'Print and Deposit' Claims will have to be run from the claim view.

What else would you like to do?

["Claim History Enquiry"](#) on page 35.

["Claim Summary"](#) on page 36.

["UCHP"](#) on page 43.

Related Topics:

["Adjusting/Manually Reconciling a Claim"](#) on page 31.

Complementary Business.

["Creating a Manual Claim"](#) on page 38.

["Extracting Credits from the Data Bank"](#) on page 39.

["Manual Credit Note Reconciliation"](#) on page 40.

[“Print and Deposit Claims”](#) on page 41.

Set up:

See the section [“UCHP”](#) on page 43.

Claim History Enquiry

Why:

This enquiry allows you to view claims (in detail) that have been completed, deposited into the data bank, sent via VCOM if UCHP is used or via an email attachment for ‘Multi franchise’ claims.

Where:

From the Claim View, select **Actions > Claim History Enquiry**. This will display a Claim History Enquiry window.



*The Claim View
button.*

How to Use Claim History Enquiry:

The Claim History Enquiry window lists all claims for all franchises that have been completed.

Highlight the claim and double-click to open and view the details or select File > Print to 'reprint' a copy of the claim.

Use the filter option  to search for claims based on registration number, customer number etc.

Related Topics:

[“About Claims”](#) on page 31.

[“Claim Summary”](#) on page 36.

Claim Summary

Why:

The claim summary shows the total outstanding value of all Product codes (Franchise), claim types, adjustments, credits received and values claimed.

Where:

From the Claim View, select **Actions > View Claim Summary**. This will display a Claim Summary window.



*The Claim View
button.*

How to View Claim Summary Information:

The information displayed in the Claim Summary window can be changed to show only the claim information for a specific product code (franchise) or customer, as well as different types of claim information:

- Labour summary
- Material summary
- Sub contract summary
- Summary (including adjustments and paid)
- Summary (excluding adjustments and paid)

What else would you like to do?

“[Claim History Enquiry](#)” on page 35.

Related Topics:

“[About Claims](#)” on page 31.

Converting an Invoiced Order into a Claim

Why:

When an order has been invoiced to a customer and is subject to a manual goodwill claim, then this function will allow any previously non-claimed items to be copied to a manual warranty claim order.

Where:



The Workshop Order View button.

From the Workshop Order View, use the filter option  to display invoiced only orders. Highlight the order that you want to convert, right-click and then select 'Convert to Claim'.

How to Convert Invoiced Orders into Claims:

When 'Convert to Claim' is selected, a message is displayed confirming that the selected order has been converted to a claim and giving the claim number. Click OK to display the Manual Claim Details window.

When the conversion takes place, any line details from the order that have not previously been claimed for will be copied to a manual good will claim.

The claim is then completed and validated in the usual way. (You can check this within the claims section).

Related Topics:

“[Creating a Manual Claim](#)” on page 38.

Creating a Manual Claim

Why:

Creating a manual claim is a way of claiming for a vehicle or part not covered by warranty. It doesn't generate any records in the accounting system or affect stock. There are two occasions when a manual claim would be raised:

- When a claim is outside the warranty parameters, although the claim type can be controlled via a parameter with age validation override (CLT 001).
- When a claim has been requested by the dealer on behalf of a customer where there may be some doubt as to the full payment of a claim.

When creating a manual claim, the vehicle must be registered in the Vehicle Master File. This is because the vehicle information is used as part of the validation and also because Fusion keeps a history of all claims generated to the importer.

Manual claims can be left 'open' if required, then updated once all details have been acquired. The transmission of the claim is automatically activated with all other claims.

There are two claim order number ranges for manual warranty and contract claims and these are set up within the Branch Table and the Maintain Number Range Table. When the manual claims are extracted/printed both claim types will use the manual claim number range as set up the 'Claim Records' option of the Fusion Control File.

Where:



The Workshop Order View button.

From the Workshop Order View, select **File > New > Manual Claim**. This will display a Create Manual Claim window.

How to Create Manual Claims:

In the Create Manual Claim window input the registration number and indicate the type of manual claim to be created then click OK. (To be able to create a manual claim in Fusion, the vehicle must exist in the Vehicle Master File. Also, to be able to create a contract claim there must be a valid contract registered in the Vehicle Master File.)

In the Manual Claim Details window the vehicle and customer information that's displayed has been retrieved from the Vehicle Master File.



The Claim Handling button.

Text, operations and parts are added to the claim by selecting the appropriate on-screen tab and using the default payment code. After adding all the details as required, select the Claim Handling Button.

This will display a Claim Summary window listing all the jobs in the claim. Each job can be opened and information such as the causal part number, old unit serial number and defect code etc. can be inputted.

Manual claims can also be created by converting invoiced orders. Highlight the invoiced order from the workshop order view, then right-click and select Convert to Claim. This will copy all the order's non claim details to a manual warranty claim.

What else would you like to do?

“[Adjusting/Manually Reconciling a Claim](#)” on page 31.

“[Print and Deposit Claims](#)” on page 41.

Related Topics:

“[Extracting Credits from the Data Bank](#)” on page 39.

“[Manual Credit Note Reconciliation](#)” on page 40.

Set up:

Parameter CLT 001 (positive or negative) determines if claim type (debit) codes may be entered in claim amendment.

Extracting Credits from the Data Bank

Why:

When credits are selected from the data bank, Fusion automatically runs a reconciliation process and those claims that have credit values (taking into account minor variances) will change from status ‘pending’ to ‘paid’.

The Minor Variance and Manual Adjustments Report is automatically produced when this process is selected.

Where:

From the Claim View, select **Actions > Extract Credit from Data Bank**.



*The Claim View
button.*

How to Extract Credits from the Data Bank:

When the action is selected, the process is initiated immediately. If there are no credits to be extracted a message will be displayed.

What else would you like to do?

“[VIDB Enquiry](#)” on page 45.

Related Topics:

Minor Variance.

Manual Adjustments Report.

Manual Credit Note Reconciliation

Why:

There are occasions when the importer doesn't create an electronic credit note (for example to dealers that don't have TWS CAS application) and as these can't be reconciled automatically through Fusion, the details have to be input manually and then verified by Fusion.

You must make sure that the manual credit note isn't a duplicate of an electronic one, because if a credit is extracted and reconciled manually, the most recent action will overwrite the previous.

Where:

From the Claim View, select **Actions > Manual Credit Note Entry**. This will display a Manual Credit Note Action window.



*The Claim View
button.*

How to Reconcile Manual Credit Notes:

In the Manual Credit Note Action window input the credit note number, credit note date and values for labour, materials and other/sublet. If entering negative values, they should always be followed by a minus sign (-).

Click OK to generate the total, then click OK to display the Credit Note Details window.

Here all the claims, job numbers and associated values must be input. The total value must match the original total value carried over from the previous screen.

Click OK and the credit note details will reconcile against the claim details. If the details and summary values don't match, an error message will be displayed. Fusion won't let you proceed any until these values match.

What else would you like to do?

“[Adjusting/Manually Reconciling a Claim](#)” on page 31.

Related Topics:

“[About Claims](#)” on page 31.

Print and Deposit Claims

Why:

Once claim details have been validated and completed in order handling and the order is invoiced, the claim details must be printed and transmitted to the importer or other Franchise for verification and settlement. (If your market is UCHP compliant, claims will be submitted automatically once the invoice is submitted.)

The action of selecting and printing Volvo claims actually initiates the following actions:

- Select and print warranty, contract and service claims.
- Transfer claim data to the history file.
- Deposit claims into the data bank ready for transmission.
- Produce claim registers.
- Produce drive line reports, where requested.
- Batch post claims into the warranty reconciliation ledger.

The action of selecting and printing Non Volvo claims actually initiates the following actions:

- Select and print warranty claims.
- Creates email with XML sheet.
- Produce claim registers.
- Batch post claims into the warranty reconciliation ledger.

If a file is in error, you can also use this screen to re-deposit Volvo claims or to remove the existing file and continue. However, before doing this you should check the details of the previous transmission to ensure that all the information is correct.

Where:

From the Claim View, select **Actions > Select and Print. > Volvo > Non Volvo**. This will display a Claim Print and Deposit window.



*The Claim View
button.*

How to Print & Deposit Claims:

In the Claim Print and Deposit window for Volvo claims indicate whether the claim must be printed and whether it is to be transmitted interactively or by batch.

If 'Interactive' is selected, the claim will be transmitted immediately. If batch is selected, the claim will be transmitted during the daily batch routine.

The repair date on the claim print uses the planned date to allow for any forward planned orders.

Depending on parameter setting, alternative currencies may be transmitted to TWS/TSA, based upon exchange rates. A fixed labour amount may be also be transmitted, but again this depends on a parameter setting.

Certain TSA and TWS claims will be transmitted with a parts prefix, taken from the Volvo Price File, or from a parameter (based upon the product code).

Claim validation will use VCOM to validate certain vehicle information. However, if a delivery date does not exist in central systems then the delivery date registered in the Vehicle File (THF001) will be used within the transmission file.

 **Note!** Only records that are at status 6 on both THF010 order header, and TFF240 claim header are printed/transmitted.

What else would you like to do?

“[Claim History Enquiry](#)” on page 35.

Related Topics:

“[UCHP](#)” on page 43.

Complementary Business.

Reassigning a Claim

Why:

If a claim number has been used before, it may be that the importer will credit the details under a different number. When the credit note is extracted, the system checks for claims that match and any that don't will be displayed in 'Credit, Adjustment and Error Details'.

Where:

From the Claim View, select **Actions > Credit Adjustment and Error Details**. This will display a Credit Details in Error window.



The Claim View
button.

How to Reassign Claims:

In the Credit Details in Error window you can select various views that let you find the credit you want to work with. Highlight the required credit and click the 'Assign Credit to Claim' button . This displays the Assign Credit to Claim window. This window lists the claims that have the same order number as the incorrect credit. Highlight the correct claim and click the 'View Re-assign Claim' button  to display the claim details. Now click the 'Re-assign Claim' button  to assign the selected claim to the credit. When the claim has been reassigned, Fusion runs an auto reconciliation that changes the credit status from '*ERR Unmatched' to '*CRD Volvo Credit Received'.

What else would you like to do?

“[Adjusting/Manually Reconciling a Claim](#)” on page 31.

Related Topics:

“[About Claims](#)” on page 31.

UCHP

Why:

Unified Claim Handling Process (UCHP) is the claim validation and claim save interface, coverage interface and campaign download function used by VTC.

It validates claim job details 'online' based on various criteria such as vehicle coverage and price rules. If the UCHP interface is active, then all claims jobs are validated online, guaranteeing that the claim will be approved once all the validations have been met. Claim details can also be 'saved' by both Fusion and UCHP, eliminating the procedure of select and print and VIDB transfer.

Where:

From the Workshop Order View, open the order that you would like to work with. This will display the Order Details window. Click the Claim Handling Button to display the Claim Summary window.



The Workshop Order View button.



The Claim Handling button.

How to Use Unified Claim Handling Process:

The Payment & Claim Summary window includes a 'Validate' button. Click on this button to validate the claim with UCHP Online. Any errors are displayed within the UCHP Validation window.

Certain errors may be controlled and overridden by using the 'Accept' button. Errors which may be overridden need to be defined within the Error Override Rules table (THF437). For example you may include error HDR 0045 Mileage not in sequence that could be as a result of a tachograph change. If coverage has expired (HDR 0114 or JOB 0114), provided that the user has this privilege set up within Security Administration, then 'Goodwill' may be selected to override the coverage expired error.

Where parameter UCH005 is set to POS (Currently for Russia only) the accept button will be replaced with a submit button where the Claim can be submitted for acceptance prior to the order being invoiced (this is due to market legislation)

What else would you like to do?

Creating a Workshop Order.

Related Topics:

["About Claims"](#) on page 31.

["Claim History Enquiry"](#) on page 35.

Set up:

Various pre-requisites apply for any dealer to use the UCHP interface:

- Remove Alpha VST Codes (in the long term). In the short term, 5 long Alpha Codes should be modified to 3 long Alpha Codes.
- Parts pricing to use 'Cost Plus' for warranty claims.
- Parameter UCH 003 controls contract pricing sent to TSA.
- Use of a single based currency. Claims cannot be sent using SEK, for example if the base currency is GBP.

- Access to coverage details.
- Error override rules need to be in place (in file THF437) to identify the errors that can be overridden.
- Repair date is dependant on setting of ROR parameter (VTC standard is 'F' for First clocking from time recording).
- Goodwill is only available to override the coverage expired message if the user is 'Allowed to create goodwill claims' within Security Administration > User Details > Privileges.
- Parameter UCH 005 controls pre Invoicing submission (Russia only) allowing the claim to be submitted and the order invoiced separately.

VIDB Enquiry

Why:

A VIDB enquiry lets you see all transmissions that are in the Volvo Dealer Data Bank.

Where:

From either the Supplier View or Claim View, select **Actions > VIDB Enquiry**. This will display a VIDB Enquiry window.



*The Claim View
button.*



*The Supplier View
button.*

Howto Perform VIDB Enquiries:

In the VIDB Enquiry window the source or target application can be input if known, to narrow down the list of transmissions.

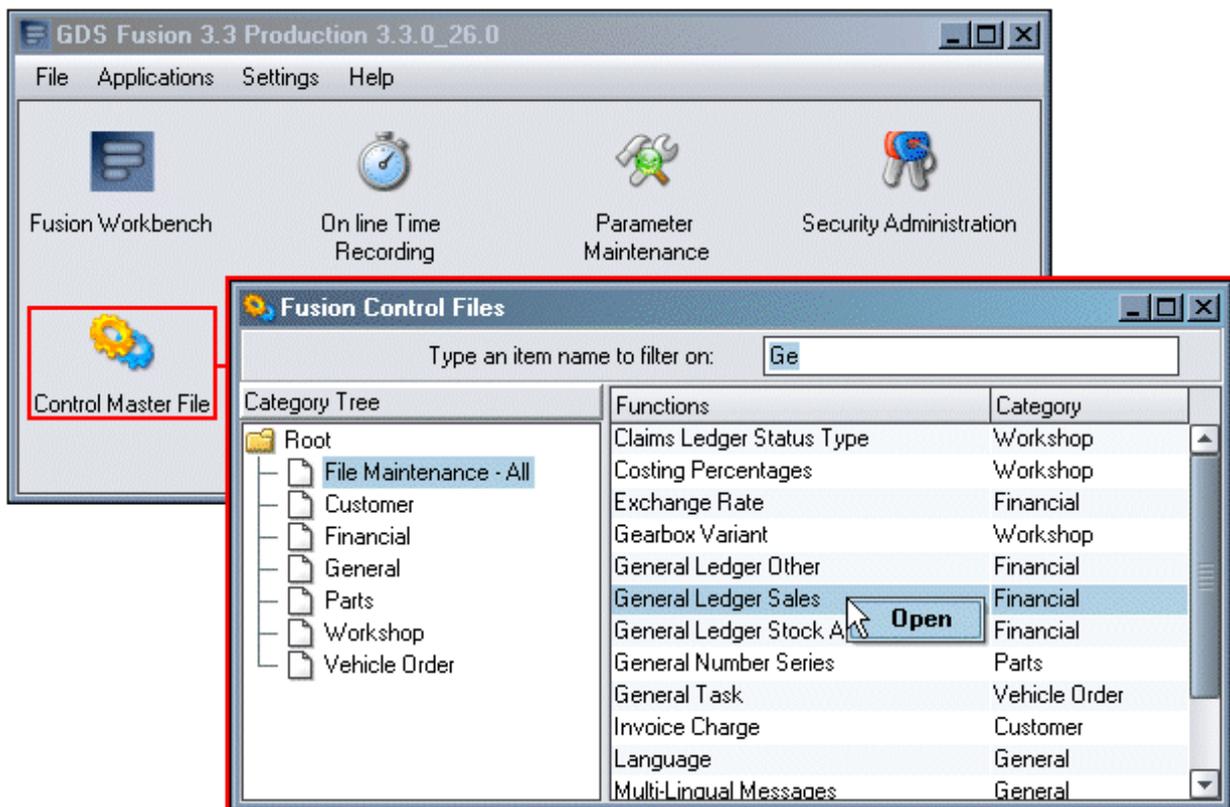
Click OK to display a VIDB Member Log window listing all transmissions that meet the selected criteria.

Double-clicking a record will display a VIDB Member Library File that displays the transaction detail.

Fusion - Control Master Files

About the Fusion - Control Master Files

This chapter documents the functionality available from the Fusion - Control Master File view.



In general, it provides information and instructions for:

- Common and Market Specific Codes & Tables.
- Code Cross-References used to establish code connections.
- Branch Maintenance.
- Standard Coding Examples.
- Cross System Field Mapping used to inter-connect Fusion with External Systems.

Account Codes

Why:

The Account Code denotes the type of goods being sold and is used in conjunction with the hard-coded Department Origin code (P = Parts Front Counter, B = Workshop Parts, W = Labour Operations, S = Vehicle Sales, M = Sundry Invoicing).

For example, if the Account Code 01 = Normal Goods Sale, then 'P-01' represents the sale of a part over the front counter, while S-01 represents the sale of a vehicle chassis. These codes form part of the account number string that determines the postings made to the general ledger interface.

Where:

From the Control Master File view, select **Account Code**. This will display an Account Code window.



*The Control Master
File view button.*

How to Add Edit and Delete Account Codes:

In the Account Code window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Examples of codes that may be used are listed below:

Account Code	Purpose / Description
01	Normal goods: Part, Labour, Vehicle Chassis
04	Sub Contract
11	Consumables
53	Surcharges

Related Topics:

[“General Ledger Other”](#) on page 81.

[“General Ledger Sales”](#) on page 83.

Additional VAT Codes

Why:

Additional VAT codes are used by certain markets where a secondary tax code is required.

Where:

From the Control Master File view, select **Additional VAT**. This will display an Additional VAT window.



*The Control Master
File view button.*

How to Add Edit and Delete Additional VAT Codes:

In the Additional VAT window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Adjustment Interface Code

Why:

The Adjustment Interface allows claim adjustments in Fusion to be transferred to the financial interface.

Where:

From the Fusion Control Files View, select **Adjustment Interface Code**. Adjustment codes created here refer to interface codes created in “[General Ledger Other](#)” on page 81.



*The Fusion Control
Files View button.*

How to Cross-Reference Adjustment Interface & Financial Interface Codes:

The cross-reference between Adjustment Interface Codes and Financial Interface Codes allows adjustments to be posted to the financial interface. Adjustment codes can be split between claim types (warranty or contract) or left blank for a single interface transaction.

Parameters WAR003 and WAR004 can be used to allow automatic posting of adjustments for manual (SCC) and minor variances. These parameter values must match claim adjustment codes in the adjustment interface table.

If you do not want to identify individual adjustments then parameter WAR005 can be set up as a generic code to post all ‘user’ adjustments to one account.

What else would you like to do?

Adjusting/Manually Reconciling a Claim

Related Topics:

“[General Ledger Other](#)” on page 81.

Alternative Payment Code Descriptions

Why:

Alternative Payment Code Descriptions are used when maintaining the “[Alternative Payment Codes](#)” on page 51, and when linking Alternative Payment Codes to “[Payment Codes](#)” on page 107.

Where:

From the Fusion Control Files View, select **Alternative Payment Codes Description**. This will access the Alternative Payment Codes Description screen.



*The Fusion Control
Files View button.*

How to Add Edit and Delete Alternative Payment Code Descriptions:

In the Alternative Payment Codes Descriptions window, codes can be added, maintained and deleted.

Related Topics:

“[Payment Codes](#)” on page 107.

“[Alternative Payment Codes](#)” on page 51.

Alternative Payment Codes

Why:

This is a branch-specific file that allows you to set up alternative general ledger accounts for the sales debit posting on parts and workshop invoices. These are used at line level to divert the posting to an alternative account in the general ledger, instead of using the sales debit account from the main accounts string.

Where:

From the Fusion Control Files View, select **Alternative Payment Codes**. This will access the Alternative Payment Codes screen.



*The Fusion Control
Files View button.*

How to Add Edit and Delete Alternative Payment Codes:

In the Alternative Payment Codes window, codes can be added, maintained and deleted.

Related Topics:

“[Payment Codes](#)” on page 107.

“[Alternative Payment Code Descriptions](#)” on page 51.



Axle Combination Variant Table

Why:

Axle combination variant codes indicate the exact type of axle that a truck has. This table holds the variant description for each code.

Where:

From the Fusion Control Files View, select **Axle Combination Variant**. This will access the Axle Combination Variant Details screen.



*The Fusion Control
Files View button.*

How to Add Edit and Delete Axle Combination Variants:

In the Axle Combination Variant Details window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

The Parts & Workshop Orders Chapter.

About the Vehicle Master File.

Branch Maintenance

Why:

Branch details are created and maintained in two control files, 'Branch' and 'Branch Values'. New branches are created in the branch option and the branch parameters are maintained in the Branch Values option.

Where:

From the Fusion Control Files View, select **Branch**. This will display the Branch window. Alternatively, selecting Branch Value will display the Branch Values window.



*The Fusion Control
Files View button.*

How to Add Edit and Delete Branches:

The Branch window lists the branches currently set up in Fusion and each record can be opened and amended as well as deleted.

To create a new branch, select File > New. This will display the Create Branch window. Input the new branch number and the branch whose parameter values you want to copy to the new branch and click OK. This will display the Branch Details window. The Branch Details window is where the address, invoice, bank details and aftermarket information is held.

Details of the branch parameters assigned to a branch are held in the Branch Parameters tab of the Branch Details window. Each parameter can be opened and deleted, and right-clicking will let you add or read any scratchpad information for the parameter. When you've created a new branch, the parameters will have been copied in from an existing branch and you must check to make sure they're correct for the new branch.

How to Add Edit and Delete Branch Values:

 **Note!** Branch values should only be amended by qualified market support personnel. If parameters are amended incorrectly, this can lead to malfunctions in the system.

Branch parameters are created and maintained in the Branch Values option. The Branch Values window lists all branch parameters currently set up in Fusion and each record can be opened and amended or deleted.

To create a new branch parameter, from the Branch Values window select File > New. This will display a Branch Details window. Input the required information and click OK.

Category Code

Why:

Category codes are used to indicate different types of sale, for example internal, external, warranty etc.

Where:

From the Fusion Control Files View, select **Category Code**. This will display the Category Code window.



*The Fusion Control
Files View button.*

How to Add Edit and Delete Category Codes:

In the Category Code window, new codes can be created and existing codes opened, viewed, amended as well as deleted. Standard codes that must exist are listed below:

Category Code	Purpose / Description
E	External
I	Internal
M	For Contract maintenance
S	For Service claim
W	For warranty

Other codes should be added with caution and only after consultation with your Fusion support organisation.

If your market uses automatic consumables, then additional fields will be displayed when creating or changing category records. The 'Auto Consumables Calculation Value %' indicates the percentage consumable for this category, based on the auto consumables calculation terms parameter. The 'Operation Number' is a unique operation number for automatic consumables, which must be set up in the VST file. The text in the VST file will be what's required on the invoice print and the account code in the VST will ensure that the value is posted to the accounting interface as normal. If you occasionally want to add consumables to a category manually at order completion, then the operation number must be filled in, even though the other fields are blank.

The minimum and maximum values allow you to set either a minimum or a maximum value when a calculation value % is used, or to use a fixed price if a calculation value % is not used.

Three parameters control whether auto consumables are active, whether they should apply to credit notes and what the calculation should take place on. To apply auto consumables to an invoice, a local VST must be set up.

Related Topics:

See the Parts & Workshop Orders Chapter.

CDB – Fusion Field Mapping

Why:

When a customer is added to Fusion from CDB a number of different customer details are downloaded. In turn, when changes are made to a customer in Fusion details are sent back to CDB for update.

For some fields it's clear where they belong, for example CBD Customer Name naturally matches Fusion Customer Name. However, for some other fields usage may vary from market to market, for example the address line containing 'town' may be address 3 in some Fusion markets and town/city in others.

To handle such variations, a control file is used by the program and this is set up and maintained in Fusion.

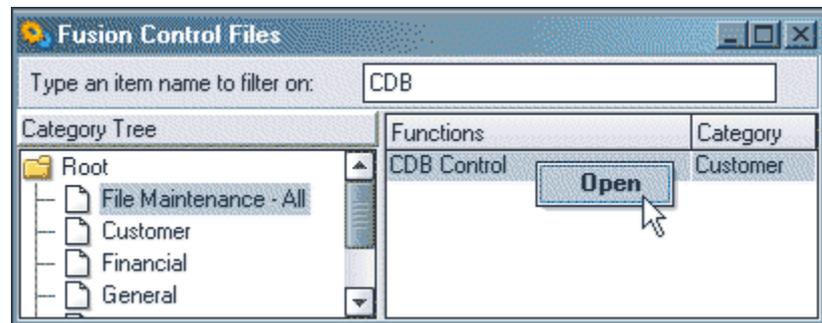
Note! To activate any changes to this file, you must sign-off and sign-on again!



The Fusion Control Files View button.

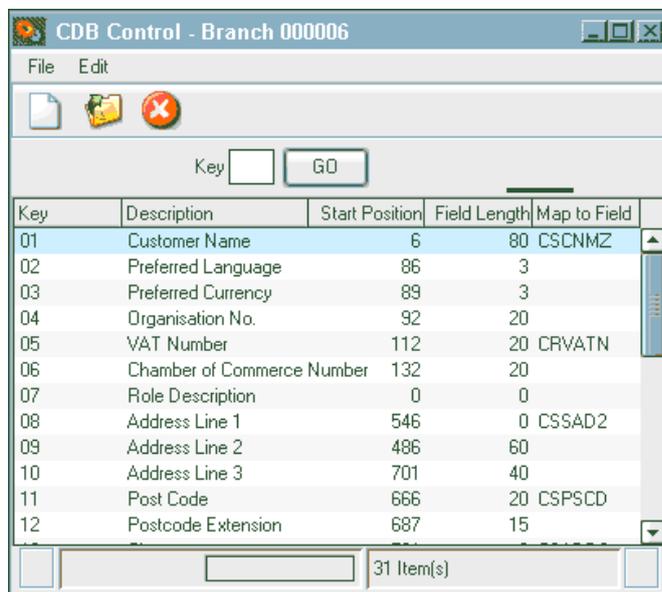
Where:

After logon, access the Fusion Control Files View and select **CDB Control**.



How to Map Name & Address Fields to CDB:

The CDB Control window displays a list of the customer fields found in Fusion in relation to the fields they are mapped towards within CDB.



Key	Description	Start Position	Field Length	Map to Field
01	Customer Name	6	80	CSCNMZ
02	Preferred Language	86	3	
03	Preferred Currency	89	3	
04	Organisation No.	92	20	
05	VAT Number	112	20	CRVATN
06	Chamber of Commerce Number	132	20	
07	Role Description	0	0	
08	Address Line 1	546	0	CSSAD2
09	Address Line 2	486	60	
10	Address Line 3	701	40	
11	Post Code	666	20	CSPSCD
12	Postcode Extension	687	15	

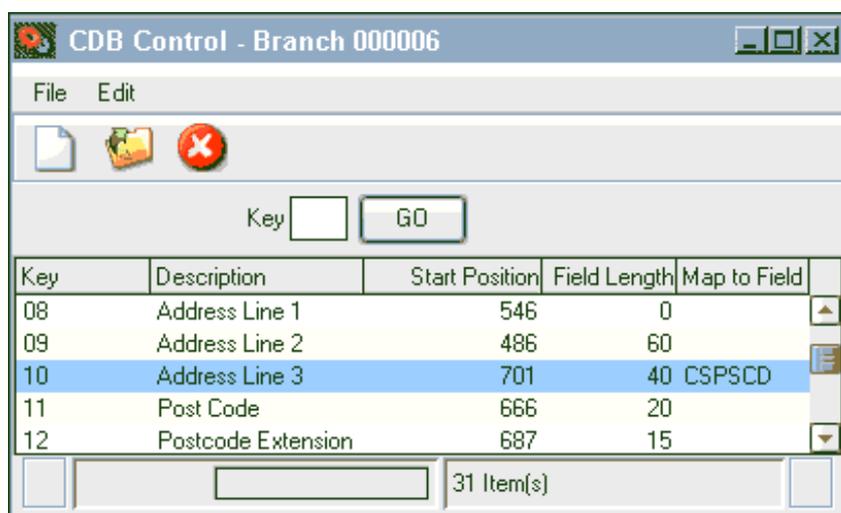
The data falls into 3 categories: *name/address*, *communication roles* and *other*. Each category of data is processed in a different way. The default settings for the name and address details are shown in the screen shot above (assuming that the town/city field is enabled in Fusion). The name and address related fields available for update are 'Customer Name', 'Address Lines 1, 2 and-3', 'Post Code' and 'City'. Do not amend any other address-type fields in this file!

'Start Position' and 'Field Length' control which CDB data should be used to update the mapped description in Fusion. The 'Map to Field' column controls which Fusion field is used to update the specified description in CDB.

In the previous example, 'City' in Fusion is updated with the value sent from CDB in Start Pos 701 Length 40; 'City' in CDB is updated with the value from Fusion field CSCITY.

If the town/city field is not enabled in your market and therefore you use Fusion Address 3 for town/city, amend key 10 'Address Line 3' to contain Start Pos 701, Field Length 40, leaving 'Map to Field' blank, then amend key 13 'City' to contain Start Pos 701, Field Length 0 Map to Field CSADD3.

The following example illustrates a scenario where Address 1 in Fusion is never used, Post Code is never used and the actual post code is input in Address 3:



How to Map Communication Roles to CDB:

Communication roles are mapped in a different way from name and address details. On the download, Fusion can process up to 6 different roles. Each of these roles is received from CDB with a description and a value. For example: Description = Phone, Value = 0121 456 7890.

For each customer in CDB, the number and type of roles can be different, so Fusion has no idea what to expect on each record. In the CDB control file the role *Description* fields (keys 20, 22, 24, 26, 28, 30) are therefore used to store a range of expected descriptions. Map to Field stores the name of the equivalent Fusion field for this role description.

Do not change the Start Position and Field Length fields for roles. Ensure that the role descriptions match **exactly** the descriptions from CDB, including the following:

There are six 'Communication Roles' from CDB which can be processed in GDS and these are dependant on the value received from CDB in the 'Role Description' but only 3 are recorded in GDS. Roles 1, 2 and 3 are processed in GDS and these equate to Key 20 and 21, Key 22 and 23 and Key 24 and 25. The values available are 'Phone', 'Fax', E-mail', 'Web site'. 'Mobile Phone' and 'Alt Phone'.

Example process:

Key 20 is checked to obtain the Start Position and Length of the CDB field. From this CDB field e.g. Key 20 is Start Position 886 for Length 40 characters, it will extract the actual literal Description e.g. 'Phone', 'Fax' etc.

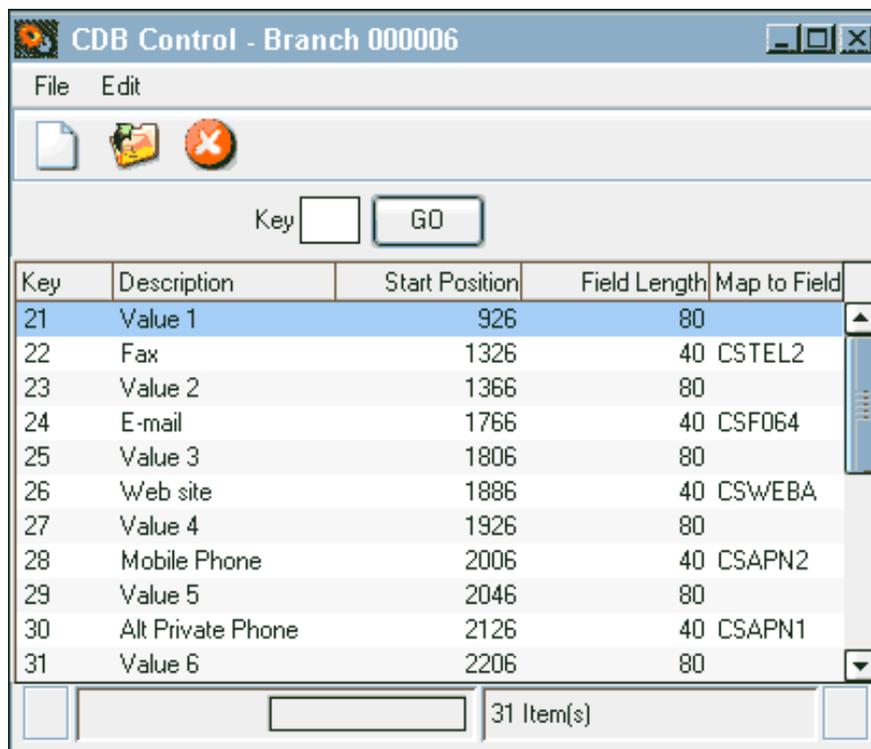
Using this Description ('Phone', 'Fax' etc) the corresponding GDS field is obtained from the mapping table e.g. 'Mobile Phone' = Map to Fieldname 'CSAPN2'.

Key 21 is then checked to obtain the Start Position and Length of the CDB field containing the actual Value e.g. Key 21 is Start Position 926 for Length 80 characters. The Value contained in this CDB field is then mapped to the GDS field.

Example:

- A) CDB field relating to Key 20 Start Position and Length contains the literal 'Web Site'.
- B) 'Web Site' relates Key 26 Description which maps to GDS field CSWEBA.
- C) The Value contained in the DBS field relating to Key 21 Start Position and Length is 'volvo.com'
- D) The value 'volvo.com' is moved to GDS field CSWEBA and shows in Web Site in Customer Maintenance.

This process is repeated for Key 22 and 23, and Key 24 and 25.



When a customer is changed in Fusion the update to CDB is hard-coded to send the three principal communication roles stored in Fusion: Phone (CSTEL1), Fax (CSTEL2) and E-mail (CSF064).

How to Map Other Fields to CDB:

Fusion and CDB also exchange information for the fields Organisation Number, Tax Number, State and Country. The CDB Control File default values should not be amended for these fields.

If CGC/Company Number is enabled in Fusion, CGC/Company Number updates the Organisation field in CDB. When a customer is downloaded from CDB, CGC/Company Number is updated if enabled.

Tax Number in Fusion is updated when a customer is downloaded from CDB. If a customer is added in Fusion without being downloaded from CDB, the VAT Number is sent to CDB. However, a subsequent change to Tax Number in Fusion is only updated in CDB if accompanied by a change to other details on the Customer Master File.

State is not downloaded from CDB to Fusion, but is sent to CDB from Fusion when a customer is added or amended.

The Country description in Fusion is updated when a customer is downloaded from CDB. Fusion sends the ISO Country Code to CDB, from which CDB derives the Country description.



Note! To activate any changes to this file, you must sign-off and sign-on again!

Related Topics:

See About the Customer Master File.

Chassis Cross-References

Why:

The chassis codes indicate the vehicle chassis type and are checked by the system when downloading vehicle details, in order to check that the required vehicle is a Volvo.

Where:

From the Control Master File view select Chassis Ref to open the Chassis Cross-Reference Table.



*The Control Master
File view button.*

How to Add Edit and Delete Chassis Cross-References:

In the Chassis X-Ref Table, new codes can be created and existing codes opened, viewed, amended, copied as well as deleted.

Related Topics:

See information About the Vehicle Master File.

Claim Status Codes

Why:

The claim status codes are used on credits received from the importer and describe the status of a warranty claim.

Where:

From the Control Master File view select **Claim Status** to open the Claim Status Details window.



*The Control Master
File view button.*

How to Add Edit and Delete Claim Status Codes:

In the Claim Status Details window, new codes can be created and existing codes opened, viewed, amended, copied as well as deleted.



Note! The codes in this list should be exactly the same as those set up in TWS.

Related Topics:

About Claims.

Claim Variance Details Codes

Why:

Claim Variance is used by the Reconciliation system to automatically adjust low cost claim lines.

Where:

From the Control Master File view, select **Claim Variance** to open the Claim Variance Details window.



*The Control Master
File view button.*

How to Add Edit and Delete Claim Variance Details Codes:

In the Claim Variance Details window, new codes can be created and existing codes opened, viewed, amended, copied as well as deleted.

Related Topics:

About Claims.

“[General Ledger Other](#)” on page 81.

Claims Ledger Status Type Codes

Why:

These codes are used when adjusting claim balances.

Where:

From the Control Master File view, select **Claims Ledger Status Type** to open the Claims Ledger Status Type window.



*The Control Master
File view button.*

How to Add Edit and Delete Claims Ledger Status Type Codes:

In the Claim Variance Details window, new codes can be created and existing codes opened, viewed, amended, copied as well as deleted.

Related Topics:

See information About Claims.

Customer Category Codes

Why:

The Customer Category is used in the Customer Master File to indicate the size of a customer's fleet.

Where:

From the Control Master File view, select **Customer Category** to open the Customer Category window.



*The Control Master
File view button.*

How to Add Edit and Delete Customer Category Codes:

In the Customer Category window, new codes can be created and existing codes opened, viewed, amended, copied as well as deleted.

Related Topics:

See information About the Customer Master File.

Customer Classification Codes

Why:

Classification codes are used to identify different types of customer, for example fleet customers, retail customers etc.

A classification code is registered against each customer in the Customer Master File.

Where:

From the Control Master File view, select **Customer Classification** to open the Customer Classification window.



*The Control Master
File view button.*

How to Add Edit and Delete Customer Classification Codes:

In the Customer Classification window, new codes can be created and existing codes opened, viewed, amended, copied as well as deleted.

The Uplift Flag field may be displayed depending on a parameter and this allows the pricing of parts to be controlled for specific customers by product code and product group (providing the customer has the appropriate classification code assigned to it in the Customer Master File).

Related Topics:

See information About the Customer Master File.

Customer Concept Codes

Why:

The Customer Concept is used to indicate how reliable a customer is at paying their invoices.

Where:

From the Control Master File view, select **Customer Concept** to open the Customer Concept window.



*The Control Master
File view button.*

How to Add Edit and Delete Customer Concept Codes:

In the Customer Concept window, new codes can be created and existing codes opened, viewed, amended, copied as well as deleted.

If 'credit check' is checked then credit checking will be performed in the order entry routine for all customers set up with the selected concept code.

If 'Allow Invoice' is checked, then invoicing will be allowed for all customers with the selected concept code.

Customer Payment Codes

Why:

In order entry routines, the default Payment Code when a line is added to an order is usually external (00). However, if required, the default value for Payment Code can be set at individual customer level for internal customers. Where they exist, you may also set up default alternative Payment Codes. This is particularly useful for controlling the Payment Code and Alternative Payment Code entry for internal customers because it means that operators don't have to remember to change the default Code to the correct Code on each order line when raising orders for internal customers.

Where Alternative Payment Codes are mandatory for internal payment codes, customer must be set up with an alternative payment code in this table if their main payment code has alternatives linked to it.

Where:

From the Control Master File view, select **Customer Payment Code** to open the Customer Payment Code window.



*The Control Master
File view button.*

How to Add Edit and Delete Customer Payment Codes:

In the Customer Payment window, new codes can be created and existing codes opened, viewed, amended, copied as well as deleted.

Related Topics:

The Accounting Interface.

“[Alternative Payment Codes](#)” on page 51.

“[Payment Codes](#)” on page 107.

Customer Tax Codes – Valid Branches

Why:

This allows for the set-up of a range of valid branches for each customer tax code. This option need only be maintained by dealers with branches in more than one country, where the tax rates are different in those countries.

When raising Parts, Workshop and Sundry invoices, the Customer Tax Code can be checked against this table to ensure it is a valid code for the branch. This validation is optional, and if it is not required there is no need to maintain this table.

Where:

From the Control Master File view, select **Customer Tax Code**. Next, right click on a tax code and select the **Valid Branches**.



*The Control Master
File view button.*

How to Add & Delete Valid Branches for Customer Tax Codes:

In the Valid Branches for Customer Code window, select or deselect branches as required.

Customer Tax Codes

Why:

Allows for the set-up and maintenance of tax codes used to define appropriate tax rates for customer products.

Where:

From the Control Master File view, select **Customer Tax Code**. This will open the Customer Tax Code screen.



*The Control Master
File view button.*

How to Add Edit & Delete Customer Tax Codes:

Here users can add edit or delete their required Customer Tax Codes.

Customer Vehicle Discount Rates

Why:

Customer / Vehicle Discount Rates allows for the creation of a discount matrix for each customer category based upon discount percentages by product and discount code, product group and marketing codes for order class 1 (emergency), order class 2 (supplementary), order class 3 (stock) and part sales to the workshop.

Where:



The Control Master
File view button.

From the Control Master File view, select **Parts** from the Category tree, then **Customer / Vehicle Discount Rates** from the functions. This will open the Discount Rates screen.

How to Add Edit & Delete Customer / Vehicle Discount Rate Codes:

In the Discount Rates window, new codes can be created, opened, amended or deleted.

While referring to the following screenshot, use the selection fields in area 1 of the screen to access specific records. Enter relevant selection criteria and click 'Find'. Depending on the selection, for example, if only branch is selected a system message is returned informing user of how many records to expect in the list. For company records only, activate the company level check box.

The fields in area 2 of the screen allows you to create a new record select Add/Update to confirm details.

Branch Number	Customer Code	Product Code	Discount Code	Product Group	Marketing Code	Emergency	Supplementary	Stock	Workshop
6									
6	01	VOLVO	00	57	BB	50.0	30.0	50.0	25.0
6	01	VOLVO	01	43		0.0	0.0	10.0	0.0
6	01	VOLVO	01	44		0.0	0.0	10.0	0.0
6	01	VOLVO	01	45		0.0	0.0	10.0	0.0
6	01	VOLVO	01	63		0.0	0.0	10.0	0.0
6	01	VOLVO	01	63	BB	1.0	0.0	10.0	0.0
6	01	VOLVO	01	65		0.0	0.0	10.0	0.0

 **Note!** Input of new data is not allowed when the selection criteria at the top of the screen is blank. The Add/Update option is unavailable.

Area 3 lists all discount detailed for groups and exceptions to groups. A group is identifiable by a green arrow an exception is a red exclamations mark. Records can be moved for amendment to the input fields in item 3 by selecting double click. Using the right mouse button against specific records displays the options to amend, delete, delete with exceptions and delete exceptions only.

In area 4 amendments can be made directly into percentage fields.

 **Note!** Specific lines can be highlighted and copied to an excel spreadsheet using the Ctrl C and Ctrl V keys from your keyboard.

Related Topics:

“[Customer Vehicle Discounts](#)” on page 65.

Customer Vehicle Discount Codes

Why:

The Customer / Vehicle Discount option allows for the creation of various levels of discount for each customer type based on their buying patterns. This code is then used on the customer file to calculate the customer discount percentage rate based on the values entered within Customer / Vehicle Discount Rate Maintenance.

Where:

From the Control Master File view, select **Customer / Vehicle Discounts**. This will open the Discounts screen.



*The Control Master
File view button.*

How to Add Edit & Delete Customer / Vehicle Discount Codes:

In the Discounts window, new codes can be created, opened, amended and or deleted.

Related Topics:

“[Customer Vehicle Discount Rates](#)” on page 64.

Customs Fee Codes

Why:

The customs fee code is used within importer goods receipt. A customs fee is registered against all part numbers which are imported into the country and the percentage value registered against each code determines the amount of customs duty paid for each part number, based on its cost prices.

Where:

From the Control Master File view, select **Customs Fee**. This will open the Customs Fee window.



*The Control Master
File view button.*

How to Add Edit & Delete Customs Fee Codes:

In the Customs Fee window, new codes can be created, opened, amended and or deleted.

Customs Office Codes

Why:

The customs office code is used within the importer goods receipt module. The customs offices are registered in the system from here.

Where:

From the Control Master File view, select **Customs Office**. This will open the Customs Office window.



*The Control Master
File view button.*

How to Add Edit & Delete Customs Office Codes:

In the Customs Office window, new codes can be created, opened, amended and deleted.

Debit Code

Why:

Debit Code is used to create and record warranty type codes. These codes are used when submitting a warranty claim to the importer so you can identify what type of warranty is being claimed for. This is used in Claim Validation in GDS Classic, this option is known as 'Warranty Type Code Table' (menu TCTRC, option 7).



*The Control Master
File view button.*

Where:

From the Control Master File view, select **Debit Code**. This will open the Debit Code window.

How to Add Edit & Delete Debit Codes:

In the Debit Code window new codes can be created and existing codes opened, viewed, amended and deleted.

Warranty type indicates the type of warranty that the code represents. The description gives an explanation of the code. The Exclude from Age Validation flag is used to override the vehicle age validation check that takes place when coding an order line to warranty.

Defect Code

Why:

Defect codes are used when generating warranty and other types of claims to indicate the reason for claim.



*The Control Master
File view button.*

Where:

From the Control Master File view, select **Defect Code**. This will open the Defect Code window.

How to Add Edit & Delete Debit Codes:

In the Defect Code window new codes can be created and existing codes opened, viewed, amended and deleted.

Related Topics:

See information About Claims.

Delivery Code

Why:

Delivery Codes are used at point of sale to indicate the method of delivery for customers who are having their parts delivered.

Period end reports can be run which analyse the delivery codes to determine the sales/profitability of delivery methods used at your dealership. A parameter can be set to display a particular code as the default for your branch or company.



*The Control Master
File view button.*

Where:

From the Control Master File view, select **Delivery Code**. This will open the Delivery Code window.

How to Add Edit & Delete Delivery Codes:

In the Delivery Code window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

If 'Default' is checked then the selected delivery code will become the default delivery code for the branch.



Note! This will override the default set in the parameter.

Related Topics:

Refer to the 'Parts & Workshop Orders' chapter for more information.

Department Codes

Why:

Department codes are used to identify different areas within the workshop, for example the body shop, tyres, administration etc.

Optionally, Department code may be used as an analysis dimension in general ledger interface postings.

Where:

From the Control Master File view, select **Department**. This will open the Department window.



*The Control Master
File view button.*

How to Add Edit & Delete Department Codes:

In the Department window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Standard Codes are as follows:

Delivery Codes	Purpose / Description
0	Truck Workshop delivery
1	Bodyshop delivery

Highlight a code and right-click, then select Product Code Details to set up product codes against the selected department code.

Related Topics:

[“General Ledger Other”](#) on page 81.

[“General Ledger Sales”](#) on page 83.

Direct Delivery Dealer – Customer Number Cross Reference

Why:

These codes enable DSP stock orders (N70 transactions) to be split and sent direct to the dealer.

Where:

From the Control Master File view, select **Direct Delivery / Dealer Customer X Ref**. This will open the Direct Delivery Dealer/Cust No X ref window.



*The Control Master
File view button.*

How to Cross-Reference Direct Deliveries with Dealers Branches and Customers:

The Direct Delivery Dealer/Cust No X-Ref window lists all dealers to be cross-referenced to a Branch and Customer. New cross-references can be created and existing ones opened, viewed, amended as well as deleted.

Related Topics:

DSP Transactions.

Discount Codes

Why:

This option enables you to create various levels of discount for each customer type based generally on their buying patterns. This code is then used against each customer within the Customer File and calculates the customer discount percentage rate based upon the discount matrix within the Customer Vehicle Discount Rates.

Where:

From the Control Master File view, select **Discount Code** to open the Discount window.



*The Control Master
File view button.*

How to Add Edit & Delete Discount Codes:

Within the Discount window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Discount Rates

Why:

The discount matrix allows discounts to be created for customers, by customer category, based on discount percentages by product and discount code, for each order class as well as part sales to the workshop.

Where:

From the Control Master File view, select **Discount Rates** to open the Discount Rates window.



*The Control Master
File view button.*

How to Add Edit & Delete Discount Rate Codes:

Within the Discount Rates window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

“[Customer Category Codes](#)” on page 61.

Discrepancy Code

Why:

Discrepancy codes can be described as transaction or source codes and are used for analysis purposes in reporting options.

The majority of Discrepancy Codes are pre-set, however you can register additional codes for stock purchases after consultation with your local Fusion representative. These codes are displayed in the following parts reports:

Source Voucher Analysis, One Page Summary, Financial Stock Report and Parts Transaction Reporting.

Where:

From the Control Master File view, select **Discrepancy Code** to open the Discrepancy Code List window.



*The Control Master
File view button.*

How to Add Edit & Delete Discrepancy Codes:

In the Discrepancy Code List window, new codes can be created and existing codes opened, viewed, amended or deleted.

If ‘Sign’ column is populated with +/- the discrepancy code description will be displayed in the stock adjustment drop down list box.

The financial stock code must correspond to discrepancy codes. You shouldn’t, for example, use a financial stock code that is allocated to stock transfers.

Related Topics:

Stock Adjustments.

DSP Supplier Maintenance

Why:

This option allows you to register the DSP supplier source number and description against the Fusion Volvo supplier number.

Where:

From the Control Master File view, select **DSP Supplier Maintenance** to open the DSP Supplier List window.



*The Control Master
File view button.*

How to Add Edit & Delete DSP Supplier Codes:

In the DSP Supplier List window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

About the Supplier Master File.

Employee Name Codes

Why:

Fusion requires each person using the system to have a unique identity code. Users are required to input their ID code when performing various tasks, for example creating orders and making stick adjustments.

Where:

From the Control Master File view, select **Name Identity Table** to open the Name Identity table window.



*The Control Master
File view button.*

How to Add Edit & Delete Employee Name Identities:

In the Name Identity Table window, new codes can be created and existing codes opened, viewed, amended or deleted.

'XXX' is a default code used by Fusion support personnel who might not have their own code set up in the system. To create a new code select File > New. This will display a Name Identity Details window. The category code controls what details can be amended in the visit system.



Note! The category code doesn't restrict the user from any departments.

Related Topics:

See information About Claims.

Engine Variant

Why:

This is a unique two character ID code used to allocate against “[Gearbox Variants](#)” on page 81.

Where:

From the Control Master File view, select **Engine Variant** to open the Engine Variant Details window.



*The Control Master
File view button.*

How to Add Edit & Delete Engine Variant Codes:

In the Engine Variant Details window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Environmental Tax

Why:

The Environmental Tax is an additional cost that is charged to the customer for the disposal of hazardous parts.

The cost can be calculated with or without VAT, as a fixed amount or percentage amount. If the amount is calculated by percentage, this is taken from the retail amount after any discounts have been applied.

Where:

From the Control Master File view, select **Environmental Tax** to open the Environmental Tax window.



*The Control Master
File view button.*

How to Add Edit & Delete Environmental Tax Codes:

In the Environmental Tax window, new codes can be created and existing codes opened, viewed, amended as well as deleted. These code numbers are applied to parts in the Parts Master File.

Related Topics:

See information About the Parts Master File.

Factory Code

Why:

Each Volvo factory has an identifying code which is used to indicate where the vehicle was built. This information is then held along with the other vehicle information in The Vehicle File.

Where:

From the Control Master File view, select **Factory** to open the Factory window.



*The Control Master
File view button.*

How to Add Edit & Delete Factory Codes:

In the Factory window, new codes can be created and existing codes opened, viewed, amended as well as deleted.



Note! Volvo factory codes are standard and should only be amended in conjunction with your importer.

Related Topics:

See information About the Vehicle Master File.

Financial Stock Codes

Why:

Financial stock codes are used to determine what transaction types get reported in the Financial Stock Control Report.

Where:

From the Control Master File view, select **Financial Stock** to open the Financial Stock window.



*The Control Master
File view button.*

How to Add Edit & Delete Financial Stock Codes:

In the factory window, new codes can be created and existing codes opened, viewed, amended or deleted.

The description of the transaction type that is inputted into here is printed on the detailed version of the Financial Stock Control Report.

The +/- sign indicates whether the items are put into received items or issued items in the detailed report.

The '+' sign is for stock transaction types where the stock balance is increased.

The '-' sign is for stock transaction types where the stock balance is reduced.

The summary code indicates what description field the transaction should be placed into within the summary report.

Fleet Master File

Why:

The Fleet Master File holds the name and address of all fleet customers. Each Fleet customer is assigned a unique identifying code.

Where:

From the Control Master File view, select **Fleet Master** to open the Fleet Master window.



*The Control Master
File view button.*

How to Add Edit & Delete Fleet Customers:

The Fleet Master window lists all fleet customers. Here you can create new fleet customers and existing ones can be viewed, opened, amended or deleted.

Related Topics:

See information About the Customer Master File.

Fleet Segment Codes

Why:

Segmentation codes are used in The Customer Master File to describe the fleet sectors in which the customer operates.

Where:

From the Control Master File view, select **Fleet Segment** to open the Segmentation window.



*The Control Master
File view button.*

How to Add Edit & Delete Fleet Segmentation Codes:

In the Segmentation window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

See information About the Customer Master File.

Franchise Code

Why:

This is a 3 digit field used to identify the supplier of parts, for example VO – Volvo or RVI- Renault.

Where:

From the Control Master File view, select **Franchise** to open the Franchise window.



*The Control Master
File view button.*

How to Add Edit & Delete Franchise Codes:

Please be aware that parameter DPP 001 is used to control the functionality of this table. There are two positions; Position one relates to the Franchise Table.

If set at 'N' where no restrictions have been made within the Part Pre-fix table, a part can be duplicated with as many pre-fix's. However, if set at 'N' where restrictions have been made to the part pre-fix table for example, if pre-fix VO, RC and GB2 have been registered as Volvo Family "Active", duplicate parts can only be created against these specific prefix's. If the prefix is not equal to those specified, the message 'Part exists within Volvo Group - please use an alternative part number' is displayed.

Franchise Selling Point Control File

Why:

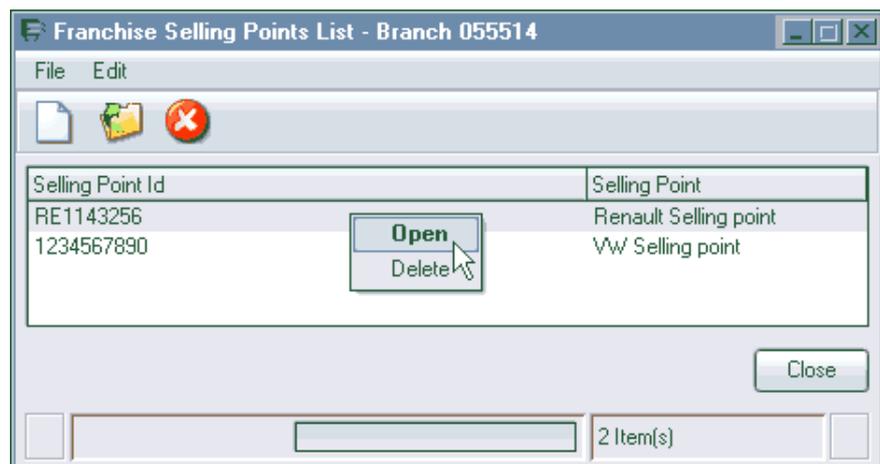
Complementary business within GDS Fusion is a suite of enhancements introduced to the product which allows for more efficient handling and support of other franchises. The Franchise Selling Point Control file allows the setup of dealer Selling Points for dealers that are multi-franchise.

Where:

From the Control Master File view, select **Franchise Selling Point** to open the Franchise Selling Points List.



*The Control Master
File view button.*



How to Setup the System for Franchise Selling Points:

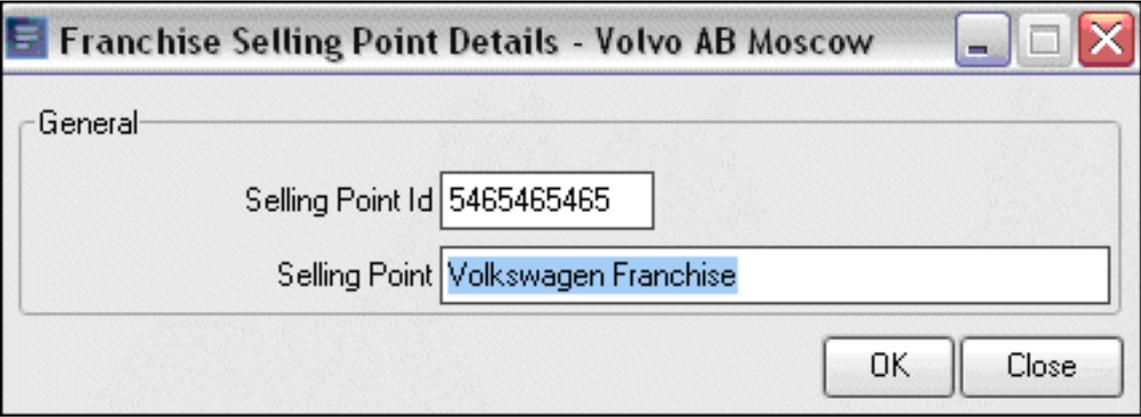
Multi-franchise processing will be controlled by new system and branch parameters, as listed here:

Parameter Name	Purpose / Description
INV160	This System Parameter for Multi-franchise handling determines if the functionality is switched on within the system. Parameter reference INV160 (POS/NEG variable)
INV161	This Branch Parameter for Franchise Selling Point is a variable that dictates if branch participates in multi-franchise print or not. Parameter reference INV161 (POS/NEG variable).

How to Add Edit & Delete Franchise Selling Points:

 **Note!** Selling points are not branch specific and so only need to be setup once. A Volvo selling point does not need to be setup. The system will assume that a blank selling point relates to Volvo.

From the Franchise Selling Point window, click the New button  to create a new Selling Point. Selling Point ID is a 10 digit alpha numeric field. Selling Point will be a 50 character text box to store description. Data is stored in the THF714 file.



Franchise Selling Point Details - Volvo AB Moscow

General

Selling Point Id 5465465465

Selling Point Volkswagen Franchise

OK Close

Related Topics:

Complementary Business.

Function Groups

Why:

Parts are grouped by type into function groups. For example, function group 3000 may cover electrical parts.

Where:

From the Control Master File view, select **Function Group** to open the Function Group window.



*The Control Master
File view button.*

How to Add Edit and Delete Function Group Codes:

In the Function Group window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

The 'Statistics Flag' field indicates whether you want the selected function group to be included in the analysis report.

Related Topics:

Part Sales by Function Group Report.

Sales by Function Group Report.

Also see information About the Parts Master File.

GDS - VTC Payment Code Cross-References

Why:

The GDS/VTC payment code cross reference is used to maintain a cross reference between GDS and VTC payment codes.

Where:

From the Control Master File view, select **GDS/VTC Payment Code X-ref** to open the GDS/VTC Payment Code X-ref window.



*The Control Master
File view button.*

How to Add Edit & Delete GDS/VTC Payment Code Cross-References:

In the GDS/VTC Payment Code X-ref window new codes can be created and existing codes opened, viewed, amended or deleted.

The GDS/VTC Payment Code is maintained from the Control Master File view by selecting 'Payment Code'. Payment Code is assigned to operations and parts when adding them to parts and workshop orders. The VTC Payment Code is a two digit code used by VTC for similar categories to GDS.

Related Topics:

“[Payment Codes](#)” on page 107.

Gearbox Variants

Why:

This is a unique two character ID code used to allocate against gearbox variant type.

Where:

From the Control Master File view, select **Gearbox Variant** to open the Gearbox Variant Details window.



*The Control Master
File view button.*

How to Add Edit & Delete Gearbox Variant Codes:

In the Gearbox Variant Details window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

General Ledger Other

Why:

The General Ledger Other table is used by Fusion to ensure that the correct information is posted to the general ledger interface for Parts Freight, Parts Extra Costs, Discounts, Tax, Rounding Adjustments, Non-Productive Labour Costs, Workshop Claim Adjustments, Invoice Administration Charges and Used Vehicle Depreciation. General ledger codes for parts discount, workshop discount and sundry invoicing discount are defined in this table. However, codes for vehicle sales discount are defined in the General Ledger Sales option.



Note! This is not currently available in Fusion.

Where:

To be made available from the Control Master File view, via **General Ledger Other**.



*The Control Master
File view button.*

How to Setup the General Ledger Other Codes:



Note! This information is to be verified when available in Fusion.

Analysis Codes are set up in the format: xxxxxx 0 0 where xxxxxx is a code specific to the item to be analysed, 0 is the Department Code (if applicable) and 0 is the Product Code. Codes must be set up for each branch.

For used vehicle depreciation, codes are derived from the Vehicle Stock Type table.

For non-productive labour costs, codes are derived from the Non-Productive Codes table. Each code should be preceded by an 'X', for example XCLLEN.

For workshop claim amendments, codes are derived from the Adjustment Interface Codes table. The debit account for claim adjustments should be the

write-off account and the credit account the warranty debtors account. These accounts will be reversed automatically if the adjustment is for an overpayment.

The codes for all other items except parts and workshop discount are defined in the Fusion Parameter File.

Product code is obtained from the part for parts discount, from the vehicle for used vehicle depreciation, from the order header for claim adjustments or from the default parameter PRD 001 for all other types of postings.

Department code, if enabled, is obtained from the order header for parts and workshop orders. Vehicle admin department code comes from a default parameter FIN013. Department code for workshop claim adjustments and non-productive labour is obtained from a default parameter DEP001.

Parts and Workshop Discount:

The codes for parts and workshop discount are defined differently depending upon the level of discount analysis required. Front Counter Parts Discount:

Code Level	Code Format	Purpose / Description
3	PDISC	This is the lowest level of discount analysis and must be set up as a default. It will only be used if no higher level exists.
2	PD300	Where PD = Counter Parts, 3 = Payment Method & 00 = Payment Code.
1	A01300	Where A = Counter Parts, 01 = Account Code, 3 = Payment Method & 00 = Payment Code.

Workshop Parts Discount:

Code Level	Code Format	Purpose / Description
3	PDISCB	This is the lowest level of discount analysis and must be set up as a default. It will only be used if no higher level exists.
2	PDB300	Where PDB = Workshop Parts, 3 = Payment Method & 00 = Payment Code.
1	B01300	Where B = Counter Parts, 01 = Account Code, 3 = Payment Method & 00 = Payment Code

Workshop Labour Discount:

Code Level	Code Format	Purpose / Description
3	WDISC	This is the only level of discount analysis and must be set up as a default.

Related Topics:

- “[Account Codes](#)” on page 47.
- “[Department Codes](#)” on page 69.
- “[Payment Codes](#)” on page 107.
- “[Payment Method](#)” on page 108.
- “[Product Codes](#)” on page 114.
- “[Tax](#)” on page 128.

General Ledger Sales

Why:

Account strings are used by Fusion to ensure that the correct information is posted to the finance system from sales transactions.

The contents of this file can vary by market to cater for the nominal ledger layout of 3rd Party Suppliers.

 **Note!** Please ensure that this layout has been discussed, designed and set up in conjunction with your interface program provider and with Retail Systems VTC personnel.



*The Control Master
File view button.*

Where:

From the Control Master File view, select **General Ledger Sales**. This will open the General Ledger Sales window.

How to Setup the General Ledger Sales Table:

The screen displays existing Account Strings in summary format. The Branch Number is assumed automatically from the Branch Number entered through 'Branch Security' and is therefore not displayed.

The Account String is displayed in the format 3 P 00 01 0 (where 3 is the Customer Credit Type, P is the Department Origin, 00 is the Payment Code, 01 is the Account Code and 0 is the Product Code).

If the Department Code is used (Parameter 910 204 being enabled), this is also a component of the account string.

To create a new code XXXXXXXXXXXXXXXX then select the customer cash/credit code as set up on the 'Cash/Credit Code table.

Select Department Origin. This code must be P, B, W, S, T, L, or M.

Select the Payment Code, as set up on the "[Payment Codes](#)" on page 107.

Select the Account Code, as set up on the "[Account Codes](#)" on page 47.

Select the Department Code (if applicable), as set up on the "[Department Codes](#)" on page 69.

Select the Product Code, as set up on the "[Product Codes](#)" on page 114.

Input the Sales Debit account from the Nominal Ledger (up to 20 characters). This is normally a Sales Ledger control account in the case of external transactions, a warranty claims control account in the case of warranty, and an expense account or stock account in the case of internal transactions.

Input the Sales Credit account from the Nominal Ledger, e.g. parts external sales account. Input the Costs Debit account from the Nominal Ledger, e.g. parts external cost-of-sale account. Input the Costs Credit account from the Nominal Ledger, e.g. parts stock account.

For Department of Origin S (vehicle sales) only, enter the Costs Accrual Account from the Nominal Ledger. Finally, input the required description & click ok to add the record to file.

General Ledger Stock Adjustments

Why:

Parts stock adjustments and price updates can optionally be posted to the accounting interface file.

General Ledger Stock Adjustment codes are used for the analysis of parts price updates and stock adjustment transactions including goods receiving, interbranch transfers, stock adjustments and buy-back. Goods receiving freight costs, extra costs and environment costs can also be accounted for. Price update transactions may only be posted to the interface if the system is set up for replacement cost processing and NOT for average costing.

Before general ledger accounts can be set up for these adjustment types, a code must be added for each of them in the "[Parts Stock Adjustment Types](#)" on page 104.

Where:

From the Control Master File view, select **General Ledger Stock Adjustments**. This will open the General Ledger Stock Adjustments window.



*The Control Master
File view button.*

How to Setup the General Ledger Stock Adjustments Table:

In the General Ledger Stock Adjustments window new codes can be created and existing codes opened, viewed, amended as well as deleted.

Analysis codes are set up by branch in the format BB 0. BB is the transaction type code, and 0 is the Product Code of the part.

The Product Codes for freight cost, extra cost and environmental cost in goods receiving transactions are obtained from a parameter.

Each record is set up with a credit account number and debit account number from the general ledger which will be used to make a double-entry posting for the stock adjustment value on the general ledger interface. The parts stock account is entered as the Debit Account, except for Buy Back and Inter Branch Transfers Out, when it is entered as the Credit Account.

Related Topics:

["Parts Stock Adjustment Types"](#) on page 104.

The Accounting Interface.

General Number Series

Why:

This controls the number series used by Fusion for Purchase Proposals, Orders and Surcharge Number Quotations.

Where:

From the Control Master File view, select **General Number Series**. This will open the General Number Series window.



*The Control Master
File view button.*

How to Add Edit & Delete: General Number Series Codes:

In the General Number Series window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

- Creating a Parts Order.
- Creating a Purchase Proposal.
- Creating a Workshop Order.

General Task

Why:

General task descriptions are used in the Vehicle Order Planning function in order to save keying time when planning general tasks.

Where:

From the Control Master File view, select **General Task**. This will open the General Task window.



*The Control Master
File view button.*

How to Add Edit & Delete General Task Codes:

In the General Task window, new codes can be created and existing codes opened, amended and deleted. Enter a code and required description.

Related Topics:

- Creating Amending Vehicle Orders.
- Planning Overview.

Goods Tax Codes

Why:

Controls tax on goods; this is defined at part line level. The table works in conjunction with the “[Customer Tax Codes](#)” on page 63 & “[Tax](#)” on page 128, controls files.

Where:

From the Control Master File view, select **Goods Tax Codes**. This will open the Second Level VAT window.



*The Control Master
File view button.*

How to Add Edit & Delete Goods Tax Codes:

In the Second Level VAT window, new codes can be created and existing codes opened, amended and deleted. Enter a code and required description.

Hourly Rates

Why:

For each branch, different types of hourly rates (otherwise known as labour or charge out rates) can be created for each product code, including a description of the payment factor along with a start and expiry date and category code.

Where:

From the Control Master File view, select **Hourly Rates**. This will open the Hourly Rates window.



*The Control Master
File view button.*

How to Add Edit & Delete Hourly Rates Codes:

In the Hourly Rates window, new codes can be created and existing codes opened and viewed or amended as well as deleted.

A payment factor code of ‘99’ must be reserved for use with a blank hourly rate. Payment factor 99 can then be set up with a specific hourly rate in the vehicle and/or customer files to overwrite payment factors from VST/TST on order lines.

The category code is the sale type that’s attached to each hourly rate and is used for reporting functions throughout Fusion.

Related Topics:

See the ‘Parts & Workshop Orders’ chapter.

Icms Code

Why:

This is a type of tax unique to the Brazilian market.

Where:

From the Control Master File view, select **Icms Code**. This will open the Icms Code window.



*The Control Master
File view button.*

How to Add Edit & Delete Icms Codes:

In the Icms Code window, new codes can be created and existing codes opened and viewed, amended as well as deleted.

Importer Payment Codes

Why:

This option is used to maintain payment due codes used in the calculation of vehicle adoption dates.

Where:

From the Control Master File view, select **Importer Payment**. This will display the Importer Payment Code window.



*The Control Master
File view button.*

How to Add Edit & Delete Importer Payment Codes:

In the Importer Payment Code window, new codes can be created and existing codes opened and viewed, amended as well as deleted. The Payment Due Days is the number of days after the actual receipt date that the payment becomes due.

Internal Transactions on External Workshop Orders

Why:

The only circumstance in which internal payment codes may be used on an order for an external customer, is on a workshop order.

For example, an external order might contain labour and parts that are to be invoiced out to the customer, plus labour and parts that are to be charged to an internal expense account.

Where:

From the Control Master File view, select **General Ledger Sales**. This will display the General Ledger window.



*The Control Master
File view button.*

How to Setup Internal Transactions on External Workshop Orders:

The system would normally require separate account strings to be set up to cater for both the external and the internal work. For example:

01 3 W 00 01 0 for the external labour and **01 3 B 00 01 0** for the external parts.

01 3 W 31 01 0 for the internal labour and **01 3 B 31 01 0** for the internal parts.

However, it is very likely that the nominal accounts attached to the **01 3 W 31** and **01 3 B 31** strings would be identical to those set up for **01 1 W 31** and **01 1 B 31**.

With this in mind, parameter 910 205 allows you to redirect internal transactions on external orders to the appropriate internal analysis codes automatically. This means that strings for external customer types, such as 01 3 W 31, 01 0 W 31 and 01 2 W 31 is present.

From the Parameter Maintenance window, locate parameter 910 205.

To activate this facility, set Fusion parameter 310 205 to point to a default Cash/Credit code for internal transactions on external workshop orders (e.g. set it to 1). To disable this parameter, the value *NONE is entered.

Related Topics:

The Accounting Interface.

Inventory – Product Code Cross-References

Why:

Because the Volvo Price File does not always hold the inventory value code, this table is used to populate that field in the THF101 file.

(The basis of this is on new parts being N50 and N70 records.)

Where:

From the Control Master File view, select Inventory/Product Code X-Ref. This will display the Maintain Inventory to Product Code X-Ref window.



*The Control Master
File view button.*

How to Add Edit & Delete Inventory – Product Code Cross-References:

In the Maintain Inventory to Product Code X-Ref window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

[“Product Group – Inventory Cross-References”](#) on page 115.

Invoice Charge Code

Why:

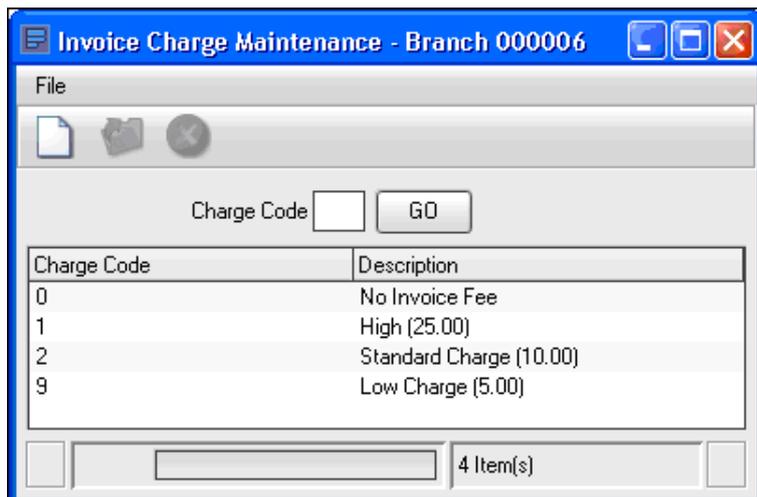
This code enables you to create various levels of invoice charge for each customer type. The code is then used against each customer within the Customer File and applies the invoice charge amount to a parts order, workshop order or quotation raised for the customer.

Where:

From the Control Master File view, select Invoice Charge Code. This will display the Invoice Charge window.



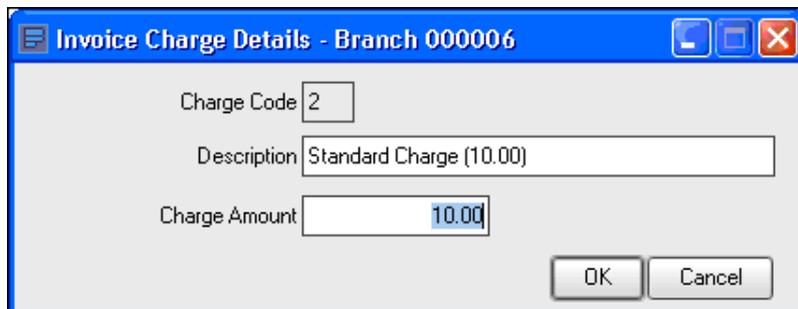
*The Control Master
File view button.*



Charge Code	Description
0	No Invoice Fee
1	High (25.00)
2	Standard Charge (10.00)
9	Low Charge (5.00)

How to Add Edit & Delete Invoice Charge Codes:

In the Invoice Charge window, new codes can be created and existing codes opened, viewed, amended as well as deleted. Each charge code is given a description and charge amount.



Invoice Charge Details - Branch 000006

Charge Code

Description

Charge Amount

OK Cancel

Setup:

Invoice Charge functionality is controlled by parameter IFC001. If IFC001 is positive then an invoice charge may be automatically applied to parts orders, workshop orders and quotations.

What else would you like to do?

The codes have an affect on many areas of fusion, for more information about this and the parameters, see Invoices & Credits – Invoice Administration Charge.

Lost Sales Reason Codes

Why:

Lost Sales Reason Codes are used when lost sales are recorded to indicate the reason why the sale was lost.

Where:

From the Control Master File view, select **Lost Sales Reason**. This will display the Lost Sales Reason window.



*The Control Master
File view button.*

How to Add Edit & Delete Lost Sales Reason Codes:

In the Lost Sales Reason window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

Parts Daily Sales Enquiry.

Mack Variant Cross-Reference Table

Why:

A new control file 'Mack variants' is used to update the engine variant in the Vehicle file based on a new table which will hold Product code, Horsepower, Engine Type and Engine Manufacturer, this will then cross reference to a 'TV2' engine variant code held in the variant file.

This is required because the HAX variant family is not supported for Product Class 28 (Mack) vehicles in 3P.

Where:

From the Control Master File view, select **Mack Variants**. This will display the Mack Variants window.



*The Control Master
File view button.*

How to Setup Mack Variant Cross-References:

In the Mack table window, enter the relevant Product code, Horsepower, Engine Type and Engine Manufacturer and select the Engine Variant (which must be set up first) in order to cross reference against.

Related Topics:

["Engine Variant"](#) on page 74.

Main Activity Code

Why:

Main Activity Codes are used in the Customer File to describe the main area of business in which a customer operates.

Where:

From the Control Master File view, select **Main Activity**. This will display the Main Activity window.



*The Control Master
File view button.*

How to Add Edit & Delete Main Activity Codes:

In the Main Activity window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

See information About the Customer Master File.

Marketing Code Maintenance

Why:

Marketing Codes can be assigned to parts within Fusion in order to help with categorising and analysis purposes. For Volvo parts the default marketing code will be derived from the Volvo part file, however local values can be assigned.

Where:

From the Control Master File view, select **Marketing Codes**. This will display the Marketing Codes Maintenance panel showing a list of existing marketing codes.



*The Control Master
File view button.*

How to Add Edit & Delete Marketing Codes:

In the Marketing Code panel, new marketing codes can be created and existing codes can be opened, viewed, and amended, as well as deleted.

To create a new code, select File > New or click on the 'new file' icon on the toolbar. This will open the Marketing Codes Detail panel with input fields available for you to create your new code.

The fields available to you within this panel are: marketing code (this is a 2 character alphanumeric field) and description for you to give a brief narrative describing the function of this code. The marketing code field is mandatory and also has to be unique – there cannot be any duplicate entries for the same marketing code.

Material Instruction Code

Why:

Warranty Material Instruction codes are used to create and record instruction codes used when dealing with warranty credit notes. The message entered in the description will be shown as a code when the importer responds to the dealer to provide information about what to do with warranty parts. For example, Material Instruction Code = 'H', description = 'hold parts for inspection'.

Where:

From the Control Master File view, select **Material Instruction**. This will display the Material Instruction window.



*The Control Master
File view button.*

How to Add Edit & Delete Material Instruction Codes:

In the Material Instruction window new codes can be created and existing codes opened, viewed, amended or deleted.

To create a Warranty Material Instruction code, enter a code, an abbreviation given to the description of the instruction by the importer (e.g. 'H') and then enter a description. This is the message instructing of how to deal with the parts (e.g. 'hold parts for inspection'). The codes entered should mirror the setup in TWS.

Mechanic Authority Code

Why:

Mechanic authority codes are used in conjunction with the planning board when assigning work. Fusion checks these codes before checking the skill groups set up within The Mechanic Master File, to determine if a mechanic has a special qualification/certificate to carry out the type of work required. The mechanic authority codes link to the appropriate TST group. For example, if a mechanic must qualify before he is allowed to carry out tachograph calibrations, then he can be registered along with the appropriate authorisation code.

Where:

From the Control Master File view, select **Mechanic Authority Code**. This will display the Mechanic Authority Code window.



*The Control Master
File view button.*

How to Add Edit & Delete Mechanic Authority Codes:

In the Mechanic Authority Code window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

Planning.

[Skill Groups](#).

The Mechanic Master File.

Minor Variance

Why:

Minor variance is an amount set at branch level which is used by Fusion when reconciling credits against claims. Credits must fall within this variance amount, either plus or minus, to be automatically accepted by the system.

Where:

From the Control Master File view, select **Claim Variance**. This will display the Claim Variance Details window.



*The Control Master
File view button.*

How to Add Edit & Delete Claim Variances:

The Claim Variance Details window lists the material variance limit by branch. From here, claim variance details can be created and existing details can be opened, viewed, amended or deleted.

What else would you like to do?

Extracting Credits from the Data Bank.

Related Topics:

See the information About Claims.

MMC Defect Code

Why:

MMC defect codes are used against Mitsubishi products in the claim handling routine to indicate why a part has failed.

Where:

From the Control Master File view, select **MMC Defect**. This will display the MMC Defect Details window.



*The Control Master
File view button.*

How to Add Edit & Delete MMC Defect Codes:

In the MMC Defect Details window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

See information About Claims.

Name Identity Code

Why:

Fusion requires each person using the system to have a unique identity code. Users are required to input their I.D code when performing various tasks, for example; creating orders and making stock adjustments.

Where:

From the Control Master File view, select **Name Identity**. This will display the Name Identity table.



*The Control Master
File view button.*

How to Add Edit & Delete Name Identity Codes:

In the Name Identity Table window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

To create a new code select File > New. This will display a Name Identity Details window. The category code controls what details can be amended within the visit system - please note that the category code doesn't restrict the user from any departments.

User ID is a mandatory field if the category is Aftermarket, Parts, Service or All Departments. Default employee code 'XXX' must exist in the table if you generate e-mail alerts from the Vehicle Administration system. In this case the user ID should be set to the GDS Daily Batch user ID.

Non-External Parts Pricing

Why:

Non-external parts pricing is a pricing structure for all sales that are not external retail sales.

Where:

From the Control Master File view, select **Non-External Parts Pricing**. This will display the Non-External Parts Pricing table.



*The Control Master
File view button.*

How to Add Edit & Delete Name Identity Codes:

In the Non-External Parts Pricing Table window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

To create a new code select File > New. This will display a Non-External Parts Pricing Details window. The '+/- Ind' field indicates whether the value in the 'Discount %' field is to be added to or deducted from the sale. The 'Price to Use' indicates which price the discount should be applied to.

Related Topics:

Parts Pricing.

Non-Productive Code

Why:

Non-productive codes are used when a productive person isn't involved in productive work or is absent from the workplace. The codes are referenced by the time recording system.

Where:

From the Control Master File view, select **Non-Productive**. This will display the Non-Productive window.



*The Control Master
File view button.*

How to Add Edit & Delete Non-Productive Codes:

In the Non-Productive window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

To create a new code select File > New. This will display a Non-Productive Details window. The 'Productive Availability' field indicates whether the person is available for work or not (1 represents not available). This code is taken into account when Fusion calculates mechanic utilisation. The category selected for the non-productive code indicates whether the code should be paid or unpaid.



Note! Some codes are directly related to parameters so care is required when creating and maintaining non-productive codes.

Related Topics:

Non-Productive Batch Enquiry.

Time Recording Rules.

Number Ranges

Why:

Number Ranges must be set up for every document or posting type in Fusion that requires a sequentially allocated number.

Where:

From the Control Master File view, select **Number Ranges**. This will display the Number Ranges window.



*The Control Master
File view button.*

How to Add Edit & Delete Number Ranges:

In the Number Ranges window, new codes can be created, amended, viewed or deleted.

To create a new number range input the required Branch and Type. Type codes are defined in the Branch Values table. Click on validate, then enter the from and to numbers to define the start and end of the range. Input the last used number to determine where in that range you wish to start.



Note! For Order and Invoice number ranges Fusion will validate that there are no overlapping numbers.

Related Topics:

“[Branch Maintenance](#)” on page 52.

Operation Environmental Tax

Why:

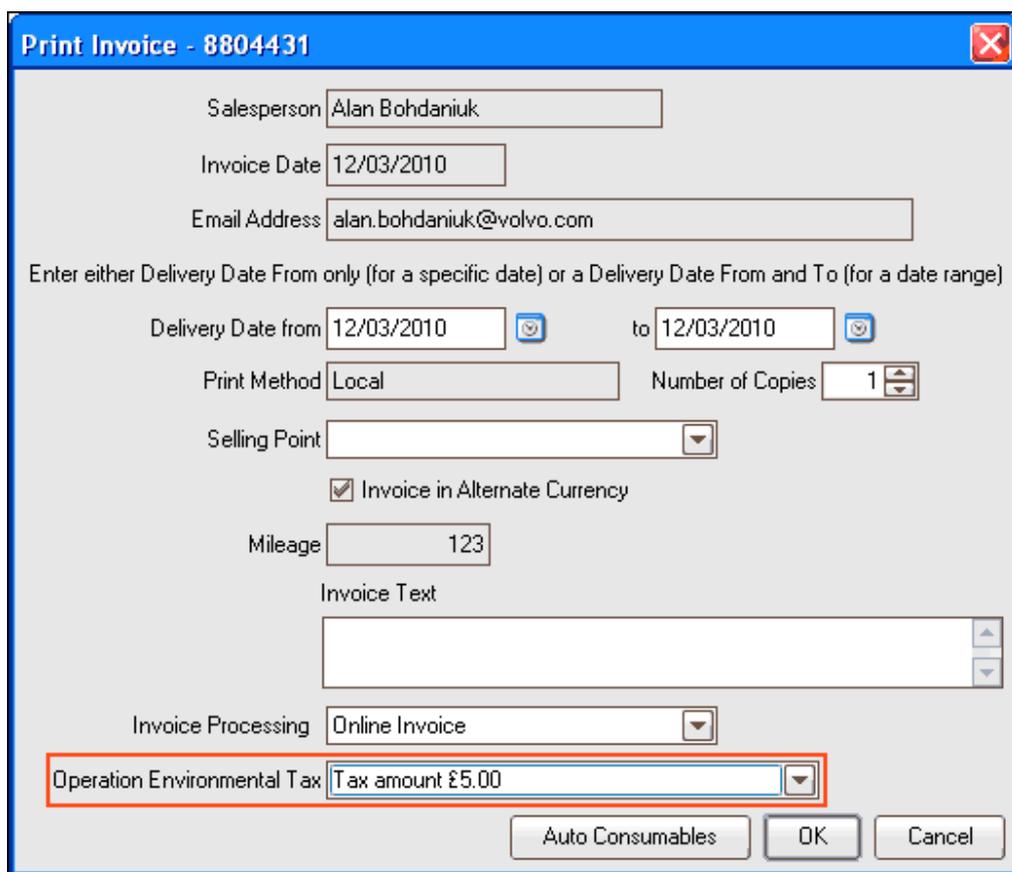
The current process of adding environmental tax against a part remains the same. However, when setup in the system, environmental tax can be added to an 'external' workshop order as a fixed amount at point of invoice.

Where:



The Control Master
File view button.

From the Control Master File view, select **Operation Environment Tax**. This will display the Operation Environment Tax window where the file can be setup. From the Workshop Order View, open the order that you would like to invoice and then select **Order** from the menu bar followed by **Print > Proforma or Invoice**. The Operation Environment Tax field will then be available as shown:



Print Invoice - 8804431

Salesperson: Alan Bohdaniuk

Invoice Date: 12/03/2010

Email Address: alan.bohdaniuk@volvo.com

Enter either Delivery Date From only (for a specific date) or a Delivery Date From and To (for a date range)

Delivery Date from: 12/03/2010 to: 12/03/2010

Print Method: Local Number of Copies: 1

Selling Point: [Dropdown]

Invoice in Alternate Currency

Mileage: 123

Invoice Text: [Text Area]

Invoice Processing: Online Invoice

Operation Environmental Tax: Tax amount £5.00

Buttons: Auto Consumables, OK, Cancel

Operation Environmental Tax is only visible if:

- 1 - Parameter ETX004 = POS
- 2 - Any order lines in THF310 or THF311 match parameter VAL016 (External)

If the above are both valid then the first sequence number in the control file will be the default in the drop down list box, then the drop down list box will display descriptions in sequence order from this control file. Blank will also be a valid selection meaning no charge.

Operation number (parameter ETX005), description and amount based on the sequence number selected will be added to Proforma/Invoice/ credit (as the last line) based on details defined in this Control file. Account code and Tax code will come from THF025.

If an invoiced order is copied then environmental tax line will be removed from THF311, (check parameter ETX005) as it will be re-applied based on new selection at point of invoice.

If ETX004 is NEG then NO processing will take place and no drop down list will be displayed on Proforma or Print Invoice screen

If ETX004 = POS but no lines match VAL016 (i.e. all lines are internal or claim lines) then no Environmental tax drop down list box will be displayed.

 **Note!** Where an Order is split the environmental tax amount will be applied to each Customers invoice.

What else would you like to do?

Invoicing a Workshop Order

Quotations

Related Topics:

Invoices & Credits

Setup:

Create a new 'Other' local VST for environmental tax.

New Security ID 687 will need to be active to access Control file
Create the required operation environmental tax records (file THF698) as required with a description and amount.

 **Note!** Lowest sequence number will be the default in the Quotation/Proforma and Invoice print dialog box.

Parameters:

Set parameter ETX004 to POS if environmental tax is to be added to a workshop order for external sales.

Add Local operation created to parameter ETX005

Order Flow Codes

Why:

Order flow codes represent the different stages of a vehicle under repair as it passes through the workshop. They are used to monitor the progress of a vehicle and enable you to see the exact stage of completion of the vehicle in the order entry routine.

Where:

From the Control Master File view, select **Order Flow**. This will display the Order Flow window.



*The Control Master
File view button.*

How to Add Edit & Delete Order Flow Codes:

In the Order Flow window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

See the 'Parts & Workshop Orders' chapter.

Order Point Codes

Why:

This table is referenced when calculating the amount of stock to be re-ordered when creating a purchase proposal.

Where:

From the Control Master File view, select **Order Point**. This will display the Order Point window.



*The Control Master
File view button.*

How to Add Edit & Delete Order Point Codes:

In the Order Point window, new codes can be created and existing codes opened, viewed, amended as well as deleted. To create a new code, select File > New. This will display an Order Point Details window. The product groups are set up in the Product Group option of the Control Files window.

The value input into the 'Order Point (weeks)' field indicates the number of weeks used for calculating when a purchase proposal should be created. The 'From' and 'To' fields indicate the maximum and minimum cost price.

Related Topics:

[“Product Groups”](#) on page 116.

Order Status Codes

Why:

Order status codes are used to indicate the status of a parts or workshop order, from the point of being opened to being completed/invoiced.

The codes themselves are standard GDS Fusion codes and only the description may be changed.

Where:

From the Control Master File view, select **Order Status**. This will display the Order Status window.



*The Control Master
File view button.*

How to Add Edit & Delete Order Status Codes:

In the Order Status window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

See the 'Parts & Workshop Orders' chapter.

Origin of Goods Codes

Why:

The origin of goods code indicates where parts have originated from. They are used in the Purchase tab of the Parts Master File.

Where:

From the Control Master File view, select **Origin of Goods**. This will display the Origin of Goods window.



*The Control Master
File view button.*

How to Add Edit & Delete Origin of Goods Codes:

In the Origin of Goods window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

See information About the Parts Master File.

Part Discount Codes

Why:

Part discount codes are combinations of product and discount codes and are used in conjunction with the discount matrix.

Where:

From the Control Master File view, select **Part Discount Code**. This will display the Part Discount Code window.



*The Control Master
File view button.*

How to Add Edit & Delete Part Discount Codes:

In the Part Discount Details window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

Creating a Parts Order.

Part Fitted Codes

Why:

Used to create and record fitted codes. When making a part warranty claim you must inform the importer.

Where:

From the Control Master File view, select **Part Fitted**. This will display the Part Fitted window.



*The Control Master
File view button.*

How to Add Edit & Delete Part Fitted Codes:

In the Part Fitted window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Parts Message Line

Why:

The parts message line appears on all parts advice notes and invoices depending on customer and general parameter settings.

Where:

From the Control Master File view, select **Part Message Line**. This will display the Branch window.



*The Control Master
File view button.*

How to Add Edit & Delete Part Message Line Texts:

The Branch window displays the current parts message line. Track me 1501 has been raised to have this error fixed allowing text to be edited.

Parts Stock Adjustment Types

Why:

Adjustment type codes are used in the General Ledger Stock Adjustments table to set up nominal codes for the analysis of parts price updates and stock adjustment transactions including goods receiving, inter branch transfers, stock take adjustments and buy back.

Where:

From the Control Master File view, select **Parts Stock Adjustment Type**. This will display the Parts Stock Adjustment Types window.



*The Control Master
File view button.*

How to Add Edit & Delete Parts Stock Adjustment Types:

In the Parts Stock Adjustment Types window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

[“General Ledger Stock Adjustments”](#) on page 84.

Parts User ID

Why:

Every user of Fusion should have a user ID set up with the correct restrictions as to their access and privilege. A user’s authority may be restricted in various ways, including:

- Limits as to the amount of discount that the user can issue at point of sale for both Parts and Labour.
- Limiting users access when changing costs within the Parts Master File.
- Default department enabling limited access on department code.
- Limiting users ability when deleting parts from the Parts Master File.
- Limiting users ability when removing parts from orders.
- Set a Default charge code for labour pricing (based on parameter PRC006).

Where:

From the Control Master File view, select **Parts User ID**. This will display the Parts User ID window.



*The Control Master
File view button.*

How to Add Edit & Delete Parts User ID Codes:

In the Parts User ID Details window, new codes can be created and existing codes opened and viewed or amended as well as deleted.

To create a new record select File > New. This will display the Part User ID window. The 'Parts Discount Allowed' field indicates how much discount the user is allowed to give at line level.

The 'Change Cost Prices' field is used to limit the users ability when changing costs in The Parts Master File:

Value 0 - will allow NO update of costs.

Value 1 - will allow update of Stock and Daily Costs fields only.

Value 2 - will allow update of Average Cost Field only.

Value 3 - will allow update to ALL Cost fields.

A default department can also be input which will be displayed by default as the department in the workshop order window when this user creates an order, however care should be taken with this!

If the 'Delete Parts' checkbox is checked, then the user is allowed to delete parts from The Parts Master File (for example through the delete inactive parts function).

The value in the 'Remove Parts from Orders' field indicates whether the user can delete parts from orders:

Not Authorised - This setting will result in the following message being displayed when the user attempts to remove a part from an order: "You do not have the authority to remove parts from an order. Request denied."

Requires 4 digit PIN - This setting will result in the following message being displayed when the user attempts to remove a part from an order: "In order to remove parts from an order or cancel an order containing confirmed parts, you must hold sufficient authority to do so. Enter your PIN . . ." If this level of authority is required, a 4 digit PIN number must be input in the 'Removal Pin' field. This pin number must then be input by the user when deleting a part from an order.

Fully Authorised - This setting allows the user unrestricted parts deletion.

Related Topics:

Creating a Parts Order.

Deleting Parts from the Parts Master File.

Parts Warranty Codes

Why:

These are used to create and record warranty type codes. These codes are used when submitting a warranty claim to the importer to identify what type of warranty is being claimed for. Used in claim validation.

Where:

From the Control Master File view, select **Parts Warranty**. This will display the Warranty Code window.



*The Control Master
File view button.*

How to Add Edit & Delete Parts Warranty Codes:

In the Warranty Code window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Payment Category Codes

Why:

Payment categories exist for the different types of productive time, enabling reporting functions to operate correctly.

Where:

From the Control Master File view, select **Payment Category**. This will display the Payment Category window.



*The Control Master
File view button.*

How to Add Edit & Delete Payment Category Codes:

In the Payment Category window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

To create a new payment category select File > New. This will display a Payment Category Details window. The rate indicates the actual percentage rate of pay the productive person will receive if allocated this code. For example 100 represents 100%, 150 represents one and a half times the basic rate of pay.

If payroll maintenance is active a 'Payroll Source' field is displayed, allowing the payment category to be cross referenced to a payroll source code.

Related Topics:

[“Payroll Source Codes”](#) on page 110.

Payment Codes

Why:

An invoice can consist of several lines each going to different payment destinations. The payment code defines who will be paying for each line on an invoice.

A number of restrictions apply. A workshop invoice for an external customer may contain a mix of payment codes, but on a parts invoice only external payment codes should be included. An invoice for an internal customer should never include any external payment codes under any circumstances.

To prevent an incorrect mix of payment codes, ensure that invalid combinations are not set up on the General Ledger Sales table. Anyone then attempting to use an invalid combination in order handling will receive a validation error.

In Fusion order handling routines, payment code either defaults to 00 - External (parts and workshop) or a pre-defined default value (vehicle sales and sundry invoicing).

If required, you can set up a specific payment code default for internal customers in the option Customer Default Payment Codes (from the Fusion Control File menu). This customer-specific payment code will be used in parts and workshop order handling routines.

Where:

From the Control Master File view, select **Payment Code**. This will display the Payment Code window.



*The Control Master
File view button.*

How to Add Edit & Delete Payment Codes:

In the Payment Code window, new codes can be created and existing codes opened and viewed or amended as well as deleted. Standard codes used listed below.

Payment Code	Purpose / Description
00	External Credit
81	Volvo Contract Maintenance
91	Warranty

Other codes may be set up in addition to the standard codes. Right-Click on Payment codes and select the Alternative Payment Code Option to link alternative payment codes to this payment code.

Related Topics:

[“General Ledger Other”](#) on page 81.

[“General Ledger Sales”](#) on page 83.

[“Alternative Payment Codes”](#) on page 51.

[“Alternative Payment Code Descriptions”](#) on page 51.

Payment Method

Why:

The Payment Method option is where the customer credit types are set up. Each customer in the Fusion Customer Master File has one of these codes attached to it to enable the system to split reporting by different types.

- 0 = External Cash Customer
- 1 = Internal Customer
- 2 = Local Group Customer
- 3 = External Credit Customer

Where:

From the Control Master File view, select **Payment Method**. This will display the Payment Method window.



*The Control Master
File view button.*

How to Add Edit & Delete Payment Method Codes:

In the Payment Method window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

The Accounting Interface.

Payment Terms

Why:

A payment terms code is registered on every invoice and enables the system to calculate the due date for the invoice to be paid. In the Customer File it is possible to allocate a default payment terms code to each customer.

Where:

From the Control Master File view, select **Payment Terms**. This will display the Payment Terms window.



*The Control Master
File view button.*

How to Add Edit & Delete Payment Terms Codes:

In the Payment Terms window, new codes can be created and existing codes opened, viewed, amended and deleted.

To create a new code select File > New. This will display a Payment Terms Details window. The date flag is either a '1' to represent the document date or '2' to represent the period date.

For example, if payment code 123 is set up with a 'Days to Due Date' of 30 and a date flag of 1, the due date will be calculated as being the document (invoice) date plus 30 days.

The display of the Payment Terms field and the printing of due dates on invoices are controlled by parameters.

The remaining entries apply to flexible payment terms functionality, which is used in some markets and is controlled by parameter FPT 001. A customer may arrange to pay a percentage of an invoice in cash and defer the remainder for an agreed number of days. The dealer may recover his interest charges by uplifting parts and service prices using the uplift percentages specified here (Parts Uplift %, Service Uplift % and Promotion Parts Uplift %).

The credit limit flag determines if the customer credit limit is checked before applying uplift changes.

Related Topics:

The Accounting Interface.

Set Up:

The display of the Payment Terms field and the printing of due dates on invoices is enabled/disabled by Fusion parameters DPT 001.

Payroll Source Codes

Why:

As payroll systems will inevitably use different codes to Fusion, alternative codes can be registered in Fusion and cross referenced to payment categories. These are then both transmitted on the payroll Excel spread sheet.

These codes are used in the payroll maintenance function and only codes flagged as 'No' can be added, any discrepancy for codes relating to hours must be corrected in the manual time recording routine.

Where:

From the Control Master File view, select **Payroll Source Codes**. This will display the Payroll Source window.



*The Control Master
File view button.*

How to Add Edit & Delete Payroll Source Codes:

In the Payroll Source window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

The 'Hour Indicator' checkbox should be checked for those source codes which reference hours for which there's a Fusion payment category.

Related Topics:

Manual Time Recording.

Payroll Maintenance.

Price Uplift Maintenance

Why:

The setting up of this table allows an uplift factor to be applied to the local retail price at order line level. There is no change to the retail price on the parts master.

The system adds the calculated percentage to the local retail value before it adds the line to the order.

Where:



The Control Master File view button.

From the Control Master File view, select **Price Uplift**. This will display the Price Uplift Maintenance window.

How to Maintain Price Uplift Information:

The following screenshot and texts describe the functionality of this table.

Product Code	Parts Discount C.	Product Group	Marketing Code	Uplift Factor 1	Uplift Factor 2	Uplift Factor 3	Uplift Factor 4	Uplift Factor 5
				0.00	0.00	0.00	0.00	0.00
VOLVO				10.00	0.00	0.00	0.00	0.00
VOLVO	03 0 LEYLAND ...	042 VTC DRVLI...		25.00	40.00	61.00	80.00	100.00
VOLVO	03 0 LEYLAND ...	042 VTC DRVLI... 2A test		25.00	40.00	65.00	80.00	100.00
VOLVO	03 0 LEYLAND ...	042 VTC DRVLI... 4A test		1.00	2.00	3.00	4.00	5.00
VOLVO	03 0 LEYLAND ...	045 VTC ACCESS		2.00	2.00	2.00	2.00	2.00
VOLVO	04 LEYLAND T...	044 VTC XCHA...		10.00	20.00	30.00	40.00	50.00
VOLVO	05 Non-Volvo P...	042 VTC DRVLI...		10.00	20.00	30.00	40.00	50.00
VOLVO	06 Local Brake ...	044 VTC XCHA... 99 test		0.00	0.00	0.00	0.00	0.00
VOLVO	06 Local Brake ...	046 VTC AUDIO 2A test		11.00	11.00	11.00	11.00	11.00
VOLVO BUS test	05 Non-Volvo P...	V/BUS - ACCESS		2.00	2.00	2.00	2.00	2.00
VOLVO BUS test	05 Non-Volvo P...	V/BUS - ACCESS B6 test		0.00	0.00	0.00	0.00	0.00
VOLKSWAGON	Test	BICYCLES		10.00	20.00	30.00	40.00	50.00

- Matrix Element Selection - Here users will select the combination of matrix elements with which they wish to work. If no selection is made the list (in section 6) will include the whole uplift matrix. If a selection is made and the FIND button selected, the list (in section 6) will show only the uplifts below the selection.
- The uplift values found for the given selection. These values may have been manually created as a group level uplift, or may exist as a result of being a subordinate to a group, or may be a manually created exception to a group. Values may be entered here to add or amend uplift levels. To delete an uplift, the check box should be selected. If the user chooses to delete the uplift, they also have the option to delete any exceptions if that uplift is a group uplift. If the user chooses to delete exceptions, and no exceptions exist, an error message should be displayed. The default option for both check

boxes will be to not delete. Confirmation pop-up messages will be displayed for the delete actions, the text will depend on the combination of check boxes selected. If only the current uplift is selected for deletion, message "Delete Uplift" Y/N is displayed. If No is selected exceptions will not be deleted. If only the exceptions are selected for deletion, message "delete exceptions" is displayed. This will delete all exceptions to this group". If both delete boxes are selected, message "Delete group and exception" is displayed. If a selection is made within the matrix.

7. Text is displayed if the uplift currently displayed is a group level uplift, or an exception or both. The definitions are:
Group: An uplift that can have lower level uplifts. The uplift defined applies to any lower level combination unless an exception exists for a lower level combination.
Exception: An uplift below a group uplift that is different to the group uplift.
Both: An uplift that can have lower level uplifts, but which is also an exception to a higher level group uplift.
8. Where the selection represents a group level uplift, messages should be displayed to indicate the number of subordinate exceptions to this group.
9. This area lists all exceptions subordinate to the selected level. To amend a line either double click of select RMK and open. The uplift values will populate the fields at the bottom of the screen (section 7) , amend uplift values using tab and/or cursor keys. To delete a line highlight it and select the delete icon, alternatively select RMK then delete. Confirmation window is displayed to delete row yes/no. Fields displaying codes in this area will show text when hovered-over.
10. It should also be possible to add new uplifts by adding to the matrix directly, at the end of the list. Depending on the selection made in section 1, appropriate uplift criteria will be available in drop-down lists, and the user can enter uplift percentage values. By selecting the Update check box, a new 'blank' line will be made available for further entries to be added.

From order entry, if the customer has a classification code assigned to it which in turn has a price uplift flag attached to it, any parts sold where the product code, product group. Discount code, marketing code combination are registered in the price uplift control table, will have their prices uplifted by the specified percentage.

The implementation of the uplift factor is based on the following:

- The product code, Product Group, discount code and marketing code.
- The classification code attached to the customer.
- The uplift flags 1 to 5 and the percentage amount.

If Parameter CCO001 is positive, then the "Uplift Flag" on the customer classification codes control file option will be visible. This field can have values of blank (for no uplift) or values of 1 to 5 for uplift factors relating to those setup in the Price Uplift control table.

You can assign a classification code to a specific customer through customer file maintenance on the customer workbench.

To set up the percentages for the uplift, use the Price Uplift control table. Here, you can set up percentages for all combinations of product code, product group, discount code and marketing code. You can set up five different uplift factors for each combination.

Related Topics:

[“Customer Classification Codes”](#) on page 61.

For Customer maintenance information, see About the Customer Master File.

Product Codes

Why:

It is possible to separate sales by product code. These codes must follow the Volvo specified codes for each market.

Where:

From the Control Master File view, select **Product Code**. This will display the Product Code window.



*The Control Master
File view button.*

How to Add Edit & Delete Product Codes:

In the Product Code window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

The 'Product Code Group' allows the product code to be attached to the prospecting system in the form of a product group.

Standard Product Codes are listed below.

Product Code	Purpose / Description
0	Volvo Truck
2	Volvo Bus
4	Trailer
8	Non-Volvo Bus
9	Non-Volvo Truck

Related Topics:

The Accounting Interface.

The Parts Master File.

The Vehicle Master File.

Complementary Business.

Product Code Groups

Why:

Product groups are created to identify the different application areas for parts for each Manufacturer / Supplier and are used in after sales analysis.

Where:

From the Control Master File view, select **Product Code Group**. This will display the Product Code Group window.



*The Control Master
File view button.*

How to Add Edit & Delete Product Code Groups:

In the Product Code Group window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

[“Product Codes”](#) on page 114.

Product Group – Inventory Cross-References

Why:

This table defines which inventory code should be used for new parts delivered via DSP. The inventory code is then used to define which parameter defaults should be used for new parts.

Where:

From the Control Master File view, select Product Group/Inventory X-Ref. This will display the Product Group/Inventory X-Ref window.



*The Control Master
File view button.*

How to Create Product Group/Inventory Cross-References:

In the Product Group/Inventory X-Ref window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

The priority must be set so that exceptions are registered at a higher level. For example, if all product groups in range 60 to 69 are inventory code 0, but product group 65 needs to be code 3, then this line **must** be placed at a higher priority level. If it's not, then the rule 60 to 69 will set product group 65 at inventory Code 0. The inventory code can be anything you want it to be.

Related Topics:

[“Inventory – Product Code Cross-References”](#) on page 89.

Product Groups

Why:

The product group assigned to a part indicates a generic classification of the part, for example oils, tyres, accessories etc.

Where:

From the Control Master File view, select **Product Groups**. This will display the Product Groups window.



*The Control Master
File view button.*

How to Add Edit & Delete Product Groups:

In the Product Group/Inventory X-Ref window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

See About the Parts Master File.

Purchase Order Text

Why:

Purchase order text is quoted on all documents/confirmations mailed to alternative suppliers. Suppliers are split between parts and workshop (or both) and the text can be branch and/or department specific.

Where:

From the Control Master File view, select **Purchase Order Text**. This will display the Purchase Order Text window.



*The Control Master
File view button.*

How to Add Edit & Delete Purchase Order Texts:

In the Purchase Order Text window, select the supplier type and click OK. This will display a Purchase Order Text Lines window where 'Order Message' and 'Terms & Conditions' text is displayed. This text can be amended or deleted as required.

Related Topics:

Creating a Purchase Proposal.

Maintaining a Purchase Proposal.

Rear Axle Variant

Why:

Rear axle variant codes indicate the exact type of rear axle fitted to a truck. This table holds the variant description for each code.

Where:

From the Control Master File view, select **Rear Axle Variant**. This will display the Rear Axle Variant Details window.



*The Control Master
File view button.*

How to Add Edit & Delete Rear Axle Variants:

In the Rear Axle Variant Details window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

See the 'Parts & Workshop Orders' chapter.

See information About the Vehicle Master File.

Repair Code Table

Why:

A new control file 'Repair Code' allows a repair code to be set up, which when cross referenced with Payment Code and Visit Reason automatically allows the reporting of costs per vehicle and customer.

Where:

From the Control Master File view, select **Repair Code**. This will display the Repair Code Maintenance window.



*The Control Master
File view button.*

How to Add Edit & Delete Repair Codes:

In the Repair Code Maintenance window, new codes and descriptions can be created and existing codes opened, viewed, amended or deleted. Each code can be flagged to be included in the cost calculation and the report.

Related Topics:

["Repair Visit Codes"](#) on page 118.

["Repair Code Cross-Reference Table"](#) on page 118.

Repair Code Report.

Repair Code Cross-Reference Table

Why:

A new control file 'Repair Code X Ref table' allows Repair Codes to be X referred to Payment codes and Visit codes in order to automatically report on costs per vehicle or customer.

Where:

From the Control Master File view, select **Repair Code X Reference table**. This will display the Repair Code X Reference window.



*The Control Master
File view button.*

How to Add Edit & Delete Repair Code Cross-References:

In the Repair Code X Reference new Cross-Reference codes can be created and existing codes opened, viewed, amended or deleted.

Related Topics:

[“Repair Code Table”](#) on page 117.

[“Payment Codes”](#) on page 107.

[“Repair Visit Codes”](#) on page 118.

Repair Visit Codes

Why:

Repair visit codes indicate why a vehicle has been into the workshop.

Where:

From the Control Master File view, select **Repair Visit**. This will display the Repair Visit window.



*The Control Master
File view button.*

How to Add Edit & Delete Repair Visit Codes:

In the Repair Visit window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

See 'The Parts & Workshop Orders' Chapter.

Sales Department Customer

Why:

This option is used to maintain default internal customer numbers for different vehicle stock type and product code combinations. Repair orders created via the Workshop Requisition Interface are linked automatically to the appropriate internal customer based on this table.

Where:

From the Control Master File view, select Sales Department Customer. This will display the Sales Department Customer window.



*The Control Master
File view button.*

How to Add Edit & Delete Sales Department Customers:

In the Sales Department Customer window, enter the required Stock Type, Product Code and Customer Number to create Sales Department Customers. Users can also select and edit Sales Department Customers here.

Salesperson Tracking Link

Why:

The Salesperson/tracking status link might be used in the vehicle order routine where a vehicle's tracking code can be automatically updated when a particular salesman is assigned to it - provided the link is set up. If you don't want tracking codes to be automatically updated, don't set anything up in this table!



Note! This option is branch-specific.

Where:

From the Control Master File view, select **Salesperson/Tracking Link**. This will display the Salesperson/Tracking Link window.



*The Control Master
File view button.*

How to Add Edit & Delete Salesperson/Tracking Link Codes:

In the Salesperson/Tracking Link window, new codes can be created and existing codes opened, viewed, amended as well as deleted. The 'Update Action' field refers to whether the automatic update will take place in add mode or add and change modes.

Related Topics:

Vehicle Sales.

Shift Clocking Codes

Why:

Shift clocking codes can be attached to shifts to indicate which days and hours the shift is intended to cover. If required, roundings can also be set up here.

Where:

From the Control Master File view, select **Shift Clocking**. This will display the Shift Clocking window.



The Control Master
File view button.

How to Add Edit & Delete Shift Clocking Codes:

In the Shift Clocking window, new codes can be created and existing codes opened and viewed or amended as well as deleted. Each code consists of a header record and a details window.

To create a new shift clocking code, select File > New. This will display a Shift Clocking window. Input the new shift clocking code and a description and click OK.

To delete an existing clocking code, highlight the clocking code and click the delete toolbar button. A confirm delete prompt will be displayed. Click 'Yes' to delete.



Note! All shift clocking details associated with the shift clocking code will also be deleted.

Highlight the new code from the list in the Shift Clocking window and right-click then select Details. This will display a Shift Clocking Detail Selection window. This is blank as the code's new, so you'll need to set up the days and times the shift is to cover. Select File > New to display the Shift Clocking Details window where the days and times can be input. 'Down' refers to any time during the shift that the person isn't available, for example lunch. Downtime should be accumulated against ONE core time and not split, as in the case of a night shift set up where two core times are applicable. (i.e. in the case of tea breaks etc.) 'Core' can be set to 'Core Time' if these hours are to be included in the planning function. More than one core time is allowed, but certain rules must be observed:

- Where core time is denoted as 'Core' any secondary core time must follow this and be flagged as core time plus to denote a continuation of the previous core time. This must also apply to each applicable day, however it is possible to flag a core time without a secondary core time.
- Only one downtime is allowed per core time, therefore no downtime can be entered against the secondary core time.

Payment Category is selected to denote the pay rate cost for each shift. When setting up the days and times for the clocking code it's important to remember that each shift clocking code must cover the complete 24 hour day and a 7 day cycle should also be set up.

Related Topics:

Time Recording Rules.

Shift Clocking Details

Why:

A control file 'Shift Clocking' allows a shift header record and description to be created. Once created shift clocking details can be added, then dependant on parameters rounding's and fixed breaks can also be added.

Where:

From the Control Master File view, select **Shift Clocking**. This will display the Shift Clocking window.



*The Control Master
File view button.*

How to Add Edit & Delete Shift Clocking Codes:

In the Shift Clocking window enter a new clocking code and description, to create a new record, existing codes can be opened, viewed, amended or deleted.

Select File > Details to enter clocking detail records. Highlight 'Core time' record to insert rounding's or fixed breaks dependant on parameter settings.

Related Topics:

Time Recording Rules.

Set Up:

Parameter TIM005 used to control rounding's

Parameter TIM006 used to control fixed breaks.

Shift Patterns

Why:

Shift patterns are the shift headers for each shift and include the number of days in that shift pattern.

Where:

From the Control Master File view, select **Shift Pattern**. This will display the Shift Pattern window.



*The Control Master
File view button.*

How to Add Edit & Delete Shift Patterns:

In the Shift Pattern window, new codes can be created and existing codes opened and viewed or amended as well as deleted. Each code consists of a header record and a details window.

To create a new shift pattern select File > New. This will display a Shift Pattern Header window. Input a code for the new shift pattern and a description and start date and click OK.

Highlight the new code from the list in the Shift Pattern window and right-click then select Details. This will display a new Shift Pattern window which will be blank as the code's new, so you'll need to set up the days the shift is to cover and

which shift will be worked on those days. To do this select File > New and select the shift and how many days of the pattern it should cover.

As many patterns as required can be created for the shift, for example 7 (for a 7 day shift) or 14 (for a 14 day shift).

When the shift pattern is assigned to a mechanic, the system will automatically calculate whether any days in the shift pattern fall on the mechanic's non-working days. For example a weekend which is not included as a core function in the shift clocking detail.

Related Topics:

Time Recording Rules.

Skill Groups

Why:

Skill groups indicate a particular area of expertise and are assigned to mechanics in The Mechanic Master File. This enables the correct mechanic to be assigned to the most appropriate operation.

Where:

From the Control Master File view, select **Skill Groups**. This will display the Skill Group window.



*The Control Master
File view button.*

How to Add Edit & Delete Skill Group Codes:

In the Skill Group window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

See About the Mechanic Master File.

Source Codes

Why:

Source codes are market specific codes used for data analysis.

Where:

From the Control Master File view, select **Source**. This will display the Source Code window.



*The Control Master
 File view button.*

How to Add Edit & Delete Source Codes:

In the Source Code window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

See 'The Parts & Workshop Orders' chapter.

Source Voucher Codes & Transaction Analysis Codes

Why:

Source voucher, transaction analysis and discrepancy codes are pre-defined codes to identify and provide analysis on all stock movements. Fusion applies one of these codes to all of the various types of 'transactions' it processes. This enables the system to then process the data for analysis and reporting purposes.

Source Voucher Codes:

Source Voucher Code	Purpose / Description
01	Stock Order
02	Sales Special
11	Volvo Receipt
12	Direct Delivery Volvo Receipt
21	Non-Volvo Receipt
30	Issue or Return - Front counter cash customer
31	Issue or Return - Front counter internal customer
32	Issue or Return - Front counter local group customer
33	Issue or Return - Front counter credit customer
39	Issue or Return - Workshop customer
40	Invoice or Credit - Front counter cash customer
41	Invoice or Credit - Front counter internal customer
42	Invoice or Credit - Front counter local group customer
43	Invoice or Credit - Front counter credit customer
49	Invoice or Credit - Workshop customer
50	Direct Delivery Issue or Return - Front counter cash customer

51	Direct Delivery Issue or Return - Front counter internal customer
52	Direct Delivery Issue or Return - Front counter local group customer
53	Direct Delivery Issue or Return - Front counter credit customer
60	Adjustment stock transfer +
61	Adjustment stock transfer -
62	Adjustment stock write off -
63	Adjustment stock check +
64	Adjustment stock check -
65	Adjustment Discrepancy +
66	Adjustment Discrepancy -
67	Adjustment Misc +
68	Adjustment Misc -
69	Buy Back
70	Adjustment New Part +
91	Price Change
92	Re-Valuation

Transaction Analysis Codes:

Transaction Analysis Code	Purpose / Description
A	Sale
B	Return
D	Receipt
E	Stock Adjustment
F	Adjustment Stock Taking
G	Cancelled Sale
H	Cancelled Return
I	Invoice
J	Credit
L	Price Change
M	Inter Branch Transfer
N	Inter Branch Receipt
O	Unknown Part Sale
P	Unknown Part Cancelled Sale
Q	Unknown Part Return
R	Unknown Part Cancelled Return
S	Cancelled Inter Branch Transfer
T	Direct Delivery Receipt
U	Direct Delivery Sale
V	Direct Delivery Invoice
W	Buy Back

Related Topics:

“[Discrepancy Code](#)” on page 71.

“[Source Codes](#)” on page 123.

Special Discount by Function Group

Why:

Special discounts can be created at branch level for customer/function group.

Where:

From the Control Master File view, select **Special Discount by Function**. This will display the Special Discount list window.



*The Control Master
File view button.*

How to Add Edit & Delete Special Discount Codes:

The Special Discount List window lists all special discounts set up for each branch. From here new codes can be created and existing codes opened, viewed, amended as well as deleted. To create a new special discount select File > New. This will display the Special Discount View window where you can input the relevant information.

Related Topics:

“[Function Groups](#)” on page 79.

Special Labour Rates

Why:

Special labour rates are created for contract maintenance vehicles. They're branch specific so each branch can have its own unique contract rates.

Where:

From the Control Master File view, select Special Labour Rates. This will display the Special Labour Rate window.



*The Control Master
File view button.*

How to Add Edit & Delete Special Labour Rate Codes:

The Special Labour Rate List window lists all special discounts set up for the branch. From here, new codes can be created and existing codes opened, viewed amended as well as deleted. When creating special labour rate codes, the system requires a 'priority'. This allows a range of operations to be selected. However, individual ranges or operations can be prioritised within this, to apply a different rate (the lower the priority number, the higher the sequence). For example, if an entry is made with priority entry 20 for operation numbers in the range 1 to 4 with a labour rate of 50 and discount percentage of 1%, these operations will use a rate of 49.50 (50 – 1%). This applies, provided that the operation is coded to a contract payment code and the vehicle has been flagged to use these special rates. However if a specific operation within the range 1 to 4 (for example 21035) has an entry with a higher priority (10) then that operation will use the rate from the specific entry.

Related Topics:

See About the Vehicle Master File.

Standard Extras Codes

Why:

Standard Extras are created for use in the Extras section of a vehicle order.

Where:

From the Control Master File view, select **Standard Extras**. This will display the Standard Extras Codes window.



*The Control Master
File view button.*

How to Add Edit & Delete Standard Extras Codes:

In the Standard Extras Codes window new codes can be created and existing codes opened, amended and deleted.

For each Standard Extra Code, Retail Value, Estimated Cost, Account Code and Tax Code are optional.

Extra Type is mandatory and must be either External or Internal.

For Internal Standard Extras, you can enter the relevant Operation Number from Workshop.

The Description will display within the vehicle order and can be selected to print on the vehicle invoice. You can also enter up to five lines of additional free text as memo information.

These fields default when a standard extra is added to a vehicle order and may be overridden.

If your market is multi-lingual first add Standard Extras Codes using the base language, then select the required alternative languages, and enter just their description and free text.

Related Topics:

Vehicle Sales.

Standard Phrases

Why:

Standard text phrases are created for use in the free format text section of a vehicle order. The phrases are branch specific

Where:

From the Control Master File view, select **Standard Phrases**. This will display the Standard phrases list window.



*The Control Master
File view button.*

How to Add Edit & Delete Standard Phrases:

In the Standard Phrases List window new codes can be created and existing codes opened, viewed, amended, copied, printed as well as deleted.

For each standard phrase, up to 20 separate lines of text can be entered, each containing up to 70 characters. If you require blank lines at any point, leave the text blank but check the 'print' checkbox. 'Department' indicates which applications may use the phrase (currently only the vehicle sales department). 'Vehicle Category' indicates if the phrase is available for selection on new vehicle orders, used vehicle orders or both. If your market is multi-lingual, you'll be required to enter standard phrases in your alternative languages.

Related Topics:

Vehicle Sales.

Supplier Discount Rates

Why:

Supplier discount rates enable the discounts received from each supplier to be registered within the system. Discounts can be registered by supplier number, product code and discount code.

Where:

From the Control Master File view, select **Supplier Discount Rates**. This will display the Supplier Discount Rate window.



*The Control Master
File view button.*

How to Add Edit & Delete Supplier Discount Rates:

The Supplier Discount Rate window lists all supplier discounts set up for the branch. If you want to see the codes for all branches in the company, check the 'All Branches' checkbox. From the Supplier Discount Rate window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

See About the Supplier Master File.

Tax

Why:

In order to calculate tax on an invoice, the system uses the tax code set up against the customer record, and the tax code for the goods item (e.g. the tax code held against a parts stock record). These two codes are matched against the Tax table and tax is then calculated using the corresponding VAT %.

Where:

From the Control Master File view, select **Tax**. This will display the Tax Details window.



*The Control Master
File view button.*

How to Add Edit & Delete Tax Codes:

The Tax Details window lists the current combinations of customer and goods tax codes and the tax percentage that the combination attracts.

From here, new codes can be created and existing codes opened and viewed or amended as well as deleted.

Setup:

Against each required Customer/Goods code combination, set up the % to be applied. Set the calculation method as 'Added' and the number of the Tax Column to be used for analysis in the interface files.

The Fusion Accounting Interface caters for up to 9 different tax columns. For each of these 9 columns a tax amount and taxable amount is stored in the Invoice Journal File. In the nominal analysis file, you may choose to analyse each tax amount as a separate record, creating up to 9 double-entry postings per invoice. This method is called 'tax at tax code level'. Alternatively, you may choose to generate one double entry for the total invoice tax amount regardless of how many different rates are contained in the invoice. This method is called 'tax at total level'.

The set up of Tax Codes is different depending upon whether you choose to analyse tax at tax code level or tax at total level.

Analysis of Tax at Tax Code Level:

In order to calculate tax on an invoice, the system matches the tax code set up against the customer record and the tax Code for the goods item, to the codes set up in the Tax Rate table. Tax is then calculated using the corresponding VAT %

However, the set up of codes in the Tax Rate table differs depending whether you choose to analyse tax at total level, or at individual tax code level.

If you want to analyse tax at total level, you must first set up the required tax code combinations in the Tax Rate, Customer Tax and Goods Tax options of the Fusion Control File. Each of your entries should be linked to the desired Tax Column number. If you wish you may link more than one customer/goods VAT code combination to the same Tax Column number.

Next, from the Parameter Maintenance window set up the following parameters:

Parameter	Purpose / Description
910 200	THF151 VAT postings at tax code level. Value = *LIKE (POS001).
910 201	THF151 FUTRAT description for Tax. On the THF151 file, the appropriate tax column number is appended automatically to this description, e.g. TAX:01, TAX:02, etc. Value =

	e.g. TAX:
910 179	THF152 Code for Default Nominal Account Table Tax 1. Value = e.g. TAX1
910 180	THF152 Code for Default Nominal Account Table Tax 2. Value = e.g. TAX2.
910 181	THF152 Code for Default Nominal Account Table Tax 3. Value = e.g. TAX3.
910 182	THF152 Code for Default Nominal Account Table Tax 4. Value = e.g. TAX4.
910 183	THF152 Code for Default Nominal Account Table Tax 5. Value = e.g. TAX5.
910 184	THF152 Code for Default Nominal Account Table Tax 6. Value = e.g. TAX6.
910 185	THF152 Code for Default Nominal Account Table Tax 7. Value = e.g. TAX7.
910 186	THF152 Code for Default Nominal Account Table Tax 8. Value = e.g. TAX8.
910 187	THF152 Code for Default Nominal Account Table Tax 9. Value = e.g. TAX9.
910 251	THF152 Code for Default Nominal Account Table - trade-in purchase tax 1. e.g. PTAX1.
910 252	THF152 Code for Default Nominal Account Table - trade-in purchase tax 2. e.g. PTAX2.
910 253	THF152 Code for Default Nominal Account Table - trade-in purchase tax 3. e.g. PTAX3.
910 254	THF152 Code for Default Nominal Account Table - trade-in purchase tax 4. e.g. PTAX4.
910 255	THF152 Code for Default Nominal Account Table - trade-in purchase tax 5. e.g. PTAX5.
910 256	THF152 Code for Default Nominal Account Table - trade-in purchase tax 6. e.g. PTAX6.
910 257	THF152 Code for Default Nominal Account Table - trade-in purchase tax 7. e.g. PTAX7.
910 258	THF152 Code for Default Nominal Account Table - trade-in purchase tax 8. e.g. PTAX8.
910 259	THF152 Code for Default Nominal Account Table - trade-in purchase tax 9. e.g. PTAX9.
TAX 016	Determines if tax is calculated at sale line level. May be positive or negative. See the following market specific options. Normally *LIKE(NEG001)

Parameters 910 251 - 910 259 are only used if Vehicle Admin trade-in purchase invoices are posted to the financial interface.

Finally, set up the required credit and debit accounts from the nominal ledger in the General Ledger Other option of the Fusion Control File using each of the values entered in 910 179 to 910 187 and 910 251 to 910 259 as the entry in the 'Code' prompt.

Market-Specific Tax Code Options:

- If tax is charged on internal transactions, the THF151 FUTRAT description for internal tax should be input in Fusion parameter 910 190, and the code for file THF152 should be set up in 910 189.
- If parameter TAX011 is enabled (GST – Goods and Services Tax), the code for THF152 comprises the value from Fusion parameter 910 191 plus the Payment Code. The FUTRAT description in THF151 is made up of the value from parameter 910 201 plus the Payment Code.
- Tax records can be written to the General Ledger Interface File THF151 on the basis of:

- A - One tax record per invoice sale line, or
- B - One tax record per tax rate, per invoice.

This functionality is controlled by parameter TAX016.

Analysis of Tax at Total Level:

In order to calculate tax on an invoice, the system matches the tax code set up against the customer record and the tax Code for the goods item, to the codes set up in the Tax Rate table. Tax is then calculated using the corresponding VAT %.

However, the set up of codes in the Tax Rate table differs depending whether you choose to analyse tax at total level, or at individual tax code level.

If you want to analyse tax at total level, you must first set up the required tax code combinations in the Tax Rate, Customer Tax Code and Goods Tax Code options of the Fusion Control File. Each of your entries should be linked to the same Tax Column number, e.g. 1.

Parameter	Purpose / Description
910200	THF151 VAT postings at tax code level. Value = *LIKE (NEG001).
910127	THF151 FUTRAT description for Total Tax. Value = e.g. TOTVAT.
910111	THF152 Code for Default Nominal Account Table. Value = e.g. VAT.
910260	THF152 Code for Default Nominal Account Table - trade-in purchase tax. Only used if Vehicle Admin trade-in purchase invoices are posted to the financial interface. Value = e.g. PTAX.
TAX016	Determines if tax is calculated at sale line level. Must be negative in this scenario. Value = *LIKE (NEG001).

Finally, set up the required credit and debit accounts from the nominal ledger in the General Ledger Other option of the Fusion Control File using the value entered in 910 111 as the entry in the 'Code' prompt. The credit account should usually be a tax liability account and the debit account should normally be the debtors control account.

Related Topics:

“[Customer Tax Codes](#)” on page 63.

“[Goods Tax Codes](#)” on page 85.

Team

Why:

A new control file 'Team' allows Teams codes and description to be created and used within various options such as the Mechanic file, reports and planning.

Where:

From the Control Master File view, select **Team**. This will display the Team window.



The Control Master File view button.

How to Add Edit & Delete Team Codes:

The Team window lists the current combinations of customer and goods tax codes and the tax percentage that the combination attracts.

Related Topics:

See About the Mechanic Master File.

Planning.

Payroll Reports.

Mechanic Efficiency Report.

Utilisation Report.
Time summary by Mechanic Report.

Territory Codes

Why:

Territory code is used in the Customer Master File to indicate the general location of the customer in relation to the dealer.

Where:

From the Control Master File view, select **Territory**. This will display the Territory window.



*The Control Master
File view button.*

How to Add Edit & Delete Territory Codes:

In the Territory window new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

See About the Customer Master File.

Tracking Group Codes

Why:

Tracking Group is used in the Vehicle Order Filter to link together a range of different tracking statuses, so that they can be selected as a group.

Where:

From the Control Master File view, select **Tracking Group**. This will display the Tracking Group window.



*The Control Master
File view button.*

How to Add Edit & Delete Tracking Group Codes:

Add or maintain tracking group codes as required. If you do not wish to use tracking group as a selection criterion in the Vehicle Order Filter, you need not create any records in this table. If you do wish to use Tracking Group, each Tracking Status in each branch must be assigned to a Tracking Group. This is done in the Tracking Status table in the Control Master File.

Related Topics:

[“Tracking Status Codes”](#) on page 132.

Tracking Status Codes

Why:

The Tracking Status file is entirely user definable. You can set up a range of statuses to define the various stages of a vehicle's lifecycle e.g. on order, delivered, workshop etc.

Where:

From the Control Master File view, select **Tracking Status**. This will display the Tracking Status window.



*The Control Master
File view button.*

How to Add Edit & Delete Tracking Status Codes:

In the Tracking Status window new codes can be created, viewed, amended and deleted. To create a new Tracking Status, click New or select File > New. Enter the required code and description and choose whether the actual receipt date is to be a mandatory field when this tracking status is used.

Tracking Status may be updated automatically on certain trigger events, such as receipt into stock, or delivery to customer. For automatic update to take place trigger events should be linked to a specific tracking status in each branch. You need only set up those trigger events for which you require an automatic update of tracking status, if any.

In Tracking Status table, simply select the required trigger event from the drop-down list in the 'Default Status for ' and choose from:

Default Status	Trigger Event
DAC	Actual DAC Date is first entered.
CDC	Actual CDC Date is first entered.
Invoiced	Primary Invoice is created.
Fully Credited	Vehicle Order is fully credited
Fully Costed	Vehicle costs are flagged as "Fully Allocated".
Invoice Paid	Primary Invoice is registered as paid.
Used Purchase Invoice	Used purchased invoice is created.
Cancelled	Vehicle order is cancelled.

Tracking Status is updated automatically ;when the relevant event occurs unless Actual CDC Date is already present on the vehicle order. In other words, once customer delivery has taken place automatic updates cease.

The Tracking Group is used in the Vehicle Order Filter. It is used to link together a range of different tracking statuses, so that they can be selected as a group. If you wish to use Tracking Group in the filter, each Tracking status in each branch must be assigned to a Tracking Group.

Transaction Type Codes

Why:

A transaction type can be included in parts and workshop order headers to identify how payment will be made.

Where:

From the Control Master File view, select **Transaction Type**. This will display the Transaction Type window.



*The Control Master
File view button.*

How to Add Edit & Delete Transaction Type Codes:

In the Transaction Type window new codes can be created and existing codes opened, viewed, amended and deleted.

Related Topics:

Creating a Parts Order.

Creating a Workshop Order.

Travelling Area Codes

Why:

Travelling Area codes are used within the Marketing tab of the Customer Master File window. They might be used to show the area covered by the customer or the distance from the customer to the dealer.

Where:

From the Control Master File view, select **Travelling Area**. This will display the Delivery Radius window.



*The Control Master
File view button.*

How to Add Edit & Delete Travelling Area Codes:

In the Delivery Radius window, new codes can be created and existing codes opened and viewed and amended as well as deleted.

Unit of Measurement Codes

Why:

A unit of measure code is registered against each part in The Parts Master File to help the parts person to understand what the unit value is in relation to the ordered quantity on the picking slip when picking parts from bin locations.

Where:

From the Control Master File view, select **Unit of Measure**. This will display the Unit of Measure window.



*The Control Master
File view button.*

How to Add Edit & Delete Unit of Measurement Codes:

In the Unit of Measure window new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

See About the Parts Master File.

Vehicle Credit Text Lines

Why:

Credit Note message and legislation text lines can be maintained here. This file is branch-specific.

Where:

From the Control Master File view, select **Vehicle Credit Text**. This will display the Vehicle Credit Notes Text Lines window.



*The Control Master
File view button.*

How to Add Edit & Delete Vehicle Credit Text:

Enter the required text, and click OK to update. You can also maintain the text for other languages if your system is multi-lingual.

Vehicle Extras Codes

Why:

Vehicle Extras are any extra items that the customer can ask to have fitted to a new vehicle.

Where:

From the Control Master File view, select **Vehicle Extras**. This will display the Vehicle Extras window.



*The Control Master
File view button.*

How to Add Edit & Delete Vehicle Extras Codes:

In the Vehicle Extras window new codes can be created and existing codes opened, viewed, amended or deleted.

The Vehicle Extras function in workshop is controlled by Parameter OEW017. If enabled, maintenance of the vehicle extras table is allowed and the user is prompted in the order header to complete a checklist of extras that are present on the vehicle when it arrives in the workshop. The extras checklist is also printed as an extra page of the job-card. See also parameters OCJ 013 and JCD 001.

Related Topics:

Creating a Vehicle Order.

Vehicle Invoice Text Lines

Why:

Invoice message and legislation text lines can be maintained here. This file is branch-specific.

Where:

From the Control Master File view, select **Vehicle Invoice Text**. This will display the Vehicle Invoice Text Lines window.



*The Control Master
File view button.*

How to Add Edit & Delete Vehicle Invoice Texts:

Enter the required text, and click OK to update. You can also maintain the text for other languages if your system is multi-lingual.

Vehicle Make Codes

Why:

The Vehicle Make table is used in the Vehicle Order function to identify the manufacturer of the vehicle.

Where:

From the Control Master File view, select **Vehicle Make**. This will display the Vehicle Make window.



*The Control Master
File view button.*

How to Add Edit & Delete Vehicle Make Codes:

In the Vehicle Make window new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

Vehicle Sales.

Vehicle Operation Codes

Why:

Vehicle operation codes and descriptions are supplied by VTC and are assigned to vehicles in the Vehicle File to indicate the type of vehicle and the average miles it covers.

Where:

From the Control Master File view, select **Vehicle Operation**. This will display the Vehicle Operation window.



*The Control Master
File view button.*

How to Add Edit & Delete Vehicle Operation Codes:

In the Vehicle Operation window new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

See About the Vehicle Master File.

Vehicle Order Default Payment & Account Codes

Why:

Default codes may be maintained by chassis type for each item on the vehicle, chassis, discount, cost credits, other changes, extras and trade-in. These defaults are used when a vehicle order is added to the system, or an extra is added to a vehicle order.

 **Note!** The existence of the 'Default' entry. This is a system-generated record and it may not be deleted. It will be used if:

- You add a vehicle order with a chassis type that does not exist in the table.
- You add a vehicle order with a chassis type that exists in the table, but the defaults are blank for the item in question.

Where:



The Control Master
File view button.

From the Control Master File view, select **Default Payment/Account Codes List**. This will display the Default Payment/Account Codes List window.

How to Add Edit & Delete Default Payment/Account Codes List Codes:

Default Payment and Account Codes can be set up against new chassis types. Existing chassis types can have their default codes amended, and chassis types can be deleted.

The chassis types entered should correspond to those used in the Vehicle Details window, which are in turn derived from the Vehicle Type Variant Table within Workshop.

 **Note!** The chassis type entered here is not validated against the variant table.

The Copy option allows you to copy within a single branch from an existing chassis type to a new chassis type.

The Copy Branch option allows you to copy records from one branch to another, provided the destination branch has no records of its own on file except for the Default record. When the copy takes place, all records are copied from the source to the destination branch including the default record.

When extras are added to a vehicle, the default payment code will always be derived from this defaults table. However, the account code may be derived from the Standard Extras table when a standard extra is added. If the standard extra does not have an associated account code, then the system will revert to this defaults table.

Vehicle Order Defaults

Why:

This branch-specific option is used to maintain a number of default codes within the vehicle order system.

Where:

From the Control Master File view, select **Vehicle Order Defaults**. This will display the Vehicle Order Defaults window.



*The Control Master
File view button.*

How to Add Edit & Delete Vehicle Order Defaults:

VAT Default Values - VAT Code is the default goods VAT code, used to calculate VAT on trade in vehicles.

Customer Default Values - Vehicle is the default VAT code for vehicle chassis, used in invoicing/credits.

Customer Default Values - Other charges 1-6 and extras are the default VAT codes for other charges 1-6 and extras.

General Default Values - Warranty Months is the default warranty period in months, used in the vehicle basic details screen.

General Default Values - Model Year is the default model year, used in the vehicle basic details screen.

Vehicle Stock Type Codes

Why:

This option is used to maintain new and used vehicle types.

Where:

From the Control Master File view, select **Vehicle Stock Type**. This will display the Vehicle Stock Type window.



*The Control Master
File view button.*

How to Add Edit & Delete Vehicle Stock Type Codes:

In the Vehicle Stock Type window new codes can be created and existing codes opened, viewed, amended and deleted.



Note! Stock types New and Used must exist in their own right.

Vehicle Type Variant Codes

Why:

Vehicle variants are linked to product codes and these are used to interface the accounting system. To analyse sales by truck and bus type the variants need to be set up against the required product code.

Where:

From the Control Master File view, select **Vehicle Type Variant**. This will display the Vehicle Type Variant Details window.



*The Control Master
File view button.*

How to Add Edit & Delete Vehicle Type Variant Codes:

In the Vehicle Type Variant Details window new codes can be created and existing codes opened, viewed, amended or deleted.

Vehicle Warranty Codes

Why:

The vehicle warranty codes are registered against each vehicle and indicate the vehicle's valid warranty months. These codes are referenced when a warranty validation check is performed by Fusion in the order entry routine.

Where:

From the Control Master File view, select **Warranty Code**. This will display the Warranty Code window.



*The Control Master
File view button.*

How to Add Edit & Delete Warranty Codes:

In the Warranty Code window new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

Creating a Workshop Order.

About the Vehicle Master File.

VIPS-Fusion VAT Code Cross-References

Why:

When an N50 record is generated, the VAT code held in the importer file is checked against this cross reference file. If a match doesn't exist, a check is then made against the parameter file.

Where:

From the Control Master File view, select **VIPS/GDS VAT Code X-Refs**. This will display the Maintain VIPS/Fusion VAT Code Cross Refs window.



*The Control Master
File view button.*

How to Add Edit & Delete VIPS/GDS VAT Code Cross-References:

In the Maintain VIPS/Fusion VAT Code Cross Refs window, new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

DSP Transactions.

See About the Parts Master File.

Volume Value Table

Why:

The volume value table is used during the creation of purchase proposals for non-Volvo parts.



*The Control Master
File view button.*

Where:

From the Fusion Control FileView, select **Volume Value**. This will display the Volume Value window.

How to Add Edit & Delete Volume Value Codes:

In the Volume Value window new codes can be created and existing codes opened, viewed, amended as well as deleted.

When creating a new volume value, if non-Volvo product groups have been created in Fusion you can select one of these (if appropriate). If left blank Fusion checks the system and includes all non Volvo groups within the calculation.

The 'Weeks Purchase' is used to calculate the purchase proposal lead time. If the system is set at 2, it multiplies the order by 2 weeks; assuming that the purchase proposal takes this length of time to prepare and complete.

The 'From' and 'To' fields are for the minimum and maximum value of parts to be stocked within the number of 'weeks purchase'.

Related Topics:

Creating a Purchase Proposal.

Maintaining a Purchase Proposal.

["Product Groups"](#) on page 116

Volvo Supplier Codes

Why:

The Volvo Supplier codes are created for all of the different manufacturers who supply products to VTC, for both trucks and buses.

These codes must be used when a part warranty claim is raised for a non-Volvo supplier.



*The Control Master
File view button.*

Where:

From the Fusion Control FileView, select **Volvo Supplier**. This will display the Volvo Supplier window.

How to Add Edit & Delete Volvo Supplier Codes:

In the Volvo Supplier window new codes can be created and existing codes opened, viewed, amended as well as deleted.

Related Topics:

Review information about Claims.

Review information about the Supplier Master File.

Work Bay Codes

Why:

Work bay codes are created to identify areas within the workshop where a mechanic can work upon a vehicle. These codes are then used in conjunction with the planning function.



*The Control Master
File view button.*

Where:

From the Control Master File view, select **Work Bay**. This will open the Work Bay maintenance screen.

How to Add Edit & Delete Work Bay Codes:

In the Work Bay Maintenance window new codes can be created and existing codes opened, viewed, amended, copied as well as deleted.

Related Topics:

Planning.

Invoices & Credits

About the Invoices & Credits

This chapter documents Invoice and Credit related functions of the GDS – Fusion system. It covers information and instructions about:

- Invoicing processes and functions.
- Credit handling.
- Complementary Business functionality.

Batch Invoicing

Why:

When an order is completed, if enabled within your market, the invoice can be ‘batched’ for printing locally at a later date or sent to a third party supplier for printing and mailing.

This method of invoicing is usually used by larger dealers when all the invoices are printed or transmitted at the end of the day.

Where:

From the Workshop Order View or Vehicle Order View, select **Actions > Batch Invoicing**.

From the Parts Order View, select Parts Batch Invoicing. This will display a Parts Batch Invoicing window.

How to Perform Batch Invoicing:

When a workshop order is completed and you request for the invoice to be printed, you are given the option of printing ‘Online’ or ‘Batch’. Select ‘Batch’, then when you’re ready to print all batched workshop invoices, select **Actions > Batch Invoicing** (from the workshop order view). This will then print or transmit all invoices that have been previously batched.

 **Note!** The print sequence of the workshop batch can be conditioned by parameter INV 151 (01=Customer 02=Invoice 03=Batch).



*The Workshop Order
View button.*



*The Vehicle Order
View button.*



*The Parts Order
View button.*

For part orders, input the required details within the Parts Batch Invoicing window. The system will then print invoices for any parts orders that have a status of 'Delivered'.

What else would you like to do?

[“Invoicing a Vehicle Order”](#) on page 168.

[“Invoicing a Workshop Order”](#) on page 169.

Related Topics:

Customer Point of Sale Details.

Set up:

As above, parameter INV 151 conditions the print sequence for batch invoicing.

Parameter INV155 along with XML003/XML004/XML006/XML007/XML008 and XML009 control the Bureau invoicing process.

Bureau Invoicing

Why:

Used to send parts invoices to a third-party supplier for printing and mailing.

Where:

At customer level a field 'Print Method' is available on the Point-of-Sale tab. This enables users to choose from Local, Bureau or Email. In order entry, an input-capable Print Method field is available on the overview tab. The method attached to the customer will be the default when opening a new order.



*The Workshop Order
View button.*



*The Parts Order
View button.*

How to Use Bureau Invoicing:

At Order Completion, when the user chooses to complete the order, via the Invoice option or the Delivery Note option, the program will check that the option taken is compatible with the chosen Print Method. Additionally it will check that the chosen Print Method is compatible with the customer's Payment Method.

When Parts Batch Invoicing, Parts batch invoicing will print an invoice locally, or output the invoice details to a new XML Invoice Extract file in accordance with the print method.

When the Daily batch runs, a program exists in the GDS Daily Batch, this will deposit an XML output in the Dealer Data Bank for onward transmission to the third-party supplier.

Depending on parameter settings the following functionality will take place:

Parts Batch Invoicing - If Bureau invoicing is not enabled and Print Method is Local all invoices will be processed and files updated in the normal way.

If Bureau invoicing is enabled: Where invoice header indicates that bureau invoicing is required, orders are processed and files updated in the normal way but invoices are not printed. The XML Invoice Extract file is updated with the invoice details, but not transmitted at this stage.

For collect customers only, the current customer file-held print method is applied to all orders for that customer in the current batch, the print method field on the header is overwritten with that value. However, if the customer file-held method is email these are printed locally.

Daily Batch: A batch program extracts data from the XML Invoice Extract file and deposits it in VIDB for onward transmission to the third-party supplier.

Complementary Business

Why:

Complementary business within GDS Fusion is a suite of enhancements introduced to the product which allows for more efficient handling and support of other franchises.

This user manual will discuss Multi-franchise processing which permits a dealer to invoice under different selling points; Mack, Renault, Volkswagen etc. This means that invoices with different manufacturer logo's and layouts can be printed which are separate to standard Volvo template. Also mentioned is the possibility of submitting franchise warranty claims to a third party system via a generic XML interface.

Where:

The Invoice Completion, Submission of Warranty Claims and Claim Handling in Fusion are affected by Complementary business functionality.

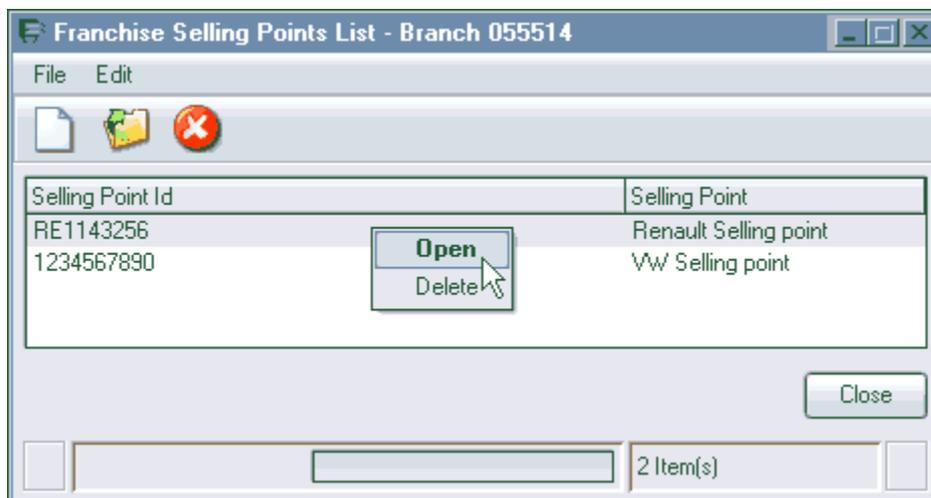
Parameters:

Multi-franchise processing will be controlled by new system and branch parameters.

Parameter	Purpose / Description
INV160	This System Parameter - INV160 (POS/NEG variable). Multi-franchise handling determines if the functionality is set on within the system.
INV161	This Branch Parameter - INV161 (POS/NEG variable). Franchise Selling Point, variable that dictates if branch participates in multi-franchise print or not.

Setting Up - Franchise Selling Point Control File (FSP):

FSP control file is accessible from the control file menu and allows the setup of Franchise Selling points.



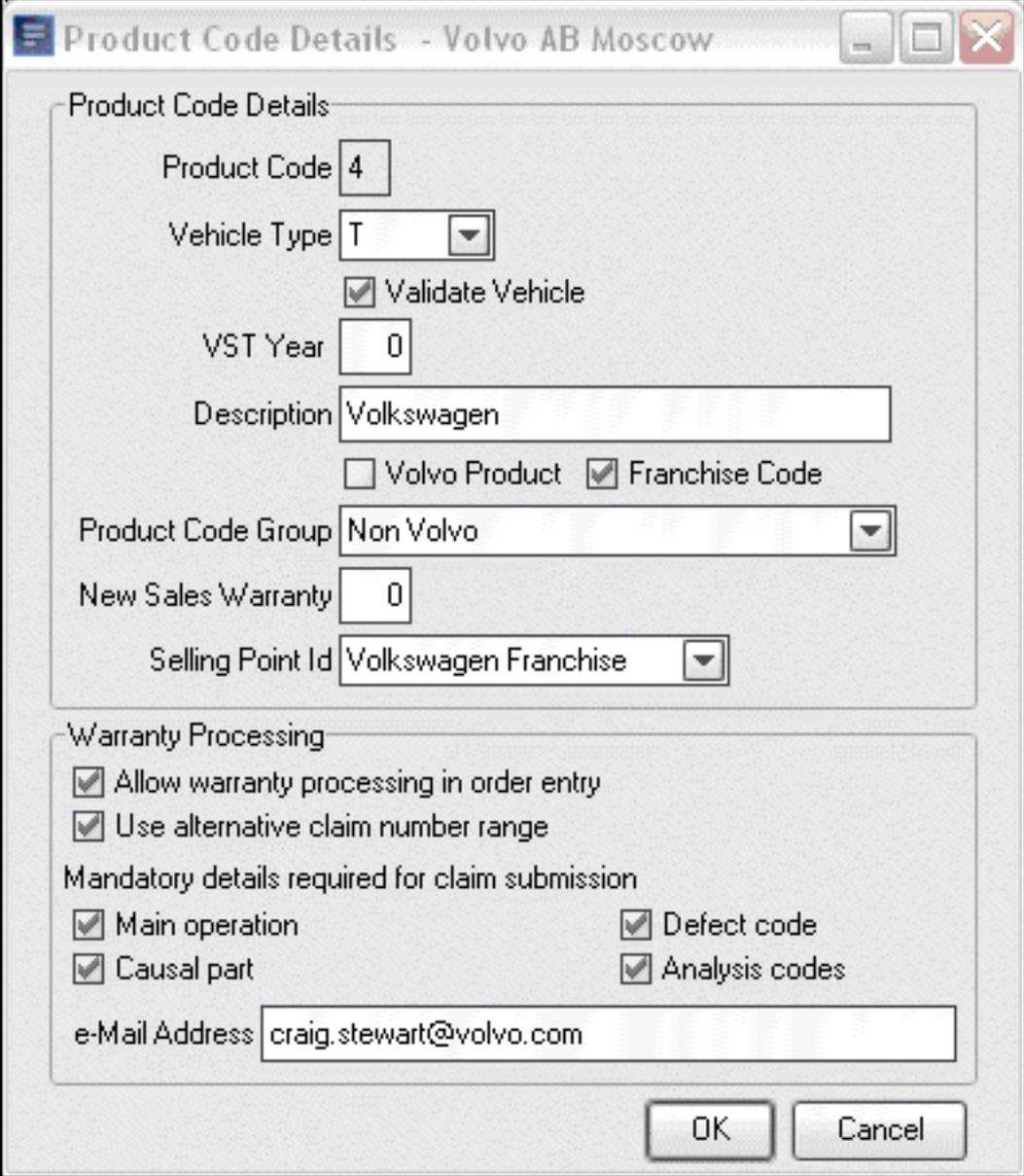
Click the New button  to create a Selling Point. Selling points are not branch specific so require setting up one time only. Also, a Volvo selling point does not

need to be setup. The system will assume that a blank selling point relates to Volvo.

Selling Point ID is a 10 digit alpha numeric field. Selling Point will be a 50 character text box to store description. Data is stored in the THF714 file.

Setting Up - Product Code Control File Setup:

From the Product Code Control File, we can now assign the newly created Selling Point. Activate the *Franchise code* selector to activate *Selling Point ID* dropdown menu and select. Click OK and the product code will be set as a franchise.



Product Code Details - Volvo AB Moscow

Product Code Details

Product Code 4

Vehicle Type T

Validate Vehicle

VST Year 0

Description Volkswagen

Volvo Product Franchise Code

Product Code Group Non Volvo

New Sales Warranty 0

Selling Point Id Volkswagen Franchise

Warranty Processing

Allow warranty processing in order entry

Use alternative claim number range

Mandatory details required for claim submission

Main operation Defect code

Causal part Analysis codes

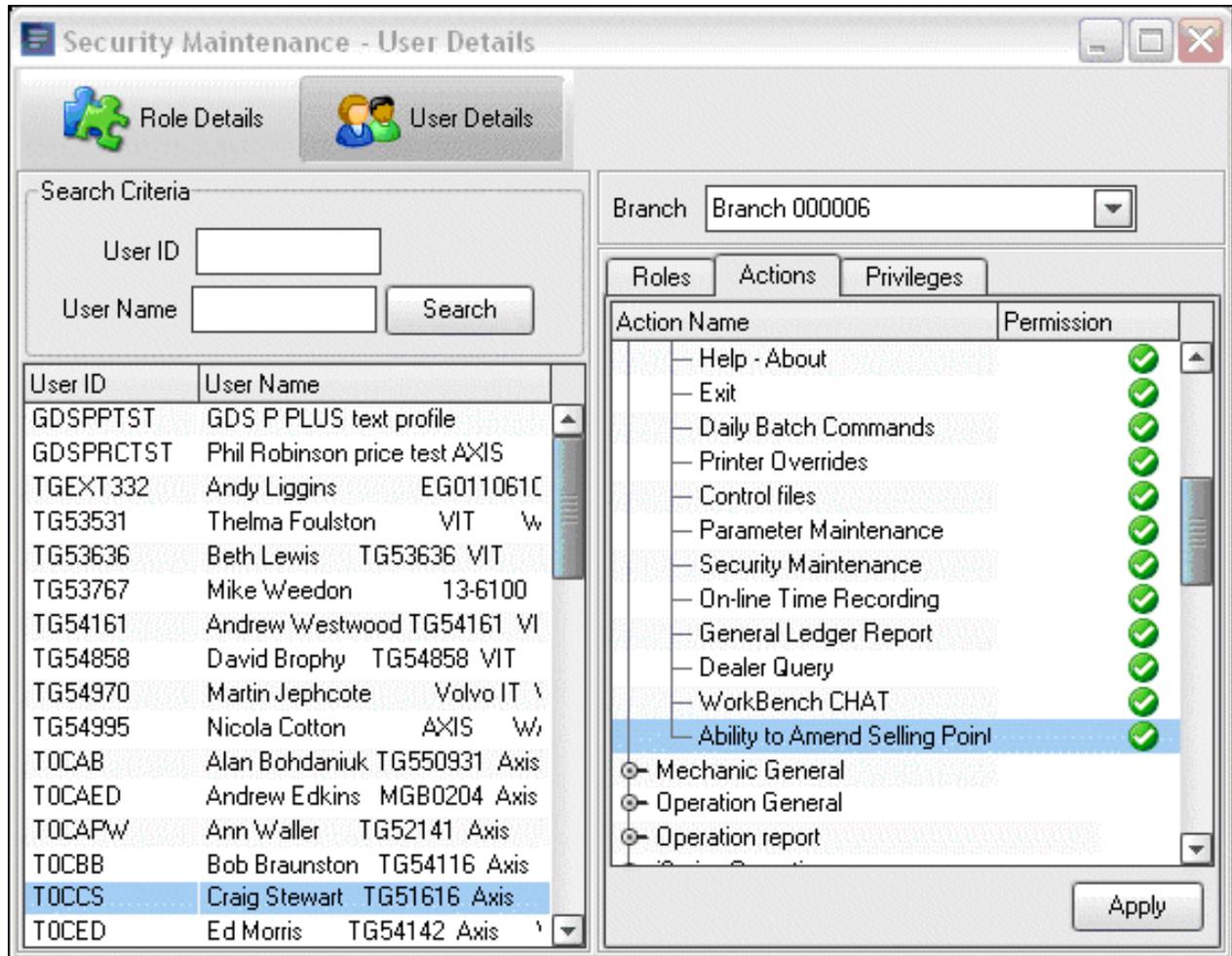
e-Mail Address craig.stewart@volvo.com

OK Cancel

Warranty Processing attributes should only be completed when sending a Non-Volvo Warranty Claim.

Setting Up - User Security:

Manual overrides are possible depending on setup in User Security. When activated it allows the user to override the franchise selling point with an alternative in the invoice completion screen. The security option is located in the Actions → General Options.



The screenshot shows the 'Security Maintenance - User Details' window. It has two tabs: 'Role Details' and 'User Details'. The 'User Details' tab is active. On the left, there is a 'Search Criteria' section with input fields for 'User ID' and 'User Name', and a 'Search' button. Below this is a table listing users. On the right, there is a 'Branch' dropdown menu set to 'Branch 000006'. Below that are three tabs: 'Roles', 'Actions', and 'Privileges'. The 'Actions' tab is selected, showing a list of actions with a 'Permission' column. The 'Ability to Amend Selling Point' action is highlighted in blue and has a green checkmark in the permission column. An 'Apply' button is at the bottom right.

User ID	User Name
GDSPPTST	GDS P PLUS text profile
GDSPRCTST	Phil Robinson price test AXIS
TGEXT332	Andy Liggins EG011061C
TG53531	Thelma Foulston VIT W
TG53636	Beth Lewis TG53636 VIT
TG53767	Mike Weedon 13-6100
TG54161	Andrew Westwood TG54161 VI
TG54858	David Brophy TG54858 VIT
TG54970	Martin Jephcote Volvo IT \
TG54995	Nicola Cotton AXIS W
TOCAB	Alan Bohdaniuk TG550931 Axis
TOCAED	Andrew Edkins MGB0204 Axis
TOCAPW	Ann Waller TG52141 Axis
TOCBB	Bob Braunston TG54116 Axis
TOCCS	Craig Stewart TG51616 Axis
TOCED	Ed Morris TG54142 Axis

Action Name	Permission
Help - About	✓
Exit	✓
Daily Batch Commands	✓
Printer Overrides	✓
Control files	✓
Parameter Maintenance	✓
Security Maintenance	✓
On-line Time Recording	✓
General Ledger Report	✓
Dealer Query	✓
WorkBench CHAT	✓
Ability to Amend Selling Point	✓
Mechanic General	
Operation General	
Operation report	

Using the System at the Workshop:

The system defaults the Selling point when creating an order using the product code set against vehicle. If the product code is recognised as a franchise, the Selling Point description from the FSP control file is copied into a new field in the Order Overview Tab. Otherwise the selling point is left blank - which by default means Volvo.

The screenshot displays the 'Order Details for 9916018, Registration Number T1EST' window. The window title bar includes 'File Order Actions Help'. The main area contains several sections: 'Customer' (0000090168, Thomas Tank Engineers, 07/09/2007), 'Registration Number' (T1EST), 'Date of Delivery' (01/09/2004), 'Mileage' (1), 'Payment Method' (EXTERNAL CUSTOM.), 'Credit Limit' (9999), 'Balance' (10824.25), 'Print Method' (Local), 'Salesperson' (Craig Stewart), 'Operator Claim' (unchecked), and 'Print Remarks on Invoice' (checked). A 'Selling Point' field is highlighted with a star icon and contains 'Volvo kswagen'. Below this is a 'Text' section with 'Operations' and 'Parts' tabs, a 'Payment Code' dropdown, 'Print' and 'Concern' checkboxes, and an 'Add' button. At the bottom, there is a table with columns: Code, Franchise, Description, Payment C..., Alternative..., Job, Ord. Q..., Picked..., Time, Price, Discou..., Tax%, Amo... The table contains one row: Order 9916018. 'Save and Close' and 'Close' buttons are at the bottom right.

Product Code description has also been added to the Order Details window to assist with identifying different franchises.

If Multi Franchise is switched off at system or branch level, all selling point references are hidden.

Quotations, Pro-formas and customer returns will also adhere to the multi-franchise rules.

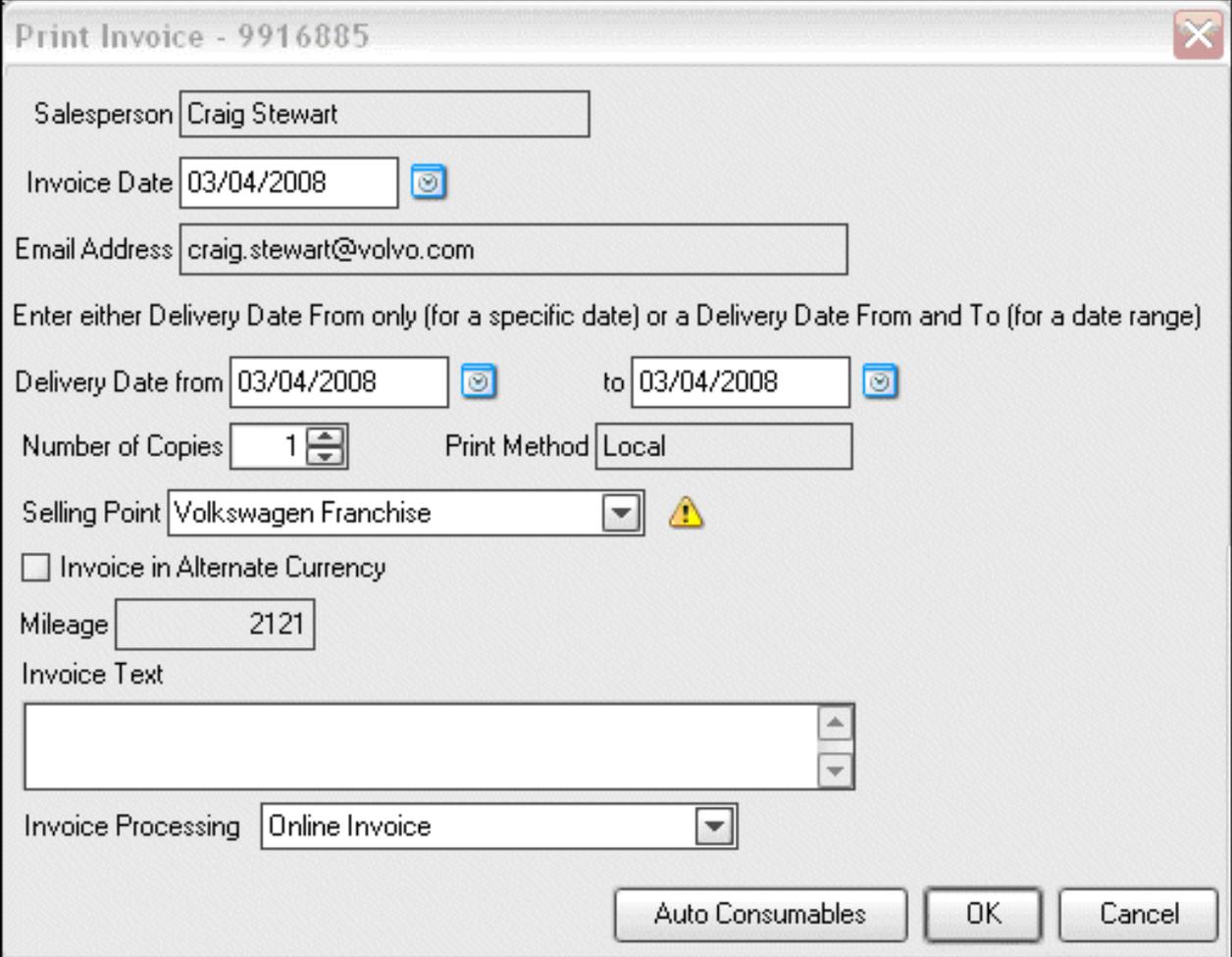
Any product code not setup as a Franchise selling point will load default logo and layout (Volvo).

The selling point cannot be changed within the order unless changing the vehicle. In this instance validation is again carried out on the vehicle product code and the selling point is overwritten accordingly.

Invoicing:

Order Details will behave as it does today, any special labour and part prices or discounts should be setup against product code as normal. Some additional warning messages have been introduced to warn when lines exist on the order and the vehicle / selling point is changed.

Clicking Print Invoice will invoke the invoice Completion user interface. The Selling Point is displayed and highlighted as a warning that an alternative layout is about to be printed. At this point and depending on the setup of a user, it is possible to override the selling point.



Print Invoice - 9916885

Salesperson: Craig Stewart

Invoice Date: 03/04/2008

Email Address: craig.stewart@volvo.com

Enter either Delivery Date From only (for a specific date) or a Delivery Date From and To (for a date range)

Delivery Date from: 03/04/2008 to: 03/04/2008

Number of Copies: 1 Print Method: Local

Selling Point: Volkswagen Franchise

Invoice in Alternate Currency

Mileage: 2121

Invoice Text

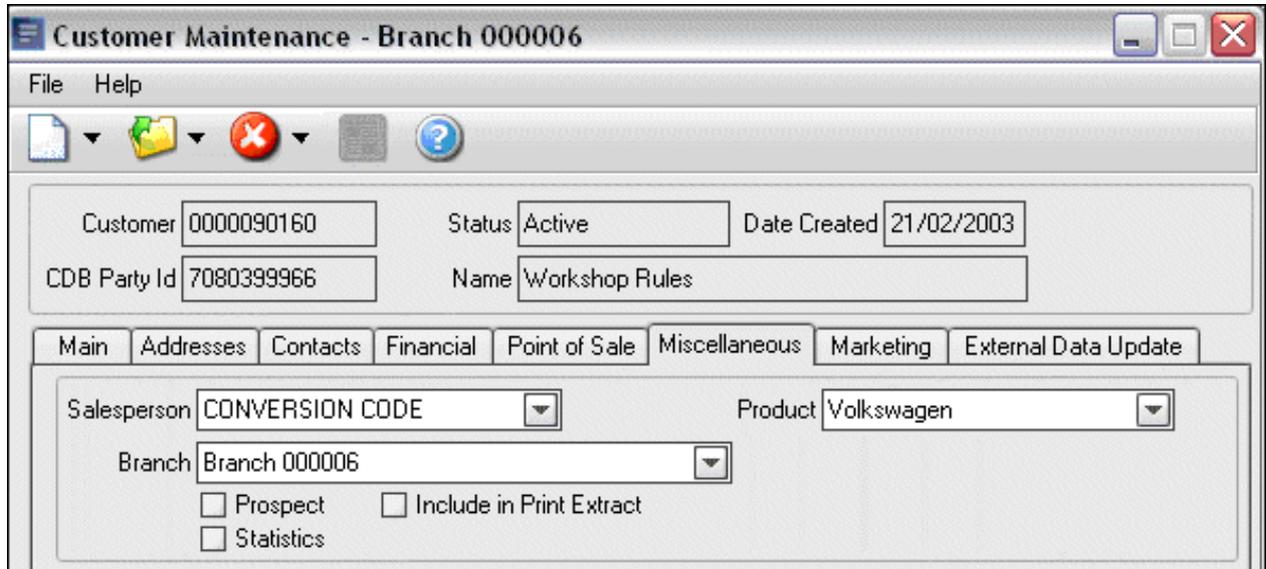
Invoice Processing: Online Invoice

Auto Consumables OK Cancel

Clicking OK in this window will then store the selling point and order number to THF715, and the specified spool file will be selected and print the invoice layout and logo. Re-printing an invoice will check THF715 file to obtain selling point print thus printing the correct invoice layout.

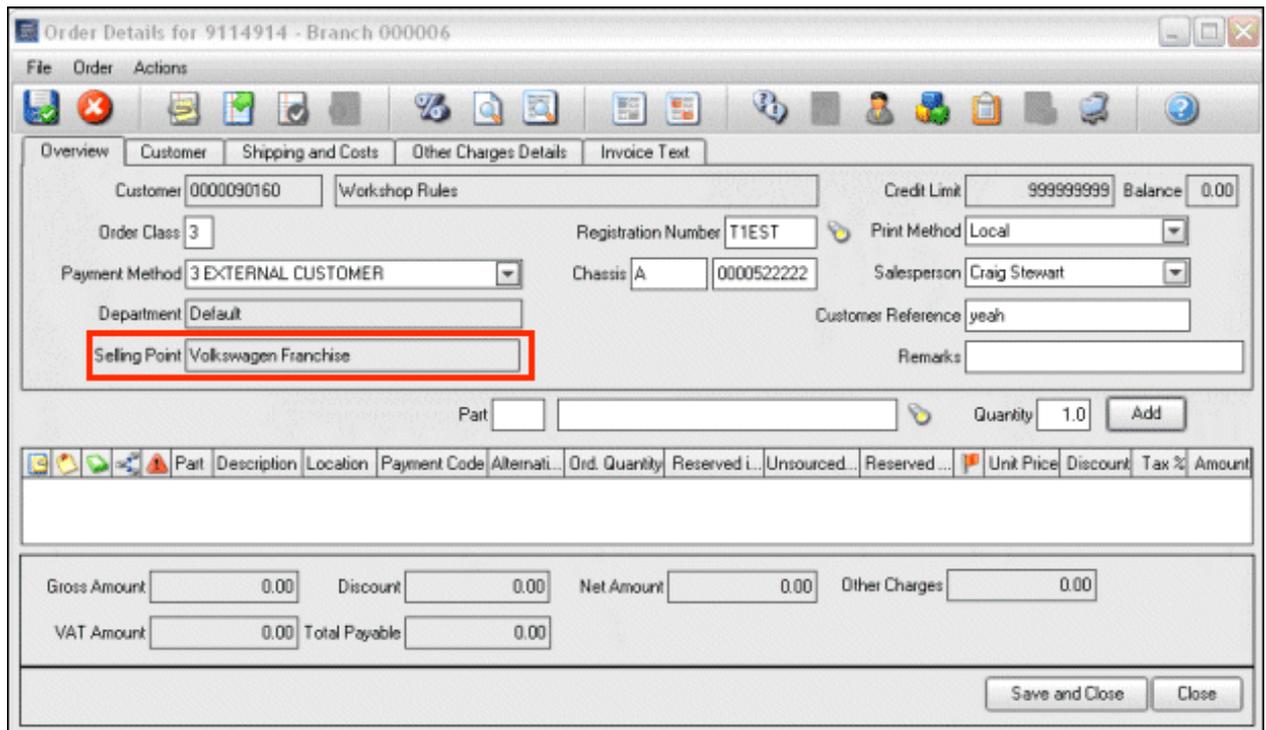
Using the System for Parts Orders:

When creating a parts order, quotation or customer return, the program will calculate the Selling Point using the product code set against customer account (THF070.CRPRCD).



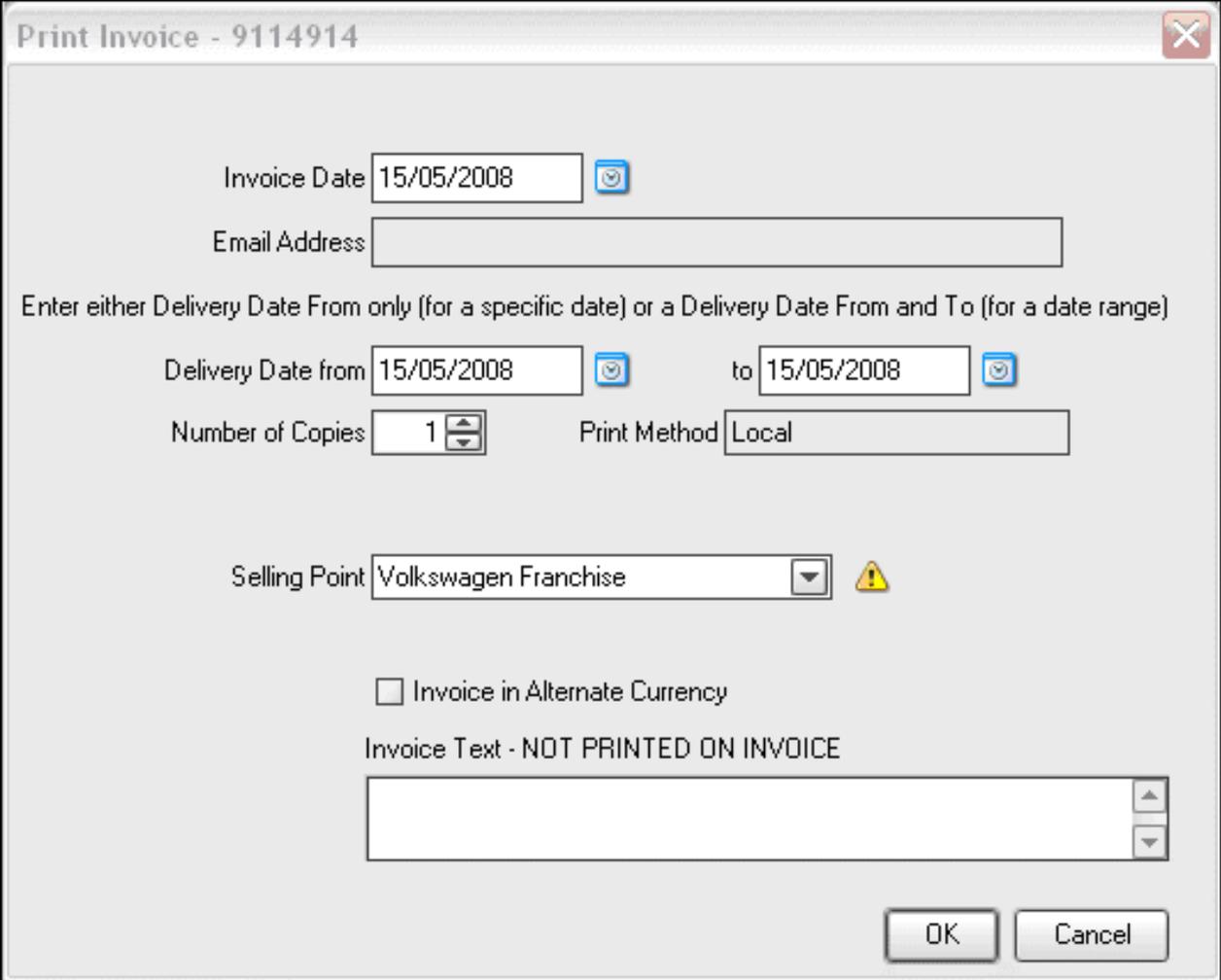
The screenshot shows the 'Customer Maintenance - Branch 000006' window. It features a menu bar with 'File' and 'Help'. Below the menu is a toolbar with icons for file operations and help. The main area contains several input fields: 'Customer' (0000090160), 'Status' (Active), 'Date Created' (21/02/2003), 'CDB Party Id' (7080399966), and 'Name' (Workshop Rules). A tabbed interface below these fields includes 'Main', 'Addresses', 'Contacts', 'Financial', 'Point of Sale', 'Miscellaneous', 'Marketing', and 'External Data Update'. The 'Main' tab is active, showing 'Salesperson' (CONVERSION CODE), 'Product' (Volkswagen), 'Branch' (Branch 000006), and checkboxes for 'Prospect', 'Include in Print Extract', and 'Statistics'.

If the product code is setup as a franchise (plus system/branch parameter is POS) then in the Order Overview Tab a non-editable *Selling Point* field is displayed.



The screenshot shows the 'Order Details for 9114914 - Branch 000006' window. It has a menu bar with 'File', 'Order', and 'Actions'. Below the menu is a toolbar with various icons. The main area is divided into tabs: 'Overview', 'Customer', 'Shipping and Costs', 'Other Charges Details', and 'Invoice Text'. The 'Overview' tab is active, displaying various order details: 'Customer' (0000090160), 'Workshop Rules', 'Credit Limit' (999999999), 'Balance' (0.00), 'Order Class' (3), 'Registration Number' (T1EST), 'Print Method' (Local), 'Payment Method' (3 EXTERNAL CUSTOMER), 'Chassis' (A), '0000522222', 'Salesperson' (Craig Stewart), 'Department' (Default), 'Customer Reference' (yeah), and 'Remarks'. A red box highlights the 'Selling Point' field, which contains the text 'Volkswagen Franchise'. Below the details is a table with columns: 'Part', 'Description', 'Location', 'Payment Code', 'Alternati...', 'Ord. Quantity', 'Reserved i...', 'Unsourced...', 'Reserved ...', 'Unit Price', 'Discount', 'Tax %', and 'Amount'. At the bottom, there are summary fields: 'Gross Amount' (0.00), 'Discount' (0.00), 'Net Amount' (0.00), 'Other Charges' (0.00), 'VAT Amount' (0.00), and 'Total Payable' (0.00). 'Save and Close' and 'Close' buttons are at the bottom right.

The selling point is non-editable unless invoking the Print Invoice window (Delivery Note outside the scope of Multi-franchise).



The image shows a screenshot of a 'Print Invoice' dialog box for invoice number 9114914. The window title is 'Print Invoice - 9114914'. It contains several input fields and controls:

- Invoice Date:** A text box containing '15/05/2008' with a calendar icon to its right.
- Email Address:** An empty text box.
- Delivery Date from:** A text box containing '15/05/2008' with a calendar icon to its right.
- to:** A text box containing '15/05/2008' with a calendar icon to its right.
- Number of Copies:** A spinner box set to '1'.
- Print Method:** A text box containing 'Local'.
- Selling Point:** A dropdown menu showing 'Volkswagen Franchise' with a warning icon to its right.
- Invoice in Alternate Currency:** An unchecked checkbox.
- Invoice Text - NOT PRINTED ON INVOICE:** A large empty text area with scrollbars.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

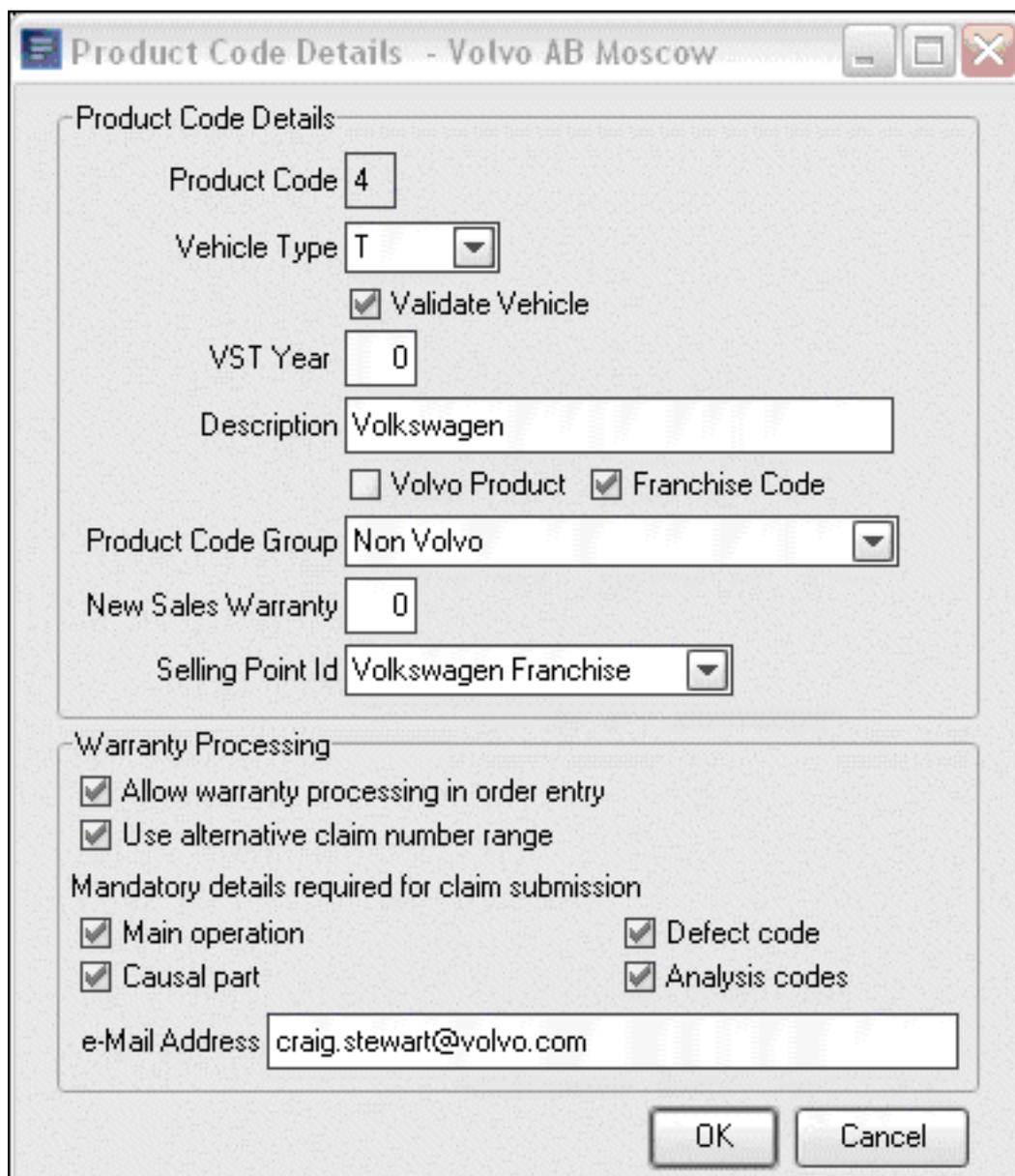
At this point and depending on the setup of a user, it is possible to override the selling point. Clicking OK in this window will then store the selling point and order number to THF715, and the specified spool file will be selected and print the invoice layout and logo.

Re-printing an invoice will check THF715 file to obtain selling point print thus printing the correct invoice layout.

Setting Up - Multi-Franchise Claims:

Franchise invoicing parameter must be switched on and branch parameters setup correctly (See above). Product Code table needs to have product code setup as FRANCHISE

Control Files: Setup Franchise selling point file as explained earlier and then open Product Code control file to assign selling point. Select *Allow Warranty processing in Order Entry* to process multi-franchise warranty claims in workshop order. The remaining *Warranty Processing* attributes require attention and are explained below.



Product Code Details

Product Code: 4

Vehicle Type: T

Validate Vehicle

VST Year: 0

Description: Volkswagen

Volvo Product Franchise Code

Product Code Group: Non Volvo

New Sales Warranty: 0

Selling Point Id: Volkswagen Franchise

Warranty Processing

Allow warranty processing in order entry

Use alternative claim number range

Mandatory details required for claim submission

Main operation Defect code

Causal part Analysis codes

e-Mail Address: craig.stewart@volvo.com

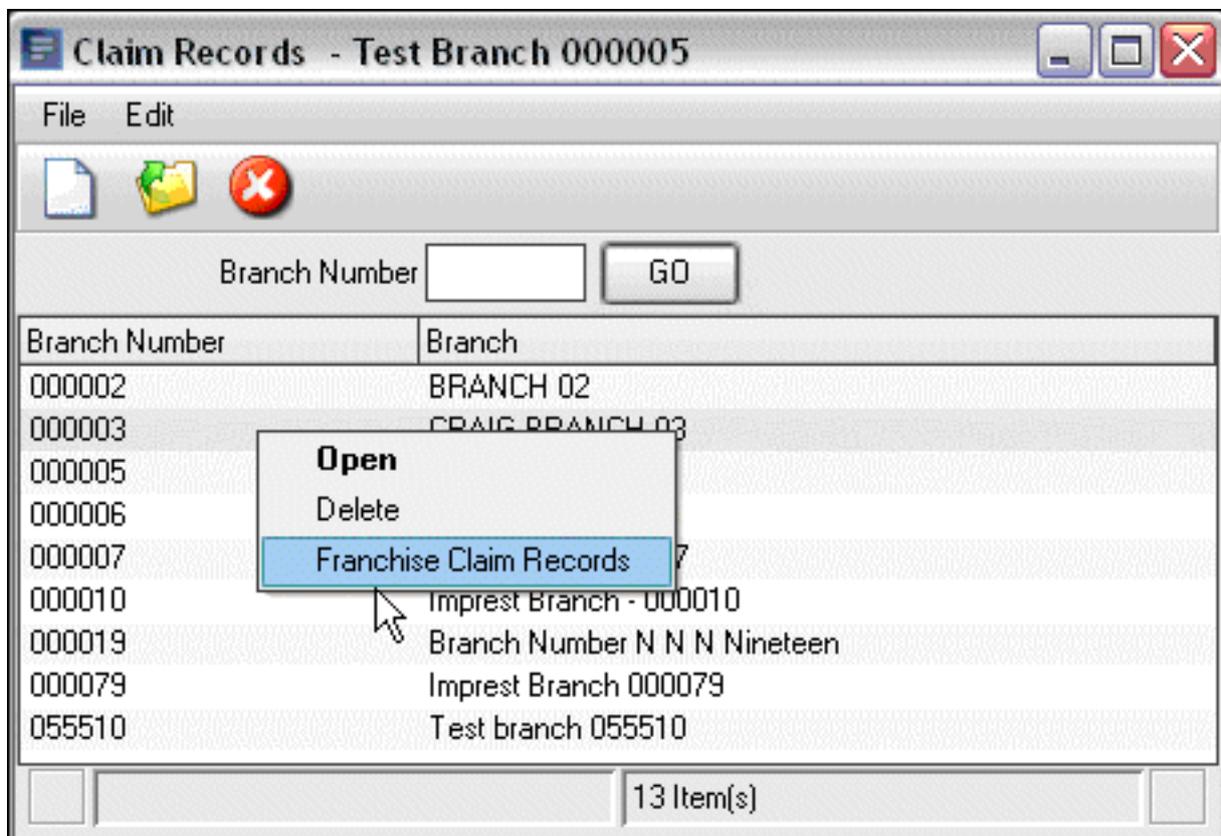
OK Cancel

- Allow warranty processing controls if warranty lines are allowed inside a franchise product repair order. Order handling will check that this is selected before allowing warranty type lines on an order against specified product code.

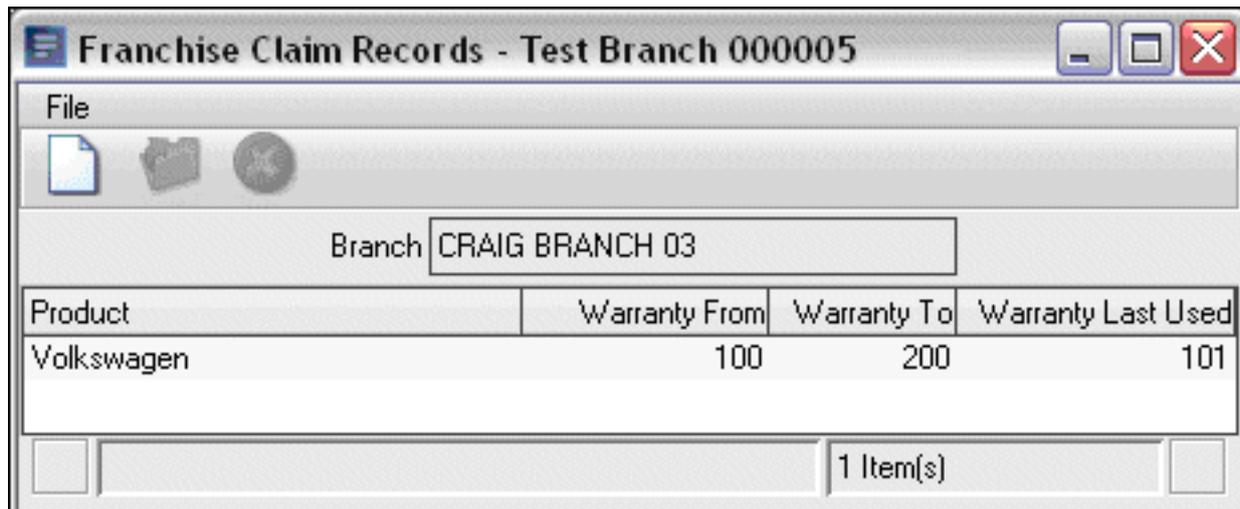
- Use alternative warranty claim number range overrides the standard warranty range with an alternative claim number range which can be setup in the Claim records control file.
- Mandatory claim details are objects that may or may not be mandatory in the Claim validation routine. Any checked items mean that the claim cannot be submitted without these items being entered in the Claim Details interface within Payment and Claim Handling.
- Analysis codes are 3 x 10 AN fields that are editable in the claim details GUI. Their main purpose is to allow the user to store any additional codes/notes – for example this could be mandatory information requested by the franchise importer like an extra set of defect codes etc.
- Email address is the 3rd party email that GDS will send warranty claims.

Claim Record Control File - Creating an Alternative Claim Number Range:

With Franchise Handling activated, a new right click function will be available in the Claims Record control file called Franchise Claims. Right click and select item to call Franchise Warranty Claim UI.



Franchise Warranty Claim Number Range: Click New to setup number range, Product is a mandatory field and will only display franchise type product codes.

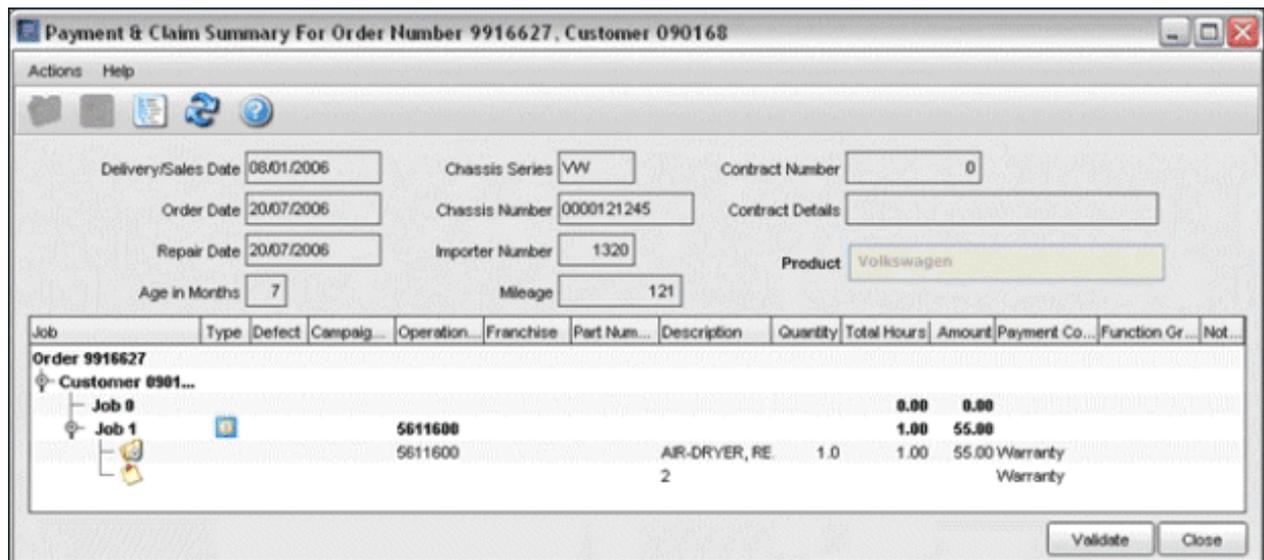


The new number range will be stored in the Claim Records file (THF222) along with the product code so that the program can differentiate between the alternative ranges.

Creating and Submitting a Claim:

The Vehicle has to have a qualifying Warranty Code.

A franchise vehicle will still invoke the warranty validation when raising a repair order. This checks if the warranty period has expired, based on the warranty details applicable to that vehicle held within the vehicle file. Adding warranty type lines is only allowed against the order when Warranty processing has been flagged in the Product Code Control File. If it is not allowed, then the repair order will prohibit the creation of any lines coded to warranty. Product Code is shown to help identification of franchises.



Updating claim information is done as normal in the Payment and Claim handling screen by double-clicking warranty job(s) or right click Open option. The claim details screen has three new analysis code fields, their purpose is to store any additional codes/notes entered by the user e.g. information requested by the franchise importer, such as an extra set of defect codes.



Product Code Details - Volvo AB Moscow

Product Code Details

Product Code

Vehicle Type

Validate Vehicle

VST Year

Description

Volvo Product Franchise Code

Product Code Group

New Sales Warranty

Selling Point Id

Warranty Processing

Allow warranty processing in order entry

Use alternative claim number range

Mandatory details required for claim submission

Main operation Defect code

Causal part Analysis codes

e-Mail Address

OK Cancel

The control for this screen on which fields are mandatory is handled by the Product Code control file as mentioned previously. If Analysis Code is mandatory then the program should check that at least one analysis code has been recorded in TFF240.

All other fields in Claim detail screen are still active on franchise product codes. Data entered into these fields will be saved as normal but NOT sent in the export routine. All messages/checks will be suppressed by validation routine, other than the items flagged against product. The claim validation messages window will output all known errors and the user will have to add any missing details before the invoice will print. When the claim validation routine has been satisfied, an invoice can be generated. The invoice routine will allocate the claim number immediately and will calculate if the claim number should be the standard default or an alternative range.

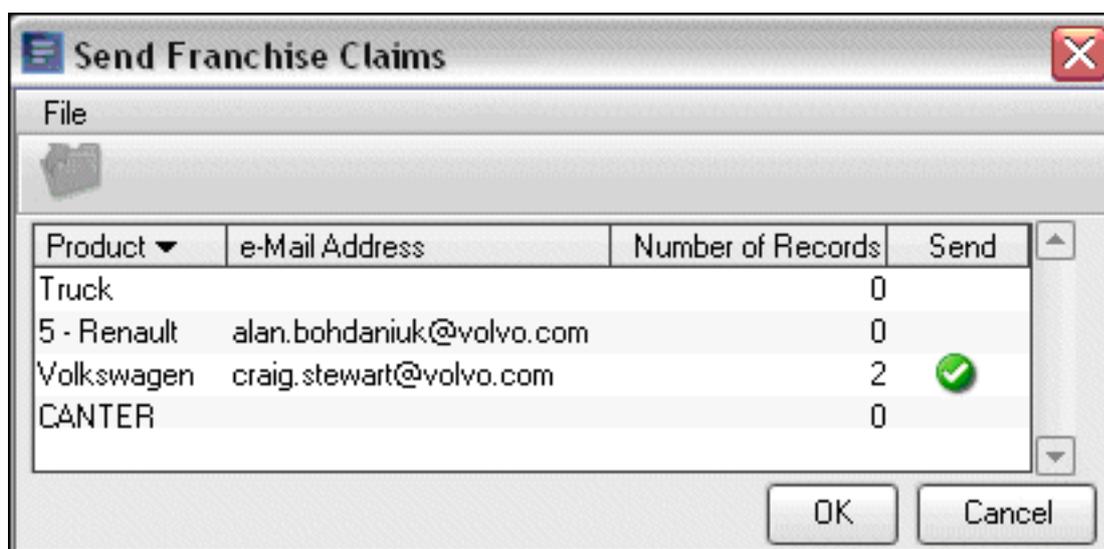
When the order has been invoiced all claim information – including new columns Product & Analysis Codes - will be saved to the claim transmission file (TFF240) with a status code set to 6 – Not Sent. Franchise claims are also saved to the claim header file (THF065) with a status set to PENDING. At this stage claims have not been sent to 3rd party system.

Sending Claims to a 3rd Party:

Sending Claims is controlled by the Claims – **Actions Menu - Select and Print** routine in the Claim Workbench Actions menu. The menu will have two items, Volvo and Non-Volvo (if the Multi-Franchise invoicing parameter is switched off, the submenu is hidden). Select *Non-Volvo* to call the Send Franchise Claim GUI.

The objectives for the Send Franchise Claim GUI are:

- View summary of multi-franchise claims by product code.
- View summary of multi-franchise claims waiting to be sent to 3rd party.
- Execute instruction to send claims to 3rd party mail client.



Here the Product column indicates Franchise Product codes set in the Product Code Control File. The Email address is also in the same file. The Number of records is the Number of claim lines waiting to be sent to the 3rd party (TFF240.JFSTCN=6). Finally, the Sendcolumn is a toggle feature which means to send / not send claims when OK button is clicked. If pending claims (not sent) exist then they will automatically have a green icon, to denote that they will be sent to the specified email address upon clicking the OK button. Clicking the OK button will create an XML file and send all the claims in the claim header, and with a green tick, to the specified email address. The program will output a confirmation message with feedback that the action has been carried out.

 **Note!** This will not mean that the email has reached its destination, just that it has been sent. For confirmation it is recommended that the email recipient is contacted directly. The Email will arrive at it's destination with a default description which can be altered in the Email Control File – program name: TH3R9926 Non Volvo Warranty Claims. The status code against claim in claim header file will have been updated to '9' meaning that the claim has been sent. (TFF240. JFSTCN)

Override Destination Email Address:

In the eventuality that the email address stored against the product code will not be answered, e.g. the recipient is on vacation / long term sickness. It is possible to over ride the email address with an alternative. To do this you should double click the product code in the Send Franchise Claim GUI. You are now allowed to change the email address for this transmission only. The email address set

against product code will be unaffected, so the next time you come into the screen, it will still display the default e-mail address.

Resubmitting Franchise Claims:

In some instances users may want to be resend claims. This could be for many reasons, recipient on vacation, sick etc. To accommodate this requirement a new menu item in the Claim workbench is available when right clicking against franchise claims records. Records can be group selected to resubmit.



Selecting the item will initiate an update to the claim transmission file (TFF240) and change the (JFSTCN) status code from 9 (sent) to 6 (Not Sent). This will allow the updated claims to re-display in the Send Franchise Claims UI and be sent again as per the normal process.

Claim Reconciliation:

The claim workbench will highlight franchise claims as PENDING. Once the dealer has received a credit from the third party franchise, then a manual credit note can be created to change the status to PAID.

All claim reconciliation screens, reports, and views are selectable by product code, so franchise claims can be managed separately to Volvo claims.

Related Topics:

An XML schema is available upon request.

Creating a Partial Credit

Why:

When a vehicle has been invoiced you have the option create full or partial credit notes. A full credit note is a complete reversal of the original invoice. A partial credit note allows you to credit selected amounts, for example if you have overcharged the customer. Full credit is not allowed once partial credits have been raised, so you should not use partial credit unless you are sure that a full credit will not be required at a later stage.

Where:



*The Vehicle Order
View button.*

From the Vehicle Order View, highlight the vehicle order you want to work with and select **Vehicle Order > Credit > Partial**. This will display the Select Invoice for Partial Credit window.

How to Create Partial Credits:

In the Select Invoice for Partial Credit window current invoices for the vehicle order are listed. There may be more than one invoice if the primary was split, or if supplementary invoices have also been raised. Double-click the desired invoice to open the Credit Notes Raised for Invoice window.

The Credit Notes Raised for Invoice window lists any credits that have been previously raised against the selected invoice.

To create a new partial credit, select File > New. This will display a Create Partial Credit window. Here, all invoice items are listed. When the customer you wish to raise the partial credit for is displayed in the customer number field, and click the “Validate” button to ensure their authenticity. Right-click the required items and select ‘Open’ to input the amounts you want to credit. Click OK to print the partial credit, then choose whether you would like to print any trade-in details on the partial credit, and the number of copies required.

What else would you like to do?

Creating a Full Credit.

Related Topics:

[“Invoicing a Vehicle Order”](#) on page 168.

Credits

Why:

In Fusion, a credit can be created for a complete order or only certain lines in an order. Credits can be created for both parts and labour.

Where:



The Workshop Order View button.



The Parts Order View button.



The Customer View button.

From the Parts Order View or Workshop Order View, select **File > New > Customer Return** or select the down arrow next to the Create Order icon and select **Customer Return**. Alternatively, highlight an invoiced order then right-click and select **Customer Return**. From the Parts Order View, right-click the order and select **Credit**. This will display a Create Customer Return window.

From the Customer View, right-click and select **Create > Workshop/Parts > Customer Return**.

How to Create Credits:

In the Create Customer Return window input the required information (including the original order number if you want to credit a complete order).

In the Customer Return Details window, input the parts and operation details that you want to credit. If you are creating a credit for a complete order and you put the order number in the previous screen, all the details from the original order should already be in the Customer Return Details window. If there are certain lines you do not want to credit these can be deleted.

When crediting surcharge parts, a window will be displayed asking whether you want to credit the part, the surcharge, or both, as well as prompting you to enter the returned part serial number and the returns note. Entry of data is dependant on the status of the original surcharge.

All credit lines update the 'Sales Forecast' and 'Picks' fields in the Parts Master File and the 'Last Sale Date' is updated when the part is added to the order.

When you have input all parts and operation details you want to credit, select **Order > Print > Invoice** (workshop credits can also be printed in batch, just like invoices). Alternatively select the Invoice button .

Email Based Invoicing

Why:

Used to selectively send Parts and Workshop invoices to a third-party supplier for printing and mailing.

Where:

From the Customer View, after selecting the Customer a field 'Print Method' is available on the Point-of-Sale tab.

In order entry, an input-capable Print Method field is available on the overview tab. The method attached to the customer will be the default when opening a new order.

The selection of email invoice and the customer's email address can both be overridden when invoicing. This only applies to Parts and Workshop invoices.



*The Workshop Order
View button.*



*The Parts Order
View button.*



*The Customer View
button.*

How to Perform Email Based Invoicing:

Email invoice processing is based on parameter settings. If the parameter setting for email is positive, the Print Method combination contains the option to email. Selection of Email is only allowed if the customer has a valid email address. If the default Print Method is Email (This is controlled by a parameter) and the customer does not have a valid email address, the Print Method for this customer should default to Local. A valid email address is defined as an entry in the customer file and must contain the @ character.

Insurance Based Invoicing

Why:

Insurance Invoicing allows the 'Goods' and tax to be separated on a workshop invoice between two parties, i.e. Customer and Insurance Company. There are some pre-requisites for this process to function:

- The Order is raised under the Insurance Company's account.
- The insurance Company is set up as a Vatable Customer.
- The Customer account is 'flagged' as an Insurance Company.
- Individual lines are NOT split between different Customers.
- Markets must NOT run common Order/Invoice numbers.



*The Workshop Order
View button.*

Where:

From the Workshop Order View, open the order that you would like to invoice. When you have opened the order, select **Order** from the menu bar followed by **Print > Invoice > Online**. This will display a Split Invoice window. The top part of the screen will display the Insurance Company details for the goods to be charged too. The bottom half will allow a Customer number to be entered along with VAT contribution, any excess and any 'betterment' value.

How to Perform Insurance Split Invoicing:

Click OK to generate two unique invoice prints.

What else would you like to do?

“[Reprinting an Invoice](#)” on page 174.

Related Topics:

“[Batch Invoicing](#)” on page 143.

“[Invoicing a Workshop Order](#)” on page 169.

Set up:

Various parameters control the layout of an invoice print and the information that it contains. A new field has been added to the Customer File to indicate that the Customer is an Insurance Customer.

A new parameter 910 114 has been created for FUTRAT to balance out any insurance postings for excess, betterment and tax.

Invoice Administration Charge

Why:

In some markets the customer is charged an invoice administration fee for each workshop or parts invoice raised. The purpose of the Invoice Charging function in GDS Fusion is to allow an invoice administration charge to be added automatically to parts and workshop orders and quotations.

The invoice administration charge defaults automatically onto new orders from an invoice charge code held on the customer file. The user is able to review and amend invoice charge and its tax on an order.

Where:



The Control Master
File view button.

Invoice Charge Code Maintenance is in the Customer Category Control Files. Each charge code is given a description and charge amount.

When parameter IFC001 is positive, invoice charge is displayed in customer maintenance, on the point of sale tab:

Customer Maintenance - Branch 000006

File Edit Help

Customer 0000000556 Status Active Date Created 13/10/2006
CDB Party Id 8209443555 Name Swedish customer

Main Addresses Contacts Financial Point of Sale Miscellaneous Marketing

Show Parts Discount Percentage Print Note on Invoice
Invoice Currency Print Price on Delivery Note
Number of Invoice Copies 1 Collect Invoices
Invoice Charge Standard Charge (10.00) Invoice/Delivery Invoice Print Method Local

Discount Fixed Prices
Parts Discount Category General Customers - Rate 1 Package Total Discount % 0.00
Parts Discount % 0.00 Package Labour Discount % 0.00
Labour Discount % 0.00 Package Parts Discount % 0.00
 Allow Price Changes Package Parts Use Discount Matrix

Payment factor
Labour Rate 0.00 Start Date Expiry Date

Save and Close Close

Invoice charge and invoice charge tax is included in the workshop order and quotation header on the customer tab:

Order Details for 9920769, Registration Number BT08YBD - Branch 000006

Customer: 0000060011 Customer Name: Customer Name Opened Date: Product Code

Customer/Vehicle Messages Overview Customer Addresses Planning

Company Number: 123
 Tax Code: 1 Customer Tax Code
 Second Level Vat: 1 Goods Tax Rate
 Payment Terms: No Uplift, No Credit Check
 Discount Category: General Customers - Rate 1
 Source Code: Normal Order
 Customer Concept: Excellent

Invoice Charge: Standard Charge (10.00) 10.00
 Invoice Charge Tax: 1 Goods Tax Rate

Text Operations Parts

Operation: Quantity: 1 Payment Code: Add

Code	Description	Payment Code	Job	Ord. Qua...	Picked Q...	Time/Price	Discount%	Tax%	Amount
Order 992									
210	Engines Ge	External	00	1.0		2.0055.16	89.90	15.00	11.14
	LINE1	External	00						
	line2	External	00						
	line3	External	00						

Save and Close Close

Invoice charge and invoice charge tax is included in the parts order and quotation header on the shipping and costs tab:

Order Details for 9117965 - Branch 000006

Overview Customer Shipping and Costs Other Charges Details Invoice Text

Delivery: Counter Delivery Name: Mark Howard
 Freight: 0.00 1 Goods Tax Rate Delivery Address: The Hedges
 Invoice Charge: 25.00 High (25.00) 20 Park Drive
 1 Goods Tax Rate Old Hoborn
 Virginia
 Post Code: CV34 5YA

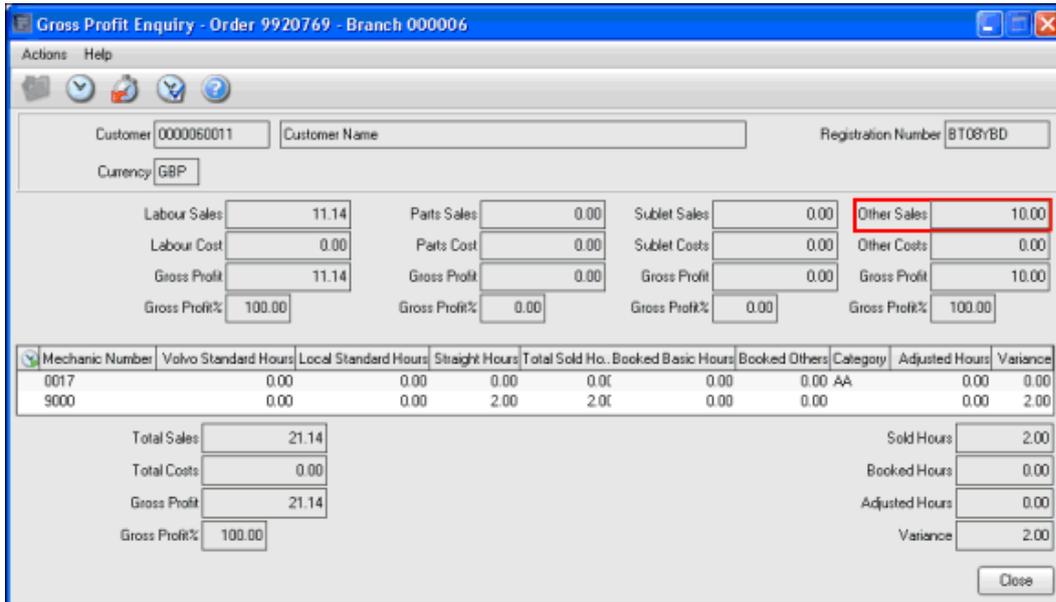
Part: Quantity: 1.0 Add

Part	Description	Location	Payment Code	Alternati...	Ord. Quantity	Reserved i...	Unsources...	Reserved ...	Unit Price	Discount	Tax %	Amount
VO-4	OIL FILTER	LOC1	External		1.0	1.0	0.0	0.0	15.99	10.90	15.00	14.25
VO-5	EXCH CDN	IBTTST	External		1.0	1.0	0.0	0.0	583.23	0.00	15.00	583.23

Gross Amount: 599.22 Discount: 1.74 Net Amount: 597.48
 Other Charges: 32.00 VAT Amount: 93.37
 Total Payable: 722.85

Save and Close Close

Workshop orders and quotations include the invoice charge amount in 'Other Sales' on the Gross Profit Enquiry screen:



Gross Profit Enquiry - Order 9920769 - Branch 000006

Customer: 0000060011 Customer Name: Registration Number: BT08YBD
 Currency: GBP

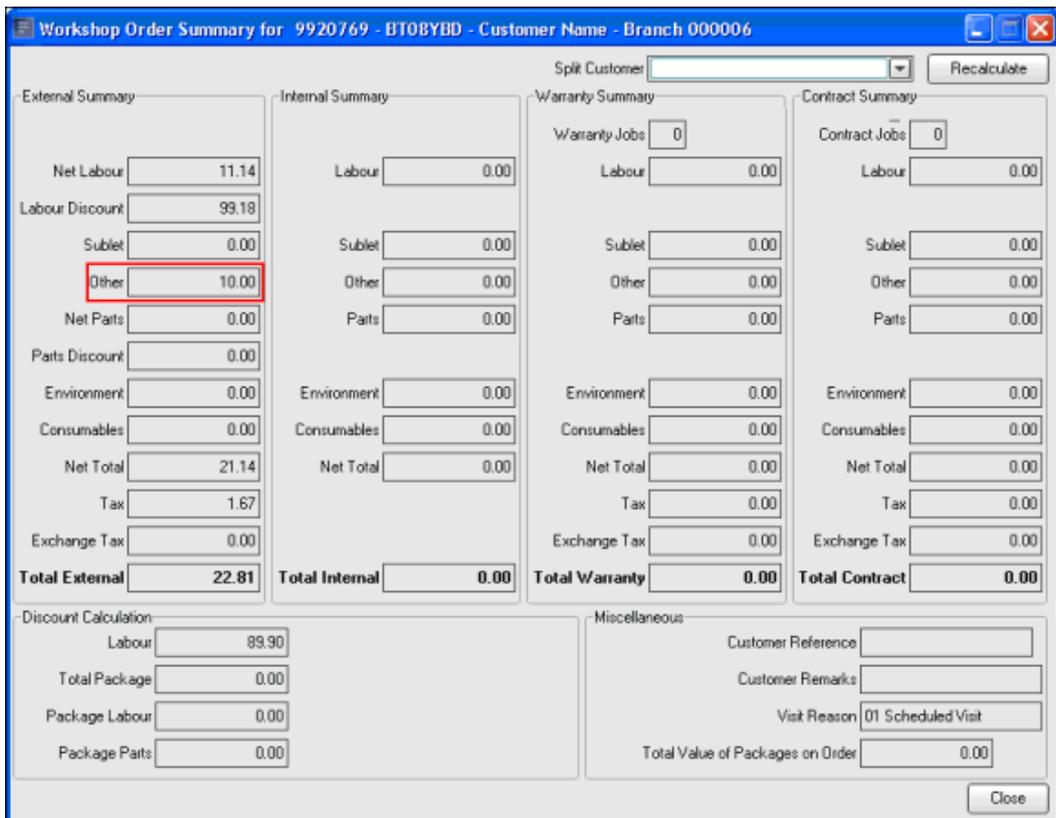
Labour Sales	11.14	Parts Sales	0.00	Sublet Sales	0.00	Other Sales	10.00
Labour Cost	0.00	Parts Cost	0.00	Sublet Costs	0.00	Other Costs	0.00
Gross Profit	11.14	Gross Profit	0.00	Gross Profit	0.00	Gross Profit	10.00
Gross Profit%	100.00	Gross Profit%	0.00	Gross Profit%	0.00	Gross Profit%	100.00

Mechanic Number	Volvo Standard Hours	Local Standard Hours	Straight Hours	Total Sold Ho.	Booked Basic Hours	Booked Others	Category	Adjusted Hours	Variance
0017	0.00	0.00	0.00	0.00	0.00	0.00	AA	0.00	0.00
9000	0.00	0.00	2.00	2.00	0.00	0.00		0.00	2.00

Total Sales	21.14	Sold Hours	2.00
Total Costs	0.00	Booked Hours	0.00
Gross Profit	21.14	Adjusted Hours	0.00
Gross Profit%	100.00	Variance	2.00

Close

Invoice Charge amount is included in 'Other Sales' on the Workshop Order Summary screen:



Workshop Order Summary for 9920769 - BT08YBD - Customer Name - Branch 000006

Split Customer: Recalculate

External Summary	Internal Summary	Warranty Summary	Contract Summary
Net Labour: 11.14	Labour: 0.00	Warranty Jobs: 0	Contract Jobs: 0
Labour Discount: 99.18	Labour: 0.00	Labour: 0.00	Labour: 0.00
Sublet: 0.00	Sublet: 0.00	Sublet: 0.00	Sublet: 0.00
Other: 10.00	Other: 0.00	Other: 0.00	Other: 0.00
Net Parts: 0.00	Parts: 0.00	Parts: 0.00	Parts: 0.00
Parts Discount: 0.00	Parts: 0.00	Parts: 0.00	Parts: 0.00
Environment: 0.00	Environment: 0.00	Environment: 0.00	Environment: 0.00
Consumables: 0.00	Consumables: 0.00	Consumables: 0.00	Consumables: 0.00
Net Total: 21.14	Net Total: 0.00	Net Total: 0.00	Net Total: 0.00
Tax: 1.67	Tax: 0.00	Tax: 0.00	Tax: 0.00
Exchange Tax: 0.00	Exchange Tax: 0.00	Exchange Tax: 0.00	Exchange Tax: 0.00
Total External: 22.81	Total Internal: 0.00	Total Warranty: 0.00	Total Contract: 0.00

Discount Calculation	Miscellaneous
Labour: 89.90	Customer Reference:
Total Package: 0.00	Customer Remarks:
Package Labour: 0.00	Visit Reason: 01 Scheduled Visit
Package Parts: 0.00	Total Value of Packages on Order: 0.00

Close

 **Notes!** Because invoice charge is stored in the extra costs' field on the order header, either Invoice Charge or Extra costs are shown on a parts order. When the invoice charge functionality is switched on extra costs cannot be used. When it is switched off, the Invoice Charge field shown in the previous screenshots will change to show the 'Extra' field instead.

Zero value orders and orders with only non-external lines (warranty or internal) do not include an automatic invoice charge.

If a credit note is created by copying a previous order (RMK > Customer Return in workshop or Full Credit of a parts order), the invoice charge from the order is copied to the credit note. A credit note raised by any other means (including Partial Credit of a parts order) does not include the invoice charge.

For Parts collect invoices, the invoice charge is only applied once for the collect invoice, even though it may include many orders. The charge applied to the first order processed is the one which is applied to the invoice.

If a workshop order is split between two or more customers, the invoice to the first customer, whose customer number is on the order header, has an invoice charge applied automatically. Subsequent invoices split to different customers, also have an invoice charge applied automatically using the default invoice charge which is defined on each respective customer file. Invoice charge for secondary customers cannot be amended or removed.

The customer invoice on an insurance order for any excess, betterment or tax payable by the customer, is created on the basis of the deal between the insurance company and the customer. If the order header holds an invoice charge it will be payable by the insurance company. The customer invoice will not include any separate invoice charge.

Parameters:

Parameter Name	Purpose / Description
CUS 018	The default Invoice Charge at customer creation. Default value = 0. Possible values 0 – 9 (1 alpha)
IFC 001	Enable Invoice Charging. Default value = *LIKE(NEG001). Possible values *LIKE(POS001) / *LIKE(NEG001).
MTD 001	The default value for zero cost invoice charge code used when order set to a cash payment type. As default this value is blank. Possible values are 0 – 9 (1 alpha).
910 151	THF152 Key-Workshop Extra Charge. Default value = WXTRA. (7 alpha)
910 152	FUTRAT Workshop: Extra Cost. Default value = WXTRA. (8 alpha)

Related Topics:

[“Invoicing a Parts Order”](#) on page 167.

[“Invoicing a Workshop Order”](#) on page 169.

[“Insurance Based Invoicing”](#) on page 162.

Invoicing a Parts Order

Why:

An order should be invoiced once all work on it has been completed. An order is considered to be complete once the invoice has been raised and therefore no further amendments can be made to it.

Where:



*The Parts Order
View button.*

From the Parts Order View, open the order you want to invoice. When you've opened the order, select **Order** from the menu bar followed by **Print > Invoice**

or select the invoice button  .

How to Invoice Parts Orders:

When you have selected the print command, a Print Invoice window is displayed, confirm that the delivery dates are correct and click OK.

Select the check box if you want to invoice in an alternative currency. Fusion will then pick up the currency type from the customer profile information.

If the order is a cash sale, check the tick box to confirm payment has been made. This is meant to act as a prompt to remind you to take the cash from the customer! Then click OK.

If prompted for invoice text, you can enter any additional comments that you'd like to see printed on the invoice before clicking OK.

The system will then return you to the parts order view. In the list of orders, you'll notice that the order you just invoiced now has a different icon which denotes that it has been invoiced.

What else would you like to do?

[“Batch Invoicing”](#) on page 143.

Customer Point of Sale Details.

Related Topics:

Finding Out About Gross Profit.

Printing and Re-Picking Slips.

[“Reprinting an Invoice”](#) on page 174.

Invoicing a Vehicle Order

Why:

For each vehicle order you have the option to create a single invoice or a split invoice (where up to 3 invoices can be created for different customers).

Where:

From the Vehicle Order View, highlight the vehicle order that you would like to work with and right-click, then select **Invoice > Primary Invoice**. This will display a Number of Invoices window.



*The Vehicle Order
View button.*

How to Invoice Vehicle Orders:

The Number of Invoices window is where you indicate if you wish to create a single invoice for this vehicle order or if you wish to split the invoice value between two or three different customers.

To invoice one customer for the entire deal, make sure that the number of invoices is '1' and input the desired customer number. Click OK to go to the Create Primary Invoice window.

In the Create Primary Invoice window you can review the customer details and invoice values. Tax code and Print on Invoice can be changed on an invoice line by right-clicking and selecting the appropriate option.

The free format text field is where you can input any additional information that you would want to see printed on the invoice. Hint: select the Show/Hide Text icon to hide this section of the screen and display more of the invoice lines. Enter the required invoice date and the correct payment terms for this customer/deal. Check the alternate currency checkbox to print the invoice in another currency. If appropriate, verify/amend the language in which the invoice will print.

Click on the Preview icon to see a preview of the printed vehicle invoice. Click OK to complete the invoice. A Print Invoice window will be displayed input the required information and click OK. To print a proforma invoice, select Invoice Type of proforma. A confirmation message will be displayed when the invoice has been printed.

What else would you like to do?

Registering an Invoice as Paid.

[“Supplementary Invoicing”](#) on page 176.

Related Topics:

Creating Split Invoices for a Vehicle Order.

Financial Details of a Vehicle Order.

[“Reprinting an Invoice”](#) on page 174.

Invoicing a Workshop Order

Why:

An order should be invoiced once all operations on it have been completed and parts delivered. An order is considered to be complete once the invoice has been raised. An invoiced order is considered as closed, therefore no amendments can be made to it.



The Workshop Order View button.

Where:

From the Workshop Order View, open the order that you would like to invoice. When you have opened the order, select **Order** from the menu bar followed by **Print > Invoice > Online**. This will display a Print Invoice window. Prior to this various message dialog boxes may be displayed dependant upon parameter settings and if there are incomplete claim jobs.

How to Invoice Workshop Orders:

In the Print Invoice window, select the required number of copies and any other information you want to see on the invoice.

Click OK to generate invoice print.



Note! Click on the invoice preview button  to see a preview of the printed workshop invoice.

What else would you like to do?

“[Batch Invoicing](#)” on page 143.

Related Topics:

The Customer Master File.

“[Invoicing a Parts Order](#)” on page 167.

“[Previewing an Invoice](#)” on page 172.

“[Reprinting an Invoice](#)” on page 174.

“[Complementary Business](#)” on page 146.

Set up:

Various parameters control the layout of an invoice print and the information that it contains. For example INV 115 allows for the use of an invoice date other than today's date when completing a parts or workshop order. Parameter INV 152 controls whether zero amount invoices are produced or not.

Printing package details is controlled via parameter INV021.

The first character controls Operations details and the second character controls Part details. 0 = No Print. 1 = Print.

For example. 00 = Do not print operations or parts. 11 = Print operations and parts. 01 = Do not print operations but print parts.

Parameter REC 201 determines if time recording records by a mechanic against the order/operation have to be 'flagged' as completed before the invoice can be produced.

Parameter WOC 004 validates each operation ensuring they have been assigned a Mechanic Number. Any operations that have not been assigned a valid Mechanic Number will be displayed in a warning dialog box and must be corrected before the invoice can be completed.

Various rules are in place for 'Bureau' invoicing based on Customer type (Cash/Credit/Internal), Print method (Local/ email/Bureau) and Parameter INV155 which will allow an online invoice to be printed.

Internal invoice prints are conditioned based on OEP 019 (Alternative Payment code mandatory) and where POS a separate document will be generated based on a combination of PC/APC.

Labour Price Matrix

Why:

A price table has been introduced whereby a labour rate can be applied based on Customer Code (held against the Customer), Charge Code (held against the Order) and Classification (held against the operation). Dependant on different scenarios of the tables, various rates can be applied. Classification codes will be approved by VTC and will define the complexity of the work to be performed, this will also take into account any training and special tools required.

Where:

Currently Fusion can apply labour rates and discount from the Vehicle, Customer, Operation and Payment Code.

How to Maintain the Labour Price Matrix:

After initial set up of appropriate data in the tables, (see Set Up below), the Labour Price Matrix can be maintained by either setting up new or editing existing data in those tables.

E.g. Set up a new Customer Code against each Customer. Set up a new Charge Code against each user that will be used as a default when creating a Workshop Order.

Set up a new classification code against any Local VST (Classification code for Central VST will be retrieved as part of the VST download). Set up a new Price classification X-ref.

Set up a new Customer Labour price and set up a new Payment price for internal, warranty and contract charges.

Related Topics:

Adding an Operation to a Workshop Order.

Customer Code Table.

Set Up:

The following tables need to be setup in order for the Labour Price Matrix to function:

Charge Code Table: This table allows codes to be created where different charges might apply, such as Normal Day Time, Breakdown, Night Hours, etc.

Price Table: Allowing a code to be applied to a Pricing Table – tables will relate to a series of labour rates applicable to different VST classification types. The Pricing table to be used by the system will be dependent upon the combination of Customer Code, Charge Code, and VST Classification code applicable to the VST line at the time it is added to the order.

Price Table Classification Cross-References: This table contains a series of labour rates for a Price Table, each rate is specific to a Price Table / VST classification combination.

Customer Labour Price Table: This table allows the system to determine which Price Table to use based on Branch, Customer Code, Charge Code and Product Code combinations.

Payment Price Table: This table allows the system to determine which Price table to use for non-external lines based on Branch, Payment Code, Alternative Payment code, Charge Code and Product code combinations.

VST Classification Code Table: Allowing a VST to store a classification code which will be used to determine the pricing. This value is held within Impact and should be entered as “90” – Local Work, for any locally created VSTs. The value will relate to the complexity of the work required and will take into account any additional equipment required to perform the task.

New parameter PRC006 will activate new fields.

Previewing an Invoice

Why:

It is useful to be able to preview invoices before they are printed to make sure that the correct information is included and also to make sure that the order lines are displayed in the correct sequence.

Where:

From the Parts Order View or Workshop Order View, open the order you would like to work with and then select the Invoice Preview button . This will display a View Queued Print window.



The Workshop Order View button.



The Parts Order View button.

How to Preview Invoices:

In the View Queued Print window the invoice is displayed in the exact format that it will be printed.

What else would you like to do?

[“Batch Invoicing”](#) on page 143.

Related Topics:

Complete the Order and Print the Invoice, as shown in [“Invoicing a Parts Order”](#) on page 167.

Reallocation Codes

Why:

Reallocation codes are used in order to:

- Raise a credit note to the customer. If you've already raised an invoice to him and then the importer accepts a manual claim and you want the customer to receive a credit note. In this instance, retail sales will be reallocated to warranty sales and debit and credit relevant accounts for the financial system to ensure that accounts for the dealer are correct.
- Raise an invoice to the customer when the importer has rejected a claim and you want the customer to pay. In this instance this will reallocate warranty sales to retail sales and debit and credit relevant accounts for the financial system to ensure that accounts for the dealer are correct.

Reallocation codes transfer sales and costs from/to external accounts and from/to warranty and contract accounts, depending on whether an invoice or credit note is raised to the customer.

There are currently eight standard local VST operations in the VST file to cover re-allocation of labour, parts, sublet and others. These are as follows:

VST Operation	Purpose / Description
XXXMO	Reallocate CONTRACT MAINTENANCE – Others.
XXXMP	Reallocate CONTRACT MAINTENANCE – Parts.
XXXMS	Reallocate CONTRACT MAINTENANCE – Sublet.
XXXMW	Reallocate CONTRACT MAINTENANCE – Labour.
XXXWO	Reallocate WARRANTY- Others.
XXXWP	Reallocate WARRANTY- Parts.
XXXWS	Reallocate WARRANTY – Sublet.
XXXWW	Reallocate WARRANTY – Labour.

These codes can be changed or increased to suit different markets, where multiple payment codes are used.

 **Note!** It is possible to use any VST operation for this purpose; so long as the reallocation tab is updated correctly with the correct details.



The Operations View button.

Where:

From the operations view, open the required operation number and select the reallocation tab.

How to Perform Reallocations:

The reallocation tab contains fields for claim type, reallocation type, reallocation discount and payment code (used for warranty/contract). The reallocation discount is the same discount percentage that is set up in the Non-External Parts pricing Table that is applied to the part when issued to this payment code. If there are several discount percentages applied to different parts (dependent on discount code), then multiple reallocation codes can be set up or one can be created based on an 'average' percentage.

Related Topics:

Operations.

Set up:

The reallocations tab on a VST operation needs to be updated to allow it to be used for the purpose of reallocations.

Reprinting an Invoice

Why:

Invoices can be reprinted as many times as required.

Where:

From the Parts Order View, highlight the order you want to work with and select **Order > Print > Copy > Invoice**.

From the Workshop Order View, highlight the order you want to work with and select **Order > Reprint > Invoice**. This will display a Reprint Invoice window.



*The Workshop Order
View button.*



*The Parts Order
View button.*

How to Reprint Invoices:

In the Reprint Invoice window select how many copies of the invoice you require as well as any other information you want to see on the invoice. The fields within this window will vary from market to market as their availability is parameter controlled.

What else would you like to do?

“[Batch Invoicing](#)” on page 143.

Related Topics:

“[Previewing an Invoice](#)” on page 172.

Sundry Invoicing

Why:

Sundry invoicing allows dealers to raise external invoices and credits for anything outside the Fusion parts, workshop and vehicle administration modules.

It is recommended for markets without this facility in their accounting package, but its reasons for use must be clearly identified within each market, in order to maintain the maximum historical data within Fusion. It is designed to interface into an accounting package in the same way that the other Fusion modules do. The only links with the other Fusion modules are that it shares the same Customer Master File and certain control files.

Where:

From the Parts Order View or Workshop Order View, select **Actions > Sundry Invoicing**. This will display a Sundry Invoices and Credits window.



The Workshop Order View button.



The Parts Order View button.

How to Create Sundry Invoices:

The Sundry Invoices and Credits window lists all sundry invoices and credits currently held in Fusion. A sundry credit is indicated by this icon .

To create a new sundry invoice, select File > New. Alternatively, select the 'New' icon. This will display the Create Sundry Invoice/Credit window. Input the required information and click OK (it might be necessary, for the purposes of the accounting interface, to complete the additional reference field for example with the chassis number).

The Sundry Invoice Details window is then displayed and you'll notice that Fusion has populated the customer information fields with the relevant information, taken from The Customer Master File.

How to Add Text to Sundry Invoices:

Lines and text are added to the invoice by selecting File > New > Detail/Text. Or select the 'New' icon down arrow and select detail or text. Always remember to save and close when you've finished adding details and text.

How to Print Sundry Invoices:

To print a sundry invoice from the Sundry Invoices and Credits window, highlight it and right-click then select Print > Invoice/Credit. Alternatively, highlight it and select Edit > Print > Invoice/Credit or proforma. A proforma invoice can also be printed. If multi-lingual processing is enabled in your market, you'll be prompted to confirm the language for the print. This prompt defaults to the code held on the customer record, or if none, the default language for the dealer; but this code can be overridden. When printing an invoice, you might also be prompted for a delivery date, depending upon the legal requirements pertaining to your market.

Supplementary Invoicing

Why:

The supplementary invoicing routine can be used to create additional invoices after the primary vehicle invoice has been raised. For example, the routine can be used to invoice a customer for an item that was not included on the original invoice.

Where:

From the Vehicle Order View, highlight the vehicle order you wish to work with. Right-click and select **Invoice**, then select **Supplementary**.



*The Vehicle Order
View button.*



Note! You may only select invoiced vehicles on which costs have not been flagged as fully allocated.

How to Create Supplementary Invoices:

Enter the required customer number and click Validate. This will bring up the customer name and address details. Enter the invoice date and a deal agreement reference, if required. Depending on the setup of your system entry of alternate currency, payment terms and language may be required. It is possible to enter invoice amounts against the vehicle chassis, or any of the other charge headings.

Payment Code and Account Code default from those entered in the vehicle order's Financial Details window. TAX codes default from the Vehicle Order Default Payment and Account Codes table. These values may be overridden. Headings for other charges 4 – 6 are pulled from the Financial window. If no headings exist for these items, they may be entered here.

You may also invoice additional extras by clicking File > New or the New icon. On invoice completion, these items are added to the Extras window.

To add an extra, enter the required description, values and Account Code. Payment Code and TAX Code default from the Vehicle Order Defaults table but may be overridden. If you have added an extra in error, it can be deleted by highlighting it and clicking Edit > Delete or the Delete icon.

For each vehicle chassis, other charge or extra item you can enter Estimated Cost and Invoice values. These values are added to the Estimated Cost and Invoice values in the vehicle order's Financial window when the invoice is completed.

If the facility is enabled to update actual costs to the financial interface, you may also enter values in the Actual Cost fields.

You may also enter any text that you wish to print on the invoice. The text includes any text lines from the vehicle order's Free Format Invoice Text window. Click OK to print the invoice, or Cancel to abandon the routine. Depending on the setup of your system, you may be prompted to enter a delivery date.

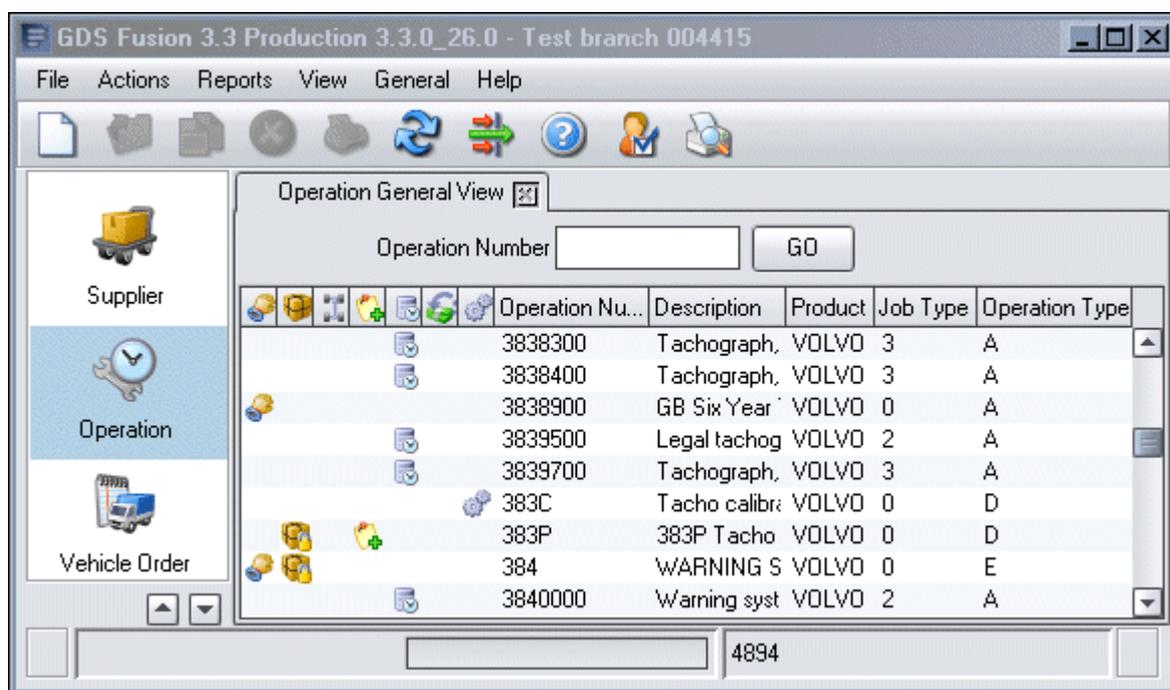
Related Topics:

[“Invoicing a Vehicle Order”](#) on page 168.

Operations & Packages

About Operations & Packages

This chapter documents Operation and Package related functions. It covers information and instructions about the Central & Local Packages, Package Handling and Operation Handling.



Operations & Packages - Status Icons:

Button / Icon	Purpose / Description
	Auto Consumables: This icon indicates that consumables are automatically applied to the operation. See the topic
	Package: This icon indicates that the operation is part of the GPSS, or Guaranteed Price Service System, meaning that the operation code shown relates to potentially multiple operations and parts which can be added to a workshop order as a single entity.
	Fixed Price Package: As a package, except the prices may not be changed, not may constituents of the package be removed, amended or added to when added to the order.
	Driveline: This icon indicates that the should the operation be performed on a vehicle, that that fact would be relayed to the importer as proof that the service was performed to comply with the rules of the Driveline warranty.

	Additional Text: This icon indicates that additional text exists for this operation.
	VST: This icon indicates that the operation is a Volvo Standard Time, and hence a recommended time exists to complete that operation.
	Downloaded from VST: This indicates that this operation was once centrally held, but that it has been amended in some way to create a local version.
	Reallocation: This icon indicates that the operation should be used to reverse any sales in the book keeping system caused by, for example, Warranty claims being rejected; then sales and costs can be reversed and re-allocated to their new turnover areas.
	Variants: This icon indicates that details exist that relate to this operation being performed on specific vehicle types; possible details include a specific length of time, tax and account codes.

Central Packages

Why:

Central packages are created by the Importer and sent to Main Distributors overnight in the Daily Batch.

Where:

From the Operations View, select **Package Flag** in the **Operation Filter**. Central Packages can be identified by the format of the Operation Number ('12345 VO – five numeric characters followed by 'VO').



The Operations View button.

How:

Regular monthly package updates are sent out from VTC to each main distributor. These are then extracted and the GPSS files THF276/7/8/9 are updated along with the VST file THF025 with the package operation. Any previous packages are replaced with the latest extract and an email is sent to designated user set up within the email distribution option. Attached to the email is a spreadsheet listing any errors.

All packages supplied centrally have the indicator 'C' on the package files and if these are modified by the dealer any details added are indicated by an 'L' (local). These will not be replaced when a new extract takes place; thus preventing the dealer having to re-key any local operations or parts.

The labour rate applied to centrally applied package operations is the dealers' normal retail rate (based on VST 001). The price applied to the part will be the retail price from the Parts Master File. Centrally supplied packages support both 'T'ruck (Product code 0) and 'B'us (Product code 2), and are distributed and extracted based on the market/dealers language code as per THF 201 set up.

The Package Description File THF 279 is restricted to four lines of text which limits the amount of details that can be transmitted. Packages created centrally use the 4-digit function group as used with the VST File and Parts Pricing File. This is followed by a single digit serial number and then a suffix of VO. For Example – 2371_O_VO. Variant descriptions are checked against THF 004 and the correct applicable variant code is written to THF 278.

Related Topics:

[“Packages”](#) on page 182.

Grouping

Why:

Grouping is an 'ad-hoc' way of creating Packages. Groups of Operations and Parts can be created from within an Order and will apply to that order only.

Where:



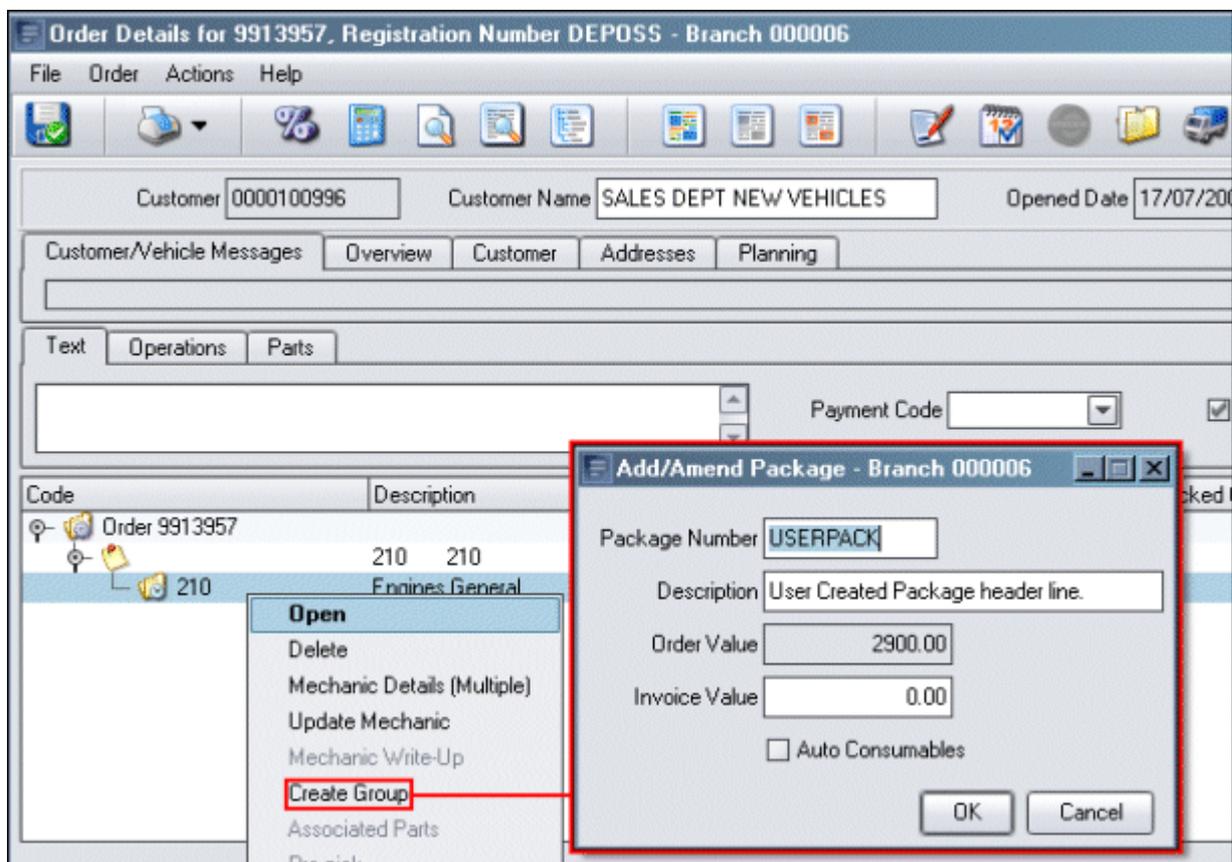
The Workshop Order View button.

From the Workshop Order View, open the order that you would like to work with. Highlight the order's operation line that is to be included in the package, right-click then select Create Group. This will display the Add/Amend Package window.

How to Group Operations & Packages:

In the Add/Amend Package window input a package number, description and an invoice value (if required). The invoice value can be a total price that you may want to charge to the customer and Fusion will apportion any difference across the labour operation lines.

In the order lines the new group is signified by the package icon and the operation that was originally selected is included within the new group as seen below:



You can use the drag-and-drop facility to move other order lines into your group.

To add parts or operations to your group, make sure that the group line is highlighted and then add parts and operations in the usual way. When labour lines are added to a group, any associated parts will be added.

Fusion applies the discount from the Customer Master File rather than the Discount Matrix to parts that are grouped.

Parts or operations in a group can be removed from the order, providing you have the correct level of authority. Highlight the line, right-click and then select Delete. For a package created using grouping, the user will be prompted to calculate consumables on the header.

What else would you like to do?

Create a Package – See “[Packages](#)” on page 182.

Related Topics:

“[Central Packages](#)” on page 177.

Operations

Why:

Any work carried out on a vehicle must be identified in Fusion by an operation number. These operations are referred as (VST) Volvo Standard Times and help to standardise Volvo workshops and enable more efficient time and mechanic utilisation measurements.

Where:

The Operation View displays all VST operation numbers that have been set up by the dealer and importer.



The Operations View
button.

How to Add Edit & Delete Operations:

There are three categories of operations indicated by the following icons:

- **Central VST** - Created and maintained at importer level (IMPACT). Identified by the  icon.
- **Downloaded Central VST** - Downloaded from Impact system by dealer. Identified by the  icon.
- **Local VST Operations** - These are operations created/maintained by the dealer. They have no icon.

Opening a VST copies it into the local VST operation file and allows information such as account code and VAT code to be added as well as amending the description. (The variant tab is never displayed against these as the time will always come from Impact).

For any local VST operations, the variant information can be amended, created or deleted.

To create a new VST operation number, from the operation view select File > New. Input the product and new operation number and click OK. In the New VST window, input the details that relate to your new VST.

When creating new operation numbers it is worth remembering the Volvo standards, as Fusion uses these when processing data for reports etc. The

Operation types are those used by Volvo, the field lengths and descriptions are a best practice way of working, recommended by VTB.

Operation Number	Operation Type	Results in Operation Type
2 Numeric	F	Other (9) and Sublet (2) Sale.
3 Numeric	E	Straight Time (Impact).
4 Numeric	D	Local Operation.
5, 7, 10 Numeric	A	Volvo Operation (Impact).
3 Numeric / 1 Alpha	D	Local Operation
5 Alpha	F	Other (9) and Sublet (2) Sale.

When creating a new local VST, only the 'General' tab is displayed initially. Once these details have been entered and you have clicked OK, other tabs then become active.

If Packages are to be associated with this operation check the 'Package' box. This will create a 'Package' tab where the package information can be created and stored.

If the Operation is to be used for Reallocations (re-charge of Warranty to External) then update the 'Reallocations' tab with the appropriate claim type, reallocation type, discount (where required) and payment code.

If the Operation is applicable to certain variants and a time is to be assigned then select the 'Variants' tab, followed by File > New > Variants. Now input the required details for the first variant. Do this for each variant as required. The list of variants within the 'Variants' tab can be opened, amended or deleted as required.

What else would you like to do?

Reallocations.

Related Topics:

["Packages"](#) on page 182.

Labour Price Matrix.

Set up:

VST header and text options can be multi-lingual dependant upon parameter LNG 002.

Parameter PRC006 will determine if a Price Factor field is displayed, if not then the price will be derived via the labour price matrix based on classification code.

Packages

Why:

Any work carried out on a vehicle must be identified in Fusion by an operation number, and some procedures carried out in the workshop involve multiple operation numbers and parts. These can all be packaged together and sold at an agreed price.

Where:



The Operations View
button.

The Operations View displays all VST operation numbers that have been set up by the dealer as well as all central operation numbers downloaded from Impact. Any operation numbers that have associated packages are displayed with a Package icon .

From the Operations View, open the operation that you would like to work with. This will display the Maintain VST window.

How to Add Edit & Delete Packages:

In the Maintain VST window select the 'Package' tab. Here, packages can be created, maintained and deleted.

Packages listed in the package tab are exclusive to that VST in that any updates affect only that package, regardless of whether another package exists with the same name against another operation number.

To create a new package select File > New > Sequence. This will display a Package Operation window. Input a unique sequence number and a description for the package. If the package is to be fixed, i.e. it can't be updated from the order entry or grouping routines, make sure that the 'Fixed Package Flag' box is checked, then click OK.

The new package should now be listed on the package tab. Highlight it, right-click and then select Variants to display the Package Operation Sequence window. Select File > New to display the Vehicle Variants window where you can select the particular vehicle variants that the package is to apply to.

Once the variant combinations have been selected it is time to add the operations and parts to the package. In the package tab, highlight the package, right-click then select Details. This will display another Package Operation Sequence window where operations and parts can be chosen.

When adding operations, costs should only be input against those set up as sublet operations. When an operation number is added, if the time multiplied by the payment factor doesn't equal the line total then this will be held as a fixed price and not subject to any changes to the payment factor.

If the labour price matrix is used (PRC006 = POS), then no PF amount is required (unless fixed), as this will be calculated dynamically based on the Customer code and Charge code when the package is added to an Order.



Note! To preserve line number integrity, operations should be added first. A warning to this effect will be displayed if parts are attempted to be added first. See installation notes to check for existing packages when first converting to Fusion.

When parts are added to a package, the unit price can be specified, if required, as well as whether the price is to be 'fixed'. (If fixed, the price will not be updated with any subsequent price changes from the parts master file).

If a part is added that has an environmental charge, you might be asked whether the charge is to form part of the value of the package. If you don't want this, the environmental charge will be added to the order as an extra amount. (The ability to choose whether the environmental charge forms part of the package value is controlled by a parameter).

When a package is copied to another operation number, the copy is seen as separate from the original by Fusion i.e. if one of the packages is updated; the updates only apply to that package.

Printing package details on a Quotation / Proforma and Invoice is controlled via parameter INV021. The first character controls Operations details and the second character controls Part details. 0 = No Print. 1 = Print.

For example. 00 = Do not print operations or parts. 11 = Print operations and parts. 01 = Do not print operations but print parts.

What else would you like to do?

Adding an Operation to a Workshop Order.

Related Topics:

[“Operations”](#) on page 180.

Setup:

Parameter PRC006 labour Price matrix.

Sales by Operation Number Enquiry

Why:

In Fusion it is possible to view a list of invoiced hours and amount for a given operation per month.

Where:

From the Workshop Order View, select the **Actions > Workshop Sales by Operation number enquiry** command.



The Workshop Order View button.

How to Perform Sales by Operation Number Enquiries:

Enter the required operation, e.g. 1774400 and select **OK** to view a list of **Invoiced Hours, Amount** and **Gross Profit per Month**. Use the right mouse button to view a list of orders where operation number was invoiced.

For a consolidated view of all service operations etc, enter 177* and select **OK**

Related Topics:

Hours Sold and Taken by Invoice.

Invoice Cost Analysis Report.

Updating Package Parts

Why:

This option allows an individual part within a range of packages to be updated. It is primarily used for replacing superseded parts on a one to one basis. However it can also be used to replace the price of an individual part within a range of packages as well as making changes to the fixed price flag.

 **Note!** Prior to running this procedure it is suggested that the GPSS Check List report is checked as this shows all superseded parts, parts not stocked at the selected branch and parts where the package value differs from the price in the Parts Master File.



The Operations View button.

Where:

From the Operations View, select the **Actions > Update Package Parts** command. This will display the Update Package Parts screen.

How to Update Package Parts:

In the Update Package Parts screen, input the **Package** and **Product Code** along with a **Package Number** (or you might want to update a range of packages by entering the package number from and to).

To select all packages ending with an alpha code, enter the numeric section of the package number followed by *, for example 511*. Enter the part number that you would like to update/replace and select the type of update required from those shown:

- Replace Part Number:** If checked, this checkbox allows you to replace one part with another by inputting a new part number.
- Update/Replace Part Price:** If checked, this checkbox allows you to specify a new price for the replaced part.
- Update Fixed Price Field:** If checked, the part is excluded from the general price update and will only change if manually updated.

To perform the update, click **OK** once all required information has been entered.

What else would you like to do?

Create a Package – See [“Packages”](#) on page 182.

Print the GPSS Checklist Report.

Related Topics:

[“Central Packages”](#) on page 177.

[“Updating Package Prices”](#) on page 186.

Updating Package Prices

Why:

Prices of parts contained within packages can be updated to reflect the current retail values of the branch by selecting this option (including parts that are flagged as 'Fixed = Y').

 **Note!** It's recommended that the GPSS Check List report be checked before this option is selected. This report shows any variance on fixed price parts where the package value differs from the price in the Parts Master File.



*The Operation View
button.*

Where:

From the Operation View, select the **Actions > Update Package Prices** command. This will display the Update Package Prices screen.

How to Update Package Prices:

In the Update Package Prices screen you can select a particular package (and sequence) to be updated as well as a specific part (and product).

What else would you like to do?

Create a Package – See "[Packages](#)" on page 182.

Print the GPSS Checklist Report.

Related Topics:

"[Central Packages](#)" on page 177.

"[Updating Package Parts](#)" on page 185.

Parts & Workshop Orders

About Parts & Workshop Orders

The sections in this chapter document the Parts Order & Workshop Order functions. In general, it provides information and instructions about:

- Workshop and Part Order handling and Maintenance.
- Assigning Mechanics to Orders.
- Part Kit & Consumables Maintenance.

Adding an Operation to a Workshop Order

Why:

Any work to be carried out on a vehicle in the workshop must be entered as an operation on the corresponding workshop order. This allows the mechanic time to be planned and workshop facilities utilized to their fullest potential. This also ensures that the customer is invoiced the 'correct time' for the repair and allows the workshop efficiency to be measured.

Where:

From the Workshop Order View, highlight the order and select **Order > Open**. This will display the Order Details window.



The Workshop Order View button.

How to Add Operations to Workshop Orders:

In the Order Details window, operations are added to the order by selecting the Operation tab and inputting the appropriate operation number and payment code.



Note! Blank will use the payment code set up against the Customer, unless 'Focus' is applied to a line, and in this situation the Payment code against the select line will be used. If neither of these cases apply then you can select the required Payment code from the drop down list box.

If the Payment code is either Warranty or Contract then you will be prompted to add a job number, unless the focus is already on a selected warranty/contract line and in this case the same job number will be applied to the new line.

The descriptive text against each operation number comes from the information held in the TST/VST files. Depending on the operation type, you might be prompted to confirm cost prices for certain operation numbers (usually sublet or other sales). Times shown for the operations are from matching the vehicle data to the VST/TST files in Impact; based on the specific variants. Any operation number that do not have a time means the system cannot find matching variants and a window will be displayed displaying minimum and maximum times. In this case you can enter the time manually.

If you add an operation that has a package attached, a window will be displayed listing the package selections. You can select a package from the list, or use the check box to indicate that you just want to use the operation only.

Select 'Part details' button on Operation tab to check if there are any Main and associated parts attached to the operation in Impact. RMK > 'Add All' will allow all details to be added to the Order

Lines can be added to the Order root or can be arranged together in a 'tree' format, for example Text: Carry out a service, Operations can then be attached 1774400, and to that part numbers 466634, 466987 etc can be attached.

What else would you like to do?

["Adding Parts to a Workshop Order"](#) on page 191.

["Changing the Customer on an Order or Quotation"](#) on page 198.

["Changing the Vehicle on an Order or Quotation"](#) on page 198.

[Invoice the order.](#)

["Cancelling or Deleting an Order"](#) on page 197.

Related Topics:

[Operations.](#)

["Impact Drag & Drop Interface to a Workshop or Parts Order"](#) on page 209.

[Labour Price Matrix.](#)

Set up:

A new parameter OEW021 has been introduced from 3.2 that allows the labour discount to be amended for non fixed value operations based on the threshold set against the user in the 'Parts user ID table'.

A new parameter PRC006 will also determine if a new Labour Price Matrix will be used to formulate a hourly rate rather than a price factor.

Adding a Parts Kit to an Order

Why:

Parts kits allow the parts department to create a 'kit' of parts that would usually be sold together. This saves time as the kits are added to orders rather than the individual parts.

Where:



*The Parts Order
View button.*



*The Workshop Order
View button.*

Open the Parts Order View or Workshop Order View and open the parts or workshop order that you would like to add the parts kit to, then Select **Actions > Parts Kits**. This will display the Work with Parts Kits window.

How to Add Parts Kits to Orders:

From the Work with Parts Kits window, highlight the kit you want to add to the order and select Kit > Issue Kit to Order. This will display the Issue Kit to Order window that lists all the parts in the kit. By default, against each part the include symbol . If you don't want to add a particular part to the order, double click the record and the symbol will change to the exclude symbol .

When adding a parts kit to an order, as well as checking for insufficient stock, exchange parts and supersessions the system will also check for fixed prices. Depending on the set up of your system, a window might be displayed asking you to verify whether the fixed price is to be used, or the sale amount. Supersessions and bulletins (publish) must also be actioned before the kit is added to the order.

All parts added to an order via a parts kit will automatically assume sales category1. Before the parts kit is added to an order, you can choose how you want to see the price information displayed on the invoice. This can be selected from 'Print Options' field by using the drop down arrow which lists three options. A parameter controls whether these print options are made available or not. If the parameter is set at positive the 'Print Option' is unavailable.

The system default in this case will print parts at the line level on the invoice. If the parameter for print options is set to negative to allow print options to be displayed.

After the kit has been added to the order from the Order Details window double-click the kit line and the Amend Kit Line Details window is displayed. Here, there is a print option field offering 3 alternatives:

- 11.** Price at Part Line Level. Selecting this option will print all part lines with quantities and prices, but won't print the total kit price on the kit line header.
- 12.** Price at Kit Header with Parts. Selecting this option will print the total kit price on the kit line header and print all part lines with quantities but not the price information per part line.
- 13.** Price at Kit Header without Parts. Selecting this option will print the total kit price on the kit line header but won't print any part line details.



Note! When a full credit is created for an order that contains a parts kit, the print options will be picked up from the original order.

When you issue a parts kit, there might be insufficient stock of some parts. A parameter controls whether stock is allowed to go negative (i.e. whether you can add them to the order or not) and another parameter controls whether you can add kit parts with zero quantities. Depending on the set up of your system, one of the following actions will be necessary:

You must enter a zero into the 'Quantity to Deliver' and 'Quantity to Back Order' fields. You can add the part to the order and enter a zero into the back order field. You can zero the delivered quantity field and create a back order transaction.

When deleting a part kit from an order, or a part line that belongs to a kit, a warning message will be displayed asking you to confirm the deletion.

What else would you like to do?

[Invoicing a Parts Order.](#)

[Invoicing a Workshop Order.](#)

Related Topics:

[Creating and Maintaining Parts Kits.](#)

Printing a Picking Slip, see "[Printing and Re-Printing Picking Slip](#)" on page 215.

[About the Parts Master File.](#)

Adding Parts to a Workshop Order

Why:

Parts are added to workshop orders if the parts are needed to complete the work on a vehicle.

Where:



The Workshop Order View button.



The Parts Order View button.

Parts are added to a Workshop Order within the Order Details window. This is accessed by locating the order from the list in the Workshop Order View and double-clicking it. You can also highlight the order, right-click then select Open, or select Order from the menu bar then Open.

From the Parts Order View, highlight the order then select **Actions > Parts Issue to WIP**.

How to Add Parts to a Workshop Order:

In the Order Details window, select the Parts tab. If the part number is known this can be entered, or you can search for it by selecting the search icon. Once you have entered the part number, enter the quantity and then click Add. Lines can be added to the order 'root' or to a specific operation that will appear arranged all together in a 'tree' format, as in the example shown below.

Code	Description	Payment Code	Job	Ord. Qua.	Picked Q.	Time	Price	Discount%	Tax%	Amount
Order 9914023										
170A	Local Service Package	External	00							119.72
210	Engines General	External	00	1.0		1.00	40.00	0.00	17.50	40.00
VO-1547562	SEALING MOULDING	External	00	1.0	0.0	0.0	79.72	0.00	17.50	79.72
VO-466634	OIL FILTER	External	00	1.0	0.0	0.0	9.35	25.00	17.50	7.01
VO-MIL	Both Depts	External	00	1.0	0.0	0.0	5.00	0.00	17.50	5.00
VO-466620	EXHAUST PIPE	External	00	1.0	0.0	0.0	58.59	0.00	17.50	0.00

A 'tree' is built up by highlighting the line against where you would like to add further part lines. If you have highlighted a line and added parts in this way then the system will use the payment code information from the highlighted line. If part lines are not added to the order as a 'tree' format and the payment code is left blank then Fusion will use the payment code that is already set up for the customer, or assume that it is an external payment code.

Part lines can be removed from a workshop order by highlighting the line within the order lines section and right-clicking then selecting Delete > Part. However, the ability to do this depends upon the authority level allocated to your user ID.

If parts have been requested for a vehicle they can be added by selecting Order > Vehicle Parts. This will display a window listing all of the parts requested. To add any of these parts to the order, select Actions > Add to Order. If they're any stock available then a message will be displayed and a back order created.

If an operation line was highlighted on the order when the requested parts were added, the parts will be added to this operation; otherwise they will be added to the order 'root'.

Parts can also be added from the Work with Parts Kits window by opening the order and selecting Actions > Parts Kits, as well as from the Impact clipboard.

What else would you like to do?

Complete the Order and raise the invoice, see [Invoicing a Parts Order](#).

Complete the Order and raise the invoice, see [Invoicing a Workshop Order](#).

“[Creating a Workshop Order](#)” on page 205.

Related Topics:

“[Adding a Parts Kit to an Order](#)” on page 189.

“[Amending a Workshop Order](#)” on page 194.

“[Printing and Re-Printing Picking Slip](#)” on page 215.

“[Reserving Parts for a Vehicle](#)” on page 224.

Set up:

Authority to remove parts from orders is given in Control Files > Parts User ID Maintenance.

Amending a Parts Order

Why:

You might want to add or remove parts lines from an order before it is completed.

Where:

From the Parts Order View, highlight the order that you would like to amend and then right-click and select Open. Alternatively, highlight the order and select



*The Parts Order
View button.*

Order > Open from the menu bar, click the open button  or double-click the order. All of these methods will display the Order Details window for the selected order.

How to Amend Parts Orders:

From the order details window, you can add more parts by following the process described in "[Creating a Parts Order](#)" on page 203. Parts can be removed from an order by highlighting the required part from the list section of the Order Details window, right clicking and selecting Delete. This is described in more detail in "[Removing Parts from an Order](#)" on page 220.

Right-clicking a part line and selecting open displays the Part Order Line Details window. From here, amendments can be made to editable fields.

What else would you like to do?

"[Changing the Customer on an Order or Quotation](#)" on page 198.

Complete the order and raise an invoice, as shown in [Invoicing a Parts Order](#).

Amending a Workshop Order

Why:

At times you may want to add additional text, operations or parts to a workshop order, or remove/change any existing details.

Where:



The Workshop Order View button.

From the Workshop Order View, highlight the order that you would like to amend and then right-click and select Open. Alternatively, highlight the order

and select Order > Open from the menu bar, click the open button  or double-click the order. All of these methods will display the Order Details window for the selected order.

How to Amend Workshop Orders:

Operations can be added to an order by selecting the operation tab and then entering the operation number, quantity and payment code.

To amend an operation, highlight it, right-click, select Change, enter the new operation number and select OK. The operation selector may also be used. Amend time if necessary and select OK.

To remove an operation, highlight it, right-click and then select Delete (if time is booked against this operation, this action is not allowed).

Parts can be added by selecting the parts tab and entering the part number, quantity and payment code (if required). To remove a part from an order, highlight it, right-click and then select Delete.



Note! Your ability to do this depends upon the authority level assigned to your user ID.

Text can be added by selecting the text tab and entering a description. Text can be removed from an order by highlighting them in the order lines section, then right-clicking > Delete.

What else would you like to do?

“[Copying a Workshop Order](#)” on page 202.

Related Topics:

“[Adding an Operation to a Workshop Order](#)” on page 187.

“[Adding Parts to a Workshop Order](#)” on page 191.

“[Changing the Customer on an Order or Quotation](#)” on page 198.

“[Changing the Vehicle on an Order or Quotation](#)” on page 198.

Set up:

Authority to remove parts from orders is given within [Control Files > Part User ID Maintenance](#).

Assigning a Mechanic to an Order

Why:

You may want to assign a particular mechanic to a job, or where multiple mechanics have worked on a job you might want to manipulate the time booked to the job for each mechanic.

Where:



The Workshop Order
View button.

From the Workshop Order View, highlight the order that you would like to work with and then right-click and select Open. Alternatively, highlight the order and select Order > Open from the menu bar, click the open button or double-click the order. All of these methods will display the Order Details window for the selected order.

How to Assign a Mechanic to an Order:

Within the Order Details window, open the operation line you would like to assign a mechanic to. In the Add/Amend Work Operation window input the mechanic number you would like to assign to this operation. More than one mechanic can be assigned to an operation. Depending on a parameter, the system treats multiple mechanics in one of two ways. It either uses the time booked for each mechanic or regardless of the time booked, it will divide the time equally among them (although this can still be manipulated).

If you want to assign multiple mechanics to an operation, highlight the operation and right-click then select Multiple Mechanic Details. In the Multiple Mechanic Details window select File > New and input a mechanic number and the time you expect them to spend on the operation then click OK. Repeat this for all the mechanic's you want to assign to the operation. When you have input all mechanic details, click Validate. This will check that the total time input for the mechanics matches the sold time for the order. (You may need to amend/delete the default mechanic time: 0000.)

Where multiple mechanics have booked time against an operation and the system has divided it up pro rata, you can access the Multiple Mechanic Details window and amend the time for each mechanic record. Once you've made your amendments, click Validate to check that the total time input for the mechanics matches the sold time for the order.

What else would you like to do?

[“Adding an Operation to a Workshop Order”](#) on page 187.

[“Adding Parts to a Workshop Order”](#) on page 191.

Related Topics:

See information [About the Mechanic Master File](#).

See [Time Recording Rules](#).

Set up:

Parameter MST 001, if set to positive will pro-rata hours sold based upon hours booked for multiple mechanics working upon a single workshop order line operation.

Automatic Consumables

Why:

Automatic consumables are added to orders to cover any incidental costs incurred by the dealer which have not been accounted for in the order lines section of the order. The calculation of automatic consumables is controlled by a parameter as well as the set up in the Category Code.

Not all markets use this function and it's availability is controlled by a parameter.

Where:

From the Workshop Order View, open the order you want to invoice and select **Order > Auto Consumables**.



*The Workshop Order
View button.*

How to Add Automatic Consumables to Workshop Orders:

The Auto Consumables window displays the auto consumables calculation by payment category. You should always check the payment code and for a contract or warranty order a job code must also be input.

If you try to amend a value for a particular category and in the category code set up there's no operation code, an error message will appear. You won't be allowed to input a value until the operation code has been set up. However, you will be able to proceed if an operation code but no values have been set up for a particular category.

If updates are made to the auto consumables, but then more lines are added to the order then the updates won't be saved. So any amendments should always be the last task completed before printing the invoice.

What else would you like to do?

[Invoicing a Workshop Order](#).

Related Topics:

“[Creating a Workshop Order](#)” on page 205.

Set up:

Parameters ACO 001, ACO 002 and ACO 003 control the set up and calculation of automatic consumables.

Cancelling or Deleting an Order

Why:

If a parts or workshop order is still at open status, it can be cancelled/deleted.

 **Note!** It is worth mentioning that Parts Orders are cancelled and are given a status of cancelled in the order view; whilst Workshop Orders are deleted and once deleted disappear from the system completely.



*The Parts Order
View button.*



*The Workshop Order
View button.*

Where:

Open the Parts Order View or Workshop Order View, highlight the order that you would like to cancel/delete.

How to Cancel or Delete Orders:

When you have highlighted the order you would like to cancel/delete you can either right-click and select Cancel or Delete, or you can select Order from the menu bar then Cancel or Delete.

When an order is cancelled/deleted, any parts allocated to that order are put back into stock and the stock quantities in the Parts Master File are updated.

The Planning function is also updated if any labour operations were included in the order. However, if time has been booked against the order then this must be un-booked before the order can be deleted.

 **Note!** Various parameters control the availability of the cancel/delete function for Workshop Orders.

What else would you like to do?

“[Creating a Parts Order](#)” on page 203.

“[Creating a Workshop Order](#)” on page 205.

Related Topics:

“[Changing the Customer on an Order or Quotation](#)” on page 198.

“[Changing the Vehicle on an Order or Quotation](#)” on page 198.

Changing the Customer on an Order or Quotation

Why:

If an order (or quotation) has been created for the wrong customer it's possible to change the customer that the order (or quotation) is for, without having to cancel and re-raise the order. Also, if the order has been opened against the correct customer but the invoice must be recharged to another customer, for example an insurance customer, then this is a quick way of changing the details.

Where:



*The Parts Order
View button.*



*The Workshop Order
View button.*

Open the Parts Order View or Workshop Order View, select the order (or quotation) that you want to change. You can then either right click and select **Change > Customer** or select Order from the menu bar then Change > Customer.

How to Change the Customer on Orders or Quotations:

When change customer is selected, a Change Customer window is displayed where you enter the customer number of the customer you want to change the order (or quotation) to.

Once the customer number has been entered, select Validate or press Enter to display the new customer's details. If these are all correct, select OK to confirm the change.

What else would you like to do?

Complete a Parts Order and Raise the Invoice, as shown in [Invoicing a Parts Order](#).

Complete a Workshop Order and raise the Invoice, as shown in [Invoicing a Workshop Order](#).

Related Topics:

[“Cancelling or Deleting an Order”](#) on page 197.

[“Changing the Vehicle on an Order or Quotation”](#) on page 198.

[“Printing and Re-Printing Picking Slip”](#) on page 215.

[“Removing Parts from an Order”](#) on page 220.

Set up:

The ability to change a customer upon a workshop order is controlled by [Security Administration](#) within the Workshop Order General Actions.

Changing the Vehicle on an Order or Quotation

Why:

If an order (or quotation) has been created for the wrong vehicle, the vehicle details on it can be changed rather than cancelling the order (or quotation) and creating a new one.

Where:



*The Parts Order
View button.*



*The Workshop Order
View button.*

Open the Workshop Order View and select the order (quotation) that you want to change. You can then either right click and select **Change > Vehicle** or select Order from the menu bar then Change > Vehicle.

How to Change the Vehicle on Orders or Quotations:

When change vehicle is selected, a Vehicle Selector window is displayed listing all vehicles in the Vehicle File. From here you can use the search or filter functions to locate the vehicle that you want to change the order (or quotation) to.

Once the vehicle has been selected, click OK to update the order (or quotation) with the new vehicle's details.

What else would you like to do?

Complete a workshop order and raise the invoice, as shown in [Invoicing a Workshop Order](#).

Related Topics:

[“Changing the Customer on an Order or Quotation”](#) on page 198.

[“Cancelling or Deleting an Order”](#) on page 197.

[“Removing Parts from an Order”](#) on page 220.

Set up:

The ability to change a vehicle upon a Workshop order is controlled by [Security Administration](#) within the Workshop Order General Actions.

Converting a Quotation into an Order

Why:

If a quotation is accepted by the customer then it can be 'converted' to an order.

Where:



*The Parts Order
View button.*



*The Workshop Order
View button.*

Open the Workshop Order View use the filter button  to locate orders with the status Quotation. Highlight the required quotation and right-click then select **Quotation Convert to Order** or from the menu bar select Order > Quotation > Convert to Order. Alternatively, in Parts Order View, open the quotation and from the details view, select Order>Convert to Order or select the Convert to Order button .

How to Change the Vehicle on Orders or Quotations:

After selecting the Convert to Order option users will see a window confirming the conversion and giving the order number. Click OK to display the Order Details window. If the customer is on stop a message window will be displayed and you won't be allowed to proceed with the conversion.

In the Order Details window, you'll notice that all details from the quotation have been re-created. Also at this point, if the quotation contains any parts, their stock levels will have been updated.

If the quotation contains a package, when converted the package quantities will be set to zero so that the parts can be confirmed when issued.

Before converting parts quotations, the system performs a series of checks and displays a Pending Parts Lines window listing any parts that are not available in stock as well as indicating supersessions, bulletins and associated parts.

Workshop quotations can also be merged into existing orders. Open the order then select Order > Merge Quotation. This will display a list of open quotations that exist in Fusion for the selected customer/vehicle. (If the quotation you want to merge is out of date, you'll need to amend the date of the quotation before you can proceed with the merge.) On the original order if the 'Customer Ref' and 'Remarks' fields are blank, they will be copied in from the quotation (if present). If on the original order these fields are already populated then they won't be copied from the quotation.

Once a quotation has been merged it no longer exists as a quotation. More than one quotation can be merged into an order.

What else would you like to do?

[Parts Pricing](#).

If you would like to re-price a quotation, right-click on the quotation.

Related Topics:

“[Changing the Customer on an Order or Quotation](#)” on page 198.

Copying a Local Campaign to an Order

See the topic, [Copying a Local Campaign to an Order](#) in the Campaigns & Schedules chapter.

Copying a Schedule to an Order

See the topic, [Copying a Schedule to an Order](#) in the Campaigns & Schedules chapter.

Copying a Workshop Order

Why:

Any existing workshop order, whether invoiced or not, can be copied to create a new workshop order. The Copy facility is designed to save keying time. All copied orders have a status of open, even if copied from an order with a different status (picked/printed, invoiced etc.). All details are copied from the original order.

Where:



The Workshop Order View button.

Open the Workshop Order View, highlight the workshop order that you would like to copy, right-click and then select **Copy to**, or select Order > Copy to from the taskbar. This will display the Copy Order window.

How to Copy a Workshop Order:

In the Copy Order window there are selections for Salesperson and type of order to copy to, whether order or quotation, click OK to confirm the copy. The new workshop order will now be included in the list in the workshop order view.

All fields will be populated with information from the original order.

What else would you like to do?

“[Adding an Operation to a Workshop Order](#)” on page 187.

“[Adding Parts to a Workshop Order](#)” on page 191.

“[Creating a Workshop Order](#)” on page 205.

Related Topics:

“[Converting a Quotation into an Order](#)” on page 200.

Creating a Parts Order

Why:

When a part is sold, whether to an internal or external customer, an order must be raised for the transaction. The completion of the order then updates the stock figures in the Parts Master File and where necessary initiates a DSP order to replace the sold stock.

Where:



*The Parts Order
View button.*

From the Parts Order View, select **File > New > Order** or select the Create

Order button . This will display the Create Order window. Here, details of the customer, salesperson and delivery method must be entered before you get to the Order Details window.



*The Customer View
button.*

From the Customer View, select **Customer > Create > Parts > Order** or right click on the customer and select **Create > Parts > Order**. This displays the Create Order window with the Customer number of the selected customer.

How to Create Parts Orders:

Within the top portion of the Order Details screen, various tabs are available for controlling customer information. When changing the field Payment Method from a non-Cash value to a Cash value within the Overview tab, depending upon parameter settings (MTD001, MTD002, and MTD003), will automatically amend the Invoice Value field, the print method field, and the Payment Terms value to values determined by the aforementioned parameters. Should these automatic changes not be required, then all three parameter values should be set to blanks; should one or more be required then any combination of values and blanks in the MTD parameters will effect only the non-blank parameters' associated fields.

From the Order Details window, you can begin to add parts to the order by inputting the required part number or searching for it. Input the quantity required and click Add. A part order line details window will be displayed for the selected part number, click okay if the details are correct. The part you have just selected is now included in the list section of the Order Lines window. As you add more parts to the order they will also be displayed in this list section.

At any time you can exit the order by clicking the Save and Close button. This leaves the order at 'open' status and you can retrieve it later to either amend, add more parts or invoice it.

What else would you like to do?

“[Changing the Customer on an Order or Quotation](#)” on page 198.

Complete the Order and raise the invoice, see [Invoicing a Parts Order](#).

“[Printing and Re-Printing Picking Slip](#)” on page 215.

“[Removing Parts from an Order](#)” on page 220.

Related Topics:

[Batch Invoicing.](#)

[“Cancelling or Deleting an Order”](#) on page 197.

[“Creating a Workshop Order”](#) on page 205.

Set up:

If parameter IFC001 is set to POS (Invoice Charge) then fields will be displayed ‘Invoice Charge Code’ and ‘Invoice Charge VAT Code’ on the order header shipping and costs tab. These allow an invoice charge to be added to the order automatically from the customer file. The invoice charge can subsequently be amended or removed before invoicing the order.

Creating a Workshop Order

Why:

An order must be created for any work done on a vehicle within the workshop. Parts required for any repairs are also added to the workshop order. The system uses these orders for planning the mechanic's time and making sure that the workshop is utilised to its full potential.

Mechanics also record their time against workshop orders. Once the work is completed the order can be invoiced to produce an invoice or claim.

Where:

From the Workshop Order View, select **File > New > Order** or select the Create

Order button . This will display the Create Order window. Here, details of the vehicle must be entered before you can access the Order Details window.

From the Customer View, select **Customer > Create > Workshop Order**. This will then display an Order Details window.



The Workshop Order View button.



The Customer View button.

How to Create Workshop Orders:

Details about the vehicle and customer are inputted into the Create Order window. If the vehicle is a Volvo vehicle and unknown at your dealership, you can download the vehicle details from central systems. Alternatively, the vehicle can be classed as passing trade; it will be added to the Vehicle File with minimal information. If a more detailed record is required then it must be inputted manually within the vehicle view.

When the Create Order window has been completed, you can proceed to the Order Details window. When you click OK in the Create Order window, the system will display a message, if there are already open orders for the selected vehicle (and if there is just one order, the order number will also be displayed).

The Order details screen is broken down into three sections. The top third is where the customer and vehicle information is contained within various tabs.

When changing the field Payment Method from a non-Cash value to a Cash value within the Overview tab, depending upon parameter settings (MTD001, MTD002, and MTD003), will automatically amend the Invoice Value field, the print method field, and the Payment Terms value to values determined by the aforementioned parameters. Should these automatic changes not be required, then all three parameter values should be set to blanks; should one or more be required then any combination of values and blanks in the MTD parameters will effect only the non-blank parameters' associated fields.

In the centre of the window there are three tabs to add 'Text', 'Operation' and 'Part' details to the order.

In the bottom third of the screen are the details of the text, operations and parts that have been added to the order.

What else would you like to do?

[“Adding an Operation to a Workshop Order”](#) on page 187.

[“Adding Parts to a Workshop Order”](#) on page 191.

[“Printing a Repair Order”](#) on page 215.

[“Printing and Re-Printing Picking Slip”](#) on page 215.

[“Changing the Customer on an Order or Quotation”](#) on page 198.

[“Cancelling or Deleting an Order”](#) on page 197.

Complete the Order and raise the invoice, see [Invoicing a Workshop Order](#).

Related Topics:

[Adding a Vehicle to the Vehicle File.](#)

[VCS Refresh.](#)

[VDA Refresh.](#)

Passing Trade, see [“Manual Addition of Vehicle Details to an Order \(Passing Trade\)”](#) on page 210.

Merging Quotations to Orders, see [“Quotations”](#) on page 218.

[Converting an Invoiced Order into a Claim.](#)

[UCHP.](#)

[Claims.](#)

[Campaigns.](#)

[Split invoicing.](#)

[“Workshop Order Summary”](#) on page 229.

[“Automatic Consumables”](#) on page 196.

[Schedules.](#)

[Vehicle Parts.](#)

[“Gross Profit Enquiry”](#) on page 208.

[Order Time Taken.](#)

[“Purchase Orders”](#) on page 217.

[Local Service History.](#)

[Coverage.](#)

[“Vehicle Notes”](#) on page 226, [Customer Notes](#) and [“Order Notes & Remarks”](#) on page 212.

Set up:

An order may be created by copying an existing order. Right-click on an order within the workshop order view and then select ‘Copy to’.

If parameter ACD001 is set to POS (Associated Customer numbers) then a new field will be displayed ‘Invoice Customer’ which will allow the order to be created against any associated Customer numbers held against the vehicle.

If PRC006 Labour Price Matrix is active then new Drop down list boxes will be displayed on the Customer tab for Customer code and Charge code which will be used to formulate a price table rather than price factor.

If parameter IFC001 is set to POS (Invoice Charge) then fields will be displayed 'Invoice Charge Code' and 'Invoice Charge VAT Code' on the order header customer tab. These allow an invoice charge to be added to the order automatically from the customer file. The invoice charge can subsequently be amended or removed before invoicing the order.

Daily Sales Enquiry

Why:

The daily sales enquiry lists all orders for both parts and workshop. The display will also show details for all branches if required.

Where:

From the Parts View or Parts Order View, select **Report > Daily Sales Enquiry**. This will display a Daily Sales Enquiry window.



*The Parts View
button.*



*The Parts Order
View button.*

How to View Daily Sales:

The Daily Sales Enquiry window lists all orders for both parts and workshop. Check the 'All Branches' checkbox to see sales for all branches. Select the print option for a hard copy of details.

Gross Profit Enquiry

Why:

The values on an order can be checked to make sure that the correct amount of gross profit has been achieved.

Where:

From the Parts Order View or Workshop Order View, open the order for which you want to see the gross profit and select the ‘%’ icon from the toolbar.

Information on gross profit for workshop orders can also be accessed by right-clicking the order and selecting Gross Profit Enquiry.



*The Parts Order
View button.*



*The Workshop Order
View button.*

How to View Gross Profit:

The Gross Profit (Enquiry) window displays the gross profit achieved for the selected order. It's shown as an amount and also as a percentage. The fields are read-only and cannot be amended.

For workshop orders, the information is split between labour, parts, sublet and others and there's also information about sold, booked and adjusted hours.

What else would you like to do?

Complete the Order and Raise an Invoice, as shown in [Invoicing a Workshop Order](#).

Impact Drag & Drop Interface to a Workshop or Parts Order

Why:

Any operation or part details required for maintaining the vehicle which are not known to the user can be identified in Impact, based on chassis number. Once identified, rather than writing the information down and re-keying into Fusion this simple interface allows the user to drag and drop the details into either a Workshop or Part Order.

Where:

In Impact, use the Navigate tab and enter the Chassis ID and Function group to search for the required operation or part details.

From the Workshop Order View or Parts Order View, highlight the order and select **Order > Open**. This will display the Order Details window.



The Parts Order
View button.



The Workshop Order
View button.

How to Drag and Drop Impact Operations into Orders:

In Impact select the required Operations, package (Operations with main and associated parts) or parts and add to clipboard. Drag the clipboard to the order in Fusion (and to a specific workshop line, if those attributes are to be used, i.e. Warranty payment code and job number).

When dropped a new 'Impact Operation detail' window will be displayed, listing the Operations, Main and associated parts from Impact. A status indicator will advise the user if the Operation can be added or not. If there are any issues with the operation, then use the right mouse button **View error list** option.

Other right mouse button options are dependant on the Order Type and whether details are Operations or Parts, e.g:

- **Add All to Order:** This will add all Operations / Parts.
- **Add Group to Order:** This will add all details within tree.
- **Add Operation:** This will add selected Operation only.
- **Add Part:** This will add selected part only.

Parts are added via the 'Pending Parts Line' window where information regarding supersession's, bulletins and surcharges etc can be displayed.



Note! Chassis ID can now be entered in a Parts Order and is validated as part of this Drag and Drop functionality.

The 'Part Details button' is also available on both Operation and Part tabs, which has a direct link to Impact to check for any main and associated parts.

What else would you like to do?

“[Adding Parts to a Workshop Order](#)” on page 191.

“[Changing the Customer on an Order or Quotation](#)” on page 198.

“[Changing the Vehicle on an Order or Quotation](#)” on page 198.

Related Topics:

[Operations.](#)

[Packages.](#)

Setup:

Parameter PRC006 will determine if a new Labour price matrix will be used to formulate an hourly rate rather than a price factor.

Parameter GDA001 will determine the region required for exchange part numbers.

Privilege, 'Parts user – Restrictions in Workshop Orders' will determine if the user can add Operations to a Workshop Order.

Manual Addition of Vehicle Details to an Order (Passing Trade)

Why:

When a workshop order is created, the vehicle details are taken from the Vehicle File or downloaded from central systems. If however the vehicle is not a Volvo or is an older model, it may not exist on file so the vehicle details must be added onto the order manually. These types of orders are known as Passing Trade.

Where:

Certain Workshop Orders are classed as Passing Trade.



*The Workshop Order
View button.*

How to Add Vehicle Details to a Passing Trade Order:

When you begin to create a workshop order, Fusion will inform you as to whether the vehicle's details are held on file. If they are, then the system will retrieve all required information from the Vehicle File. If the vehicle is unknown it might be possible to download the details from Central Systems, providing that the vehicle is a Volvo and not a Pre '93 model.

If the vehicle details aren't available from Central Systems then you can create an order and add the details to the Vehicle File manually at the same time.

Vehicle details added to the Vehicle File in this way will be held on file so, if the vehicle comes into the workshop again it will be recognised by the system.

From the workshop order view, select File > New > Order. This will display a Create Order window where you need to input the registration number and mileage of the vehicle and then click OK. If the vehicle details are already in the Vehicle File then the order details screen will be displayed; if the vehicle is not known, a Create Vehicle window will be displayed. Un-check the 'VDA Data' field and update the required details, then click OK to create the order and add the details to the Vehicle File.

Select Vehicle > Vehicle Parts from the Menu bar to display parts on order for the selected vehicle.

What else would you like to do?

[Adding a Vehicle to the Vehicle File.](#)

“[Creating a Workshop Order](#)” on page 205.

Related Topics:

Read [About the Vehicle Master File.](#)

Oil Transactions

Why:

A generic interface can accept 'Oil Transactions' from a 3rd Party Supplier.

Where:

This is from an external source, i.e., the 3rd Party system.

How Oil Transactions are Handled:

Oil transactions can either update the labour record file THF311 or update the order detail screen as an operation number (set up as an 'F' type other operation within local VST file) or they can update the parts record file THF310 and transaction file THF102 with a valid part number. (Depending upon parameter OIL 001).

Part number transactions are subject to the pricing API and all discounts/special prices are applied.

The interface uses VCOM to transfer the data between the third party and Fusion, however the information provided by the third party must meet certain demands required by Fusion and if these are not met then a return will be sent back to the third party and the transaction rejected. (For example if the order has been invoiced etc).

Order Notes & Remarks

Why:

The order notes function allows you to record information specific to a particular order. Depending on a parameter setting, each time the order is opened the order notes window might appear.

 **Note!** Depending on the set up of your system, the text from the notes window may be printed on the invoice!

Any text in the remarks field will always be printed on the invoice.

Where:



The Workshop Order View button.

From the Workshop Order View, open the order you want to add notes to. This will display a Notes For... window. Order Remarks are held in the Remarks field of the order header.

How to Add Notes and Remarks to Orders:

Order notes can be created or amended for an open order and only viewed on an invoiced order.

To add notes to an order, select the appropriate icon from the toolbar in the order maintenance window, there can be Order Notes , Customer Notes  and Vehicle Notes . Each notes window is a free text field where you can input the required information.

What else would you like to do?

“[Amending a Workshop Order](#)” on page 194.

Related Topics:

“[Creating a Workshop Order](#)” on page 205.

Set up:

Text added to an order is printed on the job card if the print checkbox is ticked upon the Text Tab. Remarks are printed on the invoice if the Print Remarks checkbox is ticked.

Pre-Picking in Order Handling

Why:

The purpose of pre-picking is to allow the parts for orders to be picked from their main locations in the branch warehouse and held ready for issue to the workshop or the customer.

The parts would be pre-picked to a location close to front or back counter.

 **Note!** It may be useful, in quiet periods, to prepare the parts for orders that will be required during a busy period.



The Parts Order View button.



The Parts View button.

Where:

A Pre-Pick Button  is available within the parts order detail screen. A search button is available to check details relating to specific parts in the 'Part Inquiry' screen and also from 'Part Maintenance' by selecting the 'stock' tab. Pre-picked parts window is available via the **Part>Actions>Pre-Picked Parts** option and the **Part Order>Actions>Pre-Picked Parts** option.

How to Pre-Pick Parts:

When a new parts order is opened the pre-pick icon is made available and parts added in the usual way.

Selecting the pre-pick button displays a pop up window where the user can specify a pre-pick location. Only one location per order is allowed.

Once a pre-pick location has been stored against an order, it will be used for all subsequent pre-picked parts for that order automatically printing a pre-pick list. When parts are pre-picked the records are written to a pre-pick file.

Any amendments to parts, (increase/decrease) the pre-pick file is updated to reflect these changes and a pre-pick list is printed. The print is based on the contents of the pre-pick file for that order.

A pre-pick window is available listing contents of the pre-picked file for the current branch.

A pre-pick search button is available from parts inquiry and part maintenance. This displays a pre-pick window with the results of the part entered.

When the part is finally picked, delivered or invoiced, the record will be removed from the pre-picked file

Related Topics:

[Stock Taking.](#)

Price Uplift in Order Handling

Why:

The setting up of this table allows an uplift factor to be applied to the local retail price at order line level.

The retail price on the parts master file does not change, the system adds the calculated percentage to the local retail value before it adds the line to the order.

Where:

From the Fusion Control File View, select the Price Uplift and Customer Classification. This will display the Price Uplift Maintenance List and the Classification Code Table.



*The Fusion Control
File View button.*

How to Setup Price Uplift for Order Handling:

From order entry, if the customer has a classification code assigned, which in turn has a price uplift flag attached, then any parts sold where the product code/product group, discount code and marketing code combination are registered in the price uplift control table will have their prices uplifted by the specified percentage.

The implementation of the uplift factor is based on the:

- Product code/Product Group, discount code and marketing code;
- Classification code attached to the customer
- Uplift flags 1 to 5 and the percentage amount.

If Parameter CCO001 is positive, then the "Uplift Flag" on the customer classification codes control file option will be visible. This field on the classification codes table can have values of blank (for no uplift) or values of 1 to 5 for uplift factors relating to those setup in the Price Uplift control table.

You can assign a classification code to a specific customer through customer file maintenance on the customer workbench.

To set up the percentages for the uplift, use the Price Uplift control table. Here, you can set up percentages for all combinations of product code, product group, discount code and marketing code. You can set up five different uplift factors for each product code/product group discount code and marketing code combination.

Related Topics:

[Price Uplift Maintenance.](#)

[Customer Classification Codes.](#)

Customer Maintenance, see [About the Customer Master File.](#)

Printing and Re-Printing Picking Slips

Why:

Picking slips are produced for any orders that come into the dealer involving parts. They show how many of each part are required and where they are located in the dealer warehouse, enabling quick and easy selection with a manual check list.

Where:

From the Workshop Order View or Parts Order View, highlight the order that you would like to print the picking slip for.



*The Parts Order
View button.*



*The Workshop Order
View button.*

How to Print Picking Slips:

Highlight the order you would like to print, right click and select Print > Picking Slip or select Order from the menu bar then Print > Picking Slip.

If the Order Details window is displayed on your screen select the Picking Slip icon from the tool bar or select Order from the menu bar then Print > Picking Slip. The icon for the order changes to indicate that a picking slip has been printed.

If Print > Picking Slip is selected again, only lines that have been added since the last picking slip was printed will be included.

How to Reprint Picking Slips:

Right click the order and select Print > Picking Slip or select Order from the menu bar then Print > Picking Slip. If the Order Details window is displayed on your screen select the Picking Slip icon from the tool bar or select Order from the menu bar then Print > Picking Slip.

What else would you like to do?

Print an Invoice, as shown in [Invoicing a Workshop Order](#).

“[Removing Parts from an Order](#)” on page 220.

Printing a Repair Order

Why:

Repair Orders (also known as Job cards) are produced for vehicles that come into the dealer requiring a repair. They will list the task to perform on the vehicle as a descriptive text or a VST Operation. The Repair order can also be used by the mechanic to perform a write up of any additional, non listed tasks which might be performed.

Where:



*The Workshop Order
View button.*

This function is found in the Workshop Order View, and accessed by highlighting the order that you would like to print the repair order for.

How to Print Repair Orders:

From the workshop order view, highlight the order that you would like to print the repair order for. Now right click and select **Print - Repair Order** or select **Order** from the menu bar then move to the Print submenu and click the Repair Order option. This will open the Print Repair Order window.

In the Print Repair Order window a number of options will be displayed and checked depending on parameter settings within the company (OCJ001 - OCJ013) and branch table (JCD001 – JCD011), update options as required and select OK to print.

What else would you like to do?

“[Creating a Workshop Order](#)” on page 205.

Purchase Orders

Why:

Purchase orders can be created to link sublet (subcontract) work with a repair order and to record the sublet costs. A purchase order document can be produced to give to the supplier to guarantee payment up to an authorised level of expenditure.

Where:

From the Workshop Order View, highlight the workshop order you want to work with and right click then select **Purchase Orders**. Alternatively highlight the workshop order and select Order > Purchase Orders from the menu.



The Workshop Order View button.

How to Create Workshop Purchase Orders:

Click New to create a new purchase order associated with the order. Enter supplier details and check the Print flag to create a purchase order print. Any sublet operations on the order will be listed for selection in the Operation list box. The Cost Value entered will be printed on the purchase order as an authorised level of expenditure for the supplier. The Sales Value is not printed.

Until the purchase order has been confirmed, the associated workshop order cannot be invoiced. If invoicing is attempted before confirming all purchase orders with an order, an error message is displayed 'Outstanding Purchase Orders exist. These must be confirmed before Invoicing'. This is to ensure that the actual cost from the supplier is known before invoicing the workshop order.

What else would you like to do?

[Purchase Orders Report.](#)

Related Topics:

“[Adding an Operation to a Workshop Order](#)” on page 187.

Set up:

The Workshop Purchase Order function is enabled by parameter WPR001.

Quotations

Why:

Quotations can be created for customers and then, if required, converted into orders or copied or merged into an existing order.

Where:

From the Parts Order View or Workshop Order View, select **File > New > Quotation**. This will display a Create Quotation window.



The Workshop Order View button.



The Parts Order View button.

How to Create Quotations:

Quotations are created in virtually the same way as an order. Input the required details in the Create Quotation window and then click OK. This will display a Quotation Details window. The Quotation Details window is like the Order Details window and is completed in the same way, although when creating a quotation some of the icons will be unavailable. Unlike when creating an order, the stock balance in The Parts Master File is not updated.

You can print the quotation by selecting Order > Print > Quotation from the Quotation Details window.

Automatic consumables are included/printed in the quotation, if used.

How to Copy a Parts Order Quotation:

To copy a parts quotation, highlight the quotation, right-click then select Quotation > Copy. This will display a Copy Quotation window where you need to input the customer number for the quotation to be copied to. The copied quotation can then be accessed and amended like any other quotation.

How to Copy a Workshop Order Quotation:

To copy a workshop quotation, highlight the quotation, right-click then select the salesperson and indicate whether the quotation is to be copied to an order or a quotation. Unlike the parts quotation the customer number remains the same here, but if required can be changed in the Quotation Details window.

When any quotation is copied, you should always check the details to make sure that they are correct (particularly if the original quotation is an 'old' one). If a copied quotation includes a package, Fusion will display a warning message reminding you to review the package details (because if package details have been changed in GPSS this won't be reflected in the new quotation). To be sure of getting the most up to date package details, it is advisable to delete it from the new quotation and add it in again.

How to Convert a Quotation into an Order:

To convert a quotation to an order, highlight the quotation and select (Quotation) Convert to Order. All details in the quotation are re-created in the order and Fusion will notify you of the order number before displaying the Order Details window. If the quotation contained a package, when converted the package quantities will be set to zero so that the parts can be confirmed when issued.

If any parts aren't available in stock, Fusion will warn you that insufficient stock exists for the order and will automatically place a back order. If a back order isn't required, select 'Skip' to ignore the part with insufficient stock.

How to Check Quotation Prices:

To make sure that a quotation has the correct prices (if it's been open for a long time then there may have been price increases), you can highlight the quotation and right-click then select (Quotation) Re-price Quotation. When this option is selected, Fusion re-applies the pricing rules to the quotation.

How to Merge Workshop Quotations into Orders:

Workshop quotations can also be merged into existing orders. Open the order then select Order > Merge Quotation. This will display a list of open quotations that exist in Fusion for the selected customer/vehicle. (If the quotation you want to merge is out of date, you'll need to amend the date of the quotation before you can proceed with the merge.)

Once a quotation has been merged it no longer exists as a quotation. More than one quotation can be merged into an order.

On the original order if the 'Customer Ref' and 'Remarks' fields are blank, they will be copied in from the quotation (if present). If on the original order these fields are already populated then they won't be copied from the quotation.

How to View Parts on a Quotation:

For an overview of parts that have been added to a quotation, select (Quotation) Stock Overview. This is useful if, for example, you create a quotation for an accident repair job that has along list of parts and you want to see which parts are available and which parts must be procured.

How to Compare Profitability of Quotations:

To compare the profitability of quotations, select (Quotation) Comparison Report. This will display a window where you can input various criteria, allowing alternative discount categories to be compared.

Related Topics:

[Parts Pricing](#).

Removing Parts from an Order

Why:

Parts can be added to and removed from orders right up until the order is invoiced (although the availability of this functionality depends on user and parameter settings).

Each amendment to the order updates the stock quantities within the Parts Master File and Transaction File for the selected part.

Where:

From the Parts Order View or Workshop Order View, select the order that you would like to amend. You can then either right-click and select Open or select Order > Open. Alternatively, double click on the order and select the open order icon.



The Workshop Order View button.



The Parts Order View button.

How to Delete Parts from an Order:

When you open a parts or workshop order, the list of parts that are included in the order is displayed in the lower half of the screen.

Highlight the part you would like to delete then right-click and select Delete. Depending on your user profile you might be asked to enter a PIN number to confirm the deletion or a message will be displayed asking you to confirm the deletion.

To delete a parts kit, select the header record and all parts in that kit will be deleted.

If you're not authorised to delete parts then the delete function will be inactive and you will be unable to delete any parts from the order.

What else would you like to do?

“[Cancelling or Deleting an Order](#)” on page 197.

Complete a Parts Order and raise the invoice, see [Invoicing a Parts Order](#).

Complete a Workshop Order and raise the invoice, see [Invoicing a Workshop Order](#).

Reservations in Order Handling

Why:

Dealers want to be able to 'reserve' parts they need for a workshop job, in advance of the job, knowing that when they need the part and go to pick it, it will be in the bin.

Dealers also want to be able to add a part to an order without generating a stock movement in GDS because they may want to reserve the part a week or more before the job date, picking the part only when it is required.

When parts are not available to reserve, the dealer has to order them and needs to ensure that when received they are allocated to the correct order. It will allow markets to operate much more efficiently with regard to stock handling, ensuring fewer situations where parts are not available to satisfy a planned job.

Where:

From the Parts Order View or Workshop Order View, open a parts or workshop order to add parts.



The Workshop Order View button.



The Parts Order View button.

How to Use Reservations in Orders:

Where there is insufficient stock of parts available when apply/change icon is selected, the following warning message is returned 'Outstanding reservation exceptions exist', selecting OK to this activates an icon 'Reservations Exceptions' when selected this starts a process to find whether parts can be sourced from other branches or from the on order file.

Where parts have insufficient stock - When added to an order when apply/change is selected the 'reservation exceptions' icon is highlighted and reservation status flag against individual part lines reads 'un-sourced reservations exist'. Colour coded red. Select 'reservation exceptions' icon to view part exceptions window.

The part you are working with will be displayed in the 'Parts not Ordered' section of the window. To open the part, do one of the following:

Highlight, RMK then select 'open', Double click highlighted part. Highlight part then select 'open' button. This gives you access to the Source parts screen.

Two tabs exist: Stock in Branches and Stock on Order, both are described below.

Stock in Branches: If stock is available at other branches, details will be listed under 'Stock in Branches' tab. Where stock is available and can be sourced from other branches the following rules apply depending on parameter settings:

If a part has not been sold at the branch in the last XX days. If the part has been sold within the days stated in the parameter, an icon will be displayed stating 'Part Sold too recently', this prevents the part from being sourced from that branch. If the cost value of the part is lower than threshold defined in the parameter. Although the part may be available at another branch if the cost is lower than that set up within the parameter, an icon will be displayed stating 'Part cost lower than threshold', this prevents the part from being sourced from that branch. Parts outside of the threshold can be accepted and moved to the Ordered Parts section.



Note! This action may be blocked depending on a parameter setting. If this is the case an icon is displayed with the text 'Inter Branch Transfer option disabled'.

Once moved the reservation status flag against the part changes to yellow with hover text 'All stock available or sourced'.

Stock on Order: Any stock that is on order is displayed within the stock on order tab.

To source the part, highlight order and select 'Accept'. Selected part is moved into the 'Ordered Parts' section. This action registers the customer order number against the order within goods receiving and maintain on order. (If the same part has been sourced for a number of customer orders the goods receiving and maintain on order record will change from a specific customer order number to 'multiple orders').



Note! Parts subsequently concluded at goods receiving are removed from the 'Ordered Parts' section and reserved status flags at part line level within the customer orders change accordingly.

The option to pick parts at line addition or not is available and controlled by a parameter. If the parameter is set at positive, within order line details a check box is displayed with text reading 'Pick available parts when adding to order' is displayed. Default for box is set at Checked.

Where parts are available, booked to an order and the box left as checked the following takes place:

- The status of the part is set to picked.
- The reservation flag is not displayed.
- Stock balance on the parts master file is reduced.
- A 'sale' transaction type is written to the transaction file.

Where parts are available, booked to an order and the box is unchecked the following takes place:

- The status of the part is set to open.
- The reservation flag is displayed as green, hover text reads 'All stock available'.
- Stock balance on the parts master file remains the same.
- A 'reservation' transaction type is written to the transaction file.

What else would you like to do?

[Reserved Parts.](#)

[Goods Receipt \(Manual and DSP\).](#)

Related Topics:

[Purchase Proposals.](#)

[Inter Branch Transfers.](#)

[Part Inquiry.](#)

Reserved Parts

Why:

Allows searches on specific parts or customers. Lists all related orders and their reservation status.

Where:

From the Parts Order View or Workshop Order View, open a parts or workshop order and select **Actions>Reserved Parts**.



*The Workshop Order
View button.*



*The Parts Order
View button.*

How to Work With Reserved Parts:

The Reserved parts view displays a 'Reservation Status' flag, their meanings are - Red = 'Un-sourced reservations exist'. Green = 'All stock available' and Yellow = 'All stock available or sourced'.

Highlight part where status flag is Red and do one of the following:

- From the menu bar select Part or select down arrow next to the 'open' icon, alternatively select RMK, each option displays 'orders' or 'sources'.
- Select 'orders' this drills down to an orders screen listing related orders.
- Select 'source' this drills down detailing where parts have been sourced from.

Highlight part where status flag is Green and do one of the following:

- From the menu bar select Part or select down arrow next to the 'open' icon, alternatively select RMK, each option displays 'orders'.
- Select 'orders' this drills down to orders screen listing related orders.

Highlight part where status flag is Yellow and do one of the following:

- From the menu bar select Part or select down arrow next to the 'open' icon, alternatively select RMK, each option displays 'orders' or 'sources'.
- Select 'orders' this drills down to orders screen listing related orders.
- Select 'source' this drills down detailing where parts have been sourced from.

Reserving Parts for a Vehicle

Why:

If a part is identified as being required for a specific vehicle some time ahead of the vehicle's arrival at the workshop then that part can be reserved by entering the details of the customer, job number and part number within this file.

This file will also be automatically updated when a part is entered onto a works order and that part cannot be supplied because stock is not available.

Following a goods receipt of parts from the supplier, at any time then can the Back Order Release Proposal be run to identify any parts that have been reserved and can now be filled from stock.

Where:

From the Parts View or Parts Order View, select **Actions > Vehicle Parts**. This will display a Parts Per Vehicle window.



*The Parts View
button.*



*The Parts Order
View button.*

How to Reserve Parts for a Vehicle:

The Parts Per Vehicle window lists all vehicles that currently have parts waiting for them in the Parts Waiting File.

To create a new entry within the Parts Waiting File select File > New. This will display a Create Vehicle Part Header window.

Here, you input the customer number and the vehicle that you would like to reserve parts for. Click OK to return to the Parts Per Vehicle window where the header you have just created should now be displayed. You then need to specify what parts you would like to reserve, to do this open the header and in the Parts on Order window select File > New. Then in the Create Vehicle Part Line window input the part number(s) that you want to reserve.

What else would you like to do?

[Print a Vehicle Part Report.](#)

The Workshop Requisition Interface

Why:

The workshop requisitions routine is used to log requests for work to be carried out on stocked vehicles, and to print work requisitions for internal suppliers. Requisitions can be transferred automatically to the workshop.

Where:

From the Workshop Order View, if the interface is enabled, details of internal work requisitions raised in vehicle admin appear automatically in the designated workshop branch.



*The Workshop Order
View button.*

How to Use the Workshop Requisition Interface:

In workshop order entry, you can either open an order or a quotation. Orders are opened using a default internal customer number.

Once an order or quotation has been created for a workshop requisition, the order number can be viewed in the Work Requisition Details screen, and on the Vehicle Admin Work-In-Progress Report . If this number is initially a quotation number, it will be updated automatically when the quotation is converted to an order in workshop.

Once the order has been invoiced in workshop, the requisition will be flagged as 'completed' in Vehicle Admin. If you subsequently need more work carried out on the same vehicle you should raise a new requisition. Do not re-open the previously completed requisition because it will not be possible to raise another workshop order against it.

What else would you like to do?

“[Creating a Workshop Order](#)” on page 205.

Related Topics:

[Workshop Requisitions.](#)

[Creating/Amending a Vehicle Order Plan.](#)

Vehicle Notes

Why:

For each vehicle it is possible to create notes detailing any information relevant to that vehicle.



The Workshop Order View button.



The Vehicle View button.

Where:

From the Workshop Order View, highlight the order and select **Order > Notepad > Vehicle**. This will display a 'Notes for Vehicle' window. Alternatively double-click on the order to open it and select the Vehicle Notes

button .

From the Vehicle View, open the vehicle (either by double-clicking on the vehicle or via the menu option Vehicle > Open) and select the 'Vehicle Notes' button.

How to Add Edit & Delete Vehicle Notes:

Vehicle notes can be added or amended in the Notes for Vehicle window regardless of where this window is opened.

Related Topics:

“[Creating a Workshop Order](#)” on page 205.

Also see, [About the Vehicle Master File](#).

Volvo Vision – Order via Order Handling

Why:

Volvo-vision Integration allows orders for parts to be placed in VIPS directly from GDS order entry.

As part of the reservations function, in certain scenarios, users will be able to see local warehouse stock levels during the GDS order entry process. When a part is not available from branch stock the option is available to replenish parts from within GDS by placing an order on VIPS without having to switch to a different system.

Where:

From the Parts Order View or Workshop Order View, open a Parts or Workshop Order, adding a part where there is insufficient stock. When apply/change is selected the reservation exception icon is available, on selection a part exceptions window is displayed.



The Parts Order View button.



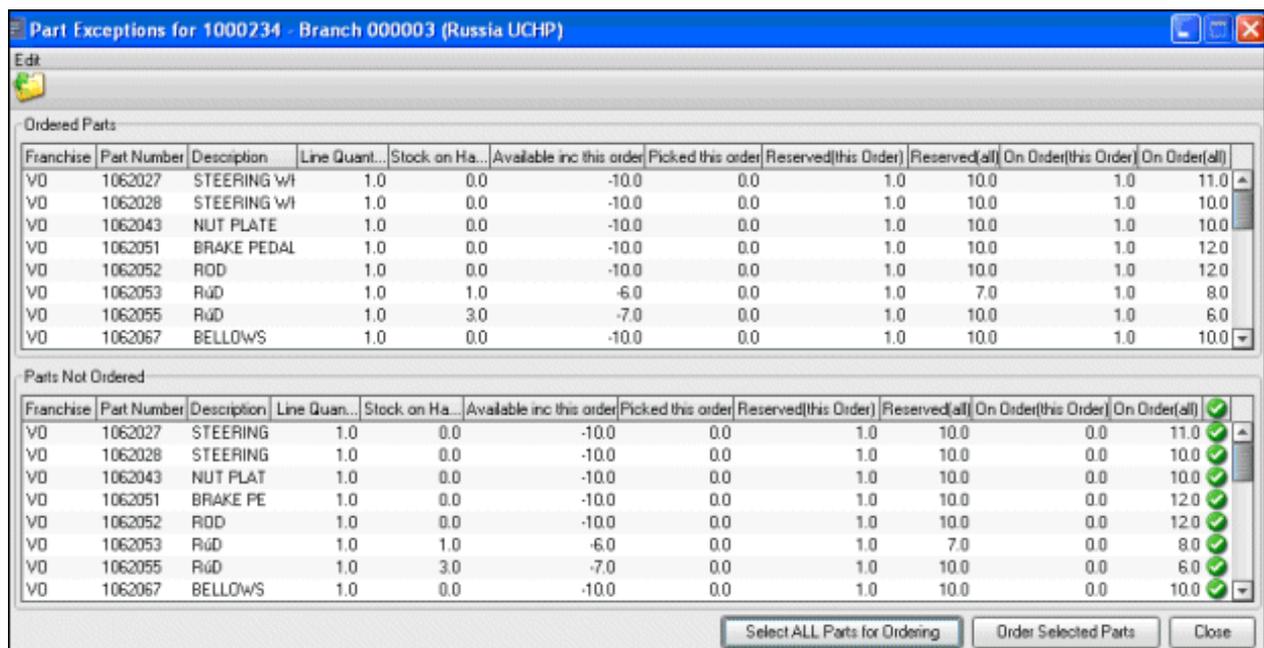
The Workshop Order View button.

How to Use Volvo Vision Integration:

Two panes are displayed, Parts that have not been sourced will be displayed in the lower pane. These are the parts that require attention.

Parts in the upper pane are those that have already been sourced for this order.

Highlighting and opening a part in the lower pane displays a ‘source part’ window. If the part cannot be sourced from other branches and is not already stock that is on order, select cancel to return to the part exceptions pane.



Franchise	Part Number	Description	Line Quant...	Stock on Ha...	Available inc this order	Picked this order	Reserved (this Order)	Reserved (all)	On Order (this Order)	On Order (all)
VO	1062027	STEERING WI	1.0	0.0	-10.0	0.0	1.0	10.0	1.0	11.0
VO	1062028	STEERING WI	1.0	0.0	-10.0	0.0	1.0	10.0	1.0	10.0
VO	1062043	NUT PLATE	1.0	0.0	-10.0	0.0	1.0	10.0	1.0	10.0
VO	1062051	BRAKE PEDAL	1.0	0.0	-10.0	0.0	1.0	10.0	1.0	12.0
VO	1062052	ROD	1.0	0.0	-10.0	0.0	1.0	10.0	1.0	12.0
VO	1062053	R&D	1.0	1.0	-6.0	0.0	1.0	7.0	1.0	8.0
VO	1062055	R&D	1.0	3.0	-7.0	0.0	1.0	10.0	1.0	6.0
VO	1062067	BELLOWS	1.0	0.0	-10.0	0.0	1.0	10.0	1.0	10.0

Franchise	Part Number	Description	Line Quant...	Stock on Ha...	Available inc this order	Picked this order	Reserved (this Order)	Reserved (all)	On Order (this Order)	On Order (all)
VO	1062027	STEERING	1.0	0.0	-10.0	0.0	1.0	10.0	0.0	11.0
VO	1062028	STEERING	1.0	0.0	-10.0	0.0	1.0	10.0	0.0	10.0
VO	1062043	NUT PLAT	1.0	0.0	-10.0	0.0	1.0	10.0	0.0	10.0
VO	1062051	BRAKE PE	1.0	0.0	-10.0	0.0	1.0	10.0	0.0	12.0
VO	1062052	ROD	1.0	0.0	-10.0	0.0	1.0	10.0	0.0	12.0
VO	1062053	R&D	1.0	1.0	-6.0	0.0	1.0	7.0	0.0	8.0
VO	1062055	R&D	1.0	3.0	-7.0	0.0	1.0	10.0	0.0	6.0
VO	1062067	BELLOWS	1.0	0.0	-10.0	0.0	1.0	10.0	0.0	10.0

From ‘Parts not Ordered’ section, where parts cannot be sourced internally, you have the option to order them through Volvo vision.

You have the choice to order everything from the list or you can be selective.

To order all parts click on tab ‘Select ALL parts for ordering’. Parts will be flagged with a green indicator.

To de-select specific parts, double click the part line to remove the indicator.

You can close the part exceptions window but be aware, any selections and de-selections made will be lost. Once you are satisfied with the list click on tab 'Order Selected Parts'.

The parts are sent to the Volvo vision file and are ordered based on parameter settings and batch routines.

If parameter ASO001 is set as positive and there are at least 20 records in THF511 these will be sent to VIPS.

VIPS return an order number, this number comes back into GDS as it is used against the DSP stock order and will be registered in the DSP tab of GDS Fusion.

When Automatic Order Sending is switched off.

If automatic send parameter is set at negative, when the option to order selected parts is taken, the part lines are written to both the Volvo vision and Maintain on Order files. Part lines within Maintain on Order will have the 'order number' at status pending until such time the scheduled job runs.

The customers order number is written to the customer order field. When the scheduled job runs, the order is processed.

The purchase order numbers are generated from the Parts Fusion control file (General Number Series) Purchase Order number.

Where part lines order number are at status 'pending', this is overwritten with the order number or numbers, depending on how many lines have been processed. Details of orders can be seen in the Manual tab of Goods Receipt.

The order is immediately removed from the Volvo vision file. (THF511)

Related Topics:

See [GDS Stock – Goods Receiving](#) for information about Manual Goods Receipt, DSP Goods Receipt or Order Maintenance.

[Creating and Maintaining Parts Kits.](#)

[“Printing and Re-Printing Picking Slip”](#) on page 215.

See information [About The Parts Master File.](#)

Workshop Order Summary

Why:

The workshop order summary is an analysis of the various types of sale within the selected order. This analysis can be performed on open or invoiced orders.

Where:

From the Workshop Order View, open the order you would like to work with and **Select Order > Workshop Order Summary** or click the Workshop Order Summary button . This will display the Workshop Order Summary window.



The Workshop Order View button.

How to View the Workshop Order Summary:

The Workshop Order Summary window displays the sales and costs for external, internal, warranty and contract sales, along with the number of claim jobs.

What else would you like to do?

Finding Out About "[Gross Profit Enquiry](#)" on page 208.

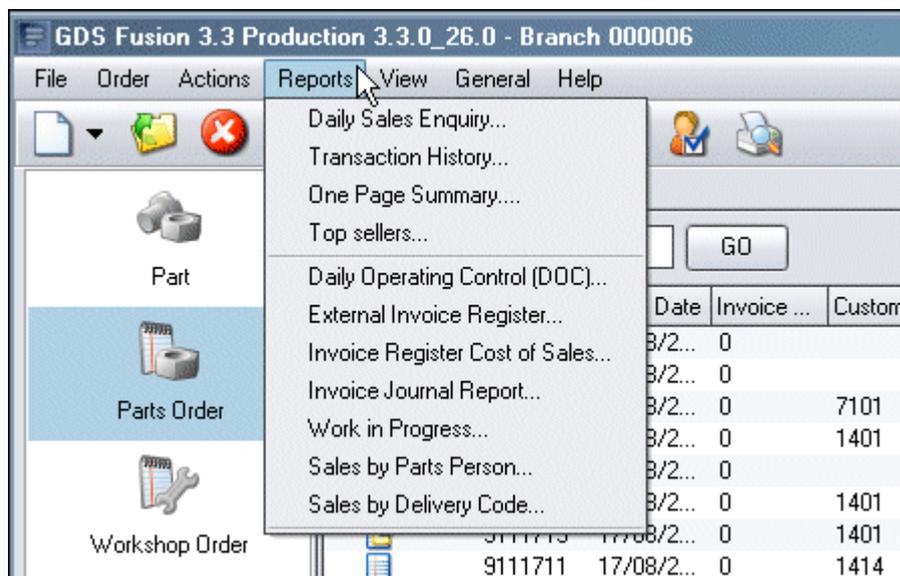
Related Topics:

"[Creating a Workshop Order](#)" on page 205.

Reports

About Reports

This chapter provides information about all of the reports that are available in the GDS – Fusion reports function.



Actual Costs Audit Report

Why:

The purpose of this report is to provide an audit of actual costs allocated to vehicles in Vehicle Order.

This is a clear-down report, which means that each time it's printed it only includes costs which have been allocated since the previous run. This means the report can be used to monitor the input of costs on a daily, weekly or monthly basis, as required. As a further control, each report is given a sequential run number so that missing reports can be easily identified. By stock number and vehicle charge item, the report displays the details of cost records that have a status of 'accepted'. Cost records sharing the same document number, document date and accepted date are summarised.

Sub-totals are given for each vehicle charge item and each stock ID, and the variance from estimated cost is displayed. Bear in mind that this variance figure does not represent the total variance value unless all costs for a given vehicle were accepted during the period covered by the report run. It's recommended that any pending costs are accepted prior to running the report to ensure that costs received from external applications are fully up-to-date. Deleted costs are not shown on this report, therefore if deletion is allowed, deleted costs should be monitored using the Cost Status Report.

Where:

From the Vehicle Order View, select **Reports > Costs > Actual Costs Audit**.



*The Vehicle Order
View button.*

How to Report on Actual Costs Audit:

There are no selection criteria for this report, only a confirmation window.

Related Topics:

“[Cost Status Report](#)” on page 233.

Actual Costs Report

Why:

The Actual Costs Report provides the same information as the Actual Cost Audit report except that it doesn't clear down and you can select all accepted costs within a given date range.

This report is used to establish the total variance between actual and estimated costs once all costs have been input for a vehicle.

Where:

From the Vehicle Order View, select **Reports > Costs > Actual Costs**. This will display an Actual Costs Report window.



*The Vehicle Order
View button.*

How to Report on Actual Costs:

In the Actual Costs Report window input the required selection criteria to customise your report.

Related Topics:

“[Actual Costs Audit Report](#)” on page 231

Cost Status Report

Why:

The Cost Status Report allows you to select detailed listings of all cost records on the system, whatever their status.

By stock ID, the report lists all cost records with the chosen cost status, detailing:

Component	Purpose / Description
Input Date	The date that the cost record was first entered in Fusion
Cost Source	Indicates the input source of the document: Pen = via Accept Pending Costs routine. Man = manually entered via Actual Costs. WS = accepted via automatic workshop interface. Ext = accepted via automatic external interface. Aut = automatically added by the Post Depreciation option (see the Post Depreciation Routine, in Vehicle Order Workbench > Actions > Depreciation), or by Print Purchase Invoice (see the Print Purchase Invoice Routine in Vehicle Order Workbench > Vehicle Order/RMK > Print Purchase Invoice option).
Workshop Branch	The Branch number where the Workshop is.
Document Number	If a document exists containing related information, this is the document number.
Document Date	This indicates when the document was recorded in the system.
Item Number	Workshop VST or package number
Item Description	The description held against the cost record
Item Value	The value of the cost record.
Cost Type Description or Supplier Name	As the title suggests, this shows either the description of the cost type or the Supplier's name.
Cost Type	Indicates the type of vehicle charge to which the cost was allocated: 0 = Vehicle Extra. 1 = Vehicle Chassis. 2 = Cost Credit 1. 3 = Cost Credit 2. 4 = Other Charge 1. 5 = Other Charge 2. 6 = Other Charge 3. 7 = Other Charge 4. 8 = Other Charge 5. 9 = Other Charge 6. D = Depreciation. I = Stocking Interest.
Accepted Date	Accepted costs only
User ID	Accepted costs only

Where:



The Vehicle Order View button.

From the Vehicle Order View, select Reports > Costs > Cost Status.. This will display a Cost Status Report window.

How to Report on Cost Status:

In the Cost Status Report window input the required selection criteria to customise your report. The input date is the date that the cost record was first entered in Fusion and therefore might not be the same as the document or accepted dates.

Related Topic:

[“Actual Costs Audit Report”](#) on page 231

Customer Sales Summary All Report

Why:

This report identifies the size of the customer (from the customer category) as well as their types of vehicles, sales trends for the last 12 months, financial status, service retention and type of business.

Where:

From the Part View, select **Reports > Customer > Sales Summary (All)** or from the Customer View, select **Reports > Sales Summary (All)**.

Either selection will display a Customer Summary Report window.



*The Part View
button.*



*The Customer View
button.*

How to Report on All Customer Sales Summary:

In the Customer Summary Report window input the required selection criteria to customise your report.

Customer Sales Summary Report

Why:

This report can be run for all customers, all flagged customers or all un-flagged. It is used to identify purchasing trends for the last period broken down into front and back counter including labour.

Where:

From the Part View, select **Reports > Customer > Sales Summary** or from the Customer View, select **Reports > Sales Summary**.

Either selection will display a Customer Summary Report window.



*The Part View
button.*



*The Customer View
button.*

How to Report on Customer Sales Summary:

In the Customer Summary Report window input the required selection criteria to customise your report.

Customer Spend Report

Why:

This report produces details of a customers spending for vehicles for the month & year entered in the selection criteria.

Option exists to select a specific 'Payment Code' and the type of report you wish to produce. Report Types include General or VST Expenditure. Additional options are available which allows you to select whether Hours and Costs are printed on the report.

Where:

From the Customer View, select **Reports > Customer Spend Report**. This will display the 'Customer Spend Report' window.



The Customer View button.

How to Report on Customer Spending:

In the Customer Spend Report window input the required selection criteria and select OK to produce a report.

Report Example:

Test Branch 000006				DMS AD Fusion Centre							
				Gener:							
Customer.....	0000000100	Rose Cooke	Parameters - Customer								
Vehicle Registration..	*ALL		Key								
Period.....	Year 10	Month 00									
Pay Code											
Registration..	general	others									

VST From	1	A									
VST To	9999999	ZZZZZZZ									
	Hrs	Cost	Hrs	Cost	Hrs	Cost	Hrs	Cost	Hrs	Cost	Hrs

HCM993	239	9.146,70	0	68,78	0	0,00	0	0,00	0	0,00	0
Details printed for 001 Vehicles											
				** End of Report **							

Deal Number Profit Report

Why:

The Deal Number Profit Report analyses deal profit over a number of vehicles that are connected together by the same deal number. It shows the total profit for all vehicles for a particular deal number.

When a new stock I.D is created, it is allocated a unique deal number. Trade-In vehicles taken against that vehicle are given the same deal number, and trade-in vehicles taken in turn against these vehicles are also given the same deal number.

It is also possible to amend deal numbers manually which allows for you to group vehicle orders together in a deal in any way that you choose.

Where:

From the Vehicle Order View, select **Reports > Sales > Deal Number Profit**. This will display a Deal Number Profit Report window.



The Vehicle Order View button.

How to Report on Deal Number Profit:

In the Deal Number Profit Report window input the required selection criteria to customise your report.

Discount Compensation Report

Why:

The Discount Compensation report can be printed in two ways, a summary report listing details at order/invoice level or a detailed report listing information at order line level.



Note! Special fixed price parts can be set up and are excluded from the compensation report if there is no discount on the Order Line File.

Where:

From the part view, select **Reports > Customer > Discount Compensation** or from the customer view select **Reports > Discount Compensation**.

Either selection will display a Discount Compensation Report window.



The Part View button.



The Customer View button.

How to Report on Discount Compensation:

In the Discount Compensation Report window input the required selection criteria to customise your report.

Discount File Report

Why:

This report lists all customer discount codes, product codes and parts discount codes.

Where:

From the Part View, select **Reports > Customer > Discount File** or from the Customer View select **Reports > Discount File**. Either selection will display a Discount File Report window.



*The Part View
button.*



*The Customer View
button.*

How to Report on Discount File:

In the Discount File Report window input the required selection criteria to customise your report.

External Invoice Register Report

Why:

This report provides a full list of all invoiced sales for a specified date range, department and product.

Where:

From the Part View, select the **Reports > External Invoice Register**. This will display the External Invoice Register Report window.



*The Part View
button.*

How to Report on External Invoice Register:

From the External Invoice Register Report window, input the required information to customise your report. The checkboxes can be used to indicate whether you want to include workshop invoices or just those with parts.

File Discount Codes Report

Why:

This report lists all customers and their relevant discount codes.

Where:

From the Part View, select **Reports > Customer > File Discount Codes** or from the Customer View select **Reports > File Discount Codes**. Either selection will display a File Discount Codes Report window.



*The Part View
button.*



*The Customer View
button.*

How to Report on File Discount Codes:

In the File Discount Codes Report window input the required selection criteria to customise your report.

Financial Stock Report

Why:

The Financial Stock Report allows you to view the opening and closing stock balances for a particular period, and also identifies all stock movements for a selected date range. In doing this, it can provide a method of ascertaining a stock valuation as at a particular moment in time. The report relies on a data collection procedure to be run on a daily basis (as part of the daily batch routine) in order to calculate the current stock balance at the end of each day. The entry in the daily batch is essential for running this report! The report will show the opening stock balance (i.e. the stock balance as at the last period end) and also the closing stock balance (i.e. the stock balance as at the last end of day run).

Where:

From the Part View, select 'Financial Stock Report' from the Reports menu.



The Part View
button.

How to Report on Financial Stock:

After selecting the Financial Stock Report option from the parts Reports menu, you will have the option to enter a from and to date range.

A date range can be entered, or, if you leave the default values, the report will be produced for the current date. Pressing enter will submit the report. Report THP782 (Financial Stock Detail Report) is produced. The commands to enter for the daily batch job are CALL PGM(THR784).



Note! It is essential that the daily batch job for the collection of opening and closing balances is run on a daily basis in order for this report to function as specified.

Related Topics:

Financial Stock Code maintenance.

Discrepancy Code maintenance.

Goods Receipt Transaction Report

Why:

When goods are received and binned, a binning receipt report is printed out. This happens whether you are performing DSP goods receiving or Manual goods receiving with each receipt type producing a different report. There are slight differences between the reports produced, but both documents are numbered and this document number is sent to the finance system.

If there is a need to view the transaction details for a particular document number again after the original report has been printed and has gone from the system, this can now be done by using the 'Goods Receipt Transaction Report' option.

The report can be run by selecting a specific document number and also, if necessary, it can be run for all transactions for a particular date or date range. The layout of the report is common to both DSP and Manual receipts, with the receipt type being clearly indicated within the report header.

This report therefore, provides an easy facility by which to list binning transactions for a given document or date. Prior to this it would have been necessary to list individual part file transactions by source code or transaction type; however these would not have provided the link to the finance system by document number which now exists.

Where:

The option to reproduce goods receiving binning information in report format can be found on the Supplier View. select **Supplier > Reports > Goods Receipt Transaction Report**.

How to Report on Goods Receipt Transactions:

On taking the option to reprint binning transactions a panel will be presented showing three input parameters: Stock movement number (which is the document number printed on the original binning documents and which is sent to the finance system); and a from and to date. Using these parameters it is possible to print a binning report for either a single stock movement/document number or a list of receipts for a given date or date range.

If you wish to run the report for a selected document number, it is not necessary to input any date values. The document number will always take precedence over the date fields.

 **Note!** The document number format to be keyed in should be in 7 digit format with leading zeroes (just as it is output on the original document), eg. document number 1234 should be keyed in as 0001234.

If you wish to run the report by date range, you must leave the document number field blank. In this instance you must key a valid date range and both from and to dates will be mandatory.

Click the OK button to produce the report. A new report for Fusion will be produced. The new report is called THP721 (please ensure that you have the correct printer overrides setup for this report – contact your market support for help if required).

The new report is a generic report designed to list all of the key data pertaining to the original receipt, and it does allow a convenient method of recalling this information for printing.

The header section will contain information about the supplier, order number, document/stock movement number, receipt type (ie. DSP or Manual).

The report details will list part details, received quantity, before and after stock balance, buying price, replacement cost and customer reference. Finally the report shows order totals and also report totals.

Related Topics:

Goods Receiving.

[“Transaction History Report”](#) on page 268

[“Source Voucher Report”](#) on page 262.

GPSS Checklist Report

Why:

The GPSS Checklist Report, for all parts defined in packages, shows superseded parts, parts not stocked at this branch and variances on fixed price parts with a package value which differs from the price in the parts master file.

Where:

From the Operations View, select the **Reports > Check List** from the menu bar.



*The Operations View
button.*

How to Report on GPSS Checklist:

The GPSS Check List report selection window allows selection of packages to include in the report by branch, product code, range of package (operation) codes and report type.

Report type selections have the following meanings:

Report Type	Purpose / Description
Non Stocked	Parts that are not stocked at the selected branch.
Price Variance	Parts with a price variance
Supersessions	Parts with a supersession code
All	All parts

What else do you want to do?

Updating Package Parts.

Updating Package Prices.

Related Topics:

Central Packages.

Gross Profit Report

Why:

This provides a gross profit summary report for invoiced vehicles. It shows sale price, actual costs, actual gross profit as a value and a percentage, estimated gross profit as a value and a percentage and the variance between actual and estimated gross profit.

 **Note!** Please note that because this report is showing gross profit, a positive variance is in favour of the dealer (i.e. actual Gross Profit is greater than estimated Gross Profit).



*The Vehicle Order
View button.*

Where:

From the Vehicle Order View, select **Reports > Sales > Gross Profit**. This will display a Gross Profit Report window.

How to Report on Gross Profit:

In the Gross Profit Report window input the required selection criteria to customise your report.

Inter Branch Transfer Report

Why:

It will sometimes be necessary to reconcile parts transferred between branches. GDS offers an Inter Branch Transfer report (known in classic as a 'List Out Transfer' report) to assist this process, in addition to the print that is produced each time a part is transferred.

The List Out Transfer report provides information, including current status, on outstanding Inter Branch Transfers (and IBTs completed since the last re-organisation). The report can be run at summary level (IBT level) and detail level (part level).

Where:

In the Parts View, select **Inter Branch Transfer report** from the Reports menu.



*The Part View
button.*

How to Report on Inter Branch Transfers:

In the Inter Branch Transfer selection window, choose from Summary Report, Detail Report or Both.

What else would you like to do?

Delete a Completed Transfer Using the Reorganisation Function.

Related Topics:

Inter-Branch Transfers.

Receiving an Inter-Branch Transfer.

Invoice Journal Report

Why:

The Invoice Journal Report provides a list of invoices and credit notes created for both parts and workshop during the specified period, with totals by type of sale. The report can be used in place of the individual reports run from each module, if preferred.

It shows a summary of invoiced net sales, rounding, discount, freight/extra costs, tax and invoice totals split by anything coded to external, internal, warranty, contract maintenance and other, by branch if requested.

It also shows grand totals of invoiced net sales, rounding, discount, freight/extra costs, tax and invoice totals split by anything coded to external, internal, warranty, contract maintenance, and other, by company.

Figures displayed on the report are from THF162/163/164.

Where:

From the Part, Parts Order or Workshop Order View select Reports > Invoice Journal. This will display an Invoice Journal Report window.



*The Part View
button.*



*The Workshop Order
button.*

How to Report on the Invoice Journal:

In the Invoice Journal Report window input the required selection criteria to customise your report.

Invoice Register Cost of Sales Report

Why:

This report lists the financial details of individual completed invoices for a given period or date range.

Where:

From the Part or Parts Order View, select **Reports > Invoice Register Cost of Sales**. This will display a Print Invoice Register and Cost of Sales Report window.



*The Part View
button.*

How to Report on the Invoice Register Cost of Sales:

In the Print Invoice Register and Cost of Sales Report window input the required selection criteria to customise you report. The invoice register gives detailed financial information for each completed invoice and the cost of sales report gives details of the cost of sales for each invoice.

Invoiced Vehicles Report

Why:

The Invoiced Vehicles Report lists details of all transactions against Invoiced vehicles.

Where:

From the Vehicle Order View, select **Reports > Sales > Invoiced Vehicles**. This will display a Invoiced Vehicles Report window.



The Vehicle Order button.

How to Report on the Invoiced Vehicles:

In the Invoiced Vehicles Report window input the required selection criteria to customise your report.

Invoiced Vehicles Statement Report

Why:

The Invoiced Vehicles Statement lists details of all transactions against Invoiced vehicles.

The report can be selected for any range of invoice dates. Vehicles are selected if their current primary invoice date falls within the selected range. Details of associated credit notes, supplementary invoices and costs post-dating the range of invoice dates can also be printed if required.

Where:

From the Vehicle Order View, select **Reports > Sales > Invoiced Vehicles Statement**. This will display an Invoiced Vehicles Statement window.



The Vehicle Order button.

How to Report on the Invoiced Vehicle Statements:

In the Invoiced Vehicles Statement window input the required selection criteria to customise your report.

Local Service History Report

Why:

The Local Service History Report lists repair and service details for selected vehicles, operations, parts, function groups or order dates.

The report can be generated in a detailed or summary format. The summary report lists the totals for labour, parts and sub—let/others values, while the detailed report lists line values and quantities. It can be produced with or without cost values displayed, enabling it to be presented to the customer if required.

Where:

From the Workshop Order View select **Reports > Local Service History**, or from the Vehicle View select **Reports > Service History**.

Either selection will display the Local Service History Report window.



The Workshop Order View button.



The Vehicle View button.

How to Report on the Local Service History:

From the Local Service History Report window input the required selection criteria to customise your report.

At least one of these items must be entered: the registration number, chassis number, operation, part, function group or order date. The report can be sequenced by order date, invoice/credit indicator or main operation number.

Local VST Header Report

Why:

This report lists locally created VST Operations and any VST's that have been downloaded to the local file.

A column within the report indicates as to whether the record has been downloaded from Impact. It also shows the status of the automatic consumables flag, the account code and the VAT code assigned to each operation.

Where:

From the operation view select **Reports > Local VST Header**. This will display a VST Report window.



The Operations View button.

How to Report on the Local VST Headers:

In the VST Report window input the required selection criteria to customise your report.

Related Topics:

Operations.

Lost Sales Report

Why:

The Lost Sales report details sales which have been lost due to insufficient stock. These lost sales are recorded in the Lost Sale File through the parts enquiry function.

The report can be run at any time during the month and is helpful when creating a purchase proposal.

Where:

From the Parts View, select **Reports > Lost Sales**. This will display a Print Lost Sales Report window.



*The Part View
button.*

How to Report on Lost Sales:

In the Print Lost Sales Report window select the date range you want reported on and click OK.

Related Topics:

Creating a Purchase Proposal.

Performing a Part Enquiry.

Manual Adjustment Report

Why:

The Manual Adjustments report lists all adjustments made in the reconciliation system that must be passed onto the accounts/book keeping department so that similar adjustments can be made in the financial system (assuming that an interface from GDS to an external accounting system is not being used. This is controlled by parameter INT 001. If the interface were active, adjustments would be passed automatically to the accounts).

Where:

From the Claim View select **Reports > Manual Adjustments**. This will display a Manual Adjustments Report window.



*The Claim View
button*

How to Report on Manual Adjustments:

In the Manual Adjustments Report window input the required selection criteria to customise your report.

Related Topics:

Adjustment Interface.
Claims.
Claims Ledger Status Type Codes.

Mechanic Efficiency Report

Why:

The Mechanic Efficiency Report is used to assess the efficiency and performance of the individual mechanics in the workshop or other departments.

The report relies on accurate data being input, with the correct mechanic being apportioned time (where more than one mechanic performed a VST operation). Providing input is done with care, the report will provide a useful indication of the efficiency of a particular mechanic on the type of work which he has been allocated to. If a mechanic is allocated work he has little experience of, it is unlikely his efficiency will be very high.

It displays hours sold compared to hours booked, by different VST categories, for each mechanic. It shows straight hours as a percentage, the efficiency percentage on standard hours and an overall efficiency percentage.

Depending on the selection criteria entered, there are in fact four variations of the report:

- Invoiced (Sold) Time v Actual Booked Time
- Invoiced (Sold) Time v Adjusted Booked Time
- TST Time v Actual Booked Time
- TST Time v Adjusted Booked Time

 **Note!** Please note that the report will only collate the current months 'live' data and doesn't check any archived files.

Efficiency Calculations Include:

Invoiced Efficiency: Mechanic Booked (Adjusted) X Sold (Invoiced) Time.

Total Booked Adjusted.

TST Efficiency: Mechanic Booked (Actual) X TST Time.

Total Booked (Actual).

Where:

From the mechanic view select **Reports > Mechanic Efficiency Report**. This will display a Mechanic Efficiency Report window.



The Mechanic View button.

How to Report on Mechanic Efficiency:

In the Mechanic Efficiency Report window input the required selection (including team if required) criteria to customise your report.

New Vehicles in Stock Report

Why:

The New Vehicles in Stock Report report provides a list of new vehicles that have been received into stock but have not yet been invoiced, based on the 'Actual Receipt Date' field in the Vehicle Order Maintenance window and the invoiced status of the vehicle.

Where:

From the Vehicle Order View, select **Reports > Stock > New Vehicles in Stock**. This will display a New Vehicles in Stock Report window.



*The Vehicle Order
View button.*

How to Report on New Vehicles in Stock:

In the New Vehicles in Stock Report window input the required selection criteria to customise your report. Depending on the set up of your system, you may or may not be able to select multiple branches.

The report can be selected for any date. Vehicles are selected if they were in stock and un-invoiced on the specified date. Vehicles are not selected if already invoiced on the specified date, even if the invoice was subsequently reversed.

If actual costs are selected, the values on the report only include actual costs dated on or before the chosen stock date.

Vehicles with a reservation date are highlighted on the report with an asterisk next to the Stock ID.

One Page Summary Report

Why:

This report gives a summary of stock movements by source code for a selected financial period. This report is only relevant to markets using replacement costs.

Where:

From the Parts View, select **Reports > One Page Summary**. This will display a One Page Summary window.



*The Parts View
button.*

How to Report on A One Page Summary:

In the One Page Summary window select which period you want to report on and whether archive data should be included.

Order Audit Report

Why:

This report is used to assess the number of hours booked, parts issued (or both) against an invoice or open order.

Where:

From the Workshop Order View, select **Reports > Order Audit**. This will display an Order Audit Report window.



The Workshop Order View button.

How to Report on Orders:

In the Order Audit Report window, input the required selection criteria to customise the report. Select parts, workshop or both types of order. Also select flow code to determine the order flow required.

See the Order Flow for a list of these values. Order flow is assigned to workshop orders and can be seen on the overview tab in workshop order details.

Part Sales by Function Group Report

Why:

This report contains information on flagged parts and customers only. It's a year end comparison which highlights any purchasing trends.

It also highlights parts turnover, identifies servicing trends and seasonal trends and can be used to measure the success of a parts promotion.

Where:

From the Part View, select **Reports > Customer > Part Sales by Function Group** or from the Customer View, select **Reports > Part Sales by Function Group**.

Either selection will display a Part Sales by Function Group window.



The Customer View button.



The Parts View button.

How to Report on Part Sales by Function Group:

In the Sales by Function Group window, input the required selection criteria to customise your report.

Part Sales Detailed Report

Why:

This report shows the total part sales subtotals for front and back counter, as well as sales total, cost price, cost total, gross profit and gross profit %.

It can be used to identify how successful a parts promotion has been and also enables any abnormal parts demands to be identified.

It can be used for internal or external sales within the selected criteria and you can decide whether to display the cost information or not.

Where:



*The Customer View
button.*

From the Part View select **Reports > Customer > Part Sales (Detailed)** or from the Customer View select **Reports > Part Sales (Detailed)**.

Either selection will display a Part Sales Report window.



*The Parts View
button.*

How to Report on Detailed Part Sales:

In the Part Sales Report window input the required selection criteria to customise your report.

Parts Daily Operating Control Report

Why:

This report provides a detailed analysis of part sales at both the front and back counters.

Where:



*The Parts View
button.*

From the part or parts order view select **Reports > Daily Operating Control (DOC)**. This will display a Daily Operating Controls window.

How to Report on Parts Daily Operating Control:

From the Daily Operating Controls window input the required selection criteria to customise your report. You can split the data for individual cash or credit codes by selecting the 'Split by Cash/Credit Code' option.

If you want to see individual payment codes reported on, select the 'Include a split by Payment Code' option. If you want to see individual product groups reported on, select the 'Include a split by Product Group' option.

If the report has been selected for company rather than for branch, the report sequence can either be selected (by branch then product code, or product code then branch). If the 'Show WIP for all Categories' is selected you'll see the work in progress values for all selected categories, even if there is no sales data for that category. If this isn't selected, you'll only see the work in progress values for the report lines that contain sales data.

Parts Daily Sales Enquiry Report

Why:

This allows you to enquire on parts and workshop sales by department and category and if required, all branches.

Where:

From the Part or Parts Order View, select **Reports > Daily Sales Enquiry**. This will display a Daily Sales Enquiry window.



*The Parts View
button.*

How to Report on Parts Daily Sales Enquiry:

From the Daily Sales Enquiry window you can select the year you want to view.

Either parts, workshop or all sales can be viewed, but if you select only workshop the value in the sales amount is only workshop labour sales. If only parts is selected, then all parts sales from both the workshop and parts counters is displayed.

The values in the Cost of Sales and Sales Amount columns are (parts) front counter sales and (workshop) back counter sales (sales through workshop).

Please note that in order for screen display and report information to be correct you must set up the following commands within the daily batch routine:

Clear Daily Sales File (Daily)

```
CALL PGM(THR343) PARM('1' '0')
```

Clear Daily Sales File (Monthly)

```
CALL PGM(THR343) PARM('1' '1')
```

Parts Received Not Sold Analysis

Why:

The parts received but not sold analysis primarily assists the dealer in identifying parts which can be returned to the Volvo supplier without penalty. The number of days to return varies between different markets and these limits, with the inclusion of line cost limits, can be set by means of parameters.

Where:

From the Part View, select **Actions > Parts Received Not Sold Analysis**. This will display a Parts Received Not Sold Analysis window.



*The Parts View
button.*

How to Report on Parts Received Not Sold Analysis:

The Parts Received Not Sold Analysis window lists all parts that correspond to the criteria set up within the parameters.

Each record can be opened for viewing only.

Right-clicking a record will give you the option to add reason text indicating why the part is being returned. You also have the option here to view receipt details for the selected part.

Parts Top Seller Report

Why:

This report lists all parts that the system has identified as your top selling parts.

The report only ever references the Parts Master File (THF100) and Parts Sales History File (THF119). Because of this, the figures relating to gross profit can only ever relate to today's Parts Master File cost and retail prices.

Where:

From the Part or Parts Order View, select **Reports > Top Seller**. This will display a Top Seller List window.



*The Parts View
button.*

How to Report on Top Selling Parts:

In the Top Seller List window input the required selection criteria to customise your report.

Parts Work in Progress Report

Why:

This report lists all outstanding parts orders and can be run at any time during the month.

Where:

From the Part or Parts Order View, select **Reports > Work in Progress**. This will display a Parts Work in Progress Report window.



*The Parts View
button.*

How to Report on Parts Work in Progress:

In the Parts Work in Progress Report window input the required selection criteria to customise your report.

Payroll Reports

Why:

The payroll reports can be used to assess the amount of salary paid to the mechanics during a specific period. The reports cover payroll and production card analysis (controlled by parameter settings). They take their information from the 'live' time recording file THF012.



Note! Please note that Fusion won't calculate time for any persons that have an end date against them in the Mechanic Master File.

You can choose from four different payroll reports: **Production Card Analysis:** Provides information on the attendance and pay categories. **Payroll Analysis:** Provides information on the payment of salary to be paid to the employee. **Production Card Summary Analysis:** Provides an overview of the employees working period. **Summary Report by Mechanic Grades:** Summarises the attendance and pay categories by mechanic grade.

Where:

From the Mechanic View, select **Reports > Payroll Reports**. This will display a Payroll Reports window.



*The Mechanic View
button.*

How to Report on Payroll:

In the Payroll Reports window input the required selection criteria (and team if required) to customise your report then indicate which report(s) you want and click OK to submit the reports.

What else would you like to do?

Payroll Maintenance.

Personnel File List Report

Why:

The Personnel File List Report provides a simple list of mechanics' details for the current branch.

The report is in mechanic number order and it shows mechanic name, hourly rate, skill factor, grade, department, skill groups and start and end date.



The Mechanic View button.

Where:

From the Mechanic View, select **Reports > Personnel File List**.

How to Report on Personnel File List:

There are no selection criteria for this report; it is submitted for print immediately.

Projected Vehicle Sales by Type Report

Why:

This is the same as the Vehicle Sales by Type, except that it's based upon projected future sales rather than sales that have already been completed. The only difference in the selection is that you specify a range of delivery dates rather than a range of invoice dates. The system selects uninvoiced vehicle records based upon the date the vehicle is due for delivery to the customer.



The Vehicle Order View button.

Where:

From the Vehicle Order View, select **Reports > Sales > Projected Vehicle Sales by Type**. This will display a Projected Vehicle Sales by Type Report window.

How to Report on Projected Vehicle Sales by Type:

In the window input the required selection criteria to customise your report. If you select the detailed report type, the listing shows the stock I.D's of the individual vehicles that make up the totals.

Related Topics:

“[Vehicles Sales by Type Report](#)” on page 273.

Purchase Orders Report

Why:

The Purchase Orders Report shows a register of purchase orders, including sublet costs, currently associated with workshop orders.



*The Workshop Order
View button.*

Where:

From the workshop order view, select **Reports > Purchase Orders** from the menu bar.

How to Report on Purchase Orders:

The Purchase Orders Report selection window allows the report to be generated by customer, date range, supplier number, confirmed / not confirmed orders or workshop order status.

What else would you like to do?

Purchase Orders.

Related Topics:

Adding an Operation to a Workshop Order.

Set up:

The Workshop Purchase Order Function is enabled by parameter WPR001.

Repair Code Reporting

Why:

This functionality has been written to provide a reporting facility on various vehicle costs.

The concept is that a Repair Code can be attached to a Payment Code/Visit Reason combination and line values retrieved from existing order lines to report on various vehicle costing.

Where:



The Workshop Order View button.

From the Workshop Order View, select **Reports > Repair Code**. This will display a Report Selection window.

How to Report on Repair Codes:

The report may be run using a mixture of the following criteria

Criteria	Purpose / Description
Report Type	By Repair Code or Customer
Include Costs	Select Yes , No , Both (Include Yes and No) or All (Include even if no record is in the Cross reference file)
Print Code	Select Yes , No , Both
Chassis Group	Select one Group or a range.
Chassis Number	Select one or a range.
Customer	Select one or a range.
Order Date	Select one or a range.
Invoice Date	Select one or a range.

When the report runs it retrieves values from the order line files via the Payment code and Visit Reason, and cross refers them to the Repair Code. Click OK to generate report.

Related Topics:

Creating a Workshop Order.

Set up:

Various control files are required to be set up in order for information to be retrieved, these are:

Repair Code Details, Repair Visit Details and Repair Code Cross Reference Details.

Reprint Actual Costs Audit Report

Why:

The Actual Costs Audit Report can be reprinted.

Where:

From the Vehicle Order View, select **Reports > Costs > Reprint Actual Costs Audit**. This will display a Reprint Actual Costs Audit Report window.



*The Vehicle Order
View button.*

How to Reprint Actual Costs Audit:

In the Reprint Actual Costs Audit Report window input the run number of the report you want to reprint and click OK.

Related Topics:

“[Actual Costs Report](#)” on page 232.

“[Actual Costs Audit Report](#)” on page 231.

Sales and Cost of Sales Report

Why:

The Sales and Cost of Sales Report analyses vehicle sales by stock ID, showing net sales, estimated costs and actual costs, estimated gross profit, estimated gross profit percentage, actual gross profit, actual gross profit percentage and the variance between estimated and actual costs, both as a value and a percentage.

Where:

From the Vehicle Order View, select **Reports > Sales > Sales and Cost of Sales**. This will display a Sales and Cost of Sales Report window.



*The Vehicle Order
View button.*

How to Report on Sales and Cost of Sales:

In the Sales and Cost of Sales Report window input the required selection criteria to customise your report.



Note! Please note that a negative variance on this report indicates a variance in the dealer's favour.

Related Topics:

“[Actual Costs Report](#)” on page 232

Sales by Budget Report

Why:

 **Note!** Please note that Budget details must have first been input into Fusion in order for this report to be meaningful!

Where:



*The Part View
button.*

From the Part View, select **Reports > Customer > Sales by Budget** or from the Customer View select **Reports > Sales by Budget**. Either selection will display a Sales by Budget Report window.



*The Customer View
button.*

How to Report on Sales by Budget:

In the Sales by Budget Report window input the required selection criteria to customise your report.

Sales by Function Group Report

Why:

This report details sales, by function group, for individual customers. It shows information for both flagged and non-flagged customers within the Customer Master File.

The information consists of both front and back counter sales.

The report can be used to identify seasonal trends and monitor whether a parts promotion has been a success or failure.

Where:



*The Part View
button.*

From the Part View, select **Reports > Customer > Sales by Function Group** or from the Customer View select **Reports > Sales by Function Group**.



*The Customer View
button.*

How to Report on Sales by Function Group:

In the Sales by Function Group window input the required selection criteria to customise your report.

Sales by Parts Person Report

Why:

This report lists sales (actual invoiced orders) by part person for a selected period, either in detail or summary and can include archive information if required.

Where:

From the Part View or Parts Order View, select **Reports > Sales by Parts Person**. This will display a Sales by Parts Person window.



*The Part View
button.*

How to Report on Sales by Parts Person:

In the Sales by Parts Person window input the required selection criteria to customise your report.

Service Degree Report

Why:

This report indicates the level of service for the front and back counters.



Note! These figures will only be relevant if you're using the parts customer back order system.

Where:

From the Part View, select **Reports > Service Degree**. This will display a Service Degree window.



*The Part View
button.*

How to Report on Service Degree:

In the Service Degree window input the required period number you want to report on.

Source Voucher Report

Why:

This report can be used as a financial document as it validates stock movements against a selected period for various types of transaction codes such as receipts, issues, stock adjustments and stocktaking.

Where:

From the Part View or Parts Order View, select **Reports > Source Voucher**. This will display a Source Voucher Report window.



*The Part View
button.*

How to Report on Source Voucher:

In the Source Voucher Report window input the required selection criteria to customise your report.

Related Topics:

Source Codes.

Source Voucher & Transaction Analysis Codes.

Special Prices Report

Why:

This report enables you to see special discounts set up for customers within parts or workshop or both, and within customer discount category.

Where:

From the Part View, select **Reports > Customer > Special Prices** or from the Customer View select **Reports > Special Prices**. Either selection will display a Customer Special Prices Report window.



*The Part View
button.*



*The Customer View
button.*

How to Report on Special Prices:

In the Customer Special Prices Report window input the required selection criteria to customise your report.

Stock Balance Report

Why:

A new report has been created specifically for the Russian Market which has also been made available as a standard report in the base product.

The report is based on the Transaction History file (THF102) and is designed to provide a list of transactions for the selected criteria with an opening and closing balance of each parts and for the report as a whole.



*The Part View
 button.*

From the Part View, select **Parts > Reports > Stock Balance report**.

How to Report on Stock Balance:

The report is security controlled and a new security item under Parts reports has been added. This is set to a default of Negative. The selection criteria include Branch selection, Part prefix, Part number Range from and to Or, Product code AND Date Range.

The report will also review archived data if selected.

The opening balance for each part will display the closing balance of the last transaction before the date range selected or if no date range is selected the oldest record on the file. The closing balance is the on hand quantity multiplied by the new average cost for the last transaction reported

The report also has two totals reported at the end of the report, Opening Balance and Closing Balance.

The Opening Balance is a total of all the opening balances and costs reported.

The Closing Balance is a total of all the closing balances and costs reported.

The report will list all transactions for the selection criteria irrespective of the effect on stock

The columns printed are defined as follows:

Column Name	Purpose / Description
Date	Date of transaction movement
Transaction Reference	Transaction Analysis Code followed by the transaction description
Reference	This will vary according to the transaction type but will take the data from one of the following fields in the transaction history file; Miscellaneous Values, Order number, Invoice number and stock movement number.
Vendor	Supplier / Customer number this is dependant on transaction type.
Quantity Before	Calculation of the Effect on the Transaction Qty or + Stock Balance after.
Operation Cost	Calculation of Quantity before multiplied by the Cost.
Operation Qty	Movement Quantity for this transaction DXTRQY
Cost Total	Stock Balance after multiplied by the transaction cost.
Balance after	Stock Balance after transaction.
Average cost	New Average cost after transaction

Stock by Vehicle Type Report

Why:

The Stock By Vehicle Type Report provides a summary list of stocked vehicles with stock values totalled by vehicle make and chassis type.

Where:

From the Vehicle Order View, select **Reports > Stock > Stock by Vehicle Type**. This will display a Vehicle Stock by Type window.



The Vehicle Order View button.

How to Report on Stock by Vehicle Type:

In the Vehicle by Stock Type Report window input the required selection criteria to customise your report.

Stock Consolidation Status Report

Why:

This report lists all parts in stock and indicates what part lines are overstocked at company level.



The Part View button.

From the Part View, select **Reports > Stock Consolidated Status**. This will display a Stock Status Report – Consolidated window.

How to Report on Stock Consolidation Status:

Input the required criteria. If a number of weeks is entered in the 'Over Stock' field, the system checks that the current stock level will cover this period. If the stock level exceeds average sales for this number of weeks, an asterisk will be printed on the report to indicate branches that are over stocked.

Stock Profile Report

Why:

This report details 'profile' information, descriptions, costs, balances, last sale, last receipt etc. or parts where stock is greater than the specified number of week's sales.

Where:

From the Part View, select **Reports > Stock Profile Report**. This will display a Stock Profile Report window.



The Part View button.

How to Report on Stock Profile:

Enter the number of weeks sales above or below where you would like to report part details for.

Stock Status Branch Report

Why:

This report details the value of stock at individual part line level or summary (product code) level).

Where:

From the Part View, select **Reports > Stock Status**. This will display a Stock Status Report – Branch window.



*The Part View
button.*

How to Report on Stock Status Branch:

From the Stock Status Report – Branch window input the required selection criteria to customise your report. Choose from a summary report (totals only) or detailed reports (by Part Number or Location, by Average or Replacement Cost.

Stock Valuation Imprest Report

Why:

This report details the inventory value of stock held at imprest stock sites. The amount should be added to the dealer/branch inventory value for a true company inventory.

Where:

From the Part View, select **Reports > Stock Valuation (Imprest)**.



*The Part View
button.*

How to Report on Stock Valuation Imprest:

There are no selection criteria for this report. It is submitted for print as soon as the option is selected.

Stock Valuation Report

Why:

Also known as the Inventory Value Report, this option displays details of the inventory value of stock held at a specific branch. It reports on all product code and product groups held within the Parts Master File.

A separate report is produced for each product code registered within the Parts Master File, a total inventory value for the branch is displayed on each report.

Each report displays a summary value of the product code and a summary value including WIP.

The summary value is split between each relevant obsolescence code.

This option allows you to create a report detailing stock inventory values, by replacement and average cost or retail price including obsolescence details.

Additional reports may also be produced, if requested, detailing rate of turnover, parts W.I.P. and sales totals for the last 12 months.

Where:

From the Part View, select **Reports > Stock Valuation**.



*The Part View
 button.*

How to Report on Stock Valuation:

Make selections for the following criteria.

Criteria	Purpose / Description
Branch code	
Product code	Select value you wish to report on or leave blank for all.
Supplier code	A search facility is available here.
Price to Use	Replacement - Shows replacement costs corresponding to current purchase prices as quoted by your supplier. Average Cost - Shows average cost as an average value for the remaining parts in stock (which may have come from several deliveries made at different prices). Retail - Shows retail cost bought in from the supplier.
Turnover Report Required	Make a selection from the three options. (The system defaults to '1' for 'Turnover Report Required'. This default is controlled by parameter PRP 001 - Parts Rep PC130.)
Obsolescence calculation	Obsolescence calculation options may also be displayed, depending on a parameter setting (OBS008). The Obsolescence tab may be selected which will display a temporary obsolescence override screen, allowing you to amend the duration figures without having any effect on the live data.

Related Topics:

Obsolescence.

[“Stock Valuation Imprest Report”](#) on page 265

Stocking Interest Report

Why:

The Stocking Interest Report shows total stocking interest by vehicle and by vehicle type.

Where:

From the vehicle order view select **Reports > Costs > Stocking Interest**. This will display a Stocking Interest Report window.



*The Vehicle Order
view button*

How to Report on Stocking Interest:

In the Stocking Interest Report window input the required selection criteria to customise your report.

The DSP Delivery Control Report

Why:

The report gives details of all DSP orders that have been pre-receipted using the Supplier Goods Receipt option.

The report should be looked at weekly to make sure that pre-receipted records have been cleared down upon the arrival of DSP transmissions. Any records that have not been cleared down will be due to a mismatch in the customer reference, which may have resulted in you receipting the parts into stock twice! When this happens it is recommended that you compare actual stock balances with your system stock balances.

Where:

From the Supplier View, select **Reports > DSP Delivery Control**. This will then display the DSP Delivery Control window.



*The Supplier View
button*

How to Report on DSP Delivery Control:

From the DSP Delivery Control window select the report start and finish dates.

Transaction History Report

Why:

This report lists details of parts transactions according to criteria specified in the selection parameters.

Where:

From the Part or Part Orders View, select **Reports > Transaction History**.



*The Parts View
button.*

How to Report on Transaction History:

Choose from Parts, Customers, orders, transaction codes and other criteria. Enter the required criteria on one or both of the criteria tabs.

Uninvoiced Vehicles Cost Report

Why:

The Uninvoiced Vehicles Cost Report summarises sales, estimated costs and actual costs for uninvoiced vehicles.

Where:

From the vehicle order view select **Reports > Costs > Uninvoiced Vehicles Cost**. This will display an Unsold Vehicles Cost Report window.



*The Vehicle Order
view button*

How to Report on Uninvoiced Cost:

In the Uninvoiced Vehicles Cost Report window input the required selection criteria to customise your report.

Related Topics:

“[Actual Costs Report](#)” on page 232.

Unposted Cost Adjustment Report

Why:

The Un-posted Cost Adjustment Report shows the value of any un-posted cost adjustments. It can be used to help reconcile unadjusted costs with the Finance system after the vehicle has been invoiced, and therefore no longer appears on stock reports. The report includes vehicles that have been invoiced but costs have not yet been fully allocated. You can choose an end cost date, a range of invoice dates and new or used vehicles, or both. End cost date allows you to exclude actual costs that are dated after the specified date.

If the current actual cost for a given item is different from that originally posted at invoice time, the report will show the difference and the associated cost debit and credit accounts from the account number table. Please note that when posted to the Finance system, the debit and credit accounts will be reversed automatically if the final cost is less than that originally posted.



The Vehicle Order view button

Where:

From the Vehicle Order View, select **Reports > Costs > Un-posted Cost Adjustments**. This will display an Un-posted Cost Adjustments Report window.

How to Unposted Cost Adjustment:

In the Un-posted Cost Adjustments Report window input the required selection criteria to customise your report.

Related Topics:

“[Actual Costs Report](#)” on page 232.

Unreasonable Gross Profit Report

Why:

This report displays parts for which the system has calculated that the gross profit is greater or less than the standard margins set. The margin values are set in company records within the Control Master File.

Where:

From the Part or Part Orders View, select **Reports > Gross Profit**. This will display an Unreasonable Gross Profit Report window.



The Part View button

How to Report on Unreasonable Gross Profit:

In the Unreasonable Gross Profit Report window, input the low and high values for the required gross profit along with the sort sequence. The report will print details of sales where gross profit is outside of this range. If you want to report on a particular supplier (or up to 10 suppliers) input the supplier numbers in the space provided.

Used Vehicle Depreciation Report

Why:

A Used Vehicle Depreciation Report is automatically printed after each depreciation calculation and is identical in format to the depreciation proposal, except for the heading and the fact that it includes the date last posted.

A copy of this report should be retained for reference as the data it contains is only available for reprint until the next time the depreciation calculation is run.



The Vehicle Order view button.

Where:

From the Vehicle Order View select **Reports > Costs > Used Vehicle Depreciation**. This will display a Used Vehicles in Stock Report window.

How to Report on Used Vehicle Depreciation:

There are no selection criteria for this report, only a confirmation window.

Related Topics:

Depreciation.

Used Vehicles in Stock Report

Why:

This report provides a list of used vehicles that have been received into stock but have not yet been invoiced, based on the 'Actual Receipt Date' field in the Vehicle Order Maintenance window and the invoiced status of the vehicle.



The Vehicle Order view button.

From the Vehicle Order View select **Reports > Stock > Used Vehicles in Stock**.

How to Report on Used Vehicles in Stock:

In the Used Vehicles in Stock Report window input the required selection criteria to customise your report.

Depending on the set up of your system, you may or may not be able to select multiple branches.

The report can be selected for any date. Vehicles are selected if they were in stock and un-invoiced on the specified date. Vehicles are not selected if already invoiced on the specified date, even if the invoice was subsequently reversed.

If actual costs are selected, the values on the report only include actual costs dated on or before the chosen stock date.

Vehicles with a reservation date are highlighted on the report with an asterisk next to the Stock ID.

Utilisation Report

Why:

The Utilisation Report is used to assess the amount of productive time and non-productive time within the workplace. The report shows how each mechanic utilised their attended time.

Broken down into time lines, details are shown according to how it was booked, either by the time recorded against a repair order or by a non-productive code by means of On-line time recording or Manual time recording.

It lists the hours and the categories of hours booked on a repair order or non-productive code. It also shows hour's available, labour utilisation percentage and cost of available hours by mechanic.

It also shows grand totals for the workshop or other department for all mechanics available hours, labour utilisation percentage and cost of available hours.



Note! The information for this report is taken from THF012/023 which is the live production card details and the production card details archive, respectively.



*The Mechanic View
button.*

Where:

From the mechanic view select **Reports > Utilisation**. This will display a Mechanic Utilisation Report window.

How to Report on Mechanic Utilisation:

In the Mechanic Utilisation Report window input the required selection (including team if required) criteria to customise you report.

Related Topics:

Assign Mechanic Exceptions.

Vehicles Part Report

Why:

Parts that are required for a particular vehicle that is due into the workshop can be reserved against that vehicle within Fusion. Regardless of whether the parts are in stock, they're added to a waiting file until they are required.

The report includes details of all parts that are in the waiting file and can be selected for a specific customer, part or vehicle.



*The Parts View
button.*

Where:

From either the Part or Parts Order View select **Actions > Vehicle Parts** or Select **Reports > Vehicle Parts**. This will display a Vehicle Parts Report window.

How to Report on Vehicle Parts:

From the Vehicle Parts Report window you can input various selection criteria to customise your report, as well as indicate the sort order that you would like the report to be printed in.

Vehicles Sales Analysis Report

Why:

The Vehicle Sales Analysis Report provides a list of invoiced vehicles and shows details of the amounts invoiced and the associated costs. It shows sales, credits, net sales, actual gross profit, actual cost as a value and percentage, estimated cost as a value and percentage and the variance between estimated and actual costs, both as a value and percentage. It also includes details of any supplementary invoices and credit notes raised.

Where:

From the vehicle order view select **Reports > Sales > Vehicle Sales Analysis**. This will display a Vehicle Sales Analysis Report window.



*The Vehicle Order
view button.*

How to Report on Vehicle Sales Analysis:

In the Vehicle Sales Analysis Report window input the required selection criteria to customise your report.

Vehicles Sales by Type Report

Why:

The Vehicle Sales by Type Report analyses vehicle sales by the number of units invoiced, chassis net sales, chassis gross profit, total net sales, other income, repair costs, total gross profit and gross profit as a percentage of total net sales. Each of these values is totalled at the following analysis levels:

- Make/Chassis Type/Axle Combination/Calendar Month and Year
- Make/Chassis Type/Axle Combination
- Make/Chassis Type
- Make
- Stock Type
- Total New
- Total Used
- Grand Total

Where:



The Vehicle Order view button.

From the Vehicle Order View select **Reports > Sales > Vehicle Sales by Type**. This will open a Vehicle Sales by Type Report window.

How to Report on Vehicle Sales by Type:

In the Vehicle Sales by Type Report window input the required selection criteria to customise your report. If you select the detailed report type, the listing shows the stock numbers of the individual vehicles that make up the totals.

Vehicles in Stock Statement

Why:

The Vehicles in Stock Statement lists details of all cost transactions against stocked vehicles, based on the 'Actual Receipt Date' field in the Vehicle Order Maintenance window and the invoiced status of the vehicle.

Where:



The Vehicle Order view button.

From the Vehicle Order View select **Reports > Stock > Vehicles in Stock Statement**. This will open a Vehicles in Stock Statement window.

How to Report on Vehicles in Stock:

In the Vehicles in Stock Statement window input the required selection criteria to customise your report. The report can be selected for any date. Vehicles are selected if they were in stock and uninvoiced on the specific date.

Vehicles Invoiced Awaiting Payment Report

Why:

The Vehicles Invoiced Awaiting Payment Report provides a list of vehicles which have been invoiced, but for which no payment has been received. An invoice is classed as Paid when it has been flagged as such within the Register Invoice Paid routine.



The Vehicle Order view button.

Where:

From the Vehicle Order View select **Reports > Sales > Vehicles Invoiced Awaiting Payment**. This will open a Vehicles Invoiced Awaiting Payment window.

How to Report on Vehicles Invoiced and Awaiting Payment:

Select New and/or Used Vehicles. Enter the number of days outstanding, e.g. enter 10 to print vehicles where the invoice has been outstanding for 10 days or more. Click OK to print the report.

What else would you like to do?

Registering an Invoice as Paid.

Vehicles on Order Report

Why:

The Vehicles on Order Report provides a list of orders for vehicles that have not yet been received into stock, based on the 'Actual Receipt Date' field in the Vehicle Order Maintenance window.



The Vehicle Order view button.

Where:

From the Vehicle Order View select **Reports > Stock > Vehicles on Order**. This will display a Vehicles on Order Report window.

How to Report on Vehicles on Order:

In the Vehicles on Order Report window input the required selection criteria to customise your report.

VST Hours Sold and Taken Report

Why:

This report shows VST hours sold/taken by payment code, either in detail or summary, within a specified period. This is a flexible and powerful report which can be printed or which in its screen version allows drilldown into data as far as individual order level from the overview of VST hours sold/taken.

Where:

From the operation view select **Reports > VST Hours Sold & Taken** from the menu bar.



*The Operations View
button.*

How to Report on VST Hours Sold and Taken:

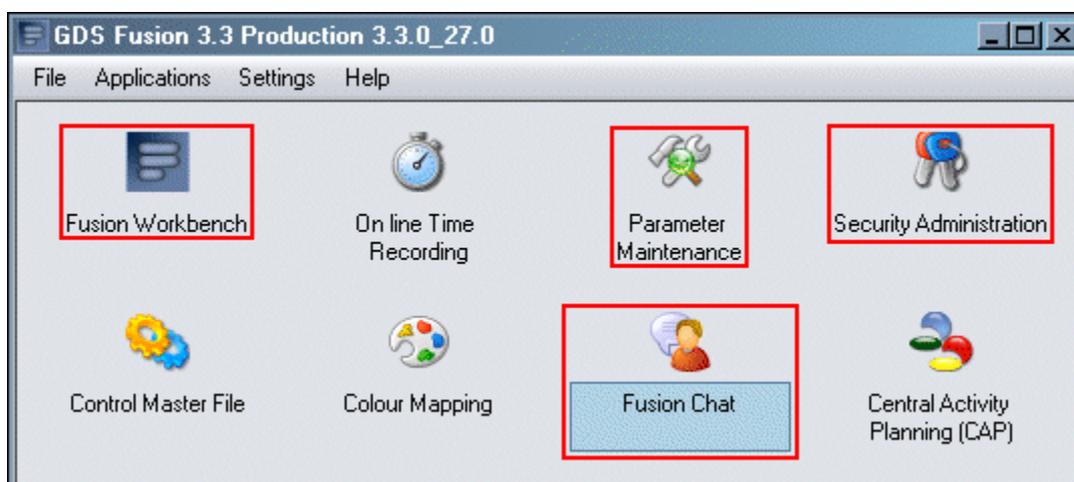
In the VST Hours Sold and Taken Report window there are multiple selections to allow refinement of your view of VST hours. Selection can be made by range of invoice date, department code, product code, operation type, registration number, chassis, range of customers and branch. Also the report can be shown in detail or summary formats, to include VST or VST and parts, and in printed or screen-based formats.

The screen-based report allows drilldown from grand totals to totals by payment code, range of VST within payment code, monthly workshop sales by group of operation codes, summary by operation number and labour sales by individual order.

Shared Functions

About Shared Functions

This chapter provides information about shared functions. The sections cover topics such as Daily Batch setup (Within the Fusion Workbench), Fusion Chat functions, Parameter Maintenance, Preferences and Presets and Security Administration.



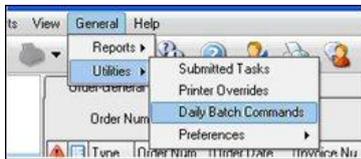
Daily Batch

Why:

It is often necessary to run a sequence of events on a daily and/or monthly basis without user input, the Daily Batch provides this feature for GDS.

Where:

From any section of the Fusion Workbench, select the **General > Utilities > Daily Batch** command. A list of sequential lines are presented on the Daily Batch Commands window, each line represents an operating system command or call to a GDS program.

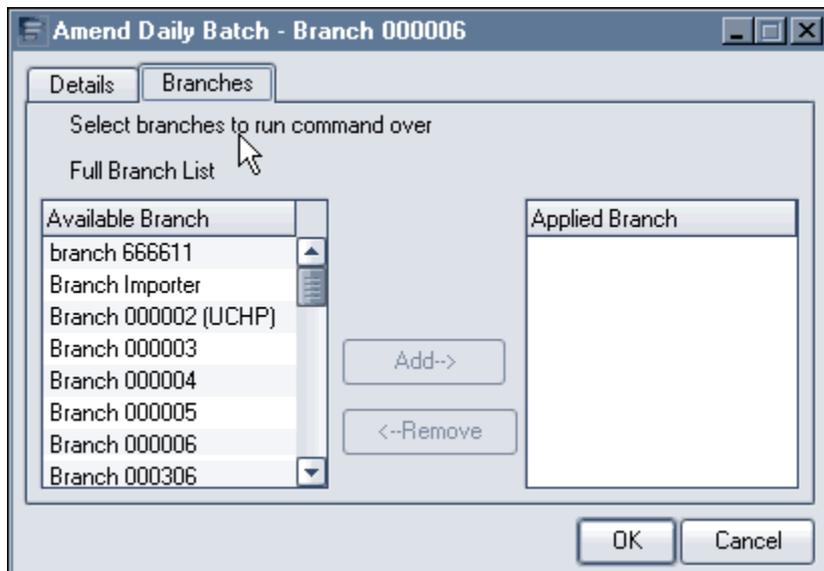


As you can see above, the window is split into several sections: A menu bar, a toolbar, a sequence finder and 8 columns in the detailed list. The 8 columns displayed are:

Column Name	Description
Errors	This displays a cross icon if the last run of the command ended in failure (the error can be viewed using the right mouse button).
Sequence	The number is a number in the range of 1->9999 and is the order that the command line will run in.
Batch Command	The description of the command line entered.
Held	This displays a hexagonal Stop sign if the command will not run with the other Daily Batch commands.
D	Daily - Ticked if the Run value is set to All, or it will show an abbreviated text value.
M	Month - This flag should be ticked if you want this command line to run at month end only.
Y	Year - This flag will be ticked for every item with its year flag ticked.
C	Company - This flag will be ticked for every item with its company flag ticked

If you open a command line you will see the following window which displays the same information as the rest of the columns in the detailed list.

Use the branches tab if you want to specify which branches a particular command line should run for. Select the branch in the left pane and press the “Add ->” button to move it to the right pane. Reverse the procedure with the “<- Remove” button to remove a branch from the right pane.



How to Create a New Daily Batch Command Line:

You must use the File menu New option or the New button  on the toolbar.

How to Open a Daily Batch Command Line:

Use the File menu, open option or the Open button  on the toolbar, select the “Open” item from the right mouse button’s context menu, or by double-clicking a command line.

How to Delete a Daily Batch Command Line:

Use the Edit menu, Delete option or the Delete button  on the toolbar, or select the Delete item from the right mouse button’s menu.

How to Hold a Daily Batch Command Line:

To Hold an existing command line so that it will never run unless it is released, select the “Hold” item from the right mouse button’s context menu. The “Release” item on the context menu will release a held command line.

Finally, the **LastRun** item on the context menu will allow you to see the details of the last time the command line was run. This is particularly useful when the Error icon is displayed in the 1st column of the detailed list.

How to Compile a List of Daily Batch Commands:

When selecting and entering your list of commands to run, bare in mind that most reports (except for those mentioned in this section) are designed to be run by themselves in submitted jobs only. The Daily Batch should have exclusive access to the GDS environment, so submitted jobs and the Report Pack may

interfere with some of the Daily Batch commands. Because of this, any submitted jobs and calls to the Report Pack should always be at the very end of the Daily Batch list of commands.

The sequence of Daily Batch items is largely up to the user, but the following commands (if used) must be before the Month & Year end processing:

CALL PGM(TFC8994)	Select & Print Claims
CALL PGM(TR060AC)	Roll Prospecting Data
CALL PGM(THC699)	Year end obsolescence
CALL PGM(THR1170)	Month & Year end processing

The following commands must be after the Month & Year end processing:

- All archive programs

All submitted jobs, reports and the Report Pack must be placed at the end of the list of Daily Batch commands, before or after the GDS VMACS application is re-opened.

How to Add a Report Pack to the Daily Batch:

The Report Pack is a list of reports especially designed to be run as a group within a package called the Report Pack. Each report pack has a unique name, but best results have always been achieved if the Report Pack that is added to the Daily Batch is named DEFAULT and that the PCK001 parameter is also set to DEFAULT.

Maintain your report pack using the Report Pack maintenance tool which is on the Fusion Workbench in the General > Reports menu. See "[Report Pack Group Maintenance](#)" on page 288.

The Report Pack should be called (if necessary) from within the Daily Batch using the REPPACK command. (e.g. REPPACK PACK(DEFAULT))

How to Run the Daily Batch from Robot:

The Daily Batch is submitted once every night, for each GDS data environment, by the Robot tool.

To create the correct entry in Robot, setup a command (using the GDS data environment's GDS Batch job description) that calls the program Daily Batch program with no parameters (CALL THR901). This Robot entry must REACT to the relevant GDS data environment's nightly backup Robot entry, and no other job of any kind must run using the same data environment at the same time as the Daily Batch.

How to Diagnose Daily Batch Errors:

Any line indicated with an error check mark in the Daily Batch Commands list will have some error information stored, and this information can be viewed using the LastRun context menu option, as detailed above. More information can only be found in the job log spooled file of the Robot job.

As the Daily Batch is run within Robot, the Robot tool should make it easy to see the last few days of job logs and output produced by the Daily Batch. If the job description logging is set to the correct level, the job logs can offer a lot of information on particular errors. Use the command line “CHGJOB LOG(4 00 *SECLVL) LOGCLPGM(*YES)” at the beginning of the Daily Batch if you wish to override the job description’s logging level to the maximum possible value for only particular Daily Batch runs (e.g. month end or Fridays.)

In the event of an error being encountered which requires support from Application Delivery, please provide as much detail as possible to help with the diagnosis by completing a ‘Support Request’ document. This should be attached to the Vinst case. The template for the Support Request document can be found in the Application Delivery Teamplace in the following location:

<https://teampplace.volvo.com/sites/volvoit-GDS/Support/Shared%20Documents/Support/support-request-pro.doc>

Related Topics:

Report Packs, see “[Report Pack Group Maintenance](#)” on page 288.

Dealer Queries

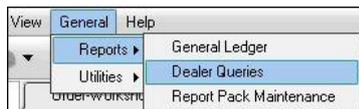
Why:

This facility allows Fusion users to submit queries that have already been created in a predefined Library.

It can be used for queries that do not require run-time parameters to be input. Queries that require run-time parameters, such as a date range, need to be run from a ‘green-on-black’ command line.

Where:

This is accessed via the Fusion Workbench - General menu – Reports – Dealer Queries option.



How to Perform Dealer Queries:

When you access the option you are presented with a list of queries that have been created in one or more libraries.

Those libraries are listed in the parameter QRY001. Each entry in this parameter needs to be 10 characters in length, so if you use library QGPL then it needs to be followed by 6 blank characters before the next library entry.

You can submit one query to run in batch, or you can run several by holding the CTRL key and selecting multiple queries.

Fusion Chat

Why:

This facility allows Fusion users to talk to each other, via the messaging facility built into Fusion, without leaving the product. One of the benefits of this internal system is that the user can see which other users are currently signed into Fusion.

Where:

From the Fusion Initial Panel, click the Fusion Chat button to open a list of users and their current status.



*The Fusion Chat
button.*

How to Search in Fusion Chat:

A user can be searched for by entering the User ID and selecting Search or by entering all, or part of the users name, and selecting search. Searching by ID will position in the list of names. Searching by name will only list those names which match the search criteria. Leaving search fields blank will present a list of all users.

How to Use Chat Settings:

The following user states can be set. Click on the arrow to choose another state:

- I am Free:** This allows the user to indicate whether they are available for Chat or not. If they are, their status will be green. Click on the arrow to choose another state.
- I am Busy:** The User is signed on but is not available for Chat. Their status will be blue. In this state messages will be sent but will not be displayed on screen. The user will have to select and expand the message window.
- I am Away:** The User is signed in but is not available for Chat. Their status will be red. In this state messages will not be sent and senders will see the message 'User is Away'.

User is not signed on: In this case the users status will be grey.

Activating the **Always on Top** checkbox means that when a recipient receives a message and selects the screen behind the message, the Chat message will remain over the top of the screens in the background. If this box is not ticked the Chat message will not remain on top.

Activating the **Beep the incoming message** means that when a recipient receives a message there will be a sound generated on the PC. If it is not ticked there will not be any sound.

How to Chat in Fusion Chat:

From the user list, double click on the user you wish to Chat with. A window will be displayed into which messages can be typed. Type the required text and select Send to send your text.

The recipient will receive the text in their window, and the Chat window will display according to the rules described in the previous section. As each user sends a message the text will appear in the body of the window.

Low Priority: If this box is ticked the message is sent with low priority and, even if the recipient has the Fusion Chat window visible on their PC the recipients window will display the message and then collapse itself.

Mandatory Response: If this box is ticked the recipient must send a response to a message before they can close the Fusion Chat window.

Parameter Maintenance

Why:

This allows selected users to perform maintenance activities on application parameters.

Where:

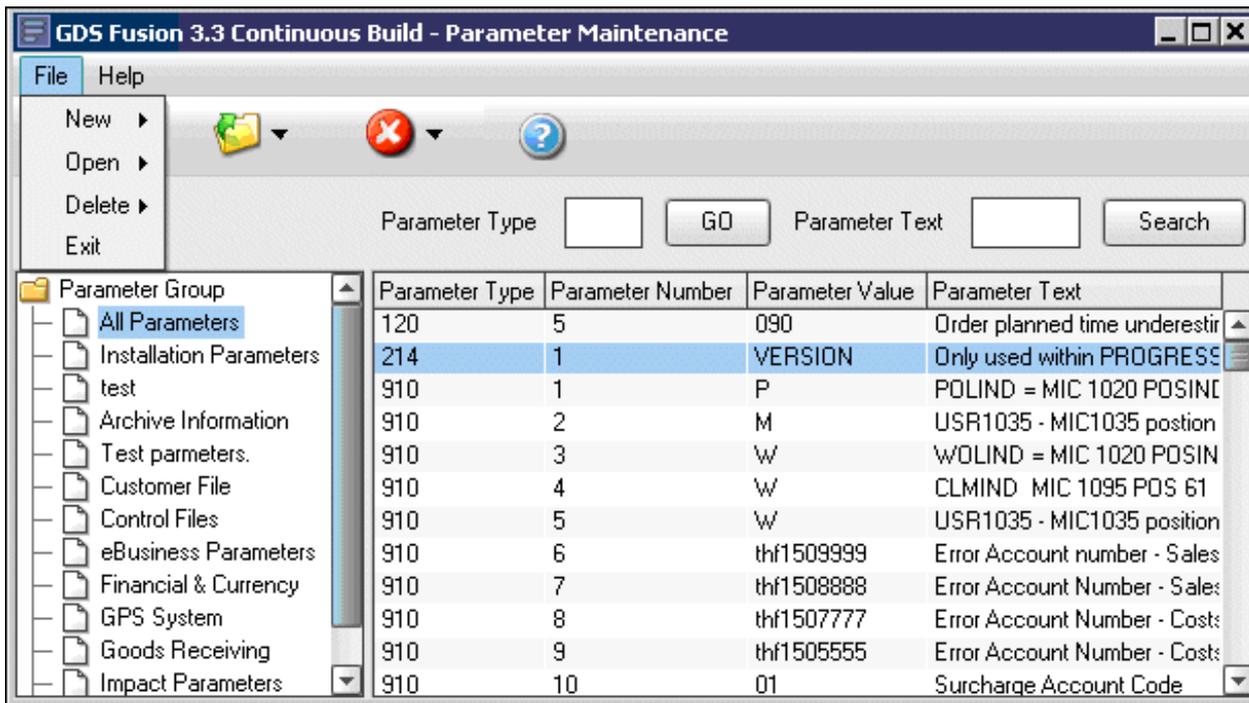
can be accessed by double clicking on the Parameter Maintenance button in Fusion World providing that you have the required privileges.



The Parameter Maintenance button.

How to Maintain Parameters:

Parameter Maintenance has two main panels, the panel on the left shows the Parameter Groups. By selecting a group it allows you to subset the parameters shown in the display on the right, with All Parameter Groups being the default and complete view. The panel on the right lists the parameters of the selected group and allows you to search for specific parameters via the Parameter Type and Parameter Text fields.



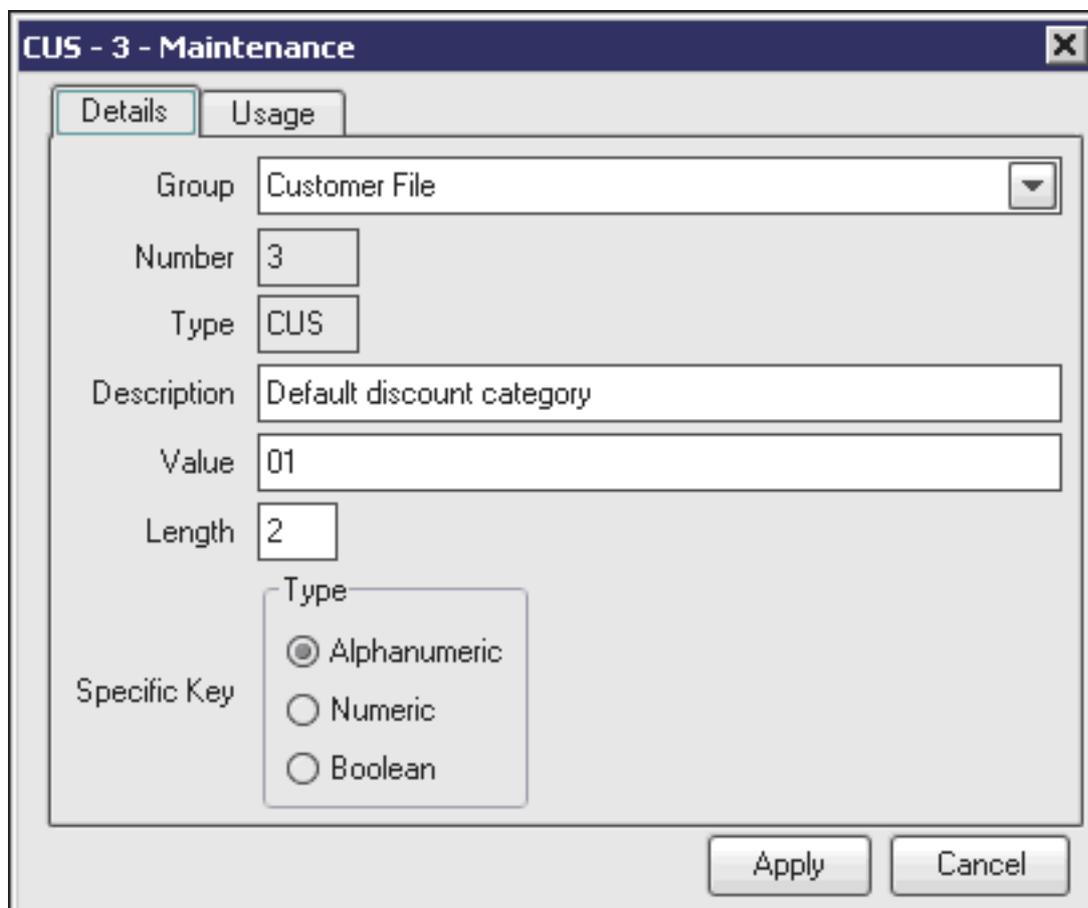
Parameter Type	Parameter Number	Parameter Value	Parameter Text
120	5	090	Order planned time underestrir
214	1	VERSION	Only used within PROGRESS
910	1	P	POLIND = MIC 1020 POSINC
910	2	M	USR1035 - MIC1035 position
910	3	W	WOLIND = MIC 1020 POSIN
910	4	W	CLMIND MIC 1095 POS 61
910	5	W	USR1035 - MIC1035 position
910	6	thf1509999	Error Account number - Sales
910	7	thf1508888	Error Account Number - Sales
910	8	thf1507777	Error Account Number - Costs
910	9	thf1505555	Error Account Number - Costs
910	10	01	Surcharge Account Code

How to Add Edit & Delete Parameters / Groups:

To create a parameter/group you select the New menu option or click on the New button . If you create a new Group the Group must have a unique ID.

To edit a parameter/group you select the Open menu item or click the Open

button . When you Open a Parameter the details window opens. There are only certain fields that you need to change. You can change the description, but they are all created with the GDS default description. The value can be changed but you need to refer to the Master GDS Parameter document for your release, to see what values are valid and the effect they may have on the application.



The screenshot shows a dialog box titled "CUS - 3 - Maintenance". It has two tabs: "Details" (selected) and "Usage". The "Details" tab contains the following fields:

- Group: Customer File (dropdown menu)
- Number: 3 (text box)
- Type: CUS (text box)
- Description: Default discount category (text box)
- Value: 01 (text box)
- Length: 2 (text box)
- Specific Key: A sub-dialog box with "Type" and three radio buttons: Alphanumeric, Numeric, and Boolean.

At the bottom right, there are "Apply" and "Cancel" buttons.

The usage tab is for information only and shows which programs currently use the Parameter.

To delete a parameter/group you select the Delete menu item or click on the delete button . If you delete a Group it will delete all Parameters contained with that Group.

 **Note!** Creation and Deletion of parameters should be strictly controlled and only be done with the assistance or instruction of Retail Systems Support Personnel. It is also worth noting that the changing of parameters, without a full understanding of their use, can have major consequences with the application.

What else would you like to do?

See "[Security Documentation](#)" on page 288 for security administration information.

For Control Master File Maintenance information, see the 'Fusion Control File' chapter.

Preferences

Why:

This facility allows the user to tailor specific views (presets) to their preference and to default the first module available when entering Fusion.

Where:

From any Module select **General / Preferences / Save Preferences** or **Reset Preferences**.

How to Set the Default Preferences:

Within the current view select **General / Utilities / Preferences / Save Preferences**. This will set the Default Module and User Preferences. For example, if the user is in Parts View then Parts will be set as the Default Module and the next time the Fusion Workbench is loaded then the Parts View will automatically be the initial view which can also include any saved presets.

 **Note!** The Default Module will always be the last User Preference saved and will include any presets created.

How to Set the User Preferences:

Within the current view a number of actions can be taken to tailor the view to the user preference.

Selecting columns to be displayed: Position the cursor in a column heading and right mouse click. This will allow the selection of which available fields should be displayed in this view.

 **Note!** This can also be done as a temporary option anytime and does not have to be done within Preferences.

Selecting the position of the columns: Position the cursor over a column heading and, while holding the left mouse key down, drag the column to the required position.

 **Note!** This can also be done as a temporary option anytime and does not have to be done within Presets.

Once the view has been tailored and any presets saved, select **General/Preferences/Save preferences**. This will save the view and the next time Fusion Workbench is loaded then this is the view that will be presented.

 **Note!** The Default Module will always be the last User Preference saved.

What else would you like to do?

“[Daily Batch](#)” on page 277.

“[Presets](#)” on page 287.

Presets

Why:

This facility allows the user to tailor specific views (presets) to their preference and to default the first module available when entering Fusion.

Where:

From any Module select View / Presets / Create Preset from these settings.

How:

Within the current view select filter and select required details as follows:

Select columns to be displayed by positioning the cursor in a column heading and clicking the right mouse button. This will allow the selection of which available fields should be displayed in this view.

Select the position of the columns by positioning the cursor over a column heading and, holding the left mouse button down. Now drag the column to the required position.

Select View / Presets / Create Preset from these settings and assign a description (not more than 50 characters).

Select the Save Preferences icon to save preset.

 **Note!** The Default Module will always be the last User Preference saved and will include any presets created.

What else would you like to do?

[“Preferences”](#) on page 286.

[“Daily Batch”](#) on page 277.

Report Pack Group Maintenance

Why:

There are currently eight reports available to add to the automated Daily Batch jobs. This function allows one or more of those reports to be grouped together in order to simplify the Daily Batch job maintenance.

Where:

Within the sub-group of 'General', found in the Control File Maintenance - workbench option.



Note! The user must have permission to access this option maintained within **Actions - Control Files – General** found within Security Maintenance.

How to Create a Report Pack Group:

A Report Pack Group can be created and given a description; this group should then be maintained at detail level in order to add the required reports and their associated parameter values to the group.

The group can then be added to a Daily Batch command by entering the command "CALL TH3C7668 PARM('group id')". This command should be added as a company record as specific branch processing is handled within the Report Packs individual parameters.

Related Topics:

["Daily Batch"](#) on page 278.

Security Administration

Why:

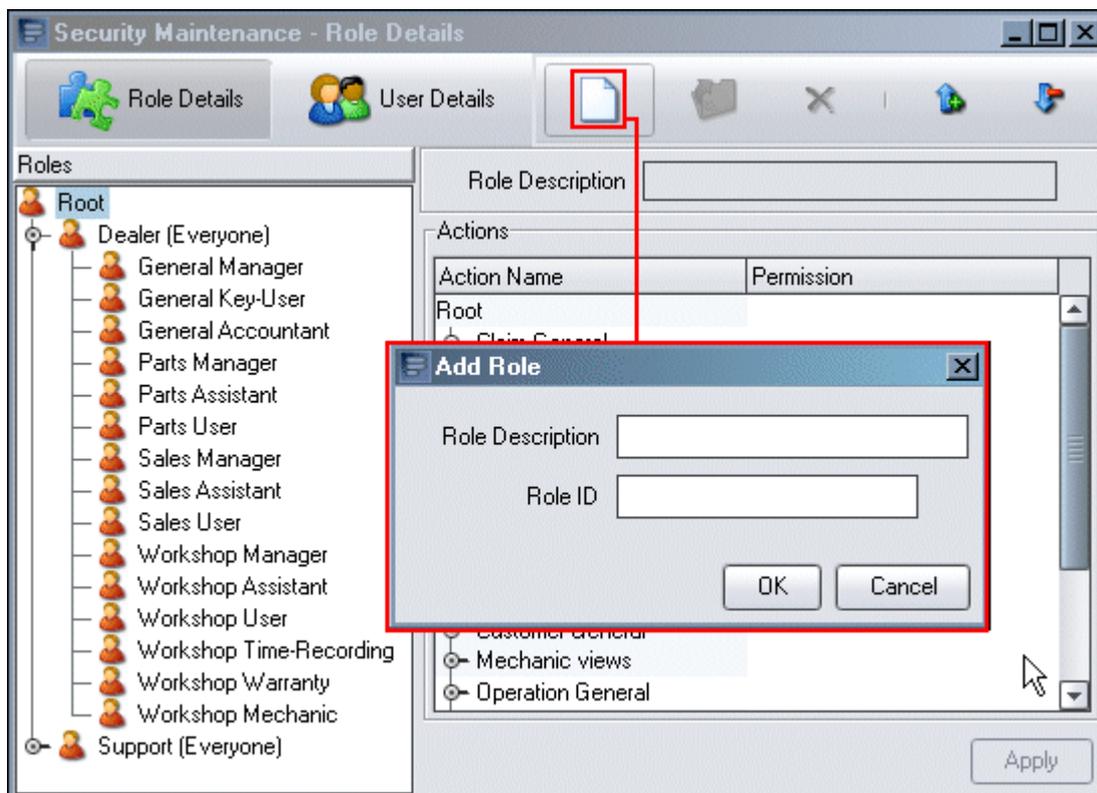
Access to the various functions in Fusion is controlled within the Fusion Security facility. Here it is possible to allow and / or deny access to a function, thereby, only allowing function access to the correct users.

Where:

From the Fusion Initial Panel, select **Security Administration**. This will open the Security Administration window.

How to Maintain Roles:

On the Fusion Initial Panel select Security Administration. This will present the 'Security Maintenance – Role Details' panel.



The Role maintenance allows a role (or template) to be setup with specific access rights which can then be used against an individual user, or a number of users. All subordinate roles are created under the Root. Roles can be created as a parent / child tree, for example Root, Dealer (Everyone) with specific roles such as General Manager, General Key-user etc. underneath. See example above.

Click on Root and all the Actions will display in the right hand panel. For Root there are no details in the Permission column. The list of Actions is fixed and cannot be maintained from within this function.

How to Create Roles:

To create a new role highlight the parent Role, right click on the Role and select New or select the New button

Enter the new Role Description and Role ID and click on OK.

This will create a new role under Root, or highlighted parent Role.

How to Delete Roles:

To delete a Role highlight the Role and then right click on the Role and select

Delete, or select the Delete button . This will remove the Role from the tree.

How to Edit Roles:

To maintain a Role, highlight the Role then double click, or right click and select

Open or Select the open button . This will show a list of the Actions available.

To expand the list of Actions and show the Permissions, click on the Expand icon,  This will expand all Actions, double click on the required Action or click on the . This will display a list of the Options available for the Action which can be allowed or denied.

To collapse the action details, double click on the Action or click on the Collapse icon. 

When the list of Options is displayed an icon will appear under the Permission column.



Indicates that this Option is Denied and inherited from the parent Role.



Indicates that this Option is Allowed and inherited from the parent Role



Indicates that this Option is Allowed and is different from the parent Role.

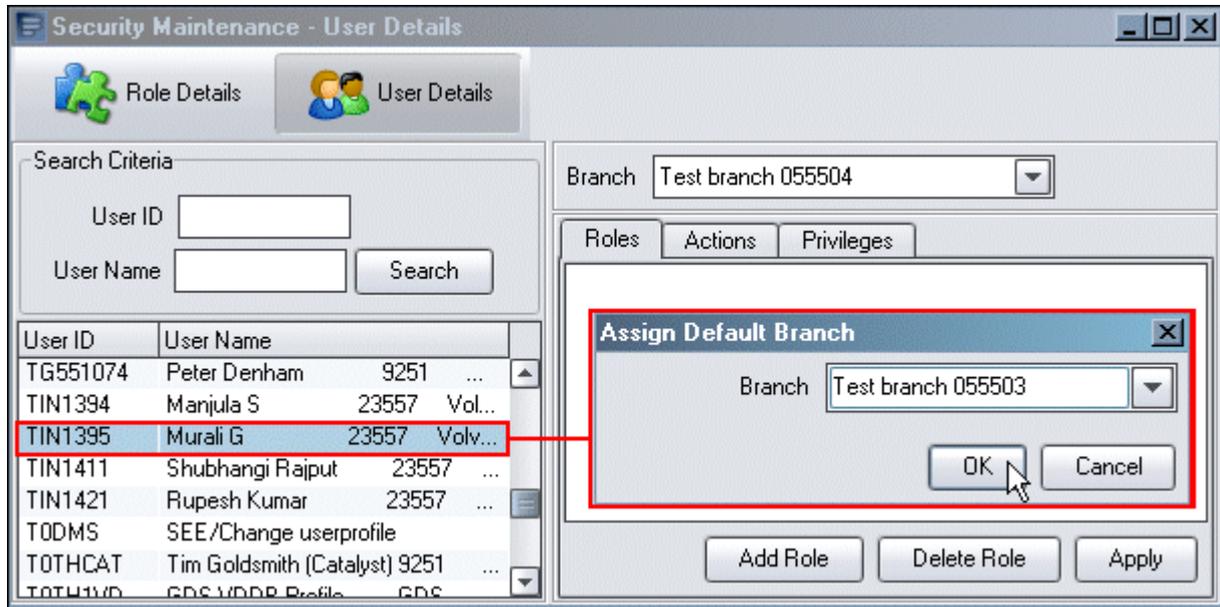


Indicates that this Option is Denied and is different from the parent Role.

To change the permission for an Option, double click on the Option line. The permission icon will change and indicate the new value, Allowed or Denied. You must then click on Apply to action the changes.

How to Maintain Users:

On the Security Maintenance panel, select User Details. This will display a list of user names. The user name list is fixed by parameter FSC001 and cannot be maintained from within this function. Parameter FSC001 contains the Fusion User Group which relates to the Group Profile allocated to the Users applicable to this environment, so, only Users where the Group Profile matches the value in FSC001 will be displayed.



Right clicking, or double clicking on the User ID, will allow the entry of the users default branch. Selecting a default branch for a user will cause the branch to show as highlighted, and with the button , when the user selects the Fusion Workbench from the Fusion Initial panel.

Selecting a user will display the Roles / Actions / Privilege details for that user. The Branch being maintained can be selected from the Branch drop down box.

To assign a Role to a User click on 'Add Role'. This will present a list of available Roles. Select the appropriate Role for the User being maintained. If required, expand each Role by clicking on it. Once a Role has been selected click on Apply

To delete a Role assigned to a User, highlight the Role and click on Delete.

To maintain the Actions applicable to a User click on Actions. This will then display the Root Actions which can be expanded / collapsed by Double Clicking the Action or by clicking the  icon. To Allow, or Deny, an Action for a User double click on the Option until the required permission is displayed. Once the required permissions have been updated click on Apply.

Repeat for other Branches that the User has access to.

Selecting Privileges will allow the maintenance of Privileges for a User.

Privileges allow a user specific authorities which are not covered in the Actions, for example Allow Changes to Credit Limits etc. as described in the "[Parameter Maintenance](#)" on page 284.

To update the Privilege for a user double click the Privilege until the required authority is displayed. Once the required Privileges have been maintained Click on Apply.

To update the Additional Information for a Privilege Right Click on the Privilege, this will show an 'Additional Info' tab, click on this tab and enter required details and OK. After adding the details click on Apply.

What else would you like to do?

[Control Master File Maintenance.](#)

Related Topics:

[Part User ID Maintenance.](#)

Stock

About Stock

This chapter provides details about Stock related functions within GDS – Fusion. Parts stock is accessed and controlled via the functions available within the Parts View.

The sections in this chapter explain:

- Alignment on Allocated Stock, Order Quantity
- The Buy Back Process
- Creating and maintaining Purchase Proposals and DSP Transaction Types
- Goods Receiving handling
- Inter Branch transfer of stock
- Stock taking and stock adjustment handling.

Align Allocated Stock

Why:

This option is only used when you have a customer placing orders within Customer Access and should be run after the month end.

Sometimes the allocated quantity remains incorrect on the Parts Master File. Selecting this option ensures that orders are checked for allocated quantities to make sure that the Parts Master File has the same quantities.

The reason for running this option relates to communication problems between Customer Access sites and the dealer where the line goes down while an order is being placed. The alignment takes place between the Order header File and the Parts Master File.

Where:

From the Part View, select **Actions > Align Allocated Stock**. This will display an Align Allocated Part window.



*The Part View
button.*

How to Align Allocated Stock:

In the Align Allocated Part window, users can indicate whether they want to re-align the part number at all branches or specify the individual branch number.

If the part number field is left blank all parts are re-aligned.

To re-align all parts at all branches, you must first make sure that all users are signed off the system.

What else would you like to do?

“[Align on Order Quantity](#)” on page 294.

Align on Order Quantity

Why:

This option is run as and when required, but usually when a market has just taken the Fusion system as it aligns the Parts Master File and the Supplier on Order File. This is a check to make sure that what is listed on orders is correctly recorded in the Parts Master File.

Where:

From the Part View, select **Actions > Align on Order**. No screen is displayed, the request is processed immediately.



*The Part View
button.*

How to Align Parts on Orders:

As soon as the Align on Order option is selected, the request goes immediately to the job queue. A report is also produced that details any alignments that have taken place.

What else would you like to do?

Work with The Parts Master File, see ‘The Parts Master File’ chapter.

Work with The Supplier on Order File.

Buy Back Processing

Why:

DSP/LPA operates a buy back policy which allows dealers to return parts to the importer. This ensures that dealer stock figures are kept up to date and their stock valuation figures are as low as possible. The buy-back facility can also be used to return non-Volvo parts.

Where:



From the Part View, select **Actions > Buy Back Handling**. This will display a Buy Back Summary window.

How to Use Buy Back Processing:

The Buy Back Summary window lists all buy back transactions, both open and sent. Selecting a record displays a Buy Back Maintenance window. The screen defaults to tab 1 to allow the input of single part details. Selecting tab2 shows the contents of the Parts Master File in the left hand frame and any parts selected for buy back in the right hand frame.

To create a new buy back record, select File>New. This will display a Buy Back Maintenance window. Select tab 2 for the parts list on the left, select the parts that you want to return and the quantity. When you've completed your returns list, select Actions > Confirm. The status is now 'Sent'. A DSP transaction type D10 will be produced for Volvo and non-Volvo (and The Parts Master File 'Stock on Hand' figure will be updated). A financial record will also be sent to the accounting interface. Parts to be returned should be picked and packed and a transmission of returned parts and quantities is created. At the same time, the dealer stock is adjusted on the Parts Master File and then a credit note is issued by the importer (or supplier) to the dealer. From the Buy Back Summary window, open buy back records can be amended, confirmed and deleted.

 **Note!** Buy back transactions are also sent automatically by DSP. A list of parts is sent to GDS via the Volvo Dealer Data Bank. To view the list of parts access Buy Back in the usual way. The list is presented to the dealer on screen so no manual input is necessary. This will help speed up the way in which buy back parts are processed within Fusion.

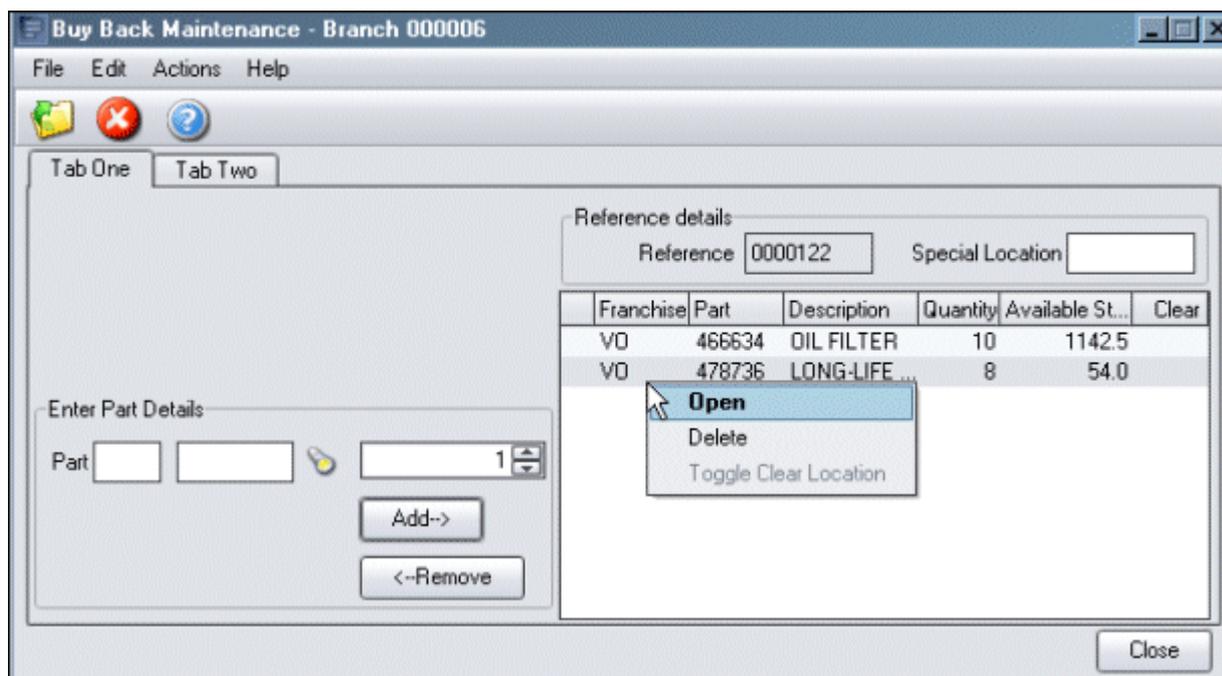
Parts can be added or deleted prior to the batch being confirmed.

 **Note!** This must be done in agreement with DSP

To add parts, enter a part pre-fix and part number, adjusting the quantity field as required then selecting the Add.

To Delete, highlight a part and select remove, confirm delete message is returned with the option to select Y/N. Selecting Y deletes part from batch.

When the buy back batch has been received there may be a discrepancy where the quantity of the buy back is greater than the available stock on the dealer parts master file. To confirm a batch from the menu bar select Actions>Confirm.



If the batch is confirmed before any action is taken to correct the discrepancy, the message 'Error – Line Quantity Exceeds Stocked Balance or Original Quantity' is returned to prompt the user about the error.

Highlight and double click the part in question to display the Update Part Detail window, this allows you to alter the quantity.

Where the stock on the parts master file has been reduced due to a buy back transaction being confirmed, but there is still stock on hand no changes are made to the location details.

If a part does not exist on the parts master file but is in the buy back batch, details of this will be written to an automatically generated report. Report THP436

How to Change Location Details Before Confirming a Buy Back Batch:

When parts quantities are fully returned to Volvo or scrapped in connection with a Buyback, there is a need to clear bin locations for new parts and to improve parts information in GDS

In the buy back maintenance screen where the quantity and available stock are the same, the part line can be set to clear the location details on the parts master file. Highlight the specific part, right mouse click and select 'Toggle Clear Location', an indicator is displayed in the 'clear' column after selection. See the previous screenshot.

If the 'Special Location' field is populated, the details from here are written to the location field against the part in the parts master file. All changes will take effect once the buy back batch has been confirmed and sent to VIDB.

How to Clear Location Details:

As well as flagging a single part to clear and register a new location, all part lines within the batch can be flagged by selecting the 'clear all' option from 'actions' option on the menu bar.

When the buy back batch has been confirmed, any part lines that become zero on the parts master file will have the original location details removed leaving the location as blank unless the special location field is populated, then this will be written to the location field.

If the buyback does not cause the stock balance to become zero, but 'Clear Location' is checked, the warning message '*Updated but not all locations were cleared. See report*' is displayed at the end of the process.

A report is produced with a list of the parts whose locations were not cleared.

After a buy back batch has been confirmed a report is automatically printed (THP436) with details of the old location.

Financial details include the value of a specific part line and the cumulative value of the part at replacement cost.

Subsequent copies of the report can be printed from the buy back summary screen.

Location history file is also updated with each location change.

Related Topics:

["DSP Transactions"](#) on page 303.

Creating a Purchase Proposal

Why:

Purchase proposals are created in Fusion for orders that are to be placed with non- Volvo suppliers. Proposals can be created in two ways:

- Automatic purchase proposals can be created, where Fusion calculates the proposal amount based on the number of units sold over a certain length of time, for Fusion to do this information must be set up in the Volume Value and Order point Table.
- A 'Manual' purchase proposal can be created adding whatever part numbers are required; this can be for a local supplier or Volvo. When a proposal is manual, a check box is displayed to enable D20 transactions to be sent or not. If the parts are to be supplied by Volvo, via DSP, the box can be checked and the order sent. However if the box is not checked the proposal will be dealt with locally and sent to a non-Volvo supplier.

Purchase proposals for DSP orders are created by the market company, but can still be maintained in the same way as those created for non-Volvo suppliers.



Note! Please note that when a purchase proposal is concluded, it becomes a purchase order!



*The Supplier View
button.*

Where:

From the Supplier View, select **Supplier > Create Purchase Proposal**. This will display a Create Purchase Proposal window.

For manual purchase proposals, from the Supplier View select **Supplier > Maintain Purchase Proposal**. This will display a Purchase Proposal for Supplier window.

How to Create Automatic Purchase Proposals:

Automatic purchase proposals can be created for an individual supplier or groups of suppliers by inputting the appropriate information in the Create Purchase Proposal window.

The order class is based on a setting in the parameter file and can't be changed.

Indicate the number of months you want to calculate the average weekly sales over and also whether you want to include the current period, then click Recalculate followed by OK to confirm.

The proposed order quantity recommended by the system is usually rounded to the nearest bulk pack quantity (if applicable) and in its calculation, the system takes into account any back orders.

A purchase proposal report is then printed that lists all proposed part numbers.

The proposal can now be accessed through the maintenance option. From the supplier view select Supplier > Maintain Purchase Proposal. Highlight the proposal and right-click to display the list of actions.

How to Create Manual Purchase Proposals:

To create a manual proposal, select File > New from the Purchase Proposal for Supplier window. Input the purchase order number and other header information and click OK. The proposal should now be displayed in the Purchase Proposal for Supplier window. Double-click the new proposal and select File > New. This will display an Add Part Number to Proposal window. Input the details for the part you want to order and click OK. Keep doing this until you've listed all the parts you require from this supplier.

How to Conclude Purchase Proposals:

To conclude both automatic and manual purchase proposals, highlight the proposal in the Purchase Proposal for Supplier window and select File > Conclude Purchase Order. A window is then displayed confirming the header details.

If you've created a manual proposal but you require additional stock from your Volvo supplier, make sure that the 'Create DSP D20 Transactions' is checked. This will send the information to a holding file from where it will be sent as a stock order the next time DSP runs.

Concluding a proposal will update the stock on order figures in the Parts Master File, as well as the Supplier on Order File.

What else would you like to do?

Creating a Supplier Group.

[“Maintaining a Purchase Proposal”](#) on page 310.

Related Topics:

Order Point Table.

The Parts Master File is detailed in 'The Parts Master File' chapter.

Volume Value Table.

Creating DSP C Type Transactions

Why:

When a new dealer is set up, or a dealer begins to use DSP for the first time, this option creates an extract of the Parts Master File.

Where:



*The Supplier View
button.*

From the Supplier View, select **Actions > DSP > Create DSP C Type Transactions**. This will display a Create DSP C Type Transactions window.

How to Create DSP C Type Transactions:

From the Create DSP C Type Transactions window, select the supplier number that you would like to create transactions for, or leave blank for all.

Selecting OK will create and transmit 'C' transactions automatically to the dealer data bank.

Then, indicate whether you require D39 records to be produced and click OK. (D39 records are only produced for non-Volvo suppliers and are placed in a holding file ready for manual transmission.)

If there is more than one branch, this procedure must be completed for each individual branch.

The different types of C transactions are as follows:

- C01 - Category 1 Sales for Periods 0 - 6
- C02 - Category 1 Sales for Periods 7 - 12
- C03 - Category 1 Picks for Periods 0 - 12
- C04 - Category 2 Sales for Periods 0 - 12
- C05 - Category 2 Picks for Periods 0 - 12

What else would you like to do?

Transmit D39 Records, as shown in "[Transmitting Data](#)" on page 317.

Related Topics:

"[DSP Transactions](#)" on page 303.

Creating DSP Supertransactions

Why:

Usually, the creation of supertransactions (D40 transactions) is an automatic process, but occasionally the dealer might have to run the process manually.

Where:

From the Supplier View, select **Actions > DSP > Create Supertransactions**. This will display a Create DSP Supertransactions window.



The Supplier View button.

How to Create DSP Supertransactions:

There are three options in the Create Supertransactions window:

- 'Create alignment for parts that have not moved' - If you select this option a D31 transaction will be created for all part numbers which were not movement marked (movement marked parts will have had a D40 transaction created). This process aligns the dealers' stock balances with the stock balances stored in DSP files at the importer.



Note! Important! Before selecting this process you should contact your regional inventory manager at the Importer.

- 'Create bin locations for all DSP flagged parts' - If you select this option you will create D32 transactions for all part numbers.
- 'Create for all DSP branches' - If you select this option the process will create data for all branches which operate DSP.

When you've made your selection, the transactions are transmitted to work files from where they will eventually be sent to DSP.

The manual creation of supertransactions produces two reports. The first report indicates the number of records created and the second report provides details on records removed from the DSP Delivery Control File.

What else would you like to do?

Submit the data to the Volvo Dealer Data Bank, as shown in "[Transmitting Data](#)" on page 317.

Related Topics:

The DSP Delivery Control Report.

Delete a Completed Transfer Using Reorganisation Functions

Why:

Inter Branch Transfers (IBTs) remain listed on screen even when confirmed (completed) or cancelled. GDS therefore has a reorganisation function that can be used to delete confirmed or cancelled IBTs.

Where:

IBT reorganisation can only be used from the GDS Batch process, it is not accessible directly from GDS screens. It is normally run on a monthly basis.

How to Delete Completed Transfers via the Reorganisation Function:

The IBT reorganisation function must be added to the GDS batch process. This can only be done by the market company or support organisation representatives.

What else would you like to do?

[“Inter Branch Transfers”](#) on page 308.

[“Receiving an Inter Branch Transfer”](#) on page 313.

DSP Transactions

Why:

There is a constant two-way communication between Fusion and DSP. This communication is referred to as 'transactions' and the type of transaction will depend on what information is being transmitted between the two systems. This exchange of information ensures that dealers maintain up to date part information and stock records.

Where:



The Supplier View button.

From the Supplier View, select **Actions > DSP**.

DSP Transactions are listed and explained in the following table:

DSP Transactions	Updates	Reports Produced
N40 - Automatic Order Line Releases the automatic purchase proposal order lines and updates the On Order File	On Order File or Purchase Proposal Maintenance, dependant on flag in branch records. Auto Y or N Y = order file N = Proposal File.	PM520 - Released Automatic – Order Lines GC140 - DSP Purchase Proposal
N42 - Manual Order Line Adds to the Purchase Proposal File for manual treatment.	Manual Purchase Proposal	PM530 - Released Manual – Order Lines PM540 - Manual Order Lines GC140 - DSP Purchase Proposal
N50 - Registration of New Parts Creates a new record on the dealer system Parts File.	Parts Master File	PM550 - Registration of a New Part Line
N70 - Advice Line Matches the invoicing information from VIPS (except order class 1) and creates a receipt file in the dealer system. This file is used for printing bin documents and decreasing the on order and increasing the stock balance in the binning confirmation.	DSP Goods Receiving	PM560 - Order Line Delivered
N71 - Order Line Updates On Order File	On Order File	PM565 - Order Line Accepted/Confirmation
N80 - Replacements Used to update the On Order File and balance for the replaced/replacing part numbers.	Spool File (requires manual entry)	PM570 - Replacement Details
N81 - Amendment of Quantity Updates the On Order File and balance. 'On order quantity' is decreased with the 'ordered quantity' and increased with the 'allocated quantity'.	On Order File	PM580 - Order Line Amended or Cancelled
N82 - Back Order	On Order File Spool File (Information only)	PM590 - Order Line Back Ordered with Supplier
N90 - Alignment, On Order and Back Order	Market Specific	

The following table explains the Fusion transactions:

GDS Transaction	Updates
<p>D10 - Buy Back Only created when the Buy Back process has been carried out, according to the rules set by the importer. The Buy Back procedure does not create any sales transactions to DSP.</p>	DSP
<p>D20 - Manual Order Line To confirm the 'manual' content of the proposed order lines. These lines are not stored in DSP, therefore all must be confirmed by D20. If a D20 is sent for a pending automatic line, this line will be cancelled and replaced by the manual record and quantity.</p>	DSP
<p>D28 - On Order Quantity - Non-Volvo To update the on order of non-Volvo parts which are to be controlled within DSP.</p>	DSP
<p>D29 - Location - Non-Volvo To increase the stock balance and reduce the on order of non-Volvo parts.</p>	DSP
<p>D31- Alignment Stock Balance Aligns the stock balance with those stored in DSP. The routine will normally involve a manual check of stock prior to creation of D31. In addition, the dealer and importer need to be aware of pending transactions from DSP which may affect the physical stock.</p>	DSP
<p>D32 - Location Amendment By using a pre-defined data code it is possible to update or amend sales forecast, movement codes, purchase codes and on order quantities.</p>	DSP
<p>D33 - Deletion of Part To delete a record from the dealer's part file.</p>	DSP
<p>D39 - Part File Update - Non-Volvo To add a non-Volvo part to the dealer's part file or amend certain data of an existing non-Volvo record.</p>	DSP
<p>D40 - Supertransaction Created for every part number in the Parts Master File that have the part movements flag on. When created the flag must be reset and accumulators set to zero.</p>	DSP

Goods Receiving

Why:

Goods delivered to the dealer must be recorded in Fusion so that stock figures are kept up to date.

Where:



The Supplier View button.

From the Supplier View, select **Supplier > Goods Receipt** or right-click on the relevant supplier and select **Goods Receipt**. This will display a Work with Received Orders window for the selected supplier. The received order window contains two tabs, “Manual” and “DSP”. A third tab ‘Delivery’ is dependent upon the setup of parameter GDR003.

How to Amend Received Orders:

Received orders Manual and DSP are listed in the appropriate tab and each can be opened to display individual part lines. For each part line, the received quantity can be amended. The cost field can be amended in Manual orders. However, for DSP cost is not available. To accept the goods into stock the parts must be concluded. For DSP this can be at part, case or order line level. Manual orders are concluded at part or order line level or, depending upon a parameter, may be added to the delivery function for conclusion.

How to Perform Manual Goods Receiving:

To conclude the entire order, highlight it , right click and select conclude. To conclude individual part lines open the order and highlight a specific part, right click and select conclude or conclude and pick where single part lines have been automatically cross referenced with a customer order number for reserving parts.

How to Perform Single Part Conclusion Where Customer/Part Order Numbers are Attached:

Where parts have been reserved and sourced from parts order handling, an order number or text ‘multiple orders’ is displayed in the customer order number column. The option to conclude and pick is available against these specific part lines.

Select ‘**Conclude and Pick**’ . After selecting this option the order status on the customer order changes from open to picked. Both receipt and sale is written to the transaction file and stock on hand is adjusted accordingly.

Select ‘**Conclude**’ After selecting this the order status flag on the customer parts order remains at open, a receipt transaction is written to the transaction file and stock on hand in parts file is increased. No sale transaction is registered in the transaction file at this point.



Note! Where parts are not cross-referenced with a customer/part order number, conclude and pick is greyed out. Where parts are cross-referenced, conclude and pick is available, if these are not processed individually they will be received into the system as normal, via the select ‘conclude’ option above.

How to Perform Whole Order Conclusion:

Where parts have not been sourced therefore no cross-reference to customer orders exist, if conclude is selected transaction and parts master file will be updated as normal.

Where parts have been sourced in advance and are cross-referenced with customer order numbers but have not been processed individually, the status flag on the customer/parts order remains at 'open'. A receipt transaction is written to the transaction file and stock on hand is updated in the parts master file. No sale transaction.

Various windows are displayed asking you to input supplier and invoice information. Depending on a parameter, a window is displayed for freight, environmental and extra costs. If the parameter is positive the following rules apply:

- If conclusion is at Order level then window for extra costs will be displayed.
- If conclusion is at Case level then window for extra costs will be displayed.
- If an order is accessed at Part Line Level the window will be displayed for any one specific part number concluded within the order.



Note! You must remember to apply the costs for whole order when concluding only one part.

A report is printed after the conclusion of orders however reports required prior to printing can be requested by highlighting the order, right clicking and selecting print.

Where parts have been sourced through order handling the customer/part order number is printed on the goods receiving report. Certain defaults govern the report layout, these can be accessed by selecting **Actions > Manual > Work with Defaults**.

Orders and individual part lines can be deleted by highlighting, right clicking then selecting Delete. Parts can also be added to existing orders (except IBT orders).

How to Perform DSP Goods Receiving:

When DSP goods receiving, it is possible to conclude the order or individual part lines in the same way as manual goods receipt.

In DSP there is also the option to work with cases.

Individual cases can be concluded or the case can be opened and individual lines within the case can be concluded.

Cases can also be deleted from orders by highlighting, right clicking and selecting delete.

How to Use Delivery Functionality:

Manual Goods Receipts can be combined and added to a 'delivery'. This functionality is dependant upon parameter GDR 003. Delivery is used to accommodate situations where several orders are delivered together and share additional costs, to apportion costs equally across all parts in an order(s) or when a Goods Receipt needs to be processed in a supplier currency and that currency is different to the local base currency.

To add a Goods Receipt to a delivery highlight the order, right-click and select Add to Delivery or alternatively, from the Menu bar select Order > Manual > Add to Delivery. A new view will be presented called 'Add to Delivery', here a list of available deliveries is shown or if a new delivery is required, you can create one by pressing the new icon or selecting File > New from the Menu bar. Once a suitable delivery exists the order may be added by highlighting the required delivery, right-clicking and selecting 'Add Selection' or alternatively, from the Menu bar select Delivery > Add Selection. Once an order has been added to a delivery it will still be listed within the Manual Goods Receipt tab, but will not be available for update. Individual Part Lines can also be added to a delivery by opening the Goods Receipt and highlighting the part line, right-clicking and selecting 'Add to Delivery'. To see the content of a delivery either right-click on the delivery record within the Delivery tab and select Open, or select Order > Delivery > Open from the Menu bar. Deliveries and Individual Part Lines within a delivery can be updated or deleted in their entirety prior to conclusion by highlighting the delivery or part line, right-clicking then selecting Open or Delete.

To conclude a delivery and, by doing so, receipt all the parts in the Manual Goods Receipt records contained there in, highlight the delivery in question, right-click and select Conclude. A view for adding costs will be presented called Apply Appointment Costs. Enter the cost and the currency for each category and press confirm to apportion the additional costs equally, then process the Goods Receipt for all parts within the delivery.

When adding Manual Goods Receipts to a delivery the part line costs will be assumed to be in the currency of the supplier, and this is inherited from the Supplier/Part X-Reference table if a suitable entry exists. If no such entry exists and the supplier's currency is different to the base currency then the cost will become zero, and a manual cost must be entered for the part(s) in question to the delivery. If the supplier currency is equal to the base currency and no Supplier/Part X-Reference exists, then the cost from the Manual Goods Receipt record will be carried over to the delivery and used in the receipt process. The current exchange rate will be applied when calculating the cost of parts within a delivery receipt that is in a supplier currency, and that currency is different to base.

Related Topics:

Supplier Cross-Ref Maintenance.

The Different Types of DSP Transaction are shown in "[DSP Transactions](#)" on page 303.

Inter Branch Transfers

Why:

Inter-branch transfers are created when stock is being transferred from one branch to another. A transfer is deemed as complete once it has been accepted by the receiving branch.

Where:

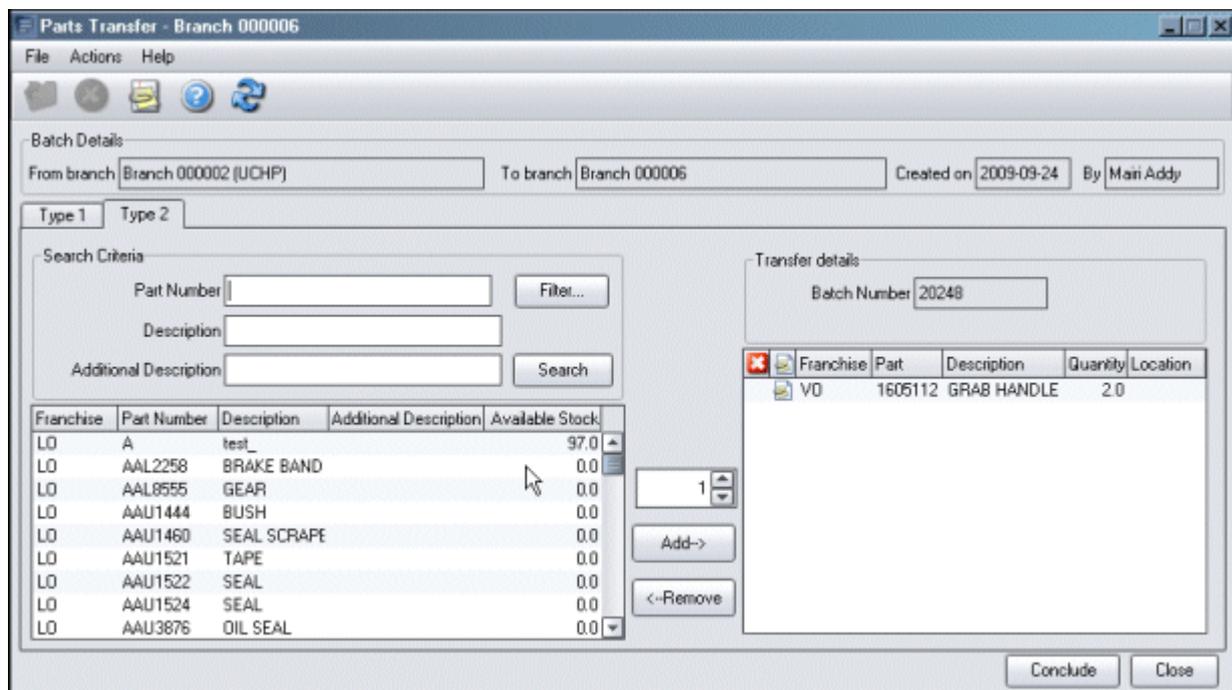


The Part View button.

From the Part View, select **Actions > Inter Branch Transfer**. This will display a Stock Transfers window. To create an IBT for individual parts, highlight a part from the part view, right click and then select Inter Branch Transfer. Select the branch you want the parts to be transferred to and the quantity.

How to Perform Inter Branch Transfers:

The Stock Transfer window lists all current inter-branch transfers. Completed transfers can be deleted by using the file reorganisation option. Stock transfers can be listed by using 'From Branch' 'To Branch' tabs. This is dependant on parameter settings and business practice within the market. The From branch/To branch view is available where parameter settings are positive, allowing a branch to transfer stock directly from another branch that they are not signed into. The icon to the left of each record indicates its status. To work with an IBT, highlight an open record from the list, select File > Open or right click and Open. Alternatively select the open icon or double click the record. Parts Transfer window is displayed. From here open records can be viewed, amended, picking slips printed and the transfer concluded. To create a new inter-branch transfer, select File > New or select New icon. This will display a Transfer Stock window: Select the branch you want the parts to be transferred to. Or depending on parameter setting being positive, select the branch you want to transfer stock from. The Parts Transfer Window is displayed overleaf with Type 1 tab for individual part entry and Type 2 for multiple part selection.



Franchise	Part Number	Description	Additional Description	Available Stock
LO	A	test_		97.0
LO	AAL2258	BRAKE BAND		0.0
LO	AAL8555	GEAR		0.0
LO	AAU1444	BIUSH		0.0
LO	AAU1460	SEAL SCRAPE		0.0
LO	AAU1521	TAPE		0.0
LO	AAU1522	SEAL		0.0
LO	AAU1524	SEAL		0.0
LO	AAU3876	OIL SEAL		0.0

Franchise	Part	Description	Quantity	Location
VD	1605112	GRAB HANDLE	2.0	

The controls in the centre of the window are used to add (and remove) parts to be transferred. Parts are selected from the list on the left and added to the transfer list on the right.

When you've completed your list of transfers, you can print a picking slip by selecting Actions > Print Picking Slip, or conclude the transfer by selecting Conclude. Concluding the transfer changes its status to 'Transferred' and updates the Parts Master File and Transaction Inquiry function for the sending branch. Until the transfer is concluded by the receiving branch, the quantity will have a status of 'Allocated' in the Parts Master File of the sending branch.

What else would you like to do?

[“Delete a Completed Transfer Using Reorganisation Functions”](#) on page 302.

[“Receiving an Inter Branch Transfer”](#) on page 313.

Related Topics:

[“Performing a Transaction Enquiry”](#) on page 312.

See ‘The Parts Master File’ chapter.

[“Parts Locator”](#) on page 311.

Maintaining a Purchase Proposal

Why:

To enable you to create manual purchase proposals for non Volvo suppliers and confirm purchase quantities on a Volvo DSP order created by the Importer.

Volvo proposals can be sent directly to the on order file, these will not be made available to users for editing. This is dependent on the DSP Auto Ordering flag within branch records. If set to negative the proposal will be available.

Where:

From the Supplier View, select **Supplier > Maintain Purchase Proposal**. This will display a Purchase Proposal for Supplier window.



*The Supplier View
button.*

How to Maintain Purchase Proposals:

In the Purchase Proposal for Supplier window, all purchase proposals for the selected supplier are displayed.

Each proposal can be opened and viewed or modified. Within each proposal the lines can be deleted (manual proposals only), the quantities changed and new lines added. To amend details multiple lines can be highlighted, right click and select Update. Each part number will be presented on screen, continue to select OK. The list of parts will remain on screen until close is selected. When a proposal is ready, it is concluded and the order placed with the supplier.

Concluding a proposal should update the stock on order figures in the Parts Master File, as well as the Supplier on Order File.

What else would you like to do?

“[Goods Receiving](#)” on page 305.

Related Topics:

See ‘The Parts Master File’ chapter.

The Supplier on Order File.

Parts Locator

Why:

This function enables you to search the entire dealer network for a particular part.

Where:

From the Part View, highlight the required part and select **Part > Parts Locator**. This will display a Locate Parts window.



*The Parts View
button.*

How to Use the Parts Locator:

When GDS Fusion finds the required part, it lists the dealer name along with its location and telephone number in the Locate Parts window. It also shows the amount of stock on hand that the dealer is holding.

Related Topics:

See 'The Parts Master File' chapter.

Performing a Transaction Enquiry

Why:

This function is useful when you want to find out about sales, receipts, price updates or stock adjustments for a particular part number. You can enquire on all current and archived parts transactions.

Where:



*The Parts View
button.*

In the parts view, locate and then highlight the part you want to enquire about. Right-click the selected part and select **Transaction Enquiry**. This will display a Transaction List window for that part.

Alternatively select Actions from the menu bar, then Transaction Enquiry. This will display a Transaction Enquiry Filter window where you can input the part number. Once you've input the appropriate details, a Transaction List window will be displayed based on the selected criteria.

How to Perform a Transaction Enquiry:

The Transaction window lists all transactions based on the criteria selected.

Each transaction can be opened to see information on costs and charges relating to that specific transaction. To open a transaction highlight it and right click "Open" or double click the transaction from the transaction list window.

To see archived information, from the Transaction List, select filter icon and select Archive from Live/Archive drop down list.

Receiving an Inter Branch Transfer

Why:

Inter-branch transfers are created when stock is being moved from one branch to another. If the transfer is to an imprest stock branch, the stock is automatically received and no manual goods receipt action is required. However, to all other branches the stock must be received manually.

All inter branch transfers, regardless of the supplier, are received against a nominated supplier in the Work with Receipted Orders window (a parameter is set at company level which indicates the nominated supplier.) Once received, the receiving branch records are updated to reflect the transferred stock.

Where:



*The Supplier View
button.*

From the supplier view, highlight the supplier nominated to receive inter-branch transfers, then select **Supplier > Goods Receipt**. This will display a Work with Receipted Orders window.

How to Receive Inter Branch Transfers:

In the Work with Receipted Orders window you can identify any inter branch transfers by looking at the 'Type' column to the right of the window.

You can check details of the transfer by highlighting it and selecting Order > Manual > Open.

Alternatively, highlight the transfer, right click and select Open.

You can also print, and conclude and delete from this option transfers from the Work with Receipted Orders window.

Concluding a transfer updates the transaction inquiry and Parts Master File.

Transfers can be deleted, but the ability to do this depends on a privilege being set against the user ID. If you are allowed to delete a parts transfer at the receiving branch, this will automatically update the stock quantities at the sending branch by putting the part(s) back into stock and the status of the IBT at the sending branch automatically changes to 'Returned'.

To check that part details have been updated, you can perform a Transaction Enquiry.

What else would you like to do?

“[Inter Branch Transfers](#)” on page 308.

Related Topics:

Inter Branch Transfer Report.

“[Performing a Transaction Enquiry](#)” on page 312

Stock Adjustments

Why:

It may be necessary to manually adjust stock figures within the Parts Master File in order to correct any discrepancies that have occurred in the parts system.

Adjustments can be made to individual part numbers or by creating a stock adjustment batch.

Where:



The Parts View
button.

To create a stock adjustment batch, from Part View, select **Actions > Multiple Stock Adjustment**. This will display a Stock Adjustment Multiple window.

To create a single stock adjustment, from the Part View, select “Go” to display a list of all parts, highlight the part that you would like to work with, right click and select **Adjust Stock**. Alternatively, highlight a part and from the menu bar select **Part > Adjust Stock** and you will see a Stock Adjustment window for the selected part.

How to Perform Single Part Stock Adjustments:

In the Stock Adjustment window you indicate the quantity, whether the adjustment is an increase or a decrease, a reference and the reason for the adjustment. The 'Update Sales' indicator is used if you are reducing stock. Although the part is not actually being sold, you might still want to update your sales (which will influence DSP).

Once the stock has been adjusted, a discrepancy report is produced.

When stock is adjusted, Fusion automatically recalculates a new average cost.

How to Perform Batch Stock Adjustments:

In the Stock Adjustment Multiple window indicate whether the adjustment is an increase or decrease and the reason for the adjustment. Select OK. This will display a screen where part details can be entered.

If decrease stock is selected additional fields are displayed: 'Update Sales', 'Number of Picks', 'Sales Forecast' and 'Sales Category'.

If 'Update Sales' is checked, this updates the DSP forecast 1 and 2 also Picks 1 and 2 in the Parts Master File “Purchase” Tab .

Number of picks for example may be 2. Quantity of 20 may have been sold but picked in two sets of 10. Enter Sales forecast, quantity of part being decreased.

Sales Category relates to category 1 and 2 sales. Category 1 sales are re-ordered through DSP. Category 2 Sales are ignored by DSP as these parts may have been ordered as part of a promotion.

Related Topics:

See 'The Parts Master File' chapter.

[“Stocktaking”](#) on page 316.

[“Goods Receiving”](#) on page 305.

Stock Robot

Why:

A Stock Robot is a moving part shelf system. It is designed for space efficiency and rapid retrieval of parts. In Volvo markets where Stock Robots are used, they can account for between 10 to 80% of the total dealer stock holding. GDS will send Part information to and from Stock Robot at various trigger points for parts that are located in a Stock Robot. These will include Goods Receipt, Orders, IBT, Buyback, Stock Taking, and Location Change

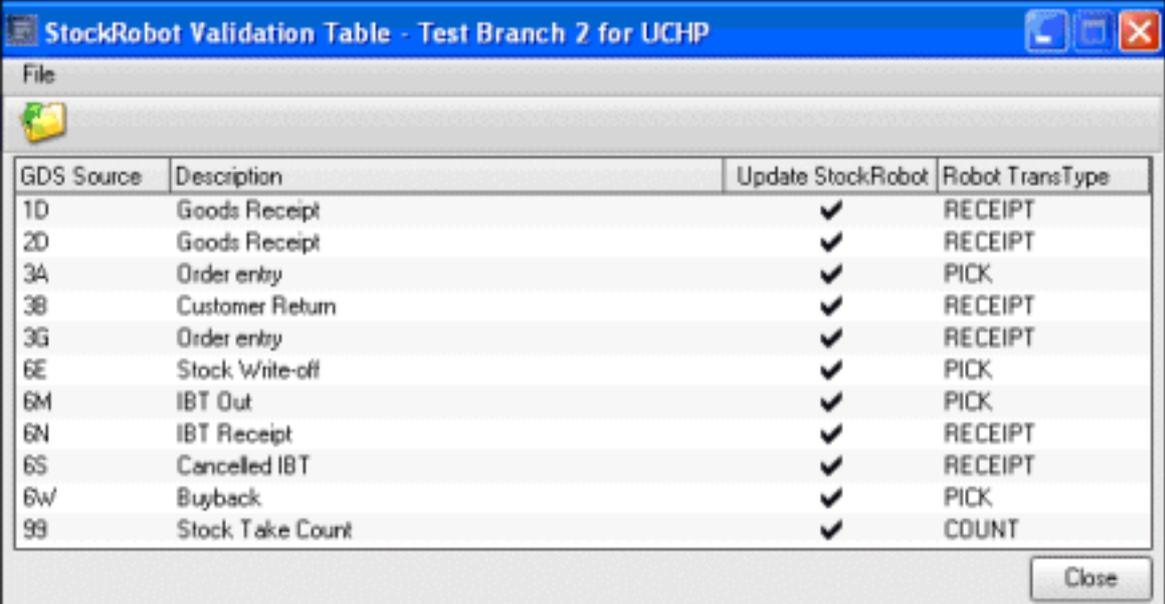
 **Note!** This should only be introduced where a stock robot will be utilized.

Where:

Once all of the relevant parameters, and interface have been set up, including the control file table for Stock Robot Validation, all of the following areas where parts are flagged as being in stock robot will be affected: Parts Orders and Workshop Orders, Manual Goods Receiving and DSP, Inter Branch Transfers (out and receipt), Buy Back, Stock Adjustment and write off, Stocktaking.

How:

One of the location fields on The Parts Master File is used to store the name of the robot, a new field holds the stock robots id number. The following screen shows the Stock Robot validation table which will be included in the initial set up. The column 'Update Stock Robot' will be checked based on which specific transactions are to be carried out.



The screenshot shows a window titled "StockRobot Validation Table - Test Branch 2 for UCHP". It contains a table with the following data:

GDS Source	Description	Update StockRobot	Robot TransType
1D	Goods Receipt	✓	RECEIPT
2D	Goods Receipt	✓	RECEIPT
3A	Order entry	✓	PICK
3B	Customer Return	✓	RECEIPT
3G	Order entry	✓	RECEIPT
6E	Stock Write-off	✓	PICK
6M	IBT Out	✓	PICK
6N	IBT Receipt	✓	RECEIPT
6S	Cancelled IBT	✓	RECEIPT
6W	Buyback	✓	PICK
99	Stock Take Count	✓	COUNT

 **Note!** Type 6E could apply to stock adjustments as well as stock write-off. For stock adjustments we do not send transactions to Robot, but for Stock write-off we do. Any code above 62 is ignored for type 6E – this is 'hard-coded' in the program. Type 99 is hard coded into the program as discrepancy codes do not exist for stock take count.

Stocktaking

Why:

Depending upon the set up of your system, Fusion will process stocktaking data in one of two possible ways:

- When a stocktaking selection is made, a copy is taken of the stock balance at the time of selection, but the stock quantity from the Parts Master File is used to compare against the counted stock.
- When a stocktaking selection is made, a copy is taken of the stock balance at the time of selection and then later used to compare against the counted stock. This method allows stock to be sold during stocktaking and is replaced with a slip in the binning location, notifying the stock checker to include these parts in the count.

Where:

From Part View, select **Actions > Stocktaking**. This will display a Stock Check Batch List window.



*The Parts View
button.*

How to Perform Stocktaking:

When performing a stock take, you create a batch of part numbers within Fusion that is later counted. This is done from the Stock Check Batch List by selecting **File > New** or click on the 'New' icon. A new batch window is then displayed. Each stock check requires a batch number of your choice.

Select the parts that you would like to stock-take and the batch will be created by clicking on OK. A report is then printed that lists all parts to be counted. In the new batch creation screen you can indicate as to whether you would like to 'Print Theoretical Stock Balances' which, if selected will print off how many of each part the stock checker can expect to find. Also, on the report you can have a field printed for the stock checker's signature.

Pre-picked parts: These parts will have been picked from their main location and moved to a holding area with a different location reference. When a batch has been selected a pre-picked parts column within 'Update Batch Details' indicates with a 'Y' where additional locations exist.

The 'Stock Taking Selection' report and 'Recount' list displays the location of the pre-picked parts directly under the main parts location.

For example if part VO 466634 is held in location LOC001 existing also in the pre-pick file in location PPL999 the report shows the part twice, once for each location but against one report line number.

Once the parts have been counted, the stock-take batch is opened and updated with the counted quantities.

To update any quantities you must physically tab through each part line and re-enter details whatever the quantity.

A Re-count List Report can be printed if required and this shows any discrepancies between the theoretical and counted quantities. Open the batch and select the print icon. The quantities in the batch can be updated and this report can be run as many times as required until you are satisfied that the data is correct.

At this stage, and with the agreement of the Parts Manager, the batch can be completed.

To complete the batch highlight the batch that you are working with then right-click > Select > Complete.

A 'Force Through' option is displayed.

'Force Through' can be checked where parts, for some reason, cannot be counted but need to be cleared from the stocktaking batch.

A report is generated for such parts with the text 'Forced without Update'.

If some parts within a batch cannot be counted but should be, 'Force Through' remains unchecked and those parts remain in the batch until such time that they can be dealt with. No report is generated for this.

Within the 'Stock' tab of the Parts Master File, there is a field which indicates as to whether the part is being stock checked or not. If a part has been forced through the system without being stock checked then this field will change to 'Not in Stock Check'.

When a batch is completed, a report is run that shows the stock balances and any stock discrepancies.

The DSP movement flag will automatically be updated for any parts that had stock balance differences. These part details will then be sent to DSP when the 'Create Supertransactions' process is run.

Transmitting Data

Why:

Data is transmitted to and from the importer systems. This updates various files in Fusion that relate to parts information, stock quantities and goods received.

Where:

From the Supplier View, select **Actions > DSP > Transfer Data to Bank**. This will display a DSP Data Transfer window.



The Supplier View button.

How to Transmit Parts Information Between GDS Fusion and VIDB:

From the DSP Data Transfer window select the method of transfer. There are two options available:

- Transfer from GDS Fusion to VIDB.
- Transfer from VIDB to GDS Fusion.

These options allow you to send/receive DSP transactions between DSP and GDS. These options are only used when a market first goes live with GDS Fusion or if problems have arisen and data has to be re-sent or received. Under normal circumstances the process of sending and receiving data is automated.

The Customer Master File

About the Customer Master File

Why:

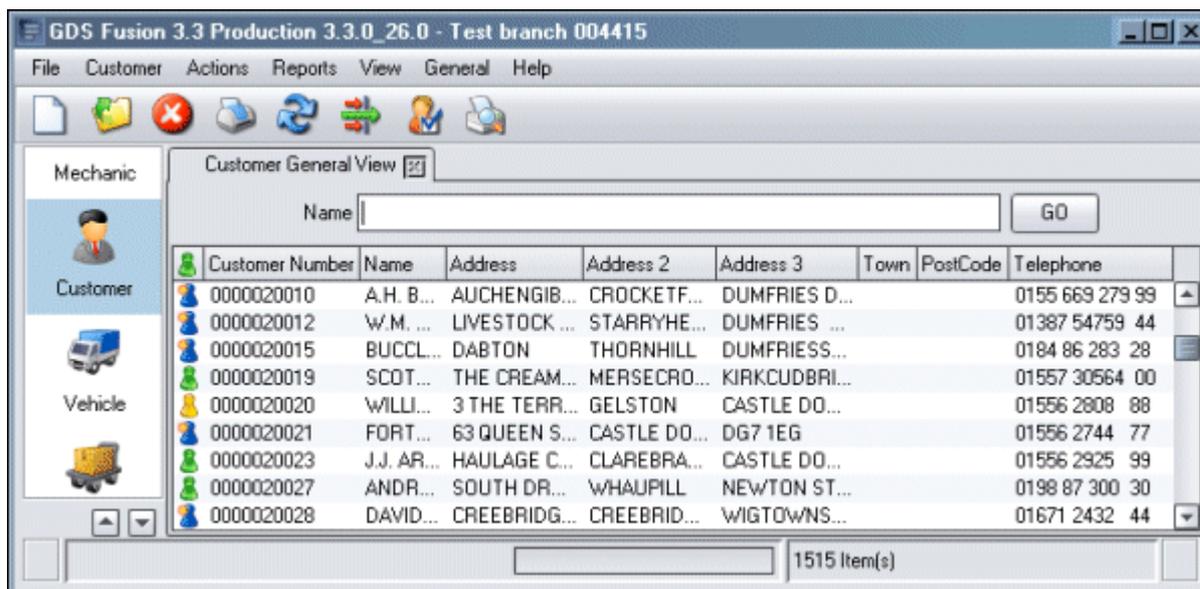
The Customer Master File contains a record for each customer who's registered at the selected branch. These records contain information such as contact details, credit limit, bank information, discount allowances and tax identification.

Where:



The Customer View button.

Click the Customer View, to access the Customer List as shown below. From here the user can highlight the customer that they would like to work with and select Customer > Open or double-click on the customer to open the Customer Maintenance window. The following sections in this chapter explain windows functions / tabs. The following texts describe the Customer List contents and general Customer Security and Maintenance information.



Customer List Description:

Column	Purpose / Description
	This column indicates the Customer Status via the coloured icons:  Prospect.  Inactive.  Active.
Customer Number	This is the customers unique ID number.
Name	This is the Customers full name.
Address	This shows the customers street / road address and building number.
Address 2	This shows the area / district for the address.
Address 3	This shows the county for the address.
Town	The Customers Town which corresponds with the above address details.
Post Code	The customer Postal Code which corresponds with the above address details.
Telephone	The customers telephone number.

Customer Security Options:

Security on each Tab of the Customer File enables any Customer facing User to have access to NON-financial data tabs in order to add or amend Names, Contacts, Addresses and certain other data for the Customer as they come into contact with them during the day. Financial data tabs can then be restricted to accounting Users, who will carry out the normal financial checks before authorising the account as an active customer. Any User can open a new account but this will initially be opened as a Prospect Customer if the User has the restricted options, and he will be forced to tick the Prospect box in order to create the record. Once a Customer is created as a Prospect they will only be converted to active by a User with full authority. On an active Customer then again tabs can be secured. Credit checking is not affected.

Customer Security Maintenance:

In the “Customer General” group on the Actions tab the following options remain as a High level option “Create Customer”, “Open Customer”.

These can be used in conjunction with the following options which can be tailored to each User or each Role.

Markets can be controlled with the high level options enabled/disabled. If required, the other tabs can be enabled/disabled to restrict access.

Generally all users should be allowed the Main, Addresses, Contacts & Misc tabs. Any financial fields which are not defaulted in, but which are normally mandatory will not be validated whilst the record is at Prospect status, these Users although having access to the Prospect field on the Misc Tab will in effect not be able to change it to unticked.

Accounting responsible Users should be allowed the other tabs particularly the Point of Sale and Financial tabs, and can then give the Customer full status by unticking the Prospect flag, inputting the mandatory fields on the financial tabs, having carried out the full financial credit checks etc.

A diverse selection of tabs could be set up for different Users, but the two above scenarios are the logical standard. “View Customer”, “Delete Customer”, “Reactivate Customer” & “Deactivate Customer” options will remain unchanged.

Customer Maintenance:

If access is denied to a tab the user will not see that tab in Customer (Prospect) Maintenance. The “View” option is not affected and will still apply to all tabs.

Restricted Users although having access to the Prospect field on the Misc tab will not in effect be able to change it, as they do not have access to the mandatory fields on the financial tabs.

What else would you like to do?

[“Creating a New Customer”](#) on page 324.

Related Topics:

CDB/Fusion Field Mapping.

Automatically Generated Customer Numbers

Why:

If required, the facility exists to automatically generate a customer number when a new customer record is created.

Where:



*The Customer View
button.*

From the Customer View, select **File > New** or click the New button .

This will display a Create Customer window (or a CDB search window if the CDB interface is enabled).

How to Activate Automatically Generated Customer Numbers:

If the automatic customer number facility is enabled, the customer number field will already be populated.

Setup:

To activate this facility, set the Fusion parameter CAN001 to positive, and in Branch parameter CSA enter the desired key for the Fusion Range Table (e.g. CUSAC). Finally, set up a number range for 'CUSAC' against branch number one in the Number Range Table.

If there is no branch number one in the company, customer numbers can be allocated from the default number range branch (as held in parameter DBR001). To activate the default branch number range for customers, ensure that parameter CSA999 is set up and that CSA is set up for the default branch number (in the branch table).

 **Note!** If a user starts to create a customer and then exits the routine, the unused customer is saved in file THF189 for re-use the next time a new customer is added.

Parameters:

CAN001: This indicates whether the customer number is automatically allocated when creating a new customer in Customer Maintenance.

DBR001: Default branch number used for document number allocation when company number ranges are in use (i.e. if generic branch number 999 is set-up for a given number range), or if there is no number range set-up for the current branch.

What else would you like to do?

“[Creating a New Customer](#)” on page 324.

Budgets

Why:

For each dealer, budgets are set relating to product codes and customer category, by branch for parts sales (front and back counter), labour sales and labour hours.

Remember, when creating budgets it is important that they are established in the correct order as there are various validation rules that will not allow the values of individual product codes etc. to exceed the branch total. Branch budgets must be created first, then budgets for product code by branch and finally budgets for customer category by product code and branch.

Customer budgets for individual customers are set up within the Customer Maintenance window.

Where:

From the Customer View, select **Actions > Budget**. This will display a Maintain Budgets window.



*The Customer View
button.*

How to Maintain Branch Budgets:

The Maintain Budgets window lists any branch budgets that are already set up within Fusion.

To create a new branch budget, select File > New, or the New icon. This will display a Create Budget window. Here, you input the branch number that this budget is to apply to along with the product and customer category (if required). Click OK to add this record to the list in the Maintain Budgets window.

Double-click the new record to display the Maintain Budget Details window and input the required amounts for each category. Click OK to save and close.

Opening an existing budget displays the Maintain Budget Details window with the figures relating to the selected budget displayed in two screen tabs, one for sales and costs and another for labour hours.

To set up individual customer budgets, open the relevant customer record and in the Customer Maintenance window select the 'Marketing' tab. In the 'Budgets' section input the budgets for parts front counter sales, parts workshop sales, labour sales and labour hours.

Creating a New Customer

Why:

Customer information is held in Fusion and is referenced by the system when orders are created, invoices or credits raised and vehicle records retrieved.

Where:



*The Customer View
button.*

From the Customer View, select **File > New** or click the New button . This will display a Create Customer window or a CDB search window (if the CDB interface is enabled).

How to Create New Customers:

In the Create Customer window, if the facility exists for automatic customer number generation, then the customer number field will already be populated. If it doesn't, then you will need to input a unique number for the new customer. Then indicate the customer type from the drop down list and click OK.

If the CDB interface is active, a CDB Customer Search window is then displayed. This allows you to search the Volvo customer database for your new customer. If found, you can just transfer the details to Fusion (this search is only used when adding external customers).

In the Customer Maintenance window input all the details you can for the new customer.

What else would you like to do?

[“Deleting a Customer”](#) on page 332.

CDB/Fusion Field Mapping.

Related Topics:

[“Automatically Generated Customer Numbers”](#) on page 319.

[“Supplying Customer Information to a Third Party System”](#) on page 334.

Customer Address and Contact Details

Why:

Customer information is held in Fusion and is referenced by the system when orders are created, invoices or credits raised and vehicle records are retrieved.

Where:

From the Customer View, highlight the customer that you would like to work with, then select **Customer > Open**. Alternatively double-click on the customer to open the record. This will then display the Customer Maintenance window.



*The Customer View
button.*

How to Maintain Customer Address Details:

Address field headings can be changed to suit the requirements of the market. Field labels for addresses can be set up in the 'Volvo message file' using the following message ID's:

- VOL7283 Heading for address line 1
- VOL7284 Heading for address line 2
- VOL7285 Heading for address line 3
- VOL7298 Heading for address line 4
- VOL7299 Heading for address line 5
- VOL7300 Heading for address line 6

Address line 4 is an optional field that will only appear if a parameter is enabled.

Many of the customer address fields are market specific and parameteres control whether they are displayed or not.

Additional addresses and contact names may also be stored againts each customer if required.

A facility is also provided that allows you to associate a specific document type with a specific address so that documents created in 'point-of-sale' routines can be addressed in accordance with the individual customers' requirements.

Additional addresses can be found in the Address tab within the customer Maintenance window.

To create an additional address select File > New > Address. This will then display the 'Create Additional Address' window. In this window you can also indicate whether this address should be used for deliveries and/or invoices.



Note! Each document type may be linked to one address only.

Invoices and delivery notes will be addressed to the main customer address if the document type has not been linked to an additional address.

Document Address Logic in Parts:

Customer Details – Display: Main Customer Address

Delivery/Ship To Details: Nominated Delivery Address

(unless manually overridden)

Invoice To Details – Invoice Print: Nominated Invoice Address

Document Address Logic in Workshop:

Customer Details – Display: Main Customer Address (unless manually overridden)

Delivery Details – Invoice Print: Main Customer Address (unless manually overridden)

Invoice To Details – Invoice Print: Nominated Invoice Address

In all cases, where no address is specifically nominated for invoices or parts delivery notes, the main customer address will be used by default. For vehicle admin and sundry invoicing please always use the customer’s main address details.

Customer contact details are held within the Contacts tab within the ‘Customer Maintenance’ window. Here, information about the person and their responsibility within the company is held.

How to Maintain Customer Contact Details:

Customer Contact details are held within the Contacts tab within the ‘Customer Maintenance’ window. Here, information about the person and their responsibility within the company is held / can be amended.

Setup / Parameters:

Parameter	Purpose / Description
CUS110	Address line 4 is an optional field that will only appear if the parameter is enabled. If it is enabled, the field display will be in 2 parts consisting of a 30 character text field and a 2-character code. The 2-character field may be used to enter a location code such as a state code or a district code, depending upon the requirements of the market.
CUS113	This parameter controls whether entries in address line 4 are validated. It also controls the sequence of the display: If enabled, entries are validated against a market-specific City/State Code table, and the display sequence is a 2-character code field followed by a 30-character text field. If disabled, entries are not validated, and the display sequence is a 30-character text field followed by a 2-character code field. State Tax Code / City Tax Code / Suframa Code are all market-specific fields that are only displayed if this parameter is enabled.
GDS001	Controls whether the ‘Company Formation Date’ field is displayed.
TER001	Controls whether the ‘Territory Code’ field is displayed. If enabled, entry is mandatory and is validated against the Territory Code table.
PAR001	Controls whether the ‘Parma Number’ field is displayed. If set to 0 Parma Number is not displayed, if set to 1 Parma Number is displayed but is an optional entry; if set to 2 Parma Number is displayed and entry is mandatory.
CGC001, CGC002, CGC003	These parameters control the fields ‘CGC/CPF Number’/‘Natureza Juridica’/‘Company Number’. If CGC001 is set to 0, none of these fields appear. If CGC001 is set to 1, CGC/CPF Number and Natureza Juridica fields are displayed, and entry can be mandatory or optional depending upon the setting of CGC002. Parameter CGC003 stores the values against which Natureza Juridica entries are validated. If CGC001 is set to 2, the Company Number is displayed and entry is mandatory. A warning message will appear if a number is entered that is present on another customer.
CUS033	This parameter controls whether the customer name can be overridden when creating

	an additional address. Where override is allowed, a name of up to 90 characters may be entered. However, names in excess of 45 characters should not be entered unless your local parts and workshop document prints can support long names.
EBS010	Controls whether the e-business interface is active. If it is, then the field 'Home Delivery Cost' is displayed. This is the default delivery cost used in e-business transactions.
DCT001, DCT002, DCT003	Define the document types used in additional customer address maintenance. Holds the text that will be used to identify the document types, for example 'Invoice' or 'Fattura'. DCT003 is reserved for future use.
INV010	If required this parameter can be set to *LIKE(POS001) in which case workshop invoices will always use the main customer address details in preference to any nominated invoice address.

What else would you like to do?

CDB/Fusion Field Mapping.

Customer Discount

Why:

Various types of discount can be applied to an order in Fusion, one of which is customer specific.

Where:

From the Fusion Control File View, select the **Customer/Vehicle Discount Category**. This will display the Discount Category window. Now From the Fusion Control File View select **Customer/Vehicle Discount Rates**. This will display the Discount Rates window.



The Fusion Control File View button.

How to Maintain Customer Discounts:

If the customer has a specific customer discount category code set up which contains a discount percentage in the customer discount rate table this will automatically be calculated against the part price.

In a parts order window, the discount column in the order lines section indicates the percentage of discount that is being applied to the price. This is retrieved either from the Special Price file or from the Customer Discount Matrix.

Customer Discount Codes are maintained within the Customer/Vehicle Discount Category option in Fusion Control Files Maintenance.

Customer Discount Rates are maintained in the Customer/Vehicle Discount Rates option in Fusion Control Files Maintenance.

Customer Financial Details

Why:

Customer Information is held within Fusion and referenced by the system when orders are created, invoices/credits raised and vehicle records retrieved.

Where:

From the customer view open the customer that you would like to work with. This will display the Customer Maintenance window.



*The Customer View
button*

How to Maintain Customer Financial Details:

In the Customer Maintenance window the financial details for the customer are held within the Financial tab.

Here, details of the customers' credit limit, tax information and bank details are maintained. When an order is created, Fusion checks the 'Credit Limit' and 'Customer on Stop' fields for the customer to make sure they've not exceeded their credit limit. If required, these fields along with the Concept Code can be protected from update by unauthorised users.

It is also possible for the 'Credit Limit' and 'Balance' fields to be updated via an interface from a third party accounting system. If your system is set up to validate tax numbers (TAX012) you can enter a country prefix followed by a number in the pre-determined format for the country in question. For countries outside the EU, the number entered will not be validated however, if a country prefix is entered, a number must be present.

In Sweden only (150001 = SE), tax number is defaulted automatically when creating a new Swedish customer, provided the Company Number has been entered on the main tab. A warning message will be displayed if the tax number input already exists on another customer record. The other customer(s) is also displayed for information. If a customer is exempt from tax you must still ensure that the correct zero-rated tax code is input within the 'Tax Code' field. Access to the 'Tax Exempt' field can be restricted if required.

Depending upon your market's requirements, you may be prompted to input a Tax Authorisation Code and Authorisation Date. Information on the customer's bank details can also be input into the Financial tab. Please note that if the same Bank/Swift Code already exists on another customer record, the 'Bank Name' field will be populated automatically.

If you decide to input a different bank name for an existing bank code the system will prompt you to confirm this action with the message "Press Enter to request Global Bank Name change or Cancel to utilise the Current System Bank Name". If you proceed, the bank name will be changed for all customers with the current bank code.

What else would you like to do?

["Creating a New Customer"](#) on page 324.

Customer Marketing Details

Why:

Customer information is held in Fusion and is referenced by the system when orders are created, invoices or credits raised and vehicle records retrieved.

Where:

From the Customer View open the customer that you would like to work with. This will display the Customer Maintenance window.



*The Customer View
button*

How to Maintain Customer Marketing Details:

In the Marketing tab within the Customer Maintenance window, information relating to the customer's area of business is held.

What else would you like to do?

[“Creating a New Customer”](#) on page 324.

Customer Miscellaneous Details

Why:

Customer information is held in Fusion and is referenced by the system when orders are created, invoices or credits raised and vehicle records retrieved.

Where:

From the Customer View open the customer that you would like to work with. This will display the Customer Maintenance window.



*The Customer View
button*

How to Maintain Customer Misc Details:

In the miscellaneous tab in the Customer Maintenance window, the name of the salesperson usually associated with this customer is held along with information relating to the customer's main product. Depending on a parameter setting, the parts system may or may not use the product code held here for accounts postings. Certain system settings are also held here that control whether the customer's transactions are included in parts statistical analysis and reports generated from the Customer Audit File. 'Transfer to Audit File' must be checked on all external customers if the interface to CDB is enabled.



Note! If the customer is a prospect orders can not be created.

What else would you like to do?

[“Creating a New Customer”](#) on page 324.

Customer Notes

Why:

For each customer it is possible to create notes detailing any information relevant to that customer.

Where:



*The Parts View
button.*



*The Customer View
button.*



*The Workshop Order
View button*

Customer notes can be accessed from various places:

From within Parts View, highlight the order that you would like to work with, then select **Order > View**. Alternatively double-click on the order to open the

record then select the '**Customer Notes**' button .

From the Customer View, open the customer either by double-clicking on the customer or via the **Customer > Open** and select the '**Customer Notes**' button.

From the Workshop Order View, highlight the order and select **Order > Notepad > Customer**.

This will display a 'Notes for Customer' window.

How to Maintain Customer Notes:

Customer notes can be added or amended in the Notes for Customer window regardless of where this window was opened.

Related Topics:

Creating a Parts Order.

Creating a Workshop Order.

Customer Point of Sales Details

Why:

Customer information is held in Fusion and is referenced by the system when orders are created, invoices or credits raised and vehicle records retrieved.

Where:

From the customer view open the customer that you would like to work with. This will display a Customer Maintenance window.



*The Customer View
button.*

How to Maintain Customer Point of Sales Details:

In the Point of Sale tab within the Customer Maintenance window, information relating to a customer's discounts and print defaults is held.

Depending upon your market setup, it may be possible to invoice customers in an alternative currency or print invoices in an alternative language. These functions are setup for the customer here, but the languages and currencies available are maintained within the Fusion Control Files.

What else would you like to do?

“[Creating a New Customer](#)” on page 324.

Deleting a Customer

Why:

Fusion can delete customers in two ways, either directly from the Customer Master File or in bulk via the Daily batch routine.

Where:



*The Customer View
button.*

From the customer view highlight the customer that you want to delete then select **Customer > Delete** or right-click the customer and click the Delete button



How to Delete Customers:

When a customer is selected for deletion in the Customer Master File, the system checks if current and archived orders or vehicles exist for this customer:

- If records exist = Fusion tries to de-activate the customer (status changed to 'inactive').
- No records exist = customer can be deleted from Fusion.

Bulk Deletion via Daily Batch Routine (THR887).

The customer batch deletion program is called in the Daily Batch and processes in turn each customer who has a status of 'inactive'. Every customer processed either remains unchanged, or is deleted from file (depending on whether they still have orders or vehicles on file).

Setup:

CUS116: This parameter controls if customers may be deleted from the Customer File. If disabled, any attempt to delete a customer will result in the customer's status changing to 'inactive', the record will not be deleted from the file. Parameter CUS116 is not used in batch deletion, 'inactive' status records are deleted, if applicable, whether CUS116 is positive or negative.

Setting Up the CDB Interface

Why:

The Volvo Customer Database (CDB) is a central database containing customer information for all customers of Volvo – regardless of market.

 **Note!** You should not activate the Fusion/CDB interface until advised to do so by the Retail Systems VTC team and the CDB project team.



The Parameter Maintenance button.

Where:

From the desktop select Parameter Maintenance. This will display the Parameter Maintenance window.

How to Setup the CDB Interface:

The following Fusion parameters first need to be set up:

- CDB 001 Enables/Disables the CDB Interface.
- CDB 002 Stores the maximum number of customers returned by CDB search (max.15).
- CDB 003 VTC Party Identifier.
- CDB 004 Dealer Party Identifier.
- CDB 005 CDB Application Name.
- CMM 030 VCOM Partner Name for Synchronous Messages and Initiator Name.
- CMM 031 VCOM Partner Name for Asynchronous Messages and Initiator Name.

Database Triggers: The Fusion/CDB interface relies upon triggers on the fusion customer files. Run the command `vautoup` from the command line and ensure that the status is 'Active' against the trigger name `CUSTAUDIT`.

Address Field Mapping: The use of the Fusion address and post code fields varies from market to market. In order to map address fields from CDB to the appropriate Fusion address fields for your market, file `THF585` should be amended. From the desktop select Settings > Control Master File > Branch > CDB Control.

 **Note!** If you amend `THF 585` incorrectly, the downloaded values will appear out of position in the Fusion Customer File. Please refer to section CDB/Fusion Field Mapping section for a detailed explanation of how to map fields.

What else would you like to do?

CDB/Fusion Field Mapping.

Supplying Customer Information to a Third Party System

Why:

If the generic customer export facility is enabled in your market, an extra tab will be displayed in the Customer Maintenance window.

This is used to communicate with a third-party accounting system. It also contains any customer data required for the Customer File in the accounting system, in addition to those fields that the standard Fusion Customer File can provide.

Where:

From the Customer View, select **Customer > Open** or click the Open button



The Customer View button.



. This will display the Customer Maintenance window. Select the External Data Update tab.

How to Supply Customer Information to a 3rd Party:

This screen is displayed whenever you Add or Change a customer. Select 'save and close' to update Fusion and the Accounting System. The system will respond in one of two ways, depending upon the setup of Fusion parameter DEF101:

- The details will be written to the Customer File without any checks being made by the accounting system, and the screen will return to the customer list.
- The details will be checked by the third-party system and any errors will be reported back to Fusion.

You must modify the fields on which errors are reported, then try to 'save and close' again. Fusion will not be updated until the data has been confirmed by the accounting system.

Alternatively choose 'close' to abandon the update. Data is also exchanged within the Third Party System when you delete, deactivate or reactivate a customer. Again this action may be validated, dependant upon Parameter DEF101.



Note! If you are trying to delete a customer from file and the accounting system insists that you may not do so, you may wish to deactivate the customer in question.

Related Topics:

Creating a Parts Order.

Creating a Workshop Order.

The Mechanic Master File

About the Mechanic Master File

Why:

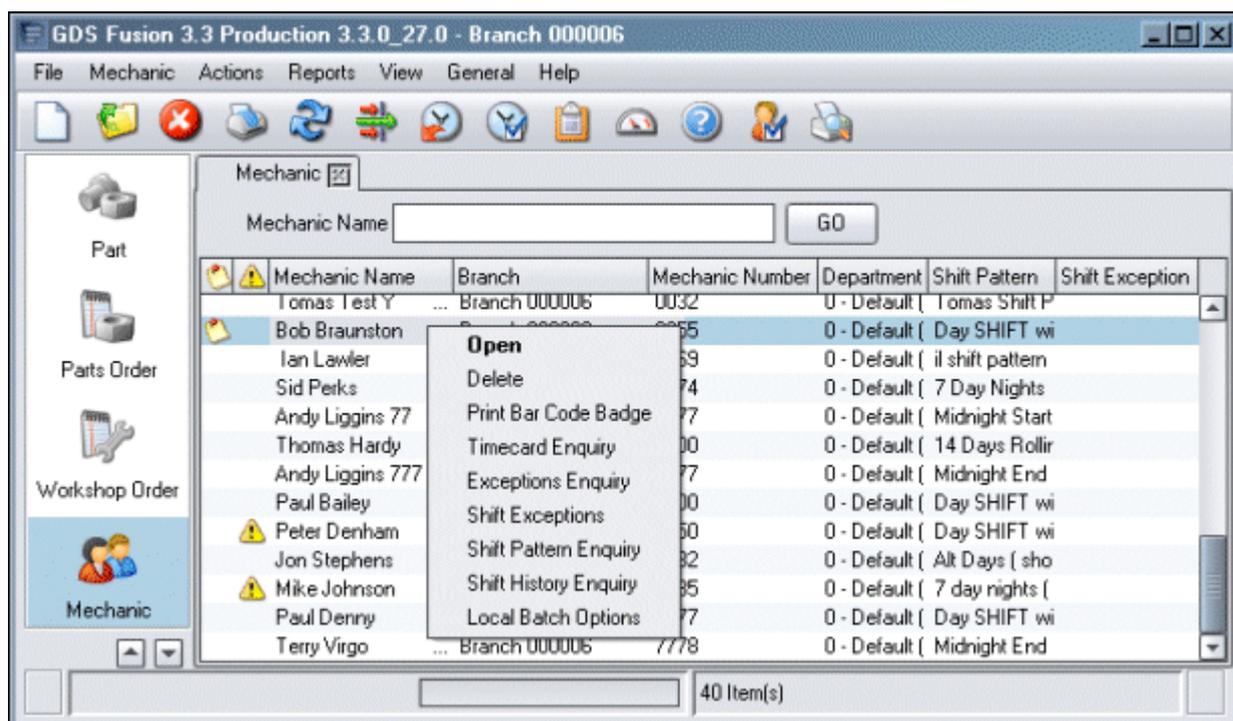
The Mechanic Master File contains a record for each mechanic registered at the selected branch. These records contain information such as the date they joined the dealer, their usual shift pattern and pay rate (used to determine job costs), the department where they work and their areas of expertise.

Where:



The Mechanic View button.

The Mechanic view lists all mechanics whose details are held in the Mechanic Master File. Individual records can be opened for viewing or amendments as well as deletion. This view is also where manual time recording is performed.



When a mechanic record is opened a Mechanic Maintenance window is displayed. Here you will find information on the mechanic's shift pattern and pay rate, the date they joined the dealer, the department where they work and an indication as to their skills and proficiencies. It is in this window that the

mechanic's access code is maintained. This access code is used by the mechanic for online time recording. A Mechanic Bar Code List can be printed from the mechanic view by selecting Reports > Print Mechanic Bar Code List from the Menu bar.

What else would you like to do?

“[Creating a New Mechanic](#)” on page 338.

Related Topics:

“[Mechanic Exceptions Enquiry](#)” on page 341.

Mechanic Timecard Enquiry.

“[Non-Working Days Enquiry](#)” on page 342.

Online Time Recording.

“[Payroll Maintenance](#)” on page 343.

“[Shift Pattern Enquiry](#)” on page 344.

Time Recording Rules.

Set up:

Display of mechanic pay rates is conditioned by parameter DPC 002.

Assign Mechanic Exceptions

Why:

An exception is anything that results in the mechanic not working his usual shift.

This could be an alternative shift for one day or more usually because of holidays, training, sickness, public holidays etc. Ideally exceptions are assigned in advance so that the planning function has accurate mechanic availability information.

Where:



*The Mechanic View
button.*

From the Mechanic View, highlight the mechanic that you would like to work with and select **Mechanic > Open**. This will display a Mechanic Maintenance window. From the Mechanic Maintenance window select **Actions > Shift Exceptions**. This will display a Shift Exceptions window. Finally, from the Shift Exceptions window select **File > New**. This will display a Shift Exception window.

How to Assign Mechanic Exceptions:

In the Create Shift Exception window select the shift that the exception applies to and then input the date range and for which days that the exception is to apply to. If necessary, the start and finish time of the exception can also be input (if left blank then the exception time will be calculated based upon the clocking pattern set up, minus any downtime for breaks etc).

The “Apply to entire day” check box can be used in order to apply the mechanic’s standard shift hours as an exception within planning, leaving the number of hours (between the from and to times) to apply to payroll processing. This feature is only available when a non-productive shift exception is being created. Click OK to add.

Either shift or non-productive code must be entered. If a non-productive code is entered, the exception time will be booked to that code.

Related Topics:

[“Mechanic Exceptions Enquiry”](#) on page 341.

Mechanic Timecard Enquiry.

Creating a New Mechanic

Why:

When a new mechanic joins a dealer, his details must be added to the Mechanic Master File so that time recording can be performed. This then allows costs, efficiency and productivity to be measured. It also allows the system to calculate his paid hours correctly.

Where:



*The Mechanic View
button.*

From the Mechanic View, select **File > New** or click the New button . This will display a Create New Mechanic Details window.

How to Create New Mechanics:

In the Create New Mechanic Details window input a unique identifying number for the new mechanic and his name then click OK. A Mechanic Maintenance window is then displayed where you need to add details about his shift, department, pay rate, skill factor etc.

If your company uses access codes for security you will also have to enter a unique access code for the Mechanic to use in on-line time recording.

What else would you like to do?

[“Deleting a Mechanic from the Mechanic Master File”](#) on page 339.

Related Topics:

[“Mechanic Exceptions Enquiry”](#) on page 341.

Setup:

Use of access codes for mechanic security is controlled by parameter REC 701.

Deleting a Mechanic from the Mechanic Master File

Why:

When a mechanic leaves the dealer, his details no longer need to be held in the Mechanic Master File.

Where:

From the Mechanic View, highlight the mechanic you would like to delete then select **Mechanic > Delete**. This will display a confirmation window.



*The Mechanic View
button.*

How to Delete Mechanics from the Mechanic Master File:

Firstly, the mechanic's 'End Date' must be updated within the Mechanic Master File and then any time recording details booked against work in progress orders should be invoiced.

When an end date is recorded against a mechanic, a warning icon is displayed to indicate that they are inactive. If required, the end date can subsequently be changed.

Once any work in progress has been completed then the mechanic can be deleted.

Before deleting a mechanic you should check for any planned work for the mechanic in the Workshop Plan Details screen. See the Time Recording > Planning section for details of how to check and remove planned work for a mechanic.

What else would you like to do?

Planning.

Lateness and Absence Enquiry

Why:

This enquiry identifies personnel that are either late or absent.

Where:

From the Mechanic View, select the Mechanic and select **Actions > Lateness & Absence Enquiry**. Select the required criteria within the filter and select OK to display enquiry.



*The Mechanic View
button.*

How to Perform Mechanic Lateness and Absence Enquiries:

The default records displayed will be lateness and absence however from the drop down list box other selections can be made such as;

Early starts: This view can be used to confirm overtime payments where the user has started prior to his normal shift start time.

Lateness before rounding: This view will display the 'actual' and 'rounded values', where the actual start time has been rounded back based on system parameters or settings

What else would you like to do?

“[Assign Mechanic Exceptions](#)” on page 335.

Related Topics:

Online Time Recording.

Manual Time Recording.

Mechanic Exceptions Enquiry

Why:

This enquiry identifies personnel that have a valid exception registered that indicates the reason as to why they are absent.



*The Mechanic View
button.*

Where:

From the Mechanic View, highlight the mechanic that you would like to enquire about then select **Mechanic > Exceptions Enquiry**. This will display a Shift Exceptions window. The mechanic exceptions enquiry can also be accessed from the Mechanic Maintenance window by selecting **Actions > Exception Enquiry**.



Note! The mechanic exceptions enquiry can also be accessed from both Online Time Recording and Barcode Time Recording.

How to Perform Mechanic Exceptions Enquiries:

If the enquiry has been accessed from Actions > Exceptions Enquiry then a Shift Exceptions Enquiry Filter window is displayed where you can retrieve the particular records that you need.

If the enquiry has been accessed by any other method, the Shift Exceptions window lists any exceptions registered for the selected mechanic.

The records displayed could be for the current year or many years depending on how the company retains its records.

What else would you like to do?

“[Assign Mechanic Exceptions](#)” on page 335.

Related Topics:

Online Time Recording.

Non-Working Days Enquiry

Why:

The non-working day's enquiry displays the number of days and hours the selected mechanic is entitled to take off work (including bank holidays) as well as the time already taken off.

The number of hours taken is based on down time codes either clocked via on-line or manual time recording or registered as exceptions within the exception file. This enquiry also displays any hours clocked or registered against exceptions for paid absence, paid sickness, non-paid absence and non-paid sickness.



Note! All of these values are linked to NPC parameters within the Control File set-up.



*The Mechanic View
button.*

Where:

From the Mechanic View, double-click the mechanic that you would like to enquire about. In the Mechanic Maintenance window select the Non-Working Days button . This will display the Working Details for Mechanic window.

How to Perform Non-Working Days Enquiries:

In the Working Details for Mechanic window, the number of days and hours for both statutory and bank holidays should be input for the mechanic.

The non-working start date will default from the set-up within calendar maintenance but can be changed if required.

Related Topics:

Online Time Recording.

Payroll Maintenance

Why:

The Payroll Interface allows information from the time recording and exception files to be collated along with Sales information from the Order line files. Additional information about call out fees, shift premiums etc. can also be added before being transmitted via an Excel™ spreadsheet to an assigned email address for payroll details.

 **Note!** Before transmitting payroll information, any additional payments that need to be made to mechanics should be added within this option.



*The Mechanic View
button.*

Where:

From the Mechanic View, select **Actions > Payroll Maintenance**. This will display a Payroll Maintenance Selection window.

How to Maintain Payroll Information:

To maintain payroll information, input the required selection criteria within the Payroll Maintenance window and make sure that the 'Output Type' is screen. (Alternative options as Transfer to PC and print are available from the drop down list box) This will display a Payroll Maintenance window.

The Payroll Maintenance window lists the invoiced sales and total hours worked for the selected mechanic during the selected date range.

If this information needs to be updated with additional payments before it is transmitted, open the mechanic record to display the Clocking by Category window. The Clocking by Category window shows a breakdown of the mechanics times per shift and payment category types for the specified date range.

To make an additional payment to a mechanic you need to add further source codes to their existing details. From the Clocking by Category window select File > New to display the Add/Amend Payments window. Input the quantity that you would like to add, along with the amount and payment source code, and then click OK. These values will then be displayed in the summary 'additional Payments'

If any of the clocking details are incorrect, then these need to be located in the Manual Time Recording function and amended there?

When all payroll information is correct, you can then select the Transfer to 'PC' or 'email' icon. If email is selected this prints a Payroll Audit report in the form of an Excel™ spreadsheet and transmits it to a designated email address (as specified in the Control File).

Related Topics:

[“Mechanic Exceptions Enquiry”](#) on page 341.

Manual Time Recording.

Setup / Parameters:

Parameter PRM 001 determines if the Workshop Payroll Interface is active. If it is set to *LIKE (POS 001) a CSV file can be generated using time recording and exception data from GDS Workshop. The file is emailed automatically to a designated email address where it can be opened as an Excel™ spreadsheet).

Email addresses for transmitting payroll details are set up in the Email Control File within the Fusion Control Files. An additional record type 500 has been added to the spread sheet for Invoiced hours and Invoiced Sales. New parameter FLR007 in 3.2> allows file to be saved on the AS400 with a specified folder.

Shift Pattern Enquiry

Why:

The Shift Pattern Enquiry allows you to view a shift pattern for the foreseeable future. This can be useful when a mechanic is on a very varied shift, for example, the 56 day rolling shift that is in operation in certain markets.

Where:

From the Mechanic View, highlight the mechanic that you would like to enquire about and select **Mechanic > Shift Pattern Enquiry**. This will display a Shift Pattern Enquiry window.



*The Mechanic View
button.*



Note! Shift pattern enquiries can also be performed from online time recording and bar code time recording.

How to Perform Shift Pattern Enquiries:

In the Shift Pattern Enquiry window the various shifts worked by the selected mechanic are listed in date order. To view a different date range, select the calendar icon.

What else would you like to do?

Time Recording Rules.

Related Topics:

Online Time Recording.

Time Recording Using Bar Codes.

The Parts Master File

About the Parts Master File

Why:

The Parts Master File holds data relating to each individual part number and is referenced by the system whenever parts are selected. Within the option to create or maintain parts, general stock and history details are also available.

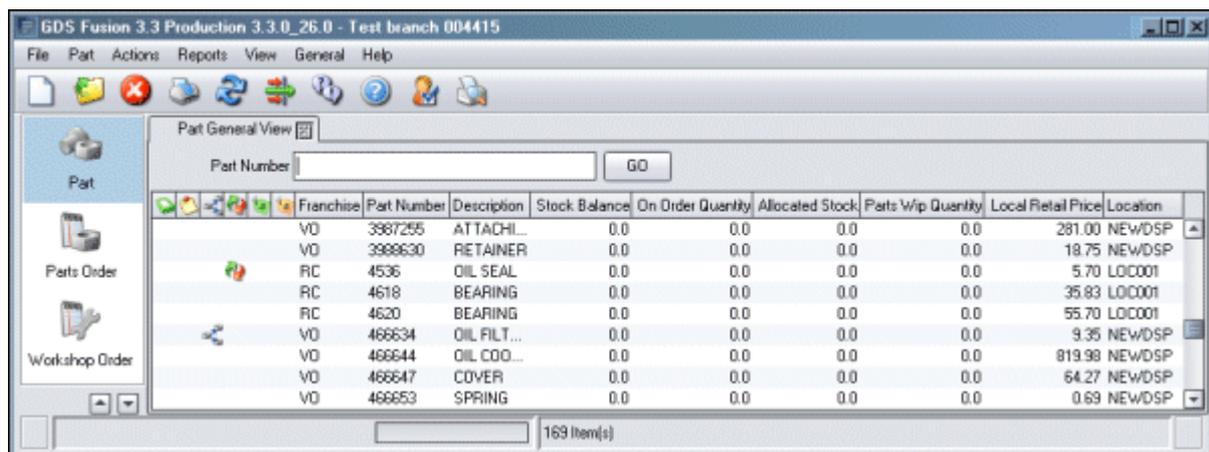
Where:

The Part View lists parts whose details are held in the Parts Master File.



The Part View button.

The part view lists any or all parts held in the Parts Master File and it's from here that individual part information is viewed and updated. To view all parts in the Parts Master File, make sure that the part number field is blank and select 'Go'.



To position to a particular part in the list, you enter the part number and select 'Go'. If you want to view a selection of part numbers you can use the filter.

When the filter icon is selected, a window is displayed where you can input any information that relates to the part or parts you want. You can also use the filter to find a particular part if you don't know the part number.

When a part is added manually or automatically, depending on a parameter, it's possible for the system to add the part to The Parts Master File of all branches (in the case of dealers with more than one branch).

What else would you like to do?

[“Creating a New Part”](#) on page 349.

[“Deleting Parts from the Parts Master File”](#) on page 351.

[“Updating a Part in the Parts Master File”](#) on page 366.

Related Topics:

[“Associated Parts”](#) on page 345.

[“Creating and Maintaining Parts Kits”](#) on page 350.

[“Part Bulletins”](#) on page 355.

[“Supersessions”](#) on page 361.

Associated Parts

Why:

‘Associated Selling’ helps to achieve additional sales when selling main part components. When a main component is sold, an associated parts list is displayed where the parts person can select which other parts are required. For each association an 'Associated Part Group' is required. Once this has been created the associated parts can be added. It is possible for a part to belong to more than one associated part group, so this function is particularly useful when selling components for different vehicle models.

Where:



*The Part View
button.*

From the Part View select **Actions > Associated Parts**. This will display a Company View of Associated Parts window. From Part View, highlight a part, select **Open>Associated Parts**. This will display the Part Maintenance window opening to the ‘Associated’ tab. In the order entry routine, where associated parts are available the following text is displayed: Associated part(s) exist for this part. These will be processed, if required, after the part has been added to the order.

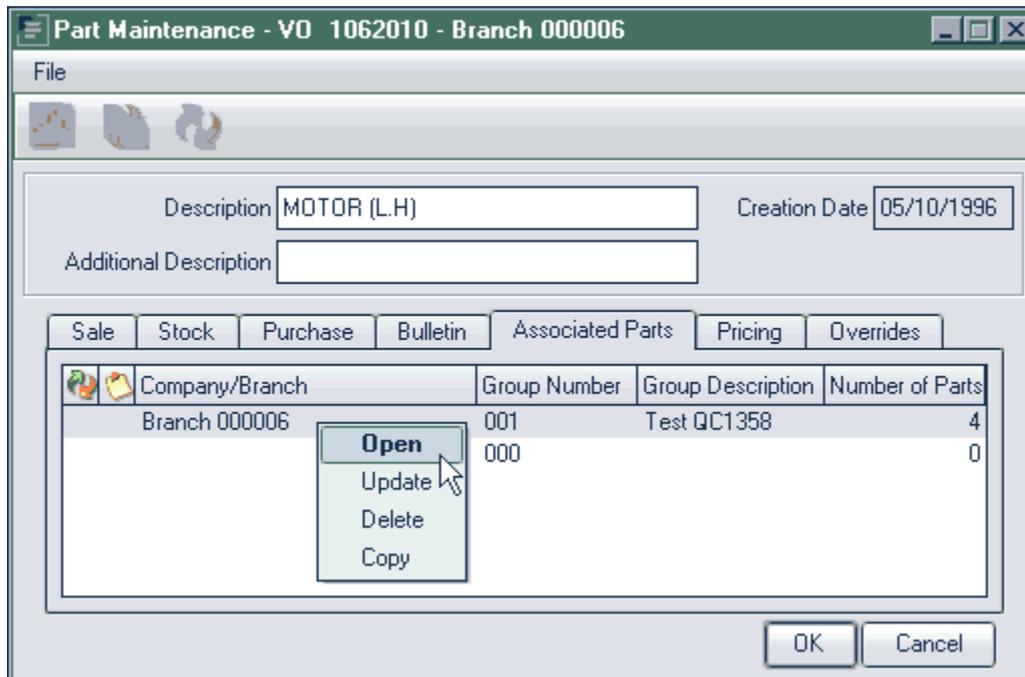
How to Work with Associated Part Groups:

To view all associated parts groups set up for the company, from the part view select Actions > Associated Parts. Here, groups can be updated, copied and deleted. To create a new associated parts group, open the parts maintenance window for the part that is to be the main component part. Select File > New > Associated Part Group. A drop down list box for branch is available, only the branch you are working in and company are available for selection. Enter branch and group description and click OK (if the branch number is left blank, the associated part group will be created for all branches). The new 'group' is automatically added to the list. When RMK is selected against a group, if you are working in branch 06 the options to open, update, delete and copy are available against company and branch 06 groups.

For all other branches open and copy is available, Update and delete is greyed out.

To add parts to a group, double-click the group and in the Associated Part Maintenance window, select File > New > Associated Part. Input the part number and quantity and click OK. Repeat this process until you have added all the parts you want included in this particular associated parts group. To remove

a part from the group, in the Associated Part Maintenance window right-click it and select Delete. Please Note: 'update' and 'delete' of parts is not available against branches other than the one you are working in and company. 'Copy' function is available and used to copy back to your own branch or company.



How to Maintain Associated Part Groups:

To maintain associated parts groups, open the parts maintenance window for the main component part. In the Associated Parts tab double click the group you want to work with. This will display an Associated Parts Maintenance window that lists the associated parts. In this window you can add more associated parts, amend the quantities for existing parts or delete parts from the group.

How to Add Associated Parts Groups to Orders:

Add the main component part to the order. The following text is displayed: "Associated part(s) exist for this part. These will be processed, if required, after the part has been added to the order." When the main part has been added, an additional Yes/No window is displayed. If Yes is selected the Associated Part Detail window is displayed with the option to apply associated parts to the order. Individual parts can be selected by right clicking part and selecting Apply. To add all parts right click the group and select Apply. The parts are transferred to a Pending Parts Lines window to be verified before being added to the order.

What else would you like to do?

["Update Supersession Details for Associated Parts"](#) on page 365.

Average Cost

Why:

Markets use either replacement cost or average cost to calculate the cost of purchases. The method used is controlled by a parameter.

Where:

From the Part View select the required part and double-click. This will display the Part Maintenance window for the selected part.



The Part View
button.

How:

In the Part Maintenance window, the average cost for the part is displayed in the Sale tab. The average cost is calculated in the following ways:

For DSP goods receiving there are four stages to the calculation:

- Current average cost value x current stock balance = XXX
- New receipt value x stock replacement cost (for order class 3) or daily replacement cost (for order class 1) = YYY
- $XXX + YYY = ZZZ$
- $ZZZ / \text{stock balance} + \text{new stock balance} = \text{average cost}$

For Manual goods receiving there are also four stages to the calculation:

- Current average cost value x current stock balance = XXX
- New receipted value x goods receiving quantity = YYY
- $XXX + YYY = ZZZ$
- $ZZZ / \text{stock balance} + \text{new stock balance} = \text{average cost}$

When stock is adjusted, Fusion automatically recalculates a new average cost. For example:

- Stock adjust part no A, quantity 1
- Current average cost = 10,00
- Current stock balance = 5
- Calculation: $10,00 \text{ (avg cost)} \times 5 \text{ (stock balance)} = 50,00 \text{ (X)}$
- $10,00 \text{ (avg cost)} \times 1 \text{ (stock adjustment quantity)} = 10,00 \text{ (Y)}$
- $50,00 \text{ (X)} + 10,00 \text{ (Y)} = 60,00 / 6 \text{ (stock bal} + \text{adjustment qty)} = 10,00$

Creating a New Part

Why:

Usually new parts are created by the Volvo parts applications that interface into Fusion. However, locally supplied parts can be created manually in Fusion.

Where:



*The Part View
button.*

From the Part View, select **File > New**. Alternatively click the New button . First the Create Part window will be displayed, second, the Select Franchise for Part Number window will be displayed.

How:

In the first Create Part window, enter the new part number and click OK.

In the Franchise window, select the appropriate prefix code and click OK.

This will display a Part Maintenance window with tabs for Sale, Stock, Purchases, Associated Parts, Replacements, Pricing and Overrides.

Certain fields will be updated automatically. The default values are preset within the parameter file. Input the remainder of the information for the new part as required, then click OK to add the record to the Parts Master File.

Depending on a parameter setting, if a part is created in one branch it might be updated into the Parts Master Files of all the other branches within the company.

What else would you like to do?

“[Updating a Part in the Parts Master File](#)” on page 366

“[Deleting Parts from the Parts Master File](#)” on page 351

Related Topics:

“[Associated Parts](#)” on page 345.

“[Creating and Maintaining Parts Kits](#)” on page 350.

“[Supersessions](#)” on page 361.

“[Obsolescence](#)” on page 354.

“[Part Bulletins](#)” on page 355.

“[The Volvo Price File](#)” on page 363.

Creating and Maintaining Parts Kits

Why:

Parts kits allow the parts department to create a kit containing a selection of parts. This saves time when booking out large numbers of parts. It also allows dealers to create fixed price kits for promotional sales and fixed price servicing.

Where:

From the Part View, select Actions > Parts Kits. This will display a Work with Parts Kits window.



*The Part View
button.*

How to Create & Maintain Parts Kits:

The Work with Parts Kits window lists all kits currently set up in the system, from here parts kits are created, maintained, copied and deleted.

Double click a record to display a list of the parts that are in that kit. To add further parts, input the part number and quantity and click Add. To delete a part from the kit, highlight the part and right-click then select Delete.

Some parts within the kit may have supersession information; this will be indicated by a supersession icon.

These parts can be updated from the kit by right clicking the part and selecting process supersession. Alternatively when the kit is added to an order the supersession can be processed then.

When adding parts to a kit, the system will check the Local Parts Master File to find details of the part and if it's not listed there, it will check the Volvo Parts Master File. If it doesn't find the part number here either, an error message will be displayed.

If you want to assign a fixed price to a part in a kit, it can either be input when the part is added to the kit, or if you double click a part that's already in a kit an Amend Part window will be displayed where you can input a fixed price.

To update the kit's header details, highlight the kit then select Kit > Edit Header. This will display the Edit Kit Description and Notes window.

To create a new parts kit, select File > Create Kit. This will display a Create Part Kit Header window. In the Kit Part Number field, input a unique number to identify the new kit along with a description and branch number and any notes that you want to be displayed when the kit is selected in the order entry routine. Click OK to add the new kit to the Work with Parts Kits window.

What else would you like to do?

Adding Parts Kit to an Order.

Deleting Parts from the Parts Master File

Why:

When parts are received or sold, the information held within the Parts Master File is referenced and updated according to the transactions being processed. Parts often become obsolete or are superseded and further retention of the part record is no longer required.

There are two ways that parts can be removed from the Parts Master File: individual parts can be deleted, or a batch of 'inactive' parts can be created and then deleted.

Where:

From the Part View, highlight the part that you would like to delete then select **Part > Delete**. Alternatively, highlight the part and right-click to select delete or click the Delete button.

To delete inactive parts, in the part view select **Actions > Delete Inactive Parts**.



The Part View
button.

How to Delete Parts:

To delete individual parts from the Parts Master File, in the part view right-click the part you want to delete then select Delete. A window is displayed asking you to confirm the deletion. To delete inactive parts, you first need to create a work file (batch). After entering selection criteria parts are selected for deletion automatically and must meet the following criteria:

- no stock on hand
- no allocated stock
- no stock on order
- no super-sessions
- no back orders
- creation date not within the last month
- no sales within the last 3 - 12 periods
- Not flagged for stock check
- No special prices
- Not on Vehicle Waiting File
- Not part of a kit, or an associated part
- Not on parts/workshop quotation

From the Delete Inactive Parts window, select File > New. This will display a Create Inactive Part Batch window. Here you can give your batch a unique number and specify certain selection criteria, from which the system will create your batch. (Simply creating a batch will not affect the Parts Master File, but it gives you the opportunity of reviewing the parts that the system has selected, before the deletion actually takes place).

Batches can be opened, deleted or printed. Opening a batch displays a list of all the parts in that batch and any parts that you don't want to delete can be removed from the batch.

Once you are sure that your batch is correct and you are ready to delete the parts, highlight it from the list, right-click and select Activate. Alternatively from 'File' select Active or use the 'Activate' icon. A window is then displayed asking you to confirm the activation. Once activated, the system performs one last validation to check that the parts selected still meet the 'inactive' criteria. Any that don't will not be removed from the Parts Master File and a report listing these will be automatically produced.

When you activate a batch, you might get a message to say that you are not authorised to delete parts. If this happens it means that you don't have the required level of authority to perform this action and you should contact your system administrator.

When any parts are deleted from the Parts Master File, a D33 record is created which the system transmits to the importer so that their records are kept up to date.

If a part is deleted in error from the Parts Master File, it must be entered back into the file manually. Please note that if this happens, then all the original transactional records will have been lost.

What else would you like to do?

Add Parts to the Parts Master File , as shown in "[Creating a New Part](#)" on page 349.

Related Topics:

Part User ID.

Setup:

Authority to remove parts from orders is given within Fusion Control Files > Part User ID Maintenance.

Free Fit Parts

Why:

Some parts might be deemed by the market company as being eligible for 'free fit'. This means that if any of these parts are sold, then the cost of fitting the parts is free to the customer. The fitting cost is split between the market company and the dealer.

'Free fit' claims are handled through the price support function.

Where:

From the Workshop Order View, select **Actions > Price Support > Claims**. This will display a Price Support – Work with Claims window.



The Workshop Order View button.

How to Use Free Fit Parts:

When a free part is added to a workshop order, a window is displayed asking you to confirm whether the customer is to be charged for fitting.

If the fitting is to be free of charge to the customer, a repair order line with an internal payment code must then be added to the order.

When the order is completed, a price support claim for the fitting of the part is automatically created by Fusion.

The claim can be viewed within price support by selecting **Actions > Price Support > Claims** from the part or parts order view.

What else would you like to do?

[“Transferring Price Support Data to and from VIPS”](#) on page 364.

[“Work with Price Support Claims”](#) on page 368.

Related Topics:

[“Price Support”](#) on page 358.

Obsolescence

Why:

Obsolescence is the term given to the life-cycle of a part. No part will exist forever. As vehicle specifications change, so do their part requirements and inevitably parts become obsolete.

Obsolescence is calculated using the last sale or last receipt date and can be calculated dynamically (where the calculation is on-going). This is controlled by a parameter.

The calculation can be set at company or branch level. Obsolescence can also be calculated monthly and at year end. Scheduled jobs must be set up within the Daily batch to enable these to run.

When obsolescence is calculated at company level, the system checks the part at each branch and selects the one with the most recent date. It then uses this part information to calculate the obsolescence code which is then applied to all branches. However, this method can distort the obsolescence result so it is advisable to calculate obsolescence at branch level.

The system recognises 9 obsolescence categories, of which 7 can be set locally based on date/week/month/year ranges. Two categories, 98 and 99, cannot be changed and are given to parts that the system finds have a receipt date but no sales date or parts with no receipt date and no sales date, respectively.

Obsolescence codes allow the accounts department to calculate stock write-off provision using the Inventory Stock Value report.

The values for 'Last Sale or Last Receipt Date' and 'Current Date or Last Date of Current Period' are set in the Parameter File (which can only be accessed by the system administrator).

Where:



*The Part View
button.*

From the Part View, select **Actions > Obsolescence Details**. How obsolescence is calculated (monthly, dynamically or yearly) influences the maintenance window displayed.

How to View & Edit Parts Obsolescence:

Dynamically or Monthly - The Obsolescence Maintenance window displays 7 obsolescence codes and their values. Double-clicking a code opens the Code Maintenance window where you can change its values. If you've updated the codes, when you exit the Obsolescence Maintenance window the system checks all the codes to make sure that the whole year is covered.

At Year End - The obsolescence code of parts moved remains the same throughout the year. At the end of the financial year, the calculation runs producing a report detailing what the obsolescence code was for each part during that year and what the new code will be at the start of the new financial year.

Related Topics:

Stock Valuation Report.

Part Bulletins

Why:

Bulletins are a way of informing a user who is selling a part that there is a special price or a promotion for that part. When a part with a bulletin is added to an order, a message window is displayed to inform the user about the bulletin.

Where:

From the Part View, highlight the part and select **Part > Open To > Bulletin**. This will display the Part Maintenance window for the selected part, open to the bulletin tab.



*The Part View
button.*

How to Maintain Part Bulletins:

The bulletin tab contains a list of any bulletins already set up for the selected part. Double-clicking a record will display a Bulletin Maintenance window where all the bulletin details are held. Here, certain fields can be updated.

To create a new bulletin, in the bulletin tab select **File > New > Part Bulletin**. This will display a Create Bulletin window. Input the start and expiry dates for the bulletin and how you want it to be published (immediately on screen or as a notifier to the user). If you want the bulletin to apply to all branches in the company, make sure you select the Company check box.

The narrative is the short description of the bulletin that is displayed in the Part Bulletin View. The larger field beneath the narrative is for a longer explanation of the bulletin and appears in the order entry routine.

To delete a bulletin, highlight it in the list and right click then select Delete.

Parts Price Update

Why:

In markets where VIPS is used, prices are constantly being updated automatically. In non-VIPS markets, a new price file is created by the market company and this is then loaded onto the system by the support organisation - usually once a year. Some markets may update their prices via magnetic tape or data file.

Where:

From the Part View, select **Actions > Price Update**. This will display a Price Update window.



*The Part View
button.*

How to Perform Parts Price Update:

In the Price Update window, follow the instructions on screen.

Parts Pricing

Why:

A pricing hierarchy exists within Fusion and can be sequenced according to individual branch pricing requirements.

Where:

From the Part View, select **Actions > Maintain Part Pricing Rules**. This will display a Maintain Part Pricing Rules window.



The Part View
button.

How to Maintain Parts Pricing Rules:

Where multiple branches occur, the parts pricing rules must be set up for each individual branch.

Sequence	Rule Description
10 PRICE SUPP	Price Support selling price used
20 FIXED PRCE	Customer has a fixed price for entered part
30 FIXED DISC	Customer has a fixed discount percentage for entered part
40 FUNC GROUP	Discount has been defined for entered part by function group
50 DSC MATRIX	A discount rate exists for the entered part in the customer discount rate table
60 CUST DISC	Customer Default Discount Percentage used

Performing a Part Enquiry

Why:

Use this function to see parts information and stock availability for a particular part number.

Where:

From the Part View or Parts Order View, select **Actions > Part Enquiry**. This will display a Part Enquiry window.



The Part View
button.

How to Perform Parts Enquiries:

The Parts Enquiry window consists of three sections. One for customer information (so you can create an order from the enquiry), one for individual part information and the other containing a list of selected parts. To see availability and pricing information for a particular part, input the part number and click OK. This will display stock and pricing information (if no customer number has been entered, the prices shown are those for a cash sale).

Select Confirm to add the part to the selections area of the window. Selecting Save will let you save the enquiry (i.e. any parts added to the selections area) and a message will be displayed with a reference number for the saved enquiry.

To retrieve saved enquiries, from the Part Enquiry window select File > Open and a list of saved enquiries will be displayed.

What else would you like to do?

“[Record a Lost Sale](#)” on page 359.

Performing a Part Enquiry Warehouse VolvoVision

Why:

Use this function to see parts information and stock availability for a particular part number.

Where:

From the Part View or Parts Order View, select **Actions > Part Enquiry**. Either selection will display a Part Enquiry window.



The Part View
button.

How to Perform Parts Enquiries on Warehouse VolvoVision:

The Parts Enquiry window consists of three sections. One for customer information (so you can create an order from the enquiry), one for individual part information and the other containing a list of selected parts.

To see availability and pricing information for a particular part, input the part number and click OK. This will display stock and pricing information (if no customer number has been entered, the prices shown are those for a cash sale).

Select Confirm to add the part to the selections area of the window. Selecting Save will let you save the enquiry (i.e. any parts added to the selections area) and a message will be displayed with a reference number for the saved enquiry.

To retrieve saved enquiries, from the Part Enquiry window select File > Open and a list of saved enquiries will be displayed.

Within the Part section you have the ability to place orders via Volvo-vision without leaving GDS.

Access is parameter controlled. When parameter is set at positive two tabs are made available, Warehouse Stock and Warehouse Detail.

Warehouse stock places the enquired part details into the Group Stock section.

Warehouse Detail, when selected, takes user to Warehouse Detail Enquiry screen which is very similar to what is used within the Volvo-vision system.

What else would you like to do?

“[Record a Lost Sale](#)” on page 359.

Price Support

Why:

The price support function gives the market company the opportunity to support dealers in offering special prices or labour costs to all or specific customers of a dealer.

It allows one price to be offered to fleet customers nationally, as well as an additional feature known as 'Free Fit' which allows certain parts to be fitted free of charge.

 **Note!** The price support function must be agreed with the market company before it can be used in Fusion.



The Part View
button.

Where:

From the Part View or Parts Order View, select **Actions > Price Support**. This displays a drop-down sub menu with the options 'Cases', 'Claims' and 'Transfer'.

How to Use Parts Price Support:

The market company creates price support 'cases' in VIPS, which replace part prices with a 'supported price' or give a specified discount. (It's also possible for dealers to create cases in VolvoVision, but the market company is not obliged to accept these.)

All cases have a specific 'rule' which indicates whether the case is for a fleet customer, normal price support, ad hoc or labour costs.

These cases are transmitted from VIPS to Fusion.

When an order is created in Fusion which meets the price support case criteria, a symbol is displayed in the Order Details window. When the order is completed a price support claim is automatically created by Fusion and sent to VIPS.

Once received by the market company, the claims are reviewed and reconciled.

The market company decides how the price support amount is split between themselves and the dealer and this information is transmitted to Fusion from VIPS upon request.

What else would you like to do?

Learn more about "[Free Fit](#)" on page 353.

["Transferring Price Support Data to and from VIPS"](#) on page 364.

["Work with Price Support Cases"](#) on page 367.

["Work with Price Support Claims"](#) on page 368.

Record a Lost Sale

Why:

It is possible to register details of any sales where parts were not available to fulfil the customers' requirements. This information is then used in sales analysis reports.

Where:

From the Part View or Parts Order View, select **Actions > Part Enquiry**. This will open the Part Enquiry window.



*The Part View
button.*

How to Record a Lost Parts Sale:

In the Parts Enquiry window, input the part number and click OK. To register the part as a lost sale, click the 'Lost Sales' button or select **Actions > Lost Sales**.

This will display a Register Lost Sales window. Input the customer number and quantity followed by a reason for the lost sale then click OK.

If the reason entered is because of insufficient stock, the system checks whether the lost sale quantity is greater than the stock balance. If there is sufficient stock, a message will be displayed informing you of this and the system will not register the lost sale.

Lost sales data is held in a work file until the next Lost Sales Report is run.

What else would you like to do?

Print a Lost Sales Report.

Special Prices

Why:

Special prices are created after agreements are made between the dealer and the customer. These agreements can be set as a discount percentage, fixed price or quantity discount and can be applied to customer, customer discount category and department (parts or workshop).

Depending upon parameter settings special prices can be set higher than the Volvo retail price. Where special prices exist at both branch and company, a parameter determines which of the two should take precedence.

Where:

From the Part View, select **Actions > Special Price**. This displays a company view of special prices. From the part view highlight a part, right-click and select **Part > Open > Pricing**. This displays the Parts Master File at the 'pricing' tab, alternatively, double-click a part and select the 'pricing' tab.



The Part View
button.

How to Maintain Special Prices:

To view all special prices, from the part view, select Actions > Special Price. Prices can be viewed, opened for amendment, copied from one part to another or deleted. Where dates have expired these can be purged.

To create a new special price, from the part view, highlight the required part, right click and select part > open > pricing.

Within the pricing tab select File > New > Special Price to display the Create special price window.

Enter required selection criteria. Where fields are left blank the special price affects all branches, customers and customer discount codes. There is an option to exclude customers from a special price offer, to create an exclusion select File > New > Exclusion and input the customer or discount category.

To create a quantity discount select File > New > Quantity Discount and input the quantity and either the discount percentage or fixed price to be applied within the special price.

Once created, special price records can be amended or deleted from both the Company view or from the Pricing Tab in the parts master file against the individual parts.

Supersessions

Why:

Supersession is the term given to the replacement of one part number by a newer number. When selling superseded parts, if there is stock on hand for these part numbers, Fusion will give you the option of selling these first. (Unless they have a consumption code of 2 which indicates there is a quality problem, in which case the stock on hand will be ignored).

Volvo parts are updated automatically via VCOM (this is controlled by a parameter. Local supersessions are those created and maintained at company level. Supersession types include:

- Single - one part number superseding
- Multiple - more than one part number superseding
- Variable - i.e. for more than one model of truck

Where:

From the Part View, select **Actions > Local Supersession**. This will display a Maintain Local Parts Supersessions window. Or from the part view, highlight a part where a supersession is attached this can be identified where a supersession icon is showing against the part, right click select **Open>Replacements**. This will display the supersession details in the parts master file at the replacement tab, alternatively you can double click the part. In the order entry routine, a Replacement Details window is displayed if a superseded part number is added to an order.



The Part View
button.

How to Maintain Parts Supersession:

The Maintain Local Parts Supersessions window displays all supersessions that have been created at company level.

The replacement tab contains a list of any local supersessions already created for a selected part.

To create a new supersession, from the replacement tab select File > New > Create Supersession Group. This will display a window to allow input of a group description.

Select OK to add the group to the list. To add superseding parts, highlight the group, right click and select Add. A Create Supersession Part window is then displayed where part details, quantity and History details can be entered.

Once a replacement group has been created, the group can be added to, deleted or opened for amendment from both the Replacement tab against an individual record or Maintain Local Parts Supersession View.

Surcharge Invoice Proposal

Why:

A surcharge invoice proposal gives details of all outstanding surcharge records - i.e. those where the old units have not been returned before the expiry date.

Where:

From the Part View or Part Order View, select **Actions > Surcharges > Invoice Proposal**. This will display a Work with Surcharge Invoice Proposal window.



*The Part View
button.*

How to Use Surcharge Invoice Proposal:

The Invoice Proposal window lists all surcharge invoice proposals already created. These proposals remain until the option to 'Generate Invoice' is selected or the proposal is deleted.

To create a new proposal select File > New. Alternatively select the “New” icon. This will display a Create Invoice Proposal window. Input the required selection criteria and click OK. Leaving the customer blank creates proposal for all customers.

The proposed surcharges will be listed in the proposal window and can be opened, amended or deleted. This then creates a Surcharge Invoice Proposal Report.

To create invoices for the proposals select Actions > Generate Invoices.

Enter Parts Person ID then select OK. This will generate invoices for all surcharges in the proposal. If there are surcharges that you don't want to invoice they must be deleted from here prior to this action.

A Surcharge Order Creation report is then created.

Related Topics:

“[Surcharges](#)” on page 363.

Surcharges

Why:

A surcharge is only applicable to exchange parts and is the amount payable by the customer for non-return of an old unit. The surcharge amount is specified against the part number in the Parts Master File.

Where:

From the Part View or Part Order View, select **Actions > Surcharges > Details**. This will display a Surcharge Details window.



*The Part View
button.*

How to Set Surcharge for a Part:

The Surcharge Details window lists all surcharges currently outstanding in Fusion. A surcharge is set up against a part by opening the part in the Parts Master File and inputting the value, number of days delay and whether this is a multiple surcharge part in the surcharge section of the 'Sale' tab.

When the part is then sold, the system knows to expect details about the old part that's been returned. The surcharge becomes payable if the old part hasn't been returned within the time period specified in the surcharge section of the Parts Master File.

What else would you like to do?

["Surcharge Invoice Proposal"](#) on page 362.

The Volvo Price File

Why:

The Volvo Price File (also known as (THF 101 File') contains information and prices for every Volvo part. The information in this file is constantly updating Fusion in a dynamic process unseen to the user, through VIPS (Volvo Importer Parts System). In certain countries where VIPS is not used, this automatic update process isn't possible and dealers must update Fusion in a batch process using a Volvo Price File created by the market company.

Where:

The Volvo Price File (also known as (THF 101 File') doesn't have a specific home within Fusion.

How:

In markets that use VIPS, the prices in the Parts Master File are updated dynamically. To enable this function, a call command must be added to the Daily Batch Controls to run daily. See your System Administrator for details.

Related Topics:

["About the Parts Master File"](#) on page 345.

Transferring Price Support Data to and from VIPS

Why:

The price support function gives the market company the opportunity to support dealers in offering special prices or labour costs to all or specific customers of a dealer.

The price support 'cases' are created in VIPS by the market company and transmitted to Fusion. Price support claims are automatically created by Fusion when an order is completed that meets the criteria of a price support case. Price support claims are then transmitted to VIPS from Fusion.

Where:

The Part View or Parts Order View, select **Actions > Price Support > Transfer**. This will display a Price Support - Send/Receive Data window.



The Part View
button.

How to Transfer Price Support Data to and from VIPS:

In the Price Support - Send/Receive Data window select whether you want to send claim details or receive case details.

If the option to send claim details is selected, any price support claims that are at 'pending transmission' status are transmitted and their status changed to 'pending confirmation'.

If the option to receive is selected, any claims with a status of 'pending confirmation' will be updated, along with any 'split' information.

'Split' information refers to how the market company have decided the price support amount should be split between themselves and the dealer.

What else would you like to do?

Learn more about "[Free Fit](#)" on page 353.

"[Work with Price Support Cases](#)" on page 367.

"[Work with Price Support Claims](#)" on page 368.

Update Supersession Details for Associated Parts

Why:

It is possible that an associated part can be superseded. Therefore GDS offers the facility to update the associated part to reflect the supersession (replacement). An associated part that has been superseded will show the Supersession icon.

Where:

From the Part View open the part (Part Maintenance) to be updated at the Associated Parts tab.



*The Part View
button.*

How to Update Supersession Details for Associated Parts:

If the Associated Parts tab shows the Supersession icon, this indicates that the associated part has been superseded. To apply the new (superseding) part, right click and select open, or double click to open the associated part, then right click and select Update Supersession.

When the Supersession Details window opens, right click the group level and select Apply, to change the associated part from the superseded part to the superseding part.

Related Topics:

“[Associated Parts](#)” on page 345.

“[Supersessions](#)” on page 361.

Updating a Part in the Parts Master File

Why:

When parts are received or sold, the information held in the Parts Master File is referenced and updated according to the transactions being processed. However, new information about the part must be entered to ensure that the most up to date information is referenced by Fusion.



*The Part View
button.*

Where:

From the Part View, select the part you want to update then select **Part > Open** and select the area that you want to update. This will display the Parts Maintenance window.

How to Update Parts:

Most fields can be updated in the Parts Maintenance window, with the exception of those relating to stock figures and DSP information.

What else would you like to do?

“[Creating a New Part](#)” on page 349

“[Deleting Parts from the Parts Master File](#)” on page 351.

Related Topics:

“[Associated Parts](#)” on page 345.

“[Creating and Maintaining Parts Kits](#)” on page 350.

“[Obsolescence](#)” on page 354.

“[Part Bulletins](#)” on page 355.

“[Supersessions](#)” on page 361.

Work with Price Support Cases

Why:

The price support function gives the market company the opportunity to support dealers in offering special prices or labour costs to all or specific customers of a dealer.

The price support 'cases' are created in VIPS by the market company and transmitted to Fusion. All cases have a specific 'rule' which indicates whether the case is for a fleet customer, normal price support, ad hoc or labour costs.

The split type for each case indicates how the price support amount will be divided up between the market company and the dealer.

Where:

From the Part View or Part Order View, select **Actions > Price Support > Cases**. This will display a Price Support - View Cases window.



The Part View button.

How to Work With Price Support Cases:

The Price Support - View Cases window lists all price support cases, both current and expired, that have been received from VIPS since the last purge. The

Expired Case symbol  indicates that the case has expired and it is in this window that the rule type is also indicated. There are 4 rule types:

- Rule 1 Fleet Price Support - A specific customer who is buying a specific part at any dealer. This rule offers the opportunity to harmonise the price level for fleet companies throughout the market, for example a contract might have been negotiated between the market company and a customer to agree the price of parts. This will then be sub-contracted to dealers who want to participate. This covers individual part numbers or any parts within a particular discount code.
- Rule 2 Normal Price Support - This rule is set up for each dealer and customer.
- Rule 3 Ad Hoc - This rule can apply to any part number and is used at the discretion of the dealer. (This will use parameter ADH 001 - which is the Ad Hoc Case Number and the Split Id).
- Rule 4 Free-fit - This rule applies to selected parts where the labour is free of charge to the customer. The part being fitted must be attached to a repair order line with an internal payment code.

The split types are set up by VTC. At regular intervals (as decided by the dealer), cases are purged from the system which removes any expired cases. Cases are purged by customer or case number and expiry date. From the Price Support - View Cases window, cases can be opened to see which parts they cover and each part can also be opened to view the split type.

There are two split types; Type 1 (UK market) and Type 2 (Belgian market). Split type 1 is used to calculate how much the dealer will support and how much the market company will support. For example:

Split File:

- Split type ID = 123
- Split type Flag = 1
- Dealer Share before split (%) = 7.5%
- Market Company share of split (%) = 50%
- Dealer refund (% above new Dealer Net) = 0
- Minimum Sales level (New Dealer Net) = 100

What else would you like to do?

Learn more about [“Free Fit”](#) on page 353.

[“Transferring Price Support Data to and from VIPS”](#) on page 364.

[“Work with Price Support Claims”](#) on page 368.

Work with Price Support Claims

Why:

The price support function gives the market company the opportunity to support dealers in offering special prices or labour costs to all or specific customers of a dealer.

Where:

From the Part View or Part Order View, select **Actions > Price Support > Claims**. This will display a Price Support – Work with Claims window.



*The Part View
button.*

How to Work With Price Support Claims:

When an order is created in Fusion which meets the price support case criteria, a symbol is displayed in the Order Details window. When the order is completed a price support claim is automatically created by Fusion and transmitted to VIPS.

When a claim is created its status is ‘pending transmission’. Once transmitted its status is changed to ‘pending confirmation’.

When received into VIPS, the market company review the claim and give it a ‘reason code’. These reason codes indicate to the dealer whether the market company disputes the claim. The reason codes are as follows:

Reason Code	Description
01	claim accepted
20	claim pending because case is in status pending
21	claim pending
53	claim rejected, dealer is not set up for price support
54	claim rejected, support amount doesn't match agreed support amount
55	claim rejected, support price can't be 0
56	claim rejected, quantity can't be 0

57	claim rejected, line number can't be 0
58	claim rejected, invoice number can't be 0
59	claim rejected, retail price can't be 0
60	claim rejected, dealer net can't be 0
61	claim rejected, claim amount can't be 0
62	claim rejected, currency can't be blank
63	claim rejected, currency code doesn't exist
64	claim rejected, split ID doesn't exist
65	claim rejected, sales date can't be 0
66	claim rejected, sales date is not between start date and end date
67	claim rejected, price support rule can't be blank
68	claim rejected, price support rule do not include any valid value
69	claim rejected, case ID doesn't belong to dealer/customer
70	claim rejected, case line doesn't exist
51	claim rejected, case ID doesn't exist
52	claim rejected, dealer doesn't exist
71	claim rejected, selling price doesn't agree with the support price
72	claim rejected by importer
73	claim rejected, incorrect discount code on part number
74	claim rejected, part number doesn't exist
75	claim rejected, part number doesn't exist on the case
76	claim rejected, operation number doesn't exist on the case
77	claim rejected, sales date isn't a valid date
78	claim rejected, selling price is below dealer net
79	claim rejected, customer type isn't valid

What else would you like to do?

Learn more about [“Free Fit”](#) on page 353.

[“Transferring Price Support Data to and from VIPS”](#) on page 364.

[“Work with Price Support Cases”](#) on page 367.

The Supplier Master File

About the Supplier Master File

Why:

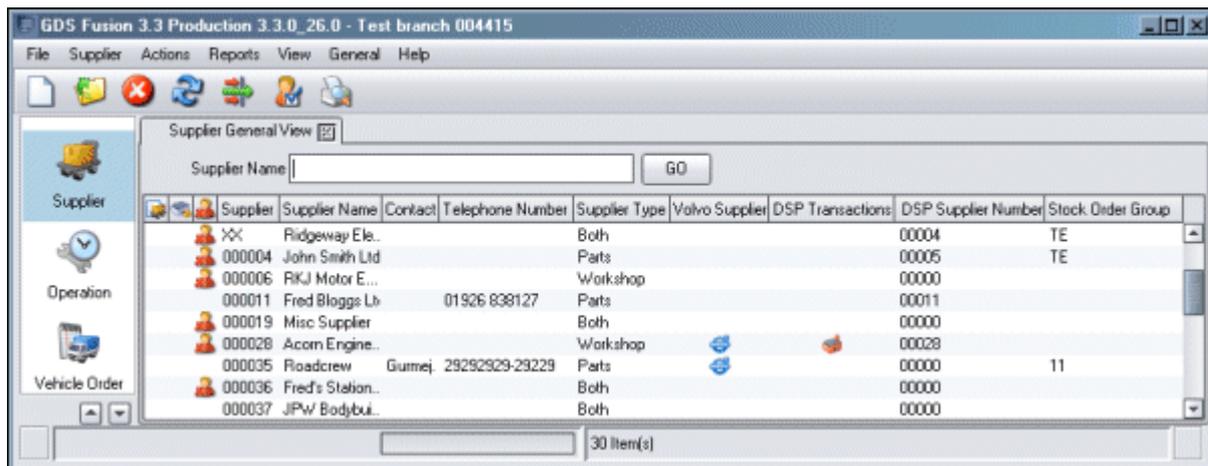
To order and receive stock, all suppliers must be set up in Fusion. The Supplier Master File holds all supplier information, such as address, contact details, DSP information, currency etc.

Where:



The Supplier View button.

Access the Supplier list by clicking the Supplier View button. From here the table shows all recorded Suppliers. The following table describes the meaning of the screens status icons.



Supplier List Description:

Column	Purpose / Description
	Purchase Order: When this icon appears next to a Supplier, there are PurchaseOrders due from the Supplier.
	Goods Receipt Transaction:
	Supplier Cross/Reference: When this icon appears next to a Supplier, there are Parts Cross/References for this Supplier. See " Supplier Cross-Reference Maintenance " on page 377.
Supplier	This is the unique Supplier ID number.
Supplier Name	This is the company name of the Supplier.
Contact	If a contact has been recorded against the supplier it is shown here.

Telephone Number	This shows the suppliers company telephone number.
Supplier Type	This shows the supplier type, this can be Parts, Workshop or Both.
Volvo Supplier	This icon  indicates that the Supplier is a Volvo Supplier. This is set via a check box in the Supplier Maintenance window.
DSP Transaction	This icon  in the column indicates that the Supplier uses DSP Transactions. This is set via a check box in the Supplier Maintenance window.
DSP Supplier Number	This shows the DSP Supplier Number.
Stock Order Group	If the Supplier belongs to a stock order group, the group is shown in this column.

What else would you like to do?

[“Creating a New Supplier”](#) on page 371.

Related Topics:

Creating a Purchase Proposal.

Maintaining a Purchase Proposal.

[“Supplier Cross-Reference Maintenance”](#) on page 377.

Creating a New Supplier

Why:

To order and receive stock, the supplier must be set up in Fusion. The Supplier Master File holds all supplier information, such as address, contact details, DSP information, currency etc.

Where:

To create a new supplier, access the Supplier screens by clicking the Supplier View button and then select the **File>New** command or click the New button. This will display the Supplier Maintenance window.



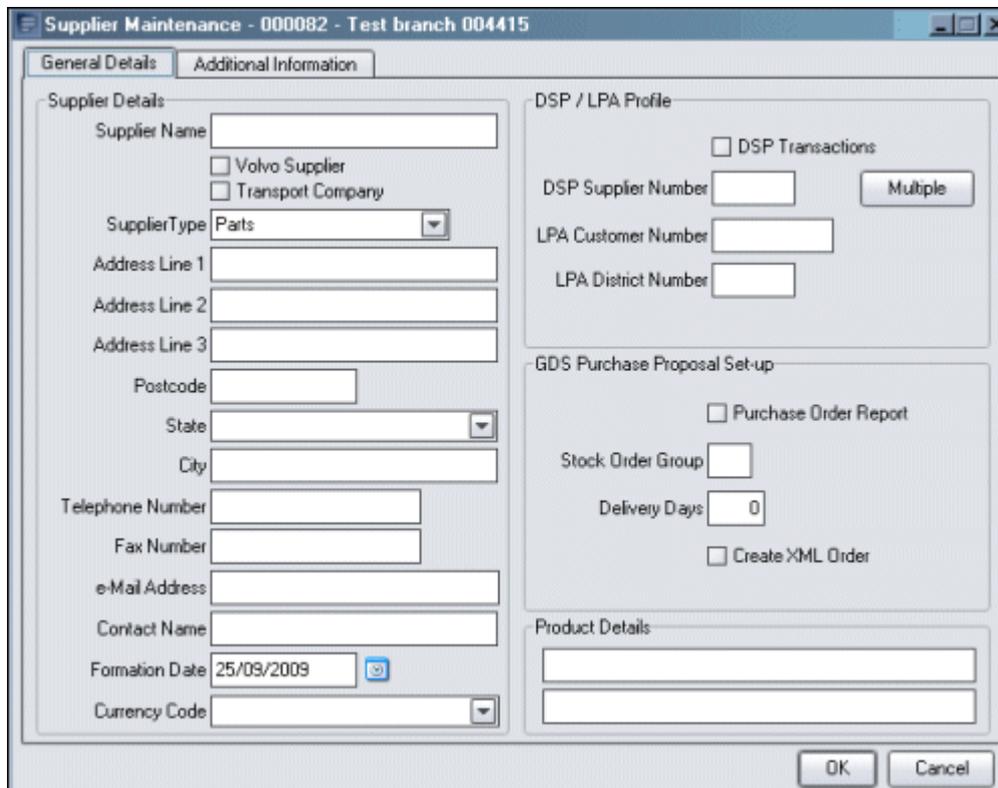
The Supplier View button.



The New button.

How to Create a New Supplier:

Supplier 'General Details' can be viewed and amended within the Supplier Maintenance window. The 'Additional' tab holds a free text field where text notes about the supplier can be entered. Enter information as required in order to define the New Supplier.



What else would you like to do?

[“Creating a Supplier Group”](#) on page 374.

Related Topics:

[“About the Supplier Master File”](#) on page 371.

Creating a Supplier Group

Why:

Suppliers can be grouped together. This is useful because when a purchase proposal is created it can be done for the group rather than each individual supplier.

Where:



The Supplier View button.

To create a new supplier group, access the Supplier screens by clicking the Supplier View button and then select the Supplier that you would like to group

via the **File>Open** command or by clicking the Open button . This will display the Supplier Maintenance window.

How to Create a Supplier Group:

In the Supplier Maintenance window there is a field for 'Stock Order Group'. This is a free format text field where you can input a 'code' that denotes the group which you would like the supplier to belong to. Simply enter your Supplier Group code into this field and do the same with all Suppliers which you want to belong to the same group.

What else would you like to do?

Creating a Purchase Proposal.

Related Topics:

“[About the Supplier Master File](#)” on page 371.

Deleting a Supplier

Why:

Suppliers can be deleted if they cease trading or become unreliable.

Where:

Deletion can be performed from the Supplier List Window. To access the list simply click the Supplier View button.



The Supplier View button.

How to Delete a Supplier:



Note! When a supplier is deleted the system does not check whether there are open orders against that Supplier. You must make sure none exist before deletion.

From the Supplier View, highlight the supplier that you would like to delete & select **Supplier > Delete** from the menu or right-click on the supplier and select the **Delete** command. Alternatively, select the supplier and click the Delete

button . A confirmation window will now appear, there you should select 'Yes' to finish deletion.

Supplier History Enquiry

Why:

Fusion stores information of all purchases and receipts from suppliers, for all parts. This 'supplier history' data is held in the Transaction Inquiry File.

Where:



*The Supplier View
button.*



*The Parts View
button.*

Access the Supplier via the Supplier list by clicking the Supplier View button and then clicking on the Supplier and selecting the **Supplier > Supplier History Enquiry** command.

Access the parts listing via the Parts View button & select a Part. Next select the **Actions > Supplier History Enquiry** command. This will display a Supplier History Enquiry window.

How to Perform Supplier History Enquiries:

In the Supplier History Enquiry window, you can input the selection criteria for the information you want to find. Details are then displayed of all receipts for the entered part or supplier number, up until the date selected.

What else would you like to do?

Check the Supplier via "[The Supplier on Order File](#)" on page 378.

Perform a Transaction Enquiry.

Related Topics:

"[About the Supplier Master File](#)" on page 371.

Supplier Cross-Reference Maintenance

Why:

It is sometimes preferable to obtain parts from non-Volvo suppliers as they may be cheaper. This function allows a cross reference to be created between the non-Volvo suppliers' part number and the Volvo part number.

Where:



The Supplier View button.

Access the Supplier list by clicking the Supplier View button and then clicking on the Supplier and selecting the **Supplier > Supplier/Part X-Ref** command. This will display a Supplier/Part X-Ref window for the selected supplier.

How to Cross-Reference Non Volvo Parts to Volvo Parts:

The Supplier/Part Cross-Reference window lists all part numbers registered against the selected supplier. Each record in the list may be amended or deleted here.

To register a part against the supplier, select **File > New**. This will display a Supplier/Part Cross Reference – new window. Enter the part number you want to register, along with the supplier's part number (if known), any additional information and the supplier's retail price.

How to Print a Suppliers Registered Parts:

To print a list of all parts registered to the selected supplier, select **File > Print**, or right click on the Supplier and select Supplier Cross Reference.



Note! The Supplier Cross Reference number is also displayed in the Parts Master File for those parts that have a cross reference.

Related Topics:

[“About the Supplier Master File”](#) on page 371.

The Supplier on Order File

Why:

The Supplier on Order File lists all orders placed with suppliers, both Volvo and non-Volvo. It is used by the parts department as a reference. From here they can see what parts have been ordered, how and when.

Where:



The Supplier View button.

Access the Supplier via the Supplier list by clicking the Supplier View button and then clicking on the Supplier. Now select the **Actions > Maintain on Order** command. This will display a Supplier on Order window for the selected supplier.

How to Access Parts on Order from Suppliers:

The Supplier on Order window lists all parts on order with suppliers. The view can be sorted and filtered in various ways. The quantity ordered can be amended here if required, this will update the stock on order quantity in the Parts Master File.

What else would you like to do?

Creating a Purchase Proposal.

Goods Receiving.

Related Topics:

The Parts Master File.

The Vehicle Master File

About the Vehicle Master File

Why:

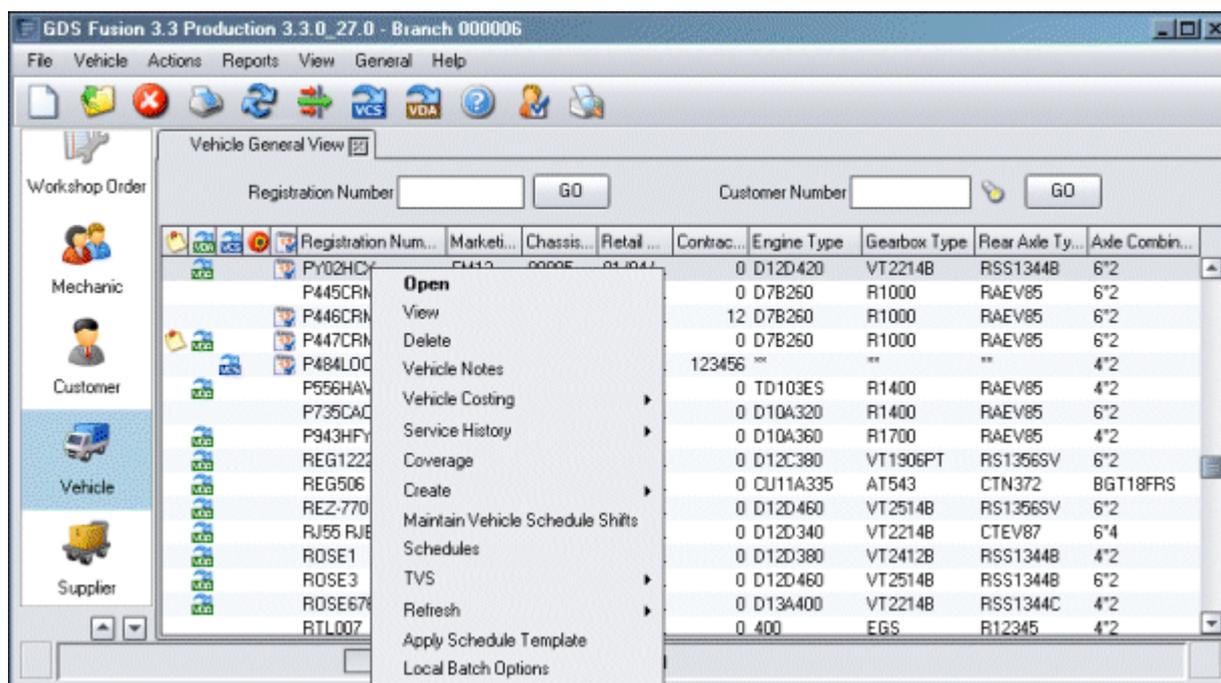
The Vehicle File is where vehicle information is held for all vehicles that have visited the dealer. Newer vehicle details will usually have been downloaded from Volvo central systems, but vehicle details can also be added to the Vehicle File manually for older vehicles or for other franchises.

Where:



The Vehicle View button.

The Vehicle View lists all vehicles of which information is held in the Vehicle File. From the Vehicle View, individual records can be opened for viewing and amendments as well as deletion. Vehicles are listed by registration number and the 'Filter' function can be used to search for a particular vehicle or selection of vehicles.



Opening a vehicle record will display the Vehicle Maintenance window containing vehicle information such as; VIN information, Retail (Delivery) date, pricing rules, warranty and contract details.

If a Volvo vehicle has been added manually to the system with a delivery date greater than 01-01-1984, then the user will be prompted to download the information from Central systems. If the download is not required un-check the VDA box to open the existing record.

From the Vehicle Maintenance window, selecting Actions from the menu bar will display a drop-down menu where you can access details for the selected vehicle relating to vehicle coverage, schedules, Local campaigns, costing, service history, vehicle notes and associated customers. Clicking the Vehicle

Equipment button  displays a notes window where any additional equipment that has been added to the vehicle can be recorded. There is also a vehicle notes

function. Click on the Vehicle Notes button  to display a notes window where information about the vehicle can be added. This notes window can also be accessed and updated from within order entry.

What else would you like to do?

“[Adding a Vehicle to the Vehicle File](#)” on page 381.

“[Deleting a Vehicle from the Vehicle File](#)” on page 385.

“[VCS Refresh](#)” on page 389.

“[VDA Refresh](#)” on page 389.

Related Topics:

[Central Campaigns](#).

[Local Campaigns](#).

“[Coverage](#)” on page 383.

“[Service History](#)” on page 388.

[Schedules](#).

“[Vehicle Costing Enquiry](#)” on page 389.

“[Vehicle Equipment](#)” on page 390.

[Vehicle Notes](#).

Set up:

Based upon parameter ACD 001 a customer icon is displayed in Maintain Vehicle where associated customer details can be recorded and used within the create order process

Adding a Vehicle to the Vehicle File

Why:

Details of Volvo vehicles (and MACK) can be downloaded from central systems to the Vehicle File, so if you have a vehicle that cannot be downloaded and will be a regular visitor to the dealership then you may want to add its details manually. That way, whenever it comes into the workshop Fusion can recall its details automatically.

Where:



The Vehicle View button.



The Workshop Order View button.

Vehicles can be manually added to the Vehicle File from the Vehicle View or downloaded from central systems in the Workshop Order View.

In the Vehicle View, select **File > New** or select the New button .

How to Add: Vehicles to the Vehicle Master File:

In the New Vehicle window, input the vehicle registration number. A Create Vehicle window is then displayed to inform you that Fusion doesn't recognise the registration number. To download the vehicle from Central systems you must input the chassis series, chassis number and customer number and make sure that the VDA box is checked before clicking OK.

To add a vehicle manually, do as explained above but this time un-check the VDA box and input the relevant product code, model and delivery date and then click OK.

The Vehicle Maintenance screen is where the main vehicle data is held. You should try to input as much information as you can in here for vehicles that have been added manually (although some fields relate only to Volvo vehicles).

Once you've entered all the information you can, click Save and Close. Select the 'Refresh' icon and the vehicle you've just added will now appear in the list in the main vehicle view.

What else would you like to do?

Check "[Central Service History](#)" on page 382.

Check [Local Service History](#).

Check Vehicle "[Coverage](#)" on page 383.

Create and Maintain [Schedules](#).

Related Topics:

[Extracting VOSP Data](#).

[Local Campaigns](#).

"[Post External Costs](#)" on page 387.

"[Post External Credits](#)" on page 388.

"[About the Vehicle Master File](#)" on page 379.

"[VCS Refresh](#)" on page 389.

"[VDA Refresh](#)" on page 389.

Set up:

Within the Security Administration option, Create Vehicle Authority is needed.

Based upon parameter ACD 001 a customer icon is displayed in Maintain Vehicle where associated customer details can be recorded and used within the create order process.

Central Service History

Why:

Vehicle repairs to Volvo vehicles are recorded in Volvo central systems. Central Service History Enquiry in Fusion allows the user to interrogate the repair history for any Volvo vehicle.

From repair history details there is a drilldown facility to show the parts and operations involved for each order

Where:

From the Vehicle View, highlight the vehicle you want to investigate and right click, then select **Service History > Central**. Alternatively highlight the vehicle and select **Vehicle > Service History > Central** from the menu bar.



The Vehicle View button.

How to View Vehicle Central Service History:

The Central Service History Summary List shows vehicle and customer details together with a list of repairs in descending date order.

Right click any repair and select Open to view the parts and operation details for the order.

What else would you like to do?

“[Service History](#)” on page 388.

Related Topics:

[Adding an Operation to a Workshop Order.](#)

[Adding Parts to a Workshop Order.](#)

Set up:

Parameters CMM010, CSH001, CSH002, CSH003 and CSH004 specify set-up and defaults used in Central Service History.

Coverage

Why:

Coverage is the term given to the various warranties and contracts that might apply to a vehicle.

Where:



The Vehicle View button.



The Workshop Order View button.

From the Vehicle View highlight the vehicle and select **Vehicle > Coverage** or from within the Workshop Order View, select the Coverage button . This will display a Coverage Details window for the selected vehicle.

How to View Vehicle Warranty and Contract Coverage Information:

The Coverage Details window lists all warranties and contracts set up in the system for the selected vehicle along with a start and expiry date for each.

Warranty and contract information is entered on the Warranty & Contract tab in the Vehicle Maintenance window by right-clicking on the vehicle and selecting open.

Related Topics:

See the chapter - [Parts & Workshop Orders](#).

“[About the Vehicle Master File](#)” on page 379.

Creating a Partial Credit

Why:

When a vehicle has been invoiced you have the option create full or partial credit notes. A full credit note is a complete reversal of the original invoice. A partial credit note allows you to credit selected amounts, for example if you have overcharged the customer. Full credit is not allowed once partial credits have been raised, so you should not use partial credit unless you are sure that a full credit will not be required at a later stage.



*The Vehicle Order
View button.*

Where:

From the Vehicle Order View, highlight the vehicle order you want to work with and select **Vehicle Order > Credit > Partial**. This will display the Select Invoice for Partial Credit window.

How to Create a Partial Credit:

In the Select Invoice for Partial Credit window current invoices for the vehicle order are listed. There may be more than one invoice if the primary was split, or if supplementary invoices have also been raised. Double-click the desired invoice to open the Credit Notes Raised for Invoice window.

The Credit Notes Raised for Invoice window lists any credits that have been previously raised against the selected invoice.

To create a new partial credit, select File > New. This will display a Create Partial Credit window. Here, all invoice items are listed. When the customer you wish to raise the partial credit for is displayed in the customer number field, and click the “Validate” button to ensure their authenticity. Right-click the required items and select ‘Open’ to input the amounts you want to credit.

Click OK to print the partial credit, then choose whether you would like to print any trade-in details on the partial credit, and the number of copies required.

What else would you like to do?

[Creating a Full Credit.](#)

Related Topics:

[Invoicing a Vehicle Order.](#)

Deleting a Vehicle from the Vehicle File

Why:

Vehicles are only ever deleted from the Vehicle File when they are 'scrapped' or exported.

Where:



*The Vehicle View
button.*

From the Vehicle View, highlight the vehicle that you would like to delete and select **Vehicle > Delete** or right-click and select Delete. This will display a confirmation window.

How to Delete Vehicles from the Vehicle Master File:

The confirmation window informs you that schedules and campaign information for the selected vehicle will also be deleted. Select Yes to confirm the deletion.

Related Topics:

“[About the Vehicle Master File](#)” on page 379.

Set up:

To be able to delete a vehicle, the user must be assigned to a role within security maintenance that has permission to 'Delete Vehicle' in the 'Vehicle General' action.

Extracting VOSP Data

Why:

Dealer specific schedule related data, stored within the external system VOSP may be required by the GDS Fusion users. This function allows users to extract the data so that the Fusion schedule file can be updated.

Where:

From the Vehicle View, select **Actions > VOSP extract**.



The Vehicle View button.

How to Extract VOSP Data:

When the option is selected, Fusion initiates contact with VOSP and extracts any records that have been deposited under the current dealer number. Fusion then uses this data to update the Schedule File. A parameter applies a shift pattern to extracted data and a report or email with attachment will be produced advising the user if the extract has been successful or not.

 **Note!** Only records where there is a valid Chassis Series and Chassis Number will be extracted, providing all TST operations also match.

Related Topics:

[Schedules.](#)

[Shift Pattern Enquiry.](#)

Setup:

Control File – Email Control

Set up VOSP report THR788/THP788 with required user list.

Parameters:

Parameter Name	Purpose / Description
VSP002	Create VOSP/GDS Interface report.
VSP003	Current extract deletes any VOSP schedules that do <i>not</i> have an order number assigned. This new parameter will determine if both Local and VOSP records should be deleted. NEG = As today, only VOSP records (sxVOSP= 1) POS = VOSP and Local records.
VSP004	Current extract attempts to 're-align' any manually created schedules with existing VOSP schedules (after the download has been run) based on parameters SEC001 (which checks nnn days before and after the existing non-VOSP schedule for an un-actioned VOSP order - the lowest applicable VOSP schedule date will be used to update the non-VOSP schedule) and SEC002 (which checks nnnnnnnn miles before and after the existing non-VOSP schedule for an un-actioned VOSP order - the lowest applicable VOSP schedule mileage will be used to update the non-VOSP schedule), this new parameter will determine if this processing should apply or not. POS = (Default) will attempt to align records. NEG = Will leave records at current date and mileage

Opening Balance Maintenance

Why:

In order to monitor vehicle costs more accurately opening balances from previous systems should be input into Fusion.

Where:

From the Vehicle View, highlight the vehicle that you would like to work with and select **Vehicle > Vehicle Costing > Opening Balance**. This will display the Maintain Opening Balance window.



The Vehicle View button.

How to Maintain Opening Balance Information:

In the Maintain Opening Balance window input the date from which the balance applies and category then click OK. This will display a Maintain Opening Balance window. Here, the parts, labour and sublet (contract) values should be input along with the amount of labour hours. Click OK to update the vehicle costs.

Related Topics:

“[About the Vehicle Master File](#)” on page 379.

Post External Costs

Why:

Post External Credits allows costs to be posted to a vehicle after an opening balance has been created.

Where:

From the Vehicle View, highlight the vehicle that you would like to work with and select **Vehicle > Vehicle Costing > Post Costs**. This will display a Post External Costs window.



The Vehicle View button.

How to Post External Costs:

In the Post External Costs window input the date, category and external reference (if available) and click OK. Enter the date for which the costs applies and then this will display the Post External Costs window. Here, the parts, labour and sublet (contract) values should be input along with the amount of labour hours and mileage. Click OK to update.

Related Topics:

“[Opening Balance Maintenance](#)” on page 387.

“[About the Vehicle Master File](#)” on page 379.

Post External Credits

Why:

Post External Credits allows credit values to be posted to a vehicle after an opening balance has been created.

Where:

From the Vehicle View, highlight the vehicle that you would like to work with and select Vehicle > Vehicle Costing > Post Credits. This will display a Post External Credits window.



The Vehicle View button.

How to Post External Credits:

In the Post External Credits window input the date, category and external reference (if available) and click OK. Enter the date for which the credit value applies and then this will display the Post External Costs window. Here, the parts, labour and sublet (contract) values should be input along with the amount of labour hours and mileage. Click OK to update.

Related Topics:

“[About the Vehicle Master File](#)” on page 379.

Service History

Why:

Every vehicle repair that is carried out by Volvo dealers is recorded in Fusion. This allows a history profile to be established for each vehicle. Details of previous repairs can be viewed and running costs can be calculated based on the vehicle mileage.

Where:

From the Workshop Order View, select **Order > Service History > Local**. This will display a Service History subset window. Alternatively, from within the order select **Order > Local Service History**.



The Workshop Order View button.

How to View Service History Information:

The Service History subset window displays the selected vehicle's customer number along with a summary of all orders based on Product code and Chassis number (regardless of Registration number and includes both open and invoiced). The total cost however, is based only on invoiced orders. To view the order details, right-click the required order and select Workshop Order Details. This will display a 'read-only' view of the Order Details window.

Select the filter button  to refine the view based on Registration number, payment type, category etc.

What else would you like to do?

[Print a Local Service History Report.](#)

Related Topics:

“[Central Service History](#)” on page 382.

[VST Hours Sold & Taken Report.](#)

Parameters:

Parameter Name	Purpose / Description
RGN001	Include Registration Number in the Local Service History access screen.

VCS Refresh

Why:

If the contract information relating to vehicles held within the Vehicle Master File has changed, selecting the VCS refresh option will ensure that information held in Fusion is updated to match the information in VCS.

Where:



*The Vehicle View
button.*

From the Vehicle View, highlight the vehicle and select **Vehicle > Refresh >**

VCS, or select the VCS Refresh button . Upon clicking, any information relating to the vehicle's contract that has changed will be updated and a message indicates whether the update was successful.

Related Topics:

“[About the Vehicle Master File](#)” on page 379

VDA Refresh

Why:

If the information relating to the vehicles held within the Vehicle File has changed, for example the date of delivery, selecting the VDA Refresh option will ensure that the information held in Fusion is updated to match the information in VDA.

Where:



*The Vehicle View
button.*

From the Vehicle View, highlight the vehicle and select **Vehicle > Refresh >**

VDA, or select the VCS Refresh button . Upon clicking, any information relating to the vehicle that has changed will be updated and a message indicates whether the update was successful.

Related Topics:

“[About the Vehicle Master File](#)” on page 379.

Vehicle Costing Enquiry

Why:

The Vehicle Costing enquiry displays job details for all operations carried out during the contract term for the selected vehicle.

Where:

From the Vehicle View, highlight the vehicle that you would like to work with and select **Vehicle > Service History > Contract**. This will display a Vehicle Costing Details window. This can also be accessed by right-clicking on a vehicle and selecting Service History and Contract.



*The Vehicle View
button.*

How to Perform Vehicle Costing Enquiries:

The Vehicle Costing Details window lists all operations for the selected vehicle. Each operation line can be double-clicked to view the operation in more detail.

Vehicle Equipment Notes

Why:

To display a Vehicle Equipment Notes window so that notes can be recorded against a specific vehicle.

Where:

From the Vehicle View, right-click on the vehicle then select **Vehicle Notes**.



*The Vehicle View
button.*

How to Add Edit & Delete Vehicle Equipment Notes:

Vehicle equipment notes can be created or amended within the Vehicle File and used to record any additional equipment etc, that has been added to the vehicle. Vehicle notes can also be access from within Workshop Order View by clicking on the Vehicle Notes button  on the taskbar.

Related Topics:

“[About the Vehicle Master File](#)” on page 379.

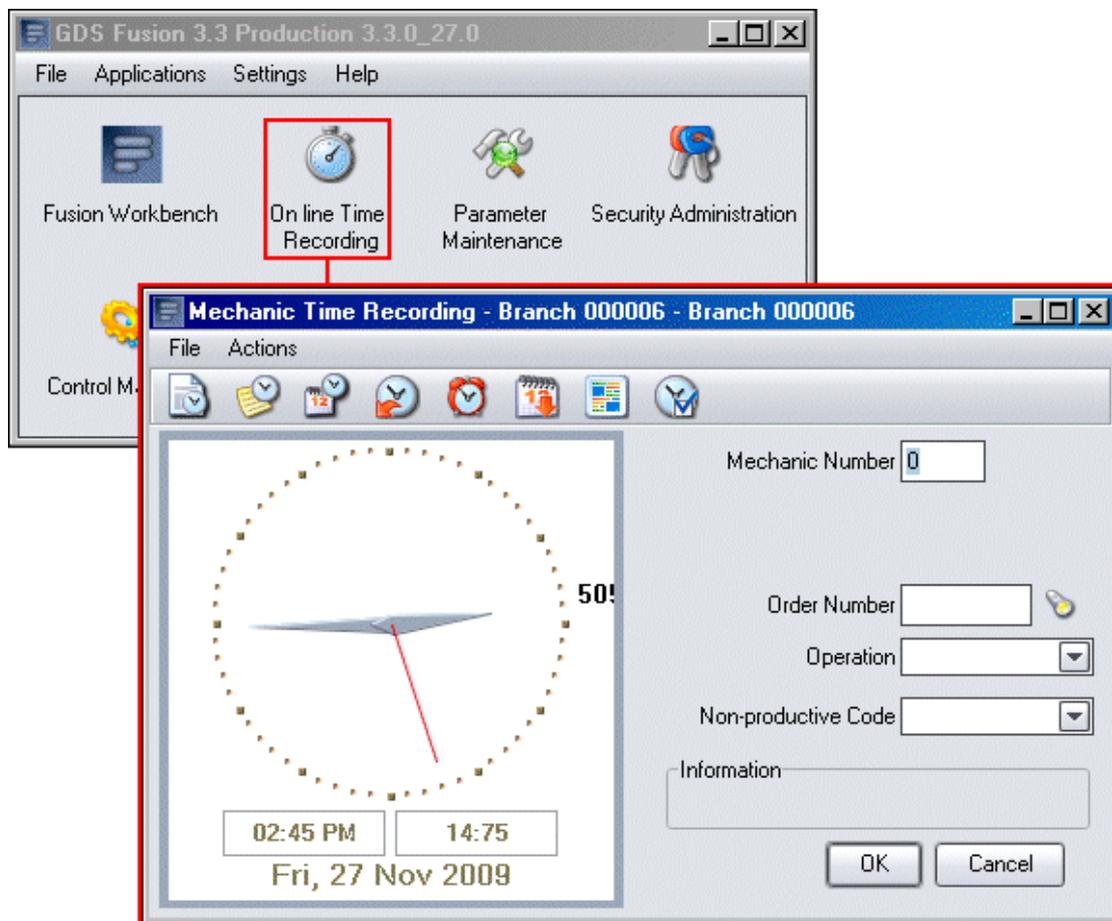
Time Recording

About Time Recording

This chapter describes GDS – Fusion – On line and Manual Time Recording functions.

On line Time Recording;

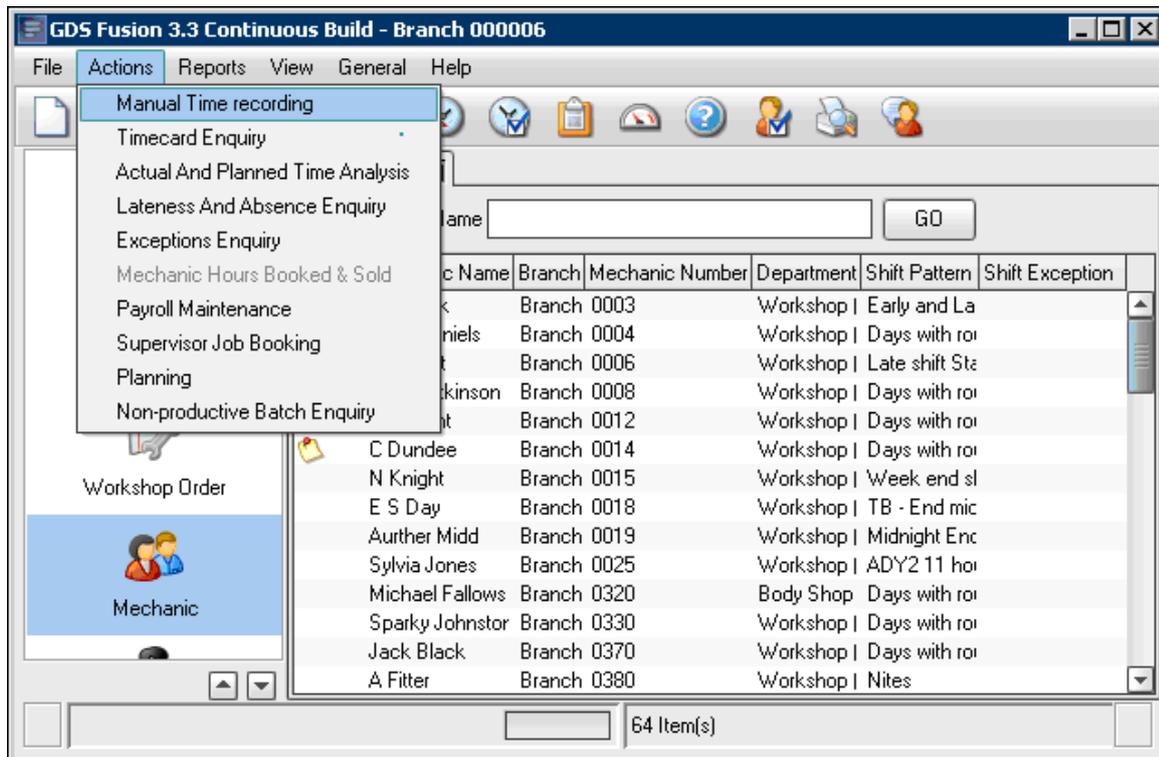
This is accessed directly after logon from the Fusion World window. This should be used by mechanics to monitor their daily activities as and when they happen.



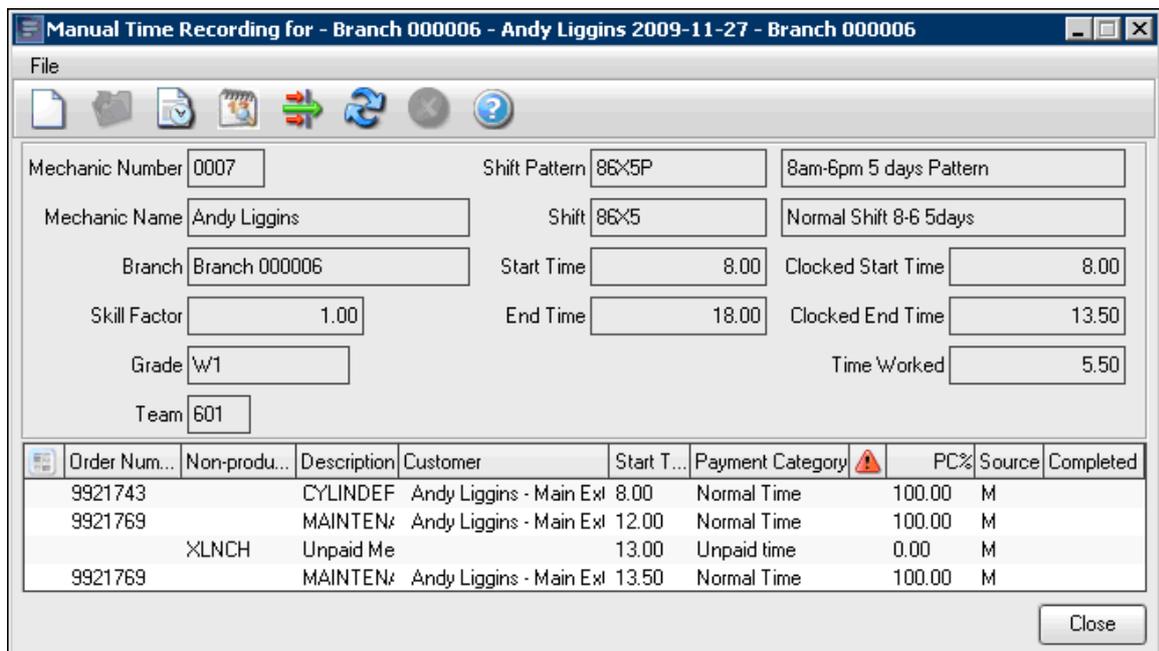
On line time recording requires the entry of the mechanic's current activity, and performs the clocking based on the current system date and time.

Manual Time Recording:

This is available from the Mechanic Workbench via the Actions – Manual Time Recording option. It is intended to be used by a Supervisor as clockings can be made at any time of day for any mechanic.



Manual Time Recording is also available from the Workshop Plan Details by right mouse clicking in the *Actual* area of the available hours bar for a specific mechanic.



Manual Time Recording allows the entry of activities at specific times on specific dates and so is intended for use by a supervisor to monitor and/or amend data created in real time by mechanics using on-line time.

Actual and Planned Time Analysis

Why:

This enquiry shows actual Order/operation clocking's verses Planned Orders/operations by mechanic and date. The records can be viewed to see how accurately the user has followed the plan.



*The Mechanic view
button*

Where:

The Actual and Time planned analysis can be accessed from the Mechanic View by selecting **Mechanic > Actions > Actual and Planned time analysis** and entering a Mechanic Number and Date.

How to Perform Actual and Planned Time Analysis:

The Actual and Planned time analysis window is split into two sections, the top section lists all actual clocking's and the bottom section displays all planned details.

What else would you like to do?

“[Planning](#)” on page 415.

Related Topics:

“[Online Time Recording](#)” on page 410.

Additional Payroll and OT Payments

Why:

A new facility has been introduced whereby information about call out fees, shift premiums etc can be added in On Line time recording, validated by a supervisor and saved to a file. An additional tab will also display any 'Overtime' hours (hours where the payment category is greater than 100%). This information can then be used/transferred to a 3rd Party system at the markets responsibility.

Additional Payroll Payments Maintenance

In Manual Time recording, Additional Payroll payments will be displayed in a drop down list box when adding records. These are the codes that are set up in the file THF 758.

Additional Payment Code	Description	Amount
BONUS	Bonus Payment	10.00
DCALLOUT	Day Time call out premium	30.00
SHIFT PREM	Shift Premiums	20.00
SPECIALPAY	Special Paymeny for add...	7.50
STANDBY	Standby Allowance	50.00
TROLL1	Additional Payment One	69.00
TROLL2	Additional Payment Two	1102.00
WCALLOUT	Weekend call out Premi...	40.50
1CHARGE	Change over payment	11.00

Additional Payments in Online Time Recording

Selecting the Additional Payments icon or selecting *Actions > Additional Payments* will display a list of additional payments for the current month.

Mechanic	Date	Order N.	Additional Payment	Quantity	Amount	Mechanic Notes	Supervisor Notes
0012	17/05...		Day Time Call out	1.00	10.00	Mech 12 Notes	Super 12 Notes 2
0012	24/05...		Shift Premium	2.00	24.00	I don't agree again	Rejected a second time
0012	30/05...	8806522	Travel Allowance	1.00	22.50	Travel from home to breakdown	
0012	31/05...	8806523	Day Time Call out	1.00	10.00	Called out early morning	123456789 123456789 123456789 12...
0012	31/05...	8806524	Standby Payment	1.00	15.00	123456789 123456789 123456789 12...	

To add new payments select the New icon or select **File > New**. Next select an Additional Payment type from the drop down list box and enter Quantity or use the icon to calculate the quantity based on order time spell for current date. The Order Number drop down list box against will display all Orders for current date icon against order number is a refresh option. Click OK to add/accept amendments.

Select record and RMB options are:

Open – Allows records to be amended*

Delete – Delete Record

Notes – Allows additional notes against an Order Payment

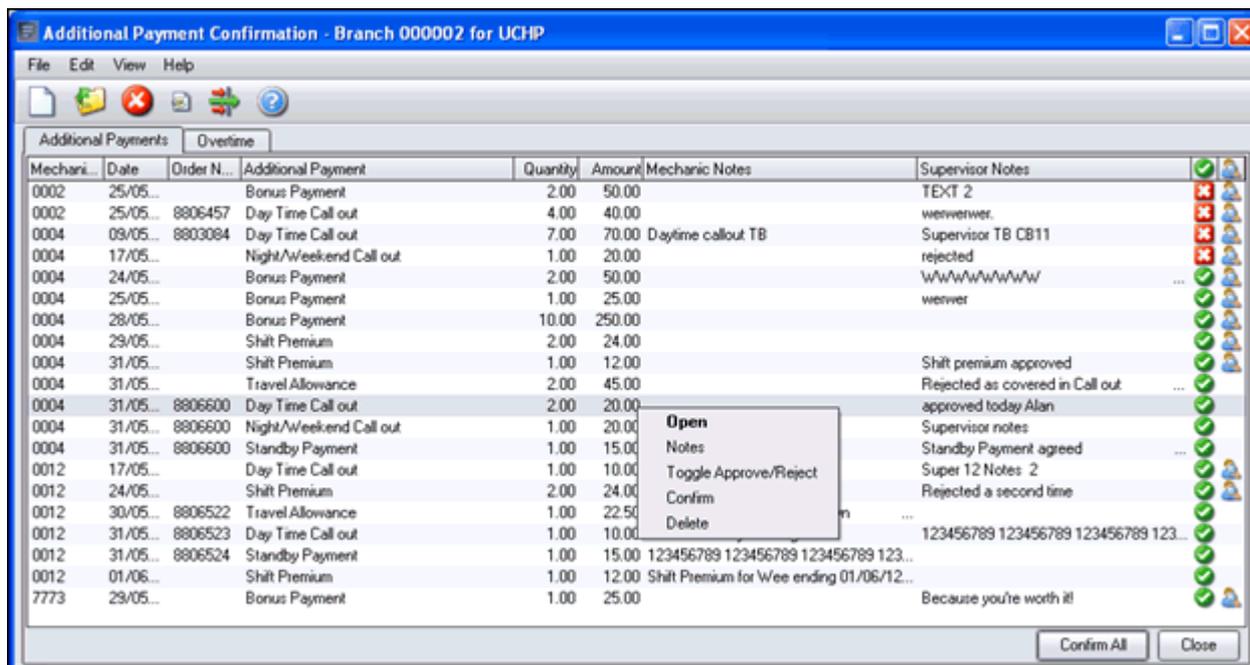
* Where a payment has been rejected, Open and amend will resubmit.

Additional Payments in the Mechanic Work bench

Select **Actions > Additional Payments > Details** (security ID697) and this will display a list of all Mechanics for the branch with their additional payments based on the current month (start date to current date).

Mechanic	Date	Order N.	Additional Payment	Quantity	Amount	Mechanic Notes	Supervisor Notes
0002	25/05...		Bonus Payment	2.00	50.00		TEXT 2
0002	25/05...	8806457	Day Time Call out	4.00	40.00		wetwerwer
0004	09/05...	8803084	Day Time Call out	7.00	70.00	Daytime callout TB	Supervisor TB CB11
0004	17/05...		Night/Week-end Call out	1.00	20.00		rejected
0004	24/05...		Bonus Payment	2.00	50.00		'w'w'w'w'w'w'w'
0004	25/05...		Bonus Payment	1.00	25.00		wetwer
0004	28/05...		Bonus Payment	10.00	250.00		
0004	29/05...		Shift Premium	2.00	24.00		
0004	31/05...		Shift Premium	1.00	12.00		Shift premium approved
0004	31/05...		Travel Allowance	2.00	45.00		Rejected as covered in Call out
0004	31/05...	8806600	Day Time Call out	2.00	20.00		approved today Alan
0004	31/05...	8806600	Night/Week-end Call out	1.00	20.00		Supervisor notes
0004	31/05...	8806600	Standby Payment	1.00	15.00		Standby Payment agreed
0012	17/05...		Day Time Call out	1.00	10.00	Mech 12 Notes	Super 12 Notes 2
0012	24/05...		Shift Premium	2.00	24.00	I don't agree again	Rejected a second time
0012	30/05...	8806522	Travel Allowance	1.00	22.50	Travel from home to breakdown	
0012	31/05...	8806523	Day Time Call out	1.00	10.00	Called out early morning	123456789 123456789 123456789 12...
0012	31/05...	8806524	Standby Payment	1.00	15.00	123456789 123456789 123456789 12...	
0012	01/06...		Shift Premium	1.00	12.00	Shift Premium for Wee ending 01/06/1...	
7773	29/05...		Bonus Payment	1.00	25.00		Because you're worth it!

Selecting **Actions > Additional Payments > Additional payment Confirmation** (security ID702) will display a list of all Mechanics for the branch with their additional payments and overtime based on the current month (start date to current date).

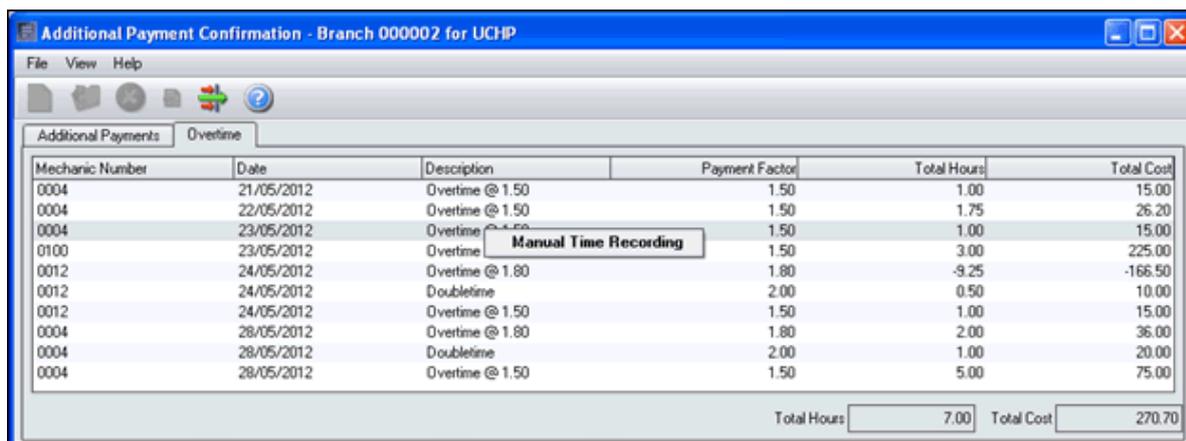


Select record and RMB options are:

- Open – Allows records to be amended (Quantity and Supervisor notes)
- Notes – Allows additional notes against an Order Payment
- Toggle Approved/Rejected – Changes Status icon
- Confirm – Confirms record once changes have been made
- Delete – Delete Record

Note! Double clicking on a line will ‘Open’ a record. Double clicking on a status icon will change the status.

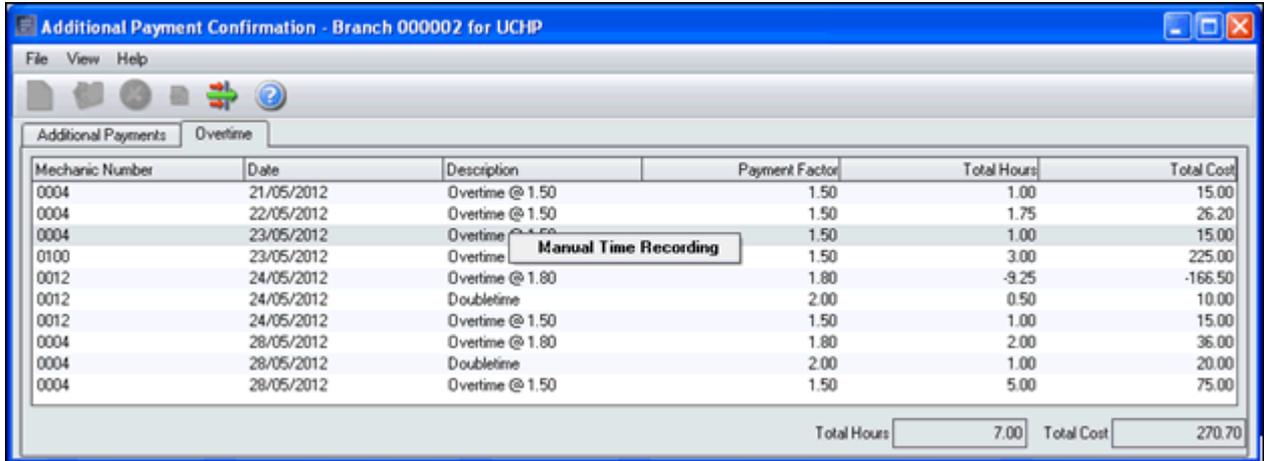
The Overtime tab will display a list of Mechanics and there Overtime (where Payment category is not equal to 100%)



All Data is held in File THF759.

Select record and RMB options are:

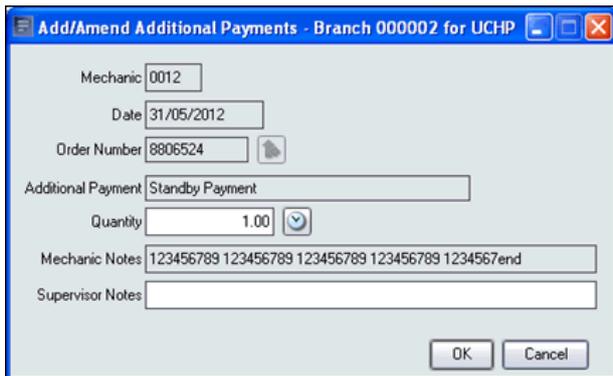
Manual Time recording – This will take you to the selected date where any records can be amended if overtime is not approved.



Mechanic Number	Date	Description	Payment Factor	Total Hours	Total Cost
0004	21/05/2012	Overtime @ 1.50	1.50	1.00	15.00
0004	22/05/2012	Overtime @ 1.50	1.50	1.75	26.20
0004	23/05/2012	Overtime @ 1.50	1.50	1.00	15.00
0100	23/05/2012	Overtime	1.50	3.00	225.00
0012	24/05/2012	Overtime @ 1.80	1.80	-9.25	-166.50
0012	24/05/2012	Doubletime	2.00	0.50	10.00
0012	24/05/2012	Overtime @ 1.50	1.50	1.00	15.00
0004	28/05/2012	Overtime @ 1.80	1.80	2.00	36.00
0004	28/05/2012	Doubletime	2.00	1.00	20.00
0004	28/05/2012	Overtime @ 1.50	1.50	5.00	75.00
				Total Hours	7.00
				Total Cost	270.70

Additional Payments Options in Manual Time Recording

Using the RMB on an Order will allow a single entry to be added or amended.

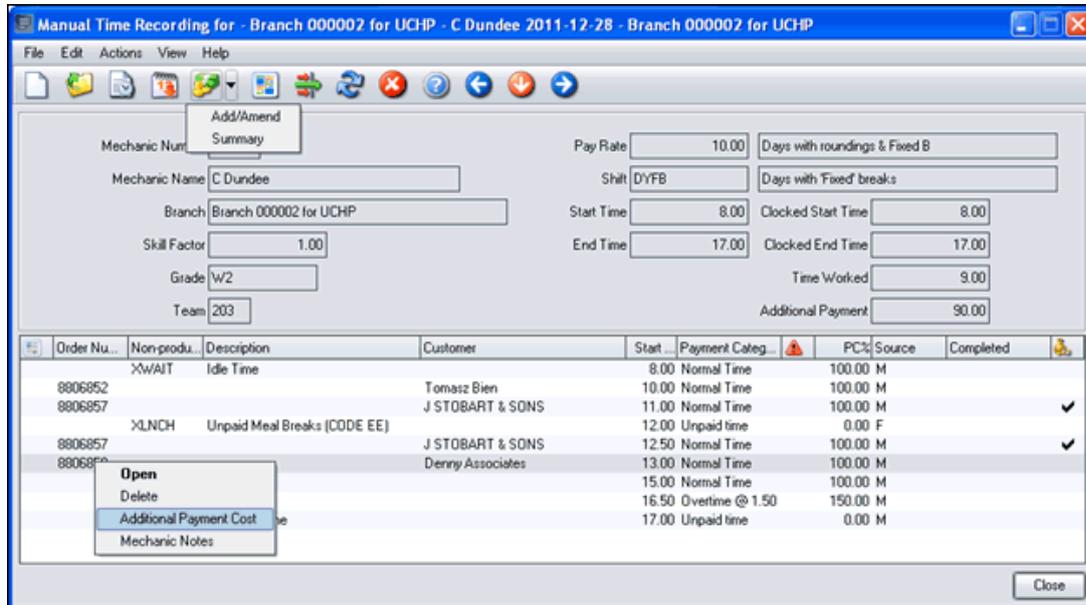


Mechanic: 0012
 Date: 31/05/2012
 Order Number: 8806524
 Additional Payment: Standby Payment
 Quantity: 1.00
 Mechanic Notes: 123456789 123456789 123456789 123456789 1234567end
 Supervisor Notes:
 [OK] [Cancel]

Select Additional Payment type from drop down list box, enter quantity or use the icon to calculate quantity based on order time spell for current date. The drop down list box against Order number will display all Orders for Current date and the icon against Order number is a refresh option.

Additional Payments Icon

Where a Payment is not related to an order select new 'Additional Payments' icon or **Actions >Additional Payments > Add**.

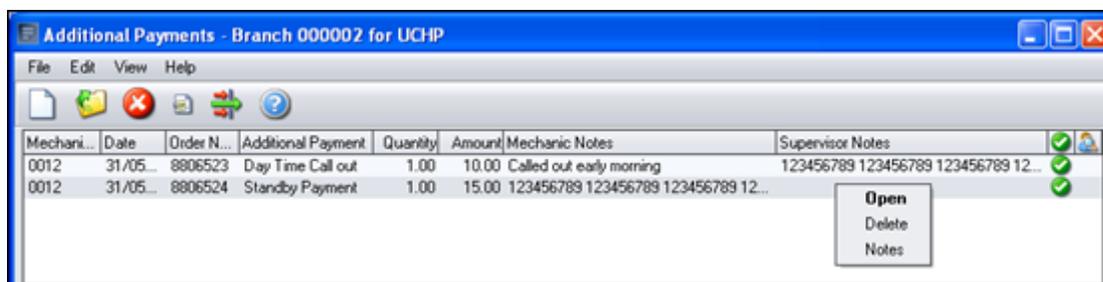


This again will allow a single entry to be added or amended without an Order number.

 **Note!** New Additional Payment summary value is displayed.

Additional Payments Summary

This screen will display all payments and also allow multiple entries to be added with or without an Order number.



Records can also be amended and deleted in this screen.

Additional Payments Set up

New security options for Mechanic Workbench include:

- ID 697 Additional Payment
- ID702 Additional Payment Confirmation

New Control File is THF758 'Additional Payroll Payments'.

Clocks by Payment Category Enquiry

Why:

The Clocking by Payment Category Enquiry displays a summary of the hours clocked against each category. This is useful when checking the paid wage for any given period to ensure that the user has worked his basic core time before any overtime or double time etc. is paid.

Where:



The Mechanic view button.



The Workshop Order View button.

After entering either the Mechanic View or the Workshop Order View, this enquiry can be accessed from three different places:

From the Manual or Online Time Recording windows - select the Clocking by Payment Category icon .

From the Time Card Enquiry window, select **File > Open Clocking by Payment Category**.

These methods will access the Clocking by Payment Category window.

How to Perform Clocks by Payment Category Enquiries:

In the Clocking by Payment Category window, input the required date range and select the enquiry type. Select the 'Recalculate' button to refresh the screen with the new data.

What else would you like to do?

“[Mechanic Timecard Enquiry](#)” on page 403.

Related Topics:

“[Manual Time Recording](#)” on page 400.

“[Online Time Recording](#)” on page 410.

The [Mechanic Master File](#).

“[Time Recording Rules](#)” on page 443.

Set up:

[Payment categories](#) in the Fusion Control Files window.

Manual Time Recording

Why:

Manual time recording allows the mechanics activities to be recorded or amended either at Order or line level, dependant on various parameter settings.

Time recording allows the control of paid wages, job costs efficiency and utilisation of the workshop.

Where:

From the Mechanic View, select **Actions > Manual Time Recording**. This will display a Manual Time Recording window.



*The Mechanic view
button*

How to Perform Manual Time Recording:

In the Manual Time Recording window input a mechanic number, branch and date, then click OK to display the Manual Time Recording window.

To add a new record select File > New, Input an order number (and Operation, if time recording is at line level or against a straight time operation) or a non-productive code, (where no order number is available), then input a start time. If order/line requires a 'Completed flag' then check the 'Completed' box and then click OK. Continue to add records as required and when complete select cancel.

The minutes of the start time are displayed as hundredths and are separated from the hours by a full stop. For example, 05:30 pm would be inputted as 17:50.

To add new records for a different mechanic or date, select the filter icon and amend the criteria accordingly.

To amend an existing record In the Manual Time Recording window for the selected mechanic, open the time record and make the necessary changes. If you would like to amend the start time, then the record has to be deleted and a new one created with the correct start time.

The 'Override Payment Category' allows you to change the payment category created by the system, based upon the user's clocking pattern.

The 'Completed' option allows either the Order or operation to be flagged as completed, this indicator will prevent an order being invoiced if not actioned based on a parameter

To delete a time record in the Time Recording window for the selected mechanic, highlight the record, right-click then select delete.



Note! System generated break records cannot be deleted where an 'XFNSH' record exists and these should be amended rather deleted

What else would you like to do?

“[Clocks by Payment Category Enquiry](#)” on page 399.

“[Online Time Recording](#)” on page 410.

Related Topics:

[“Time Recording Rules”](#) on page 443.

[“Additional Payroll and OT Payments”](#) on page 394.

[Mechanic Master File.](#)

[Mechanic Exceptions](#)

Set up:

NPC parameters define the language-specific non-productive codes used throughout time recording for categories of non-productive time like paid sickness, unpaid absence and holiday.

Parameter REC201 controls addition of a completed flag at Order or Operation level. Option not used. Completed flag at Order level. Completed flag at Line level.

Parameter ONA002 allows time to be booked against the order or line (to allow time recording against Straight time operations only).

Parameter TIM006 determines if ‘fixed’ breaks are inserted when an XFNSH is added.

Mechanic Bar Code List

Why:

For markets that use Bar coding, this report contains a list of bar codes for all mechanic numbers which can then be used to make up badges.

Where:

From the Mechanic View, select **Reports > Print Mechanic Bar Code List**. There is no selection criteria for this report, it is submitted for print immediately.



*The Mechanic view
button*



Note! Bar coding is activated per branch, so mechanic details will only be printed for ‘active’ bar coded branches.

What else would you like to do?

[“Time Recording Using Barcodes”](#) on page 447.

Related Topics:

[“Clocks by Payment Category Enquiry”](#) on page 399.

[“Mechanic Timecard Enquiry”](#) on page 403.

Set up:

Branch parameter BOH controls the use of bar codes on job cards and for recording time.

Mechanic Hours Booked and Sold Enquiry

Why:

This enquiry shows mechanic efficiency per operation, for a specified date range. The efficiency can be displayed based on sold (invoice) time or TST time.



Note! This enquiry is only valid when time is recorded at line level.



*The Mechanic view
button*

Where:

From the Mechanic View, select **Actions > Mechanic Hours Booked and Sold**. This will display an Hours Booked/Sold Filter window.

How to Perform Mechanic Hours Booked and Sold Enquiries:

In the Hours Booked/Sold Filter window input the required selection criteria.

The Mechanic Hours Booked and Sold Enquiry window then lists all the selected mechanic's invoiced records that match the search criteria. Each record will display the total time sold per operation and the amount credited to each individual mechanic along with his booked and adjusted hours, and any variance.

What else would you like to do?

“[Mechanic Timecard Enquiry](#)” on page 403.

Related Topics:

“[Online Time Recording](#)” on page 410.

Set up:

Parameter ONA 001 controls whether mechanic time is recorded at order or line level.

Mechanic Timecard Enquiry

Why:

This enquiry shows by mechanic and date, the start, finish and worked spell times. The records can also be viewed in detail to see the job details.

Where:



*The Mechanic view
button*

The timecard enquiry function can be accessed from the Mechanic View by selecting **Mechanic > Timecard Enquiry**, from the Mechanic Maintenance

window by selecting the Timecard Enquiry icon , from the Mechanic View by selecting **Actions > Timecard Enquiry**, or from On-line time recording by selecting the Timecard Enquiry icon. Whatever selection is made, a Timecard Enquiry Summary window is displayed.

How to Perform Mechanic Timecard Enquiries:

If the enquiry has been accessed from Actions > Timecard Enquiry, then a blank Timecard Enquiry Summary window is displayed and you'll need to use the filter function to access the particular records you need.

If the enquiry has been accessed by the other methods, then the Timecard Enquiry Summary window lists all timecard records for the selected mechanic. For each of these records you can access the timecard details and details of the clocking by payment category by highlighting the record and right-clicking.

The Timecard Enquiry Details window lists all operation and exception codes recorded for the selected mechanic on the selected date.

The Clocking by Payment Category window displays a summary of each payment category recorded for the selected mechanic on the selected date(s).

What else would you like to do?

[“Manual Time Recording”](#) on page 400.

Related Topics:

[Assign Mechanic Exceptions](#) .

[“Online Time Recording”](#) on page 410.

[“Time Recording Rules”](#) on page 443.

Multiple Core Times

Why:

In some markets (e.g. Sweden) dealers are required by law to pay mechanics an additional fee for working hours that are deemed unpleasant (before 07:00 and after 18:00), even if they fall within the mechanic's normal working time. This can mean two or more different rates of pay (up to five) being applied in one normal shift. Rounding is still applied to the end of shift and automatic fixed breaks are applied in the usual way.

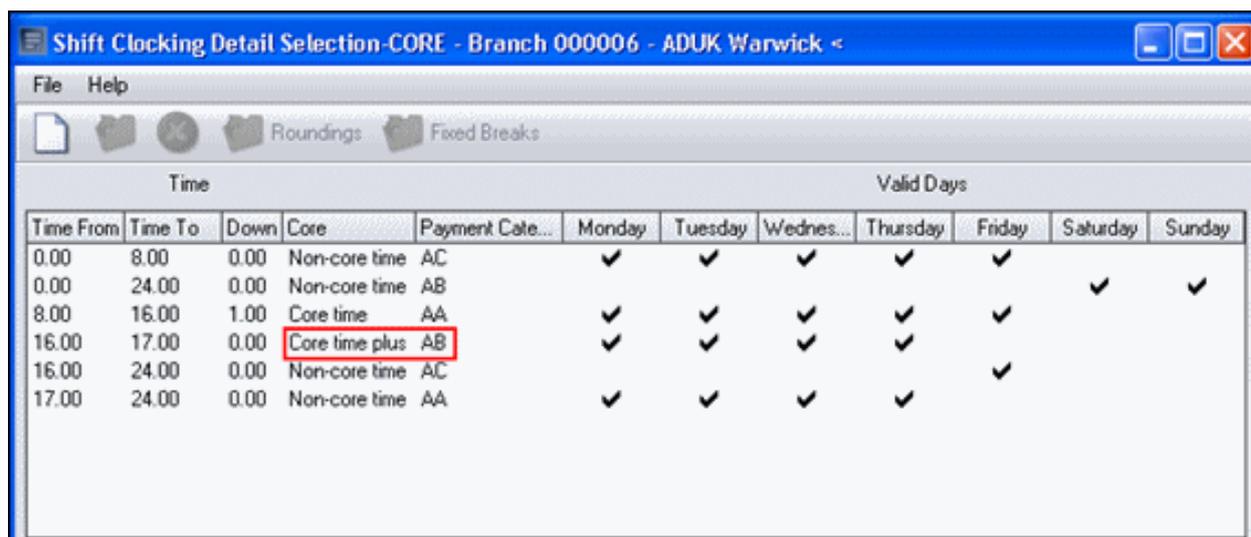
The concept of multiple core times within one shift has been introduced into GDS mechanic shift patterns. This functionality replaces the concept of core time plus which is no longer applicable in Fusion 3.3.

The scope of this change includes the following areas of GDS; mechanic shift patterns, mechanic reporting, time recording, pay rates and workshop planning (available hours).

The following sub topics explain aspects of Multiple Core Times in relation to Fusion.

Multiple Core Times and Shift Clocking

Previous functionality allowed 'core time plus' to be created in a Shift Clocking (Control Files > Shift Clocking) to allow an additional pay category (payment category AB below) as well as core time (AA below):



Time		Valid Days									
Time From	Time To	Down	Core	Payment Cate...	Monday	Tuesday	Wednes...	Thursday	Friday	Saturday	Sunday
0.00	8.00	0.00	Non-core time	AC	✓	✓	✓	✓	✓		
0.00	24.00	0.00	Non-core time	AB						✓	✓
8.00	16.00	1.00	Core time	AA	✓	✓	✓	✓	✓		
16.00	17.00	0.00	Core time plus	AB	✓	✓	✓	✓			
16.00	24.00	0.00	Non-core time	AC					✓		
17.00	24.00	0.00	Non-core time	AA	✓	✓	✓	✓			

Multiple core time functionality allows many core time entries per shift to allow multiple pay rates per shift within a mechanic's normal 'basic hours':

Shift Clocking Detail Selection-PDMC - Branch 000002 for UCHP

File Help

Roundings Fixed Breaks

Time				Valid Days							
Time From	Time To	Down	Core	Payment Cate...	Monday	Tuesday	Wednes...	Thursday	Friday	Saturday	Sunday
0.00	7.00	0.00	Non-core time	AB	✓	✓	✓	✓	✓		
0.00	24.00	0.00	Non-core time	EE						✓	✓
7.00	8.00	0.00	Core time	AE	✓	✓	✓	✓	✓		
8.00	14.00	0.75	Core time	AA	✓	✓	✓	✓	✓		
14.00	15.00	0.00	Core time	AE	✓	✓	✓	✓	✓		
15.00	16.00	0.00	Core time	AB	✓	✓	✓	✓	✓		
16.00	24.00	0.00	Non-core time	AD	✓	✓	✓	✓	✓		

Shift Clocking Detail maintenance has been amended to replace the core / core time plus dropdown list with a check box:

Shift Clocking Details - Branch 00000...

Shift Code: PDMC

Time From: 8.00

Time To: 14.00

Down: 0.75

Core

Payment Category: Normal Time

Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday

OK Cancel

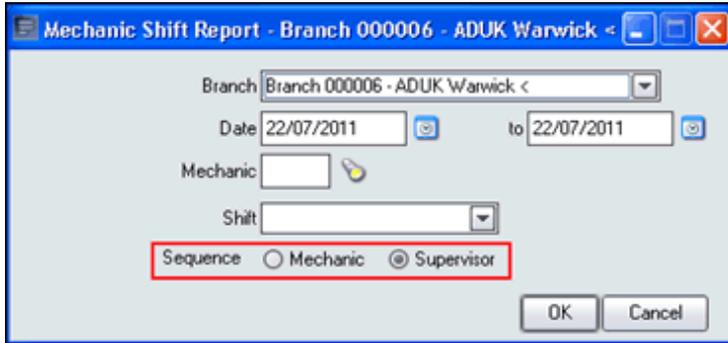
Validation of shift clocking patterns has been amended to ensure that core times are consecutive (there can be no 'gaps' between core time entries). Also start time rounding can only be entered against the first entry in a core period and end time rounding can only be entered against the last entry in a core period. Downtime rounding can only be entered against a record which includes downtime.

Existing auto clock-off (XFNSH) functionality functions with multiple core time entries so that mechanics who fail to clock off are automatically clocked off at the end of the last core time of their shift.

A mechanic with multiple core times and a holiday shift exception is be paid by the payroll interface according to their clocking including shift allowance for the additional core times. Also holiday pay will be paid as if the mechanic had worked their normal basic hours, including multiple core times. So if a holiday shift exception is added without any start and end time, then the holiday hours will be the sum of core times on this day. If a mechanic's basic hours are made up of multiple core times, then he or she will be paid for the same number of hours, including multiple core times, for a day of paid holiday.

Multiple Core Times and Reporting

The Mechanic Shift Report (**Mechanic > Reports > Mechanic Shift Report**) shows **from** and **to** shift hours including all core time at the beginning and end of shift for both the mechanic (THP847) and supervisor (THP848) sequence:



Mechanic Shift Report - Branch 000006 - ADUK Warwick <

Branch: Branch 000006 - ADUK Warwick <

Date: 22/07/2011 to 22/07/2011

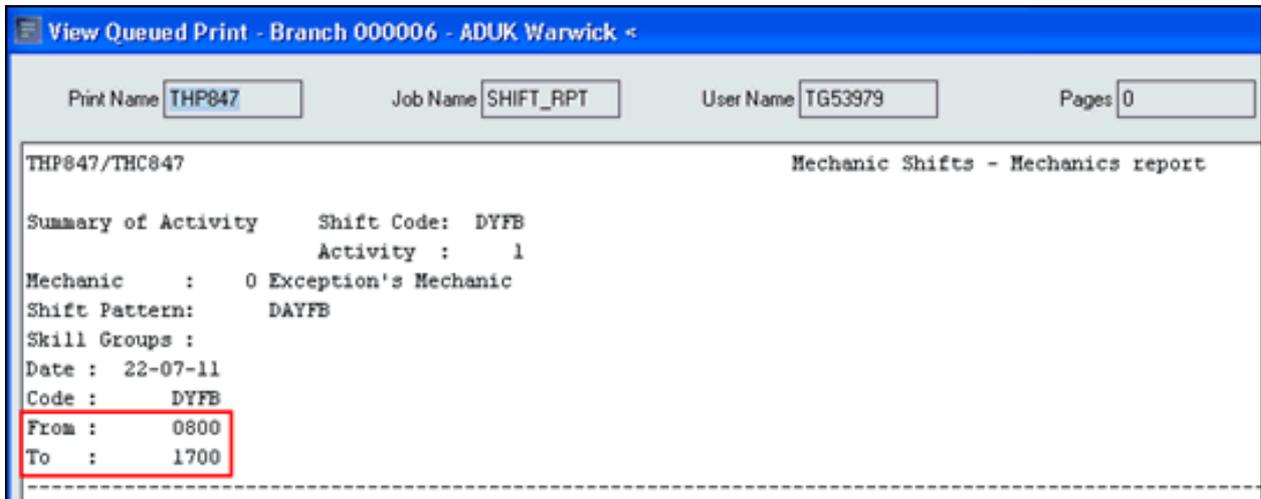
Mechanic: []

Shift: []

Sequence: Mechanic Supervisor

OK Cancel

Mechanic sequence:



View Queued Print - Branch 000006 - ADUK Warwick <

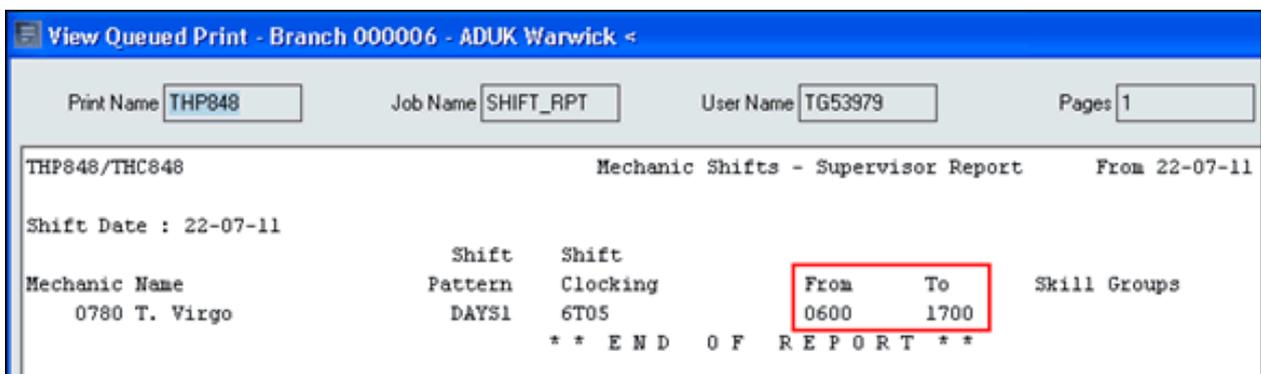
Print Name: THP847 Job Name: SHIFT_RPT User Name: TG53979 Pages: 0

THP847/THC847 Mechanic Shifts - Mechanics report

Summary of Activity Shift Code: DYFB
 Activity : 1

Mechanic : 0 Exception's Mechanic
 Shift Pattern: DAYFB
 Skill Groups :
 Date : 22-07-11
 Code : DYFB
 From : 0800
 To : 1700

Supervisor sequence:



View Queued Print - Branch 000006 - ADUK Warwick <

Print Name: THP848 Job Name: SHIFT_RPT User Name: TG53979 Pages: 1

THP848/THC848 Mechanic Shifts - Supervisor Report From 22-07-11

Shift Date : 22-07-11

Mechanic Name	Shift Pattern	Shift Clocking	From	To	Skill Groups
0780 T. Virgo	DAYS1	6T05	0600	1700	

** END OF REPORT **

Manual Time Recording shows from and to shift hours including all core time at the beginning and end of shift:

Manual Time Recording for - Branch 000006 - ADUK Warwick < - T. Virgo - *** 2011-07-22 to 20

File Actions

Mechanic Number: 0780 Pay Rate: DAYS1
 Mechanic Name: T. Virgo Shift: 6T05
 Branch: Branch 000006 - ADUK Warwick < Start Time: 6.00
 Skill Factor: 1.00 End Time: 17.00

Shift Pattern Enquiry (Mechanic > RMK > Shift Pattern Enquiry) shows from and to shift hours including all core time at the beginning and end of shift:

Shift Pattern Enquiry - 0780 T. Virgo - Branch 000006 - ADUK

Date: 22/07/2011 GO

Date	Shift
22/07/2011	(6T05)6am to 5pm - From:06.00 To:17.00
23/07/2011	*** Non Working Day.***
24/07/2011	*** Non Working Day.***

Example of shift set up with five core time entries:

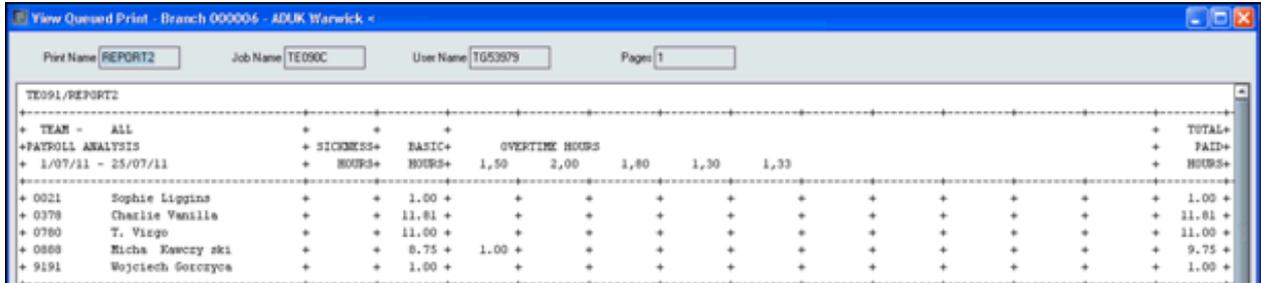
Skift detaljer för-0B5 - 41 Last & Buss - Uppsala

Tim					Gäller dagar						
Tid från	Tid till	Rast	Normaltid	Lönekategori	Måndag	Tisdag	Onsdag	Torsdag	Fredag	Lördag	Söndag
0.00	2.00	0.00	Bastid	OE		✓	✓	✓	✓	✓	
0.00	6.00	0.00	Ej Bastid	CH	✓	✓	✓	✓	✓	✓	
0.00	6.00	0.00	Ej Bastid	CK		✓	✓	✓	✓		✓
2.00	6.00	0.00	Ej Bastid	CH		✓	✓	✓	✓		
2.00	6.00	0.00	Ej Bastid	CK		✓	✓	✓	✓		
6.00	16.00	0.00	Ej Bastid	CF	✓	✓	✓	✓	✓		
6.00	16.00	0.00	Ej Bastid	CJ	✓	✓	✓	✓	✓		
16.00	18.00	0.00	Bastid	BL	✓	✓	✓	✓	✓		
16.00	24.00	0.00	Ej Bastid	CL	✓	✓	✓	✓	✓	✓	✓
18.00	20.00	0.00	Bastid utök.ed	OB	✓	✓	✓	✓	✓		
20.00	22.00	0.00	Bastid utök.ed	OC	✓	✓	✓	✓	✓		
22.00	24.00	0.00	Bastid utök.ed	OD	✓	✓	✓	✓	✓		

core time

Multiple Core Times and Points to Note

The payroll report (TE091) will report core time with pay rates that differ from the basic rate in the overtime columns (1.5, 1.8, 2.0 etc.). This differs from the original assumption that all core time would be reported in the basic hours column. See example payroll report below:



YEAR	PAYROLL ANALYSIS	SICKNESS HOURS	BASIC HOURS	OVERTIME HOURS	TOTAL PAID HOURS
1/07/11 - 25/07/11				1,50 2,00 1,80 1,30 1,33	
0021	Sophie Higgins	1.00			1.00
0378	Charlie Vanilla	11.81			11.81
0780	T. Virgo	11.00			11.00
0888	Micha Kawczy ski	8.75	1.00		9.75
9191	Wojciech Gortczyca	1.00			1.00

For initial set up, conversion program (CNV499) converts any 'core +' records to multiple core time entries and any end time rounding is moved to the last record in a core group.

Non Productive Batch Enquiry

Why:

This enquiry displays details, by non-productive code, for all non-productive hours transferred to the financial system via THF151 either via the daily batch or invoiced (where a legal document might be required).

Where:

From either the Workshop Order View or Mechanic View, select **Actions > Non-Productive Batch Enquiry**. This will display a Filter window.



The Workshop Order View button.



The Mechanic view button

How to Perform Non Productive Batch Enquiries:

In the Filter window input the non-productive code that you would like to enquire about, or leave blank for all. Select the invoice date and/or the invoice number then click OK. A Non-Productive Batch Summary window is then displayed showing the invoice number (where applicable), date and the total hours booked and their value.

Select the print icon to have this information printed.

Double-clicking to open any of the non-productive time records displays a Non-Productive Batch Details window. Here, all mechanics with time booked against the non-productive code for the selected date are displayed.

What else would you like to do?

“[Manual Time Recording](#)” on page 400.

Related Topics:

“[Time Recording Rules](#)” on page 443.

Online Time Recording

Why:

Online Time Recording allows mechanics to record their activities via a terminal or scanner, at order or line level, depending upon parameter ONA 001. See the parameters at the end of this topic. If there is no order for a mechanic to clock onto, the system holds a list of codes that describe downtime where the mechanic must choose one. Clocking onto an activity effectively 'ends' the last activity, the only time clocking 'off' is required is at lunch or the end of the day.

Where:

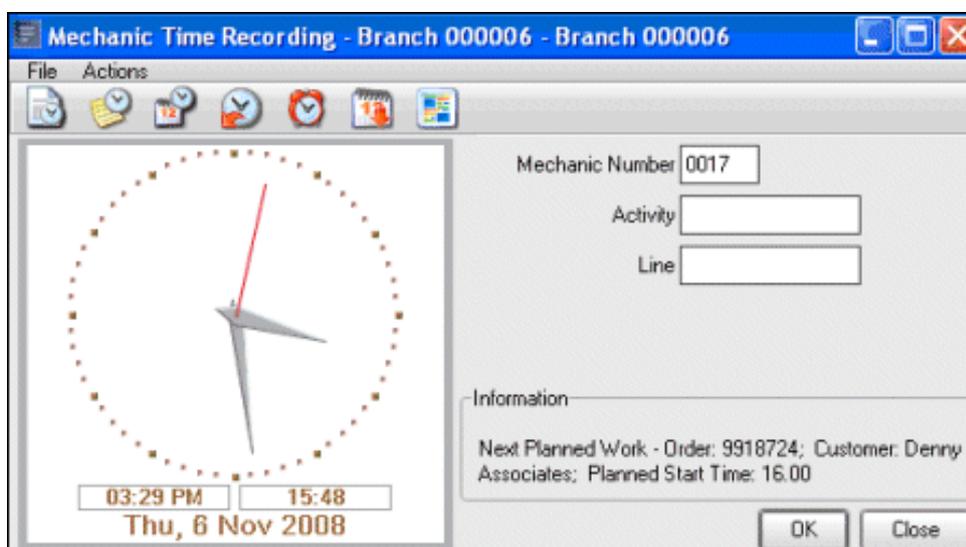


The Mechanic view
button

From the Mechanic View, select **Actions > Online Time Recording** to display the Mechanic Time Recording window. If your company uses access codes, Input your access code to proceed to the Mechanic Time Recording window.

How to Perform Online Time Recording:

If an access code was entered, then the **Mechanic Number** associated with this code will be established in the Mechanic Time Recording window. Once the mechanic number has been entered, either a non-productive code or an order number should be entered. If time recording is at line level, or a recording is required against straight time, then an operation number will also be required. When confirmation that an Order or Operation has been completed a dialog box will be displayed listing previous Order/Operations that have not been flagged as completed. Click **OK** and a message will be displayed confirming the non-productive code or order clocked onto, along with a date and time. When planning is active (parameter PLN003 is positive) and the user enters the mechanic number, a message will display in the **information area** to suggest the next planned order/operation to clock onto. In the example below mechanic 17 is shown an information message about work planned to start at 16:00. Once the user has clocked on, the suggested next order/operation message is replaced with the current clocking details message.



 **Note!** The information messages shown here relate to the Workshop Plan Details screen, see "[Planning](#)" on page 415.

What else would you like to do?

Learn about “[Manual Time Recording](#)” on page 400.

Review “[Time Recording Rules](#)” on page 443.

Learn about “[Additional Payments in Online Time Recording](#)” on page 394.

Related Topics:

The [Mechanic Master File](#).

[Exceptions](#).

Parameters:

Parameter Name	Purpose / Description
REC 701	This is used to determine if access control is set up. If yes, access codes are required before time recording can be accessed.
ONA 001	This controls if time recording is done at order line level.
ONA 002	This allows time to be booked against the order or line (to allow time recording against Straight time operations only).
REC 201	This controls if a completed flag is required (0 = not used, 1 = used at order level, 2 = used at line level).
BOH	At Branch Level, this controls if barcodes are used in online time recording.
REC0 & REC1	At Branch Level, this determines the time difference from AS400 time to region time
TIM 006	This determines if ‘fixed’ breaks are inserted when XFNSH is added. A new scheduler process can run in the batch to insert breaks and an ‘XFNSH’ record at the end of the day where a mechanic has forgotten to clock off.  Note! This will only create an XFNSH record where the last record is before the shift end time.
PLN 003	This activates the interface to Fusion Workshop Planning.



Order Time Taken

Why:

The Order Time Taken enquiry allows you to view the total hours booked and sold per order and/or operation (where time recording is at operation level).

Where:

From the Workshop Order View, highlight the order that you would like to enquire about and select **Order > Order Time Taken** and then **Summary** or **Detail**. This will then display an Order Time taken window.



The workshop order view button

How to View Order Time Taken:

In the Order Time Taken window, if time recording is at order level then only the total sold time will be displayed. Select Actions > Order Time Taken Details to view total booked (spell) hours.

In the Order Time Taken window, if time recording is at line level then both the total sold time and total spell will be displayed in summary and per operation. Each operation can be opened to view more details.

Select Actions > Order Time Taken Details to view total booked (spell) hours per operation. If time recording against straight time operations is active (ONA002 = POS) then the screen will display a combination of booked time for the order and booked time against lines. In the drop down list box 'Display Type' will allow a selection based on Operations only.

What else would you like to do?

[“Mechanic Hours Booked and Sold Enquiry”](#) on page 402.

Related Topics:

[“Manual Time Recording”](#) on page 400.

[“Online Time Recording”](#) on page 410.

Set up:

Parameter ONA 001 controls whether mechanic time is recorded at order or line level. Parameter ONA 002 controls whether time recording can be applied to straight time line level in conjunction with Order.



Note! Order Time Taken > Summary will not be active if either ONA001 or ONA002 is not set to 'POS'.

Payroll Maintenance

Why:

The Payroll Interface allows information from the time recording and exception files to be collated along with Sales information from the Order line files. Additional information about call out fees, shift premiums etc. can also be added before being transmitted via an Excel™ spreadsheet to an assigned email address for payroll details.

 **Note!** Before transmitting payroll information, any additional payments that need to be made to mechanics should be added within this option.



*The workshop order
view button*

Where:

From the Workshop Order View, **Actions > Payroll Maintenance**. This will display a Payroll Maintenance Selection window.

How to Maintain Payroll Information:

To maintain payroll information, input the required selection criteria within the Payroll Maintenance window and make sure that the 'Output Type' is screen. (Alternative options as Transfer to PC and print are available from the drop down list box) This will display a Payroll Maintenance window.

The Payroll Maintenance window lists the invoiced sales and total hours worked for the selected mechanic during the selected date range.

If this information needs to be updated with additional payments before it is transmitted, open the mechanic record to display the Clocking by Category window. The Clocking by Category window shows a breakdown of the mechanics times per shift and payment category types for the specified date range.

To make an additional payment to a mechanic you need to add further source codes to their existing details. From the Clocking by Category window select File > New to display the Add/Amend Payments window. Input the quantity that you would like to add, along with the amount and payment source code, and then click OK. These values will then be displayed in the summary 'additional Payments'

If any of the clocking details are incorrect, then these need to be located in the Manual Time Recording function and amended there?

When all payroll information is correct, you can then select the Transfer to 'PC' or 'email' icon. If email is selected this prints a Payroll Audit report in the form of an Excel™ spreadsheet and transmits it to a designated email address (as specified in the Control File).

What else would you like to do?

Amend an Existing Clocking Record via "[Manual Time Recording](#)" on page 400.

Related Topics:

[Mechanic Exceptions](#)

Set up:

Parameter PRM 001 determines if the Workshop Payroll Interface is active. If it is set to *LIKE (POS 001) a CSV file can be generated using time recording and exception data from GDS Workshop. The file is emailed automatically to a designated email address where it can be opened as an Excel™ spreadsheet).

Email addresses for transmitting payroll details are set up in the Email Control File within the Fusion Control Files.

An additional record type 500 has been added to the spread sheet for Invoiced hours and Invoiced Sales.

New parameter FLR007 in 3.2 allows file to be saved on the AS400 with a specified folder.

Planning

Why:

With the introduction of the Fusion product and new technology a workshop 'Planning' tool was one of the area's where this environment could benefit the end user with a simpler interface and greater flexibility.

This along with a new Parts Reservation function will allow the dealer to maximise his workshop potential.

This document aims to give the user a basic understanding of how the function works but for the dealer to *'get the best out of the system'* they should already be practising a practical approach to planning and loading the workshop using current options available such as CFI, VOSP, scheduling and time recording etc.

Planned details are created by the creation of a Workshop Order or Quotation where a 'Planned' and 'Ready' date and time can be added. These can be created directly from the planning screens or from the workshop order workbench.

Operations or sub groups can be added to describe the work to be carried out and an 'invoice' time can be added (this can be subsequently be amended to a planned time when the operation is allocated to a technician).

Alternatively an Estimated amount of time can be added against the Order and this can be used to plan the 'whole' order against a single or multiple mechanics.

Additionally time can be 'reserved' against a mechanic and an order created or reservation can be updated later with an Order number once the Customer has confirmed.

Fusion Planning consists of three screens:

Diary screen	Overview of current months capacity on a daily basis Available hours chart for shift and team
Plan Details	A total overview of all assigned/unassigned work for that given Day for all Mechanics and work bays.
Customer Details	A total overview of WIP, Quotations and schedules for that Planned week/day which can then be filtered specifically by Customer.

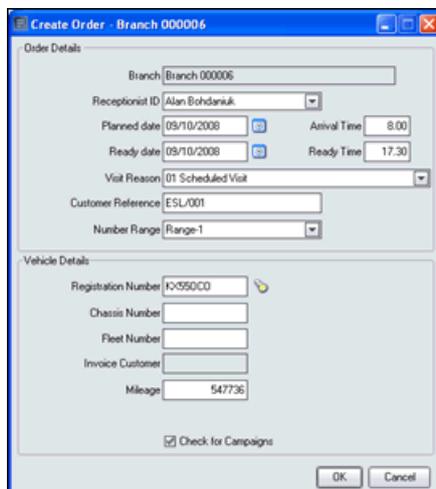
Each one of these screens is explained in detail in the following pages.

Where:

Access to the Planning functions is made either directly from Fusion world (CAP) or from the Work bench, **Workshop Order > Actions > Planning**.

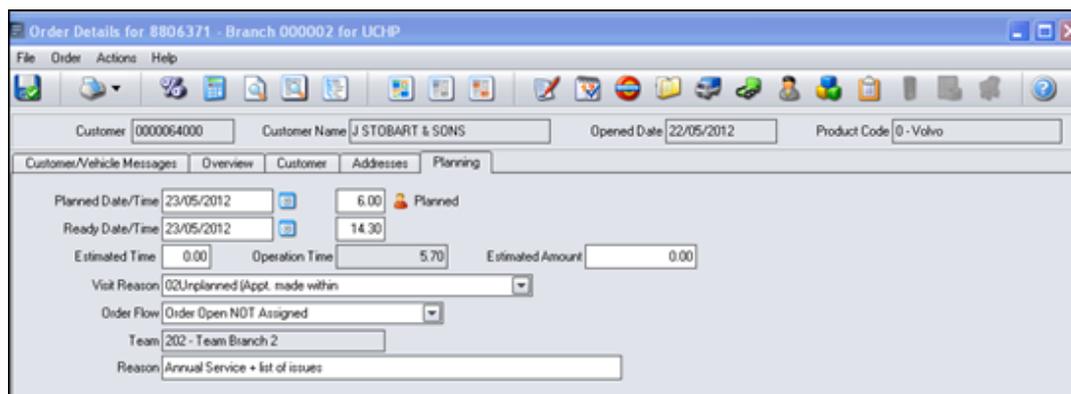
Planning - Order Screens

When an order is created, enter the planned and ready dates times as to when the vehicle will arrive and when it is due by.

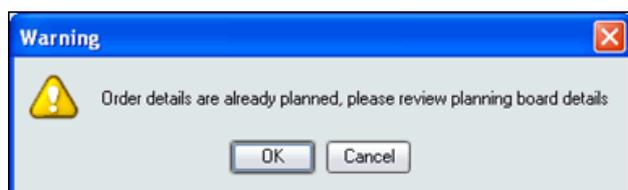


When Operations are added the 'Total time' will be displayed in Operation time. Estimated time can be used in markets where Operations are not added at time of creation; however we encourage 'Straight time' operations to be added where ever possible with a diagnostic time.

When the work is planned, this will be indicated by an icon on the workshop order planning tab.



If the planned or ready dates are changed after the work has been planned against a mechanic then a warning message will be displayed.



OK will update the ORDER details only, cancel will allow the plan to be unassigned prior to date/time changes.

Order Screen - Part Reservations

Forward Planned Orders can be created and parts allocated, these will not affect stock or be reserved until they fall within Stock Order lead times (set by branch parameter RES4). Once within the stock order lead times any un-sourced parts can be automatically ordered or a report produced for manual order.

(See the Reservation document for more details)

Planning - Diary Screen

The Workshop Diary – Month view will default to the current branch signed into

Monday		Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
	1 ✓	1/4	2 ✓	0/0	3 ✓	0/0	4 ✓
	5 ✓	6 ✓	7 ✓	8 ✓	9 ✓	10 ✓	11 ✓
	12 ✓	13 ✓	14 ✓	15 ✓	16 ✓	17 ✓	18 ✓
	19 ✓	20 ✓	21 ✓	22 ✓	23 ✓	24 ✓	25 ✓
	26 ✓	27 ✓	28 ✓	29 ✓	30 ✓	31 ✓	

The current day will also be highlighted, ⏪ ⏩ ⏴ arrows on the top left allow the user to move forward and backward a month at a time and the down arrow will return to the current month.

Drop down list box 'Branch' will allow the users to check capacity etc at other branches within the same Company. (Based on branches assigned within his User role, and only when called from Fusion World)

Diary Details

There are three icons to describe 'Capacity' Status and one for Notes:

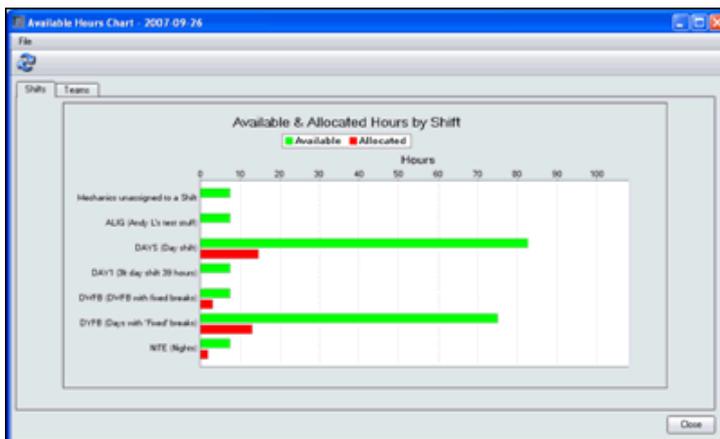
- ✓ Resource available.
- ⚠ % of Resource reached (Set by parameter PLN006).
- ✖ Resource exceeded (Set by parameter PLN007).
- 📄 Note pad details exist.

Order/Operations	The two bold figures indicate the number of Orders opened for that given day and the number of Operations assigned to the Orders.
Reserved	The number of hours planned as 'reserved time'.
Order	The number of hours allocated to Planned Orders (Estimated or Operation times).
Planned	The number of hours Planned against mechanics or teams. (This can differ to Order hours based on skill factor).
Schedule	Hours pre planned to Schedules (not copied to Orders).
Available	Available hours based on Mechanic shift and clocking patterns.

Double click any given day to select Plan details or select File > Plan details or select icon . Select Customer details icon  for an overview of all Order and Quotations details. Select Mechanic availability icon  to search for available planned time.

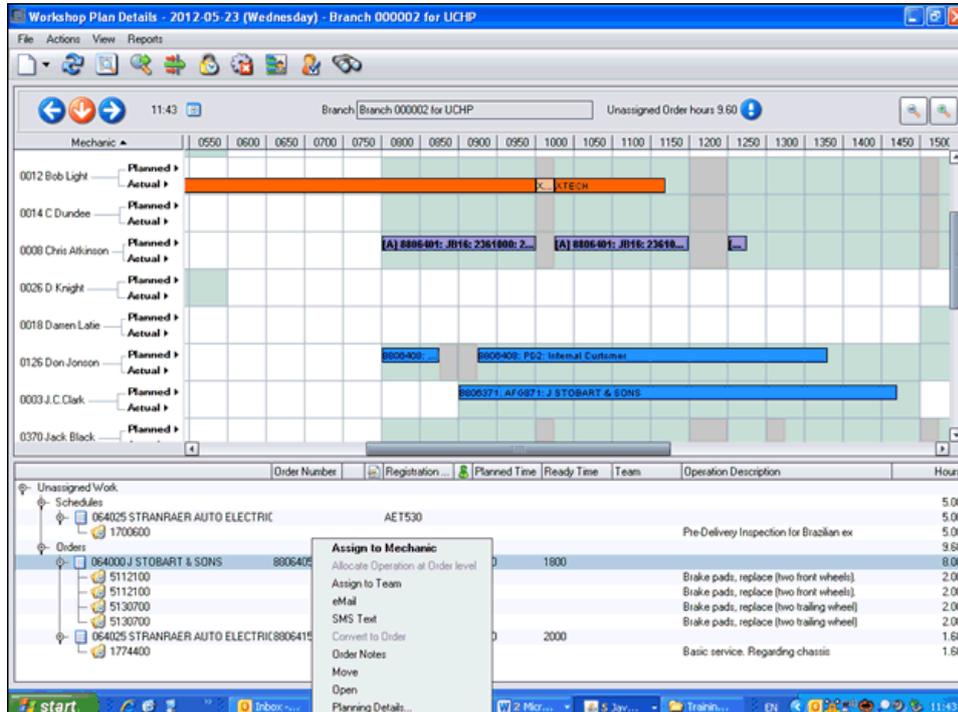
Available Hours Chart

Right click on a date and select **Available Hours chart**, or **Date > Available hours** to display a screen where available and allocated hours can be displayed by shift or team.



Planning - Workshop Plan Details

The Workshop Plan Details view will default to the current branch and date selected from the Diary screen.



Arrows on the top right allow the user to move forward and backward a day at a time and the down arrow will return to the current day.

Scroll bars allow details to be moved left to right and up and down, all screens can also be resized.

Icons on the right allow Zoom in and Zoom out so that a complete shift/day can be displayed in full.

Allows the creation of Orders (Ctrl N) and Quotations

Refresh Icon, (F5) after any new orders are created or changed.

Show Hide unassigned work details (Alt F5 allows more Mechanic details to be displayed).

Switch view between Mechanics and Work bays.

Filter on both Mechanic and unassigned work (Ctrl F)

Reserve time against a mechanic with or without creating an Order.

Overdue Planning Details (Alt F8)

Customer Details

Mechanic Availability (Alt F9)

Search (Ctrl S)

Details of work Planned per Mechanic and Work Bay:

Indicator	Purpose
White	Reservation
Dark Blue	Planned time (Order)
Sky Blue	Planned time (Operation)
Slate Blue	Planned time (Off site – Breakdown)
Gold	Completed
Blue violet	Invoiced Order
Thin red line border	Over estimated plan
Thick red line border	Under estimated plan
Bold Text	Order Flow code link (with code in brackets)

Details of Actual Mechanic activity based on clocking records:

Indicator	Purpose
Green	Completed clocking
Orange	Non Productive work, XCLEN etc.
Yellow	current clocking
Red	No clocking detail
Grey	Exception recorded

Fixed breaks:

Where fixed breaks are set up within shift clocking's maintenance these will be displayed on the planning board in grey and planned work will be assigned either side of these when dragged and assigned.

 **Note!** If work is to be carried out during a break then the record will have to be opened and 'continuous' checked.

Unassigned Work:

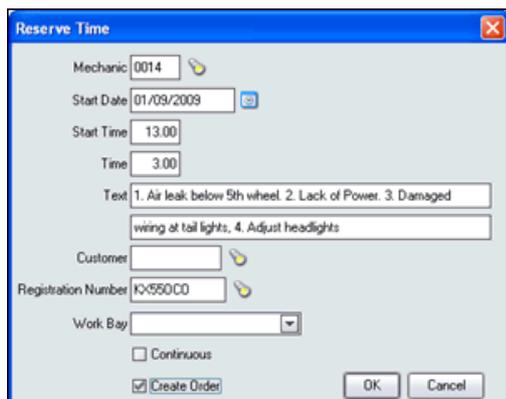
Details are displayed for Orders, Quotations and Schedules; these are displayed in Customer/Order/vehicle sequence for ease. Columns such as Planned and Ready times display details added to the order. Operation descriptions and hours are displayed from the Order details. Hours displayed against the Order can be either the 'Estimated' hours or the total of the operation hours.

 **Note!** Order hours is reflected as:

- When nothing is planned the sum Total of all operations or the Estimated amount where populated.
- When any operation within the Order is planned the Order hours reflects the sum total of the remaining Operations NOT planned.

Select 'turner' against Schedules, Orders and Quotations to expand details. Select 'turner' against each individual Schedule, Order or Quotation to expand the details and display each individual Operation.

How to Reserve Time & Create Order



Time can be reserved against a Mechanic and then subsequently updated with an Order number.

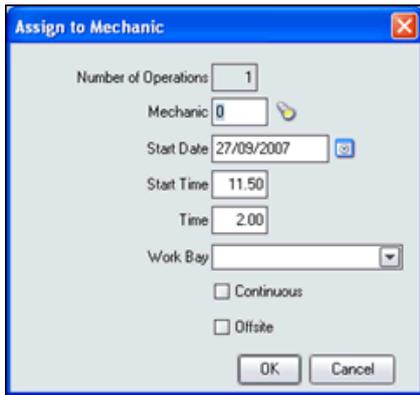
Alternatively if 'Create Order' is checked at the same time as creating the reservation the Create Order screen will be displayed with the vehicle registration, mileage can then be added where required and the Order created which will then update the reservation details.

 **Note!** Planned tab on Order will be updated with start and end times converted into HMS. Reservation Text will be added to the order as text lines (THF312 updated).

Planned Details Right Mouse Button Options

Option	Purpose / Description
Assign to Mechanic	Allows individual Operations or ALL operations to be assigned to a single or multiple mechanics.
Allocate Operation at Order Level	Allows an operation to be added back to an Order record where previously allocated individually.
Assign to Team	Allows 'unassigned' details to be assigned to Team, which then can be allocated to individuals within the team.
eMail	Allows an email to be sent to the Customer (email address default from the Customer Master file).
SMS Text	Allows a SMS text message to be sent to the Customer/Driver. (SMS phone number, default from the Vehicle file, if blank then from Customer Master File (mobile))
Convert to Order	Allows an Order to be created from schedule details displayed, and will update schedule file with Order number once created.
Order Notes	Allows access/amendment of Order notes.
Move	Allows record to be moved to another date (will set Planned date where less than Ready date, where greater than Ready date will set both Planned and Ready dates).
Open	Opens an Order or Quotation
View	Allows an Order to be viewed where invoiced
Planning Details	Allows update of Order Flow code, Planned details Team and Reason details.

About the Assign to Mechanic Option



This screen will display the number of Operations to be assigned. That can be more than one if Order is selected.

Once work is assigned then this is removed from the Unassigned work list.

The screens field descriptions are as follows:

Field	Purpose / description
Mechanic	Use the torch icon  to find a mechanic or enter a mechanic number directly. If the operation is to be applied to more than one mechanic then select the 'Multiple' icon to select several mechanics from a list.
Start Date	Set the date as required. 
Start time	Will default to the nearest quarter (in decimal) based on the system time.
Time	Order estimate or Operation time, this can be adjusted as required. Note! Same time will be allocated to each multiple mechanic and therefore might need to be adjusted.
Work Bay	Assign a Work bay from the drop down list.
Continuous	Checked will assign time outside mechanics shift time, un-checked will Assign time within his shift pattern.
Offsite	Used to indicate a break down repair etc.

About Drag and Drop Assignment

Individual Operation records can be highlighted (left mouse click) and 'dragged' and assigned to a Mechanic. Similarly the whole Order or Quotation can be selected and 'dragged' and assigned to a Mechanic. Details added to Mechanics can also be 'dragged' off the planned details and moved back into unassigned work.

Select the '**Alt key**' and left mouse click to plan order/operation continuously. Select the '**Ctrl key**' and left mouse click to allow a record to be copied to another mechanic and time. (Indicated with a + in front of the Order).

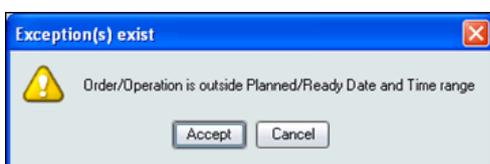
 9918354: ATEST: 818: 1.03H... Indicates plan has been split over two days.

 8803440: ... Indicates plan has been split to more than one Mechanic.

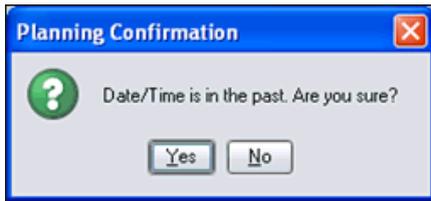
 8... Indicates the plan has been split over two days and to more than one mechanic.

If in work bay view, you can drag and drop records between work bays (you cannot amend the time as this is governed by the Operation).

If the cursor is positioned at the start or end of a plan and  is displayed, the planned time can be extended or reduced by dragging the planned record.

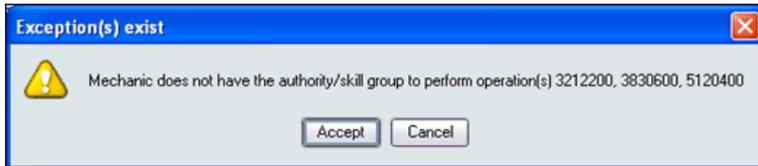


If an Order/Operation is planned outside the 'Planned and Ready' times then a warning message will be displayed.



If an Order/Operation is planned prior to the system time (i.e. in the past), then again a warning will be displayed.

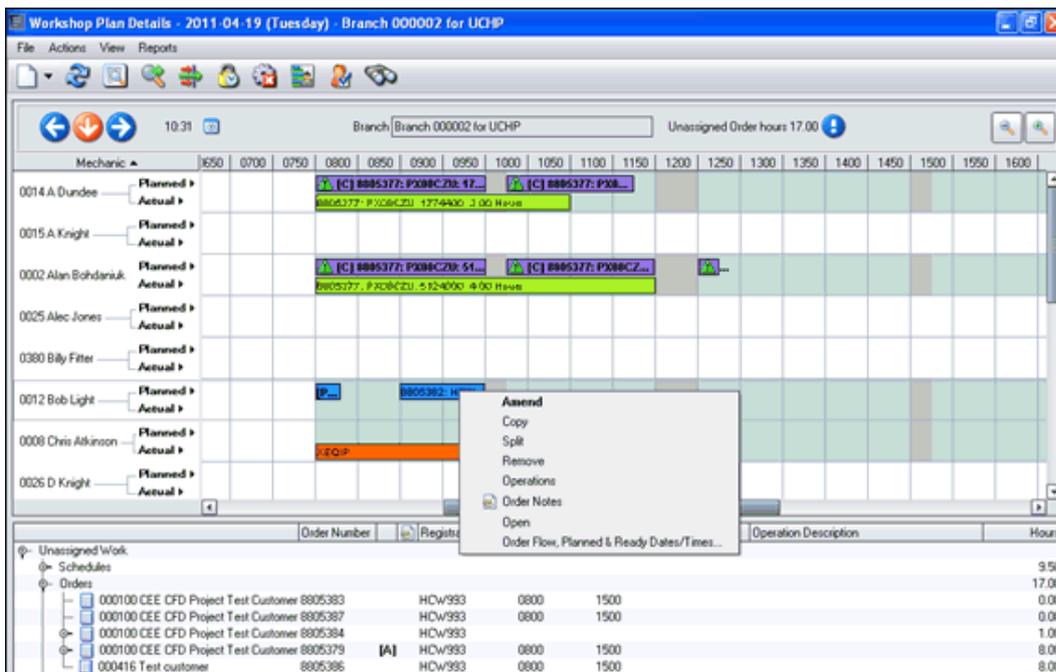
If the user does not have the correct authority code assigned with the operations that he can perform then a warning message will be displayed. Similarly, if the user does not have the correct proficiencies assigned.



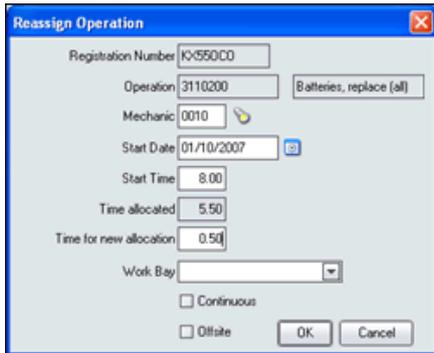
See the Control File and Mechanic Master File.

Right clicking on Planned details allows the record to be opened, amended, copied, split to another mechanic or removed and added back to unassigned work details.

Where an Order has been assigned, Operations will display the details and allow individual Operations within the order to be assigned separately. Records displayed in bold are linked to a Flow code and code set within the Flow code table is displayed in brackets.

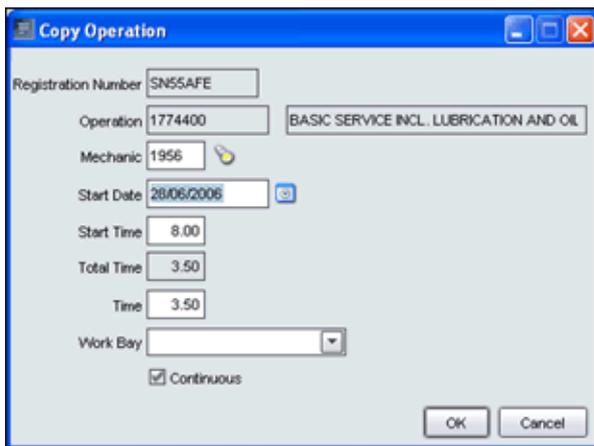


About the Amend Option



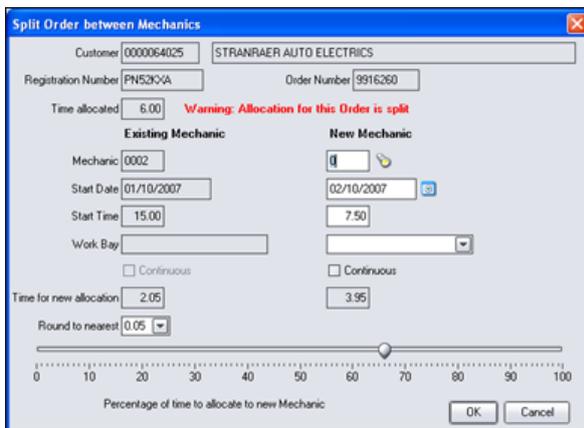
Amend allows details such as mechanic, work bay, time etc to be changed.

About the Copy Option



Copy allows the record to be 'copied' to another mechanic, (on a different date and time if required); also details such as Time (planned) can be adjusted etc.

About the Split Order / Operation Option



Both Order and Operations can be split.

Enter new mechanic number and use the slider to split the order or operation time. (Select rounding option from drop down where an exact split cannot be achieved).

Where an Order has been split between mechanics or over two days or more these records will be displayed with a different coloured warning triangles.

If the record is selected for split on the first day this will split the whole record.

If the record is selected for split on the second day this will allow the second part only to be split (re-assigned) to a different mechanic.

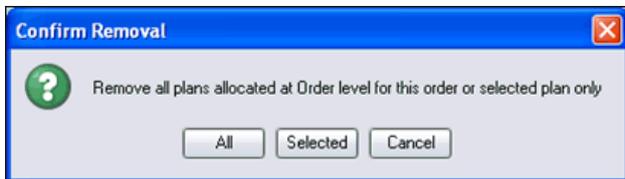
Select the 'S key' and left mouse click within the plan to allow a record to split to another mechanic and time with Drag & Drop.

About the Remove Option



Removes details from Mechanic and adds it back to unassigned work so that it can be re-assigned.

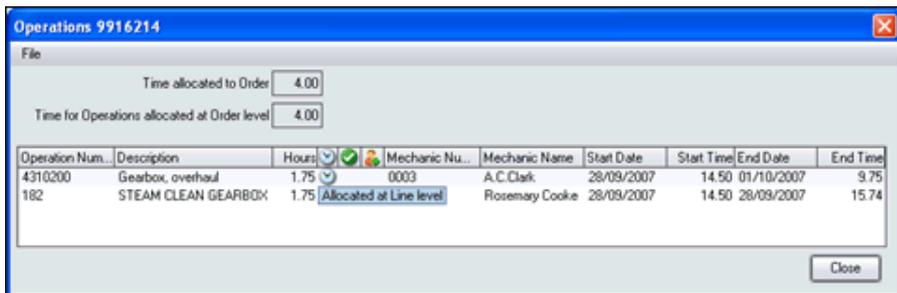
Dependant on the record type/allocation it will be added back to unassigned work or the current planned Order will be highlighted with a red border to indicate under/over estimated time.



Where an Order/Operation is Split the 'Selected' record can be removed

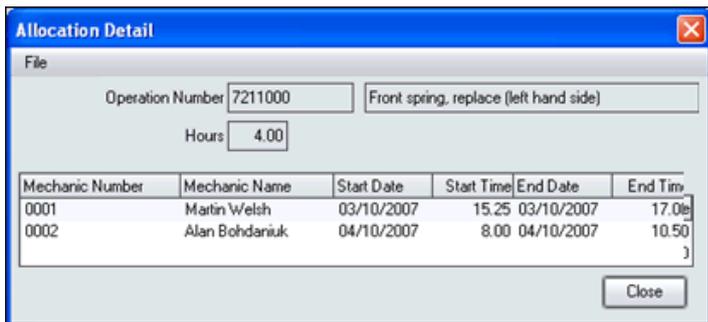
If however 'All' records are removed then the Order/Operation will then be re-displayed under Unassigned work

About the Operations Option on a Planned Order

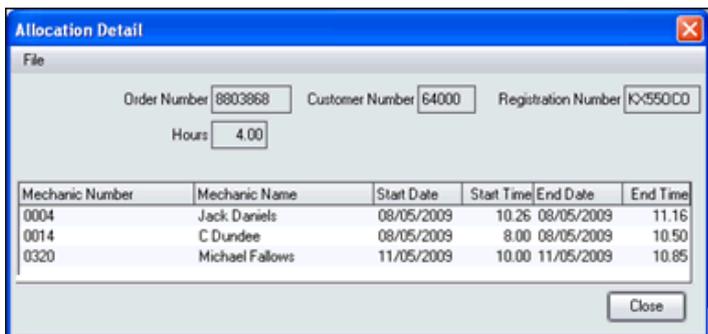


This screen displays all operations on the order that are planned at either Order or Operation level.

Icons denote if an Operation is planned at Order or line level, whether it has been completed and whether an operation has been assigned to more than one mechanic.



Where an Operation has been split to more than one mechanic, this screen will display the Operation details, Mechanic number and name along with the planned start date and time.

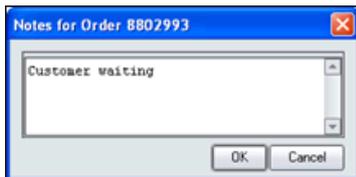


Where an Order has been split to more than one mechanic, this screen will display the Order details, Mechanic number and name along with the planned start date and time.

About the Allocate Operations at Order level

This function allows a separately allocated operation to be allocated back to its original order.

About the Order Notes Option



Allows the display and amendment of Order notes.

If icon is displayed in the menu, this indicates there are notes present.

About the Open/View Option

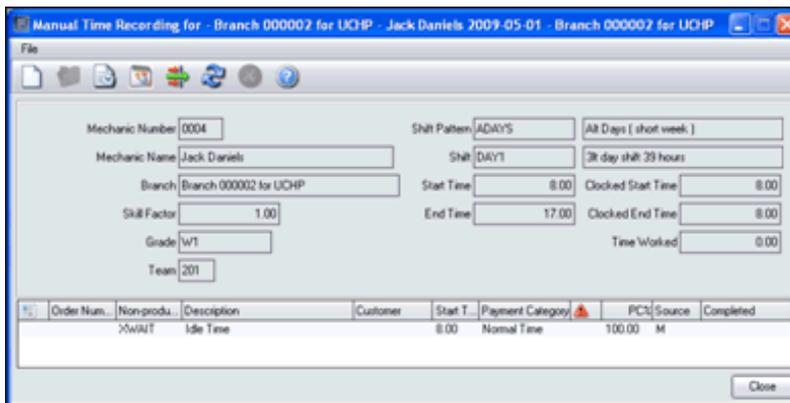
Allows the Order to be opened or viewed, dependant on status.

About the Planning Details Option



Allows the Order Flow code to be amended along with Planned dates. Reason details can be added/amended and Team can be allocated (only where plan is unassigned).

Actual - Manual Time Recording

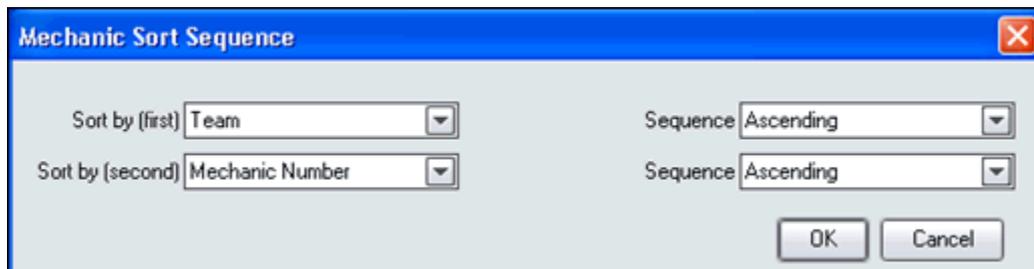


Right mouse clicking on 'Actual' will allow the Manual Time recording screen to be called based on branch, Mechanic and date.

 **Note!** This option is only available if the user has authority to Mechanic General – manual time recording (security ID 160).

About Mechanic Sorting

A right mouse click on the Mechanic heading of Workshop Plan Details screen allows mechanic details to be sorted in number, name, team, department or shift sequence as well as ascending or descending sequence.



The dialog box titled "Mechanic Sort Sequence" has a blue header with a close button (X). It contains four dropdown menus: "Sort by (first)" set to "Team", "Sort by (second)" set to "Mechanic Number", "Sequence" (top) set to "Ascending", and "Sequence" (bottom) set to "Ascending". At the bottom are "OK" and "Cancel" buttons.

A combination of two sort options may be used. Filter and sequence selections may be saved for the user and branch using the Save icon in the toolbar .

About Hover Help

Hover help is available against Mechanic, Order and Workbay:

Mechanic

Mechanic: 0002 Alan Bohdaniuk
Department: Workshop (Default)
Team: 203
Shift: Days with 'Fixed' breaks (8.00-17.00)
Exceptions/Breaks
Tea Break (CODE EE) (10.00-10.25)
Unpaid Meal Breaks (CODE EE) (12.00-12.50)
Tea Break (CODE EE) (15.00-15.25)
Skill Grades: 2, 4, 5, 6, 7, 8
Authority Codes: DIAOG, REPAIR1, REPAIR2

This displays details on Team, skill grades, Authority codes etc, and if an exception is registered this will also be displayed.

Order

Registration Number: HCW993
Operations allocated at Order level:
210 Engines General
Time: 1.00 Hours
Order: 8805382
Flow Code: Order Open NOT Assigned
Customer : 000100 CEE CFD Project Test Customer maximum amount
Work Bay: L1

Hover help is also available against the planned record, displaying details of the Order/operation. This will display details of Operations allocated at either Order or Operation level.

Work bay

Registration Number: HCW993
Order: 8805382
Mechanic: 0012 Bob Light
Operations
210 Engines General
Planned Time: 1.00 Hours

This will display details of Operations allocated at either Order or Operation level.

About the Mechanic Activity Filter (Ctrl F)

The Filter displays details of both planned and unassigned work for certain selection criteria such as Customer, Registration number, Reservations, etc.

Mechanics on Downtime, Time remaining and Percentage complete etc and based on Mechanic activity (current clocking's).

Use the torch icons to search for Mechanic, Customer or Registration etc.

Use the drop down list box to filter on shift, Team, department and flow codes.

Note! Filter on Team will display Team records plus any unassigned details for ease of allocation.

About the Search Options (Ctrl S)

The search option allows selection based on Registration, Customer, Order number, Operation number and Date range (Default is Planned details date and 'high' date). Schedules can also be included within the search

Screen will display a single entry if Unplanned or Planned against one mechanic. The display will show the Operation with the most hours and the number of other operations on the Order. If Planned, and copied or split between a number of mechanics then multiple records will be displayed.

Right mouse click options – Search:

Option	Purpose / Description
Open	Opens an Order or Quotation (only valid in current branch).
Move	Allows record (Unplanned or Schedule) to be moved to another date (will set Planned date where less than Ready date, where greater than Ready date will set both Planned and Ready dates).
Go To	Opens Planned details screen with <u>filtered view</u> based on selected record (also closes search windows).
eMail	Allows an email to be sent to the Customer (email address default from the Customer Master file).
SMS Text	Allows a SMS text message to be sent to the Customer/Driver. (SMS phone number, default from the Vehicle file, if blank then from Customer Master File (mobile)).

About Over Due Planning Details (Alt F8)

Overdue Planning details displays all planned details where the mechanic has not recorded time against. Column sorts allow sequence by Mechanic, Customer or Registration number etc.

Mechanic	Mechanic Name	Start Date	Start Time	Order Number	Registration Num...	Customer Num...	Name	Telephone
0330	Sparky Johnston	09/07/2009	9.00	8904027	AB1	0000064025	STRANRAER AUTO EL...	01776 704473...
0330	Sparky Johnston	08/07/2009	9.00	8904025	AE51JVJ	0000000013	Andy Liggins - Main Exter...	01926838116
0014	C Dundee	06/07/2009	9.02	8903997	SF588HK	0000064025	STRANRAER AUTO EL...	01776 704473...
0012	Bob Light	06/07/2009	8.00	8903992	PX08CZU	0000064000	J STOBART & SONS	01926401777
0008	Arthur Atkinson	03/07/2009	13.00	8903981	KX550CO	0000064000	J STOBART & SONS	01926401777
0008	Arthur Atkinson	01/07/2009	14.00	8903974	KR52RKE	0000064000	J STOBART & SONS	01926401777
0004	Jack Daniels	29/06/2009	13.50	8903961	SF53KVB	0000064025	STRANRAER AUTO EL...	01776 704473...
0003	A.C.Clark	26/06/2009	7.75	8903960	PX08CZU	0000064000	J STOBART & SONS	01926401777
0003	A.C.Clark	26/06/2009	6.50	8903959	KX550CO	0000064000	J STOBART & SONS	01926401777
0330	Sparky Johnston	16/06/2009	9.00	8903930	BS-LN-78	0000060045	INTERNAL SALES DEPT	
0320	Michael Fallows	16/06/2009	8.00	8903930	BS-LN-78	0000060045	INTERNAL SALES DEPT	
0330	Sparky Johnston	05/06/2009	15.75	8903917	PX08CZU	0000064000	J STOBART & SONS	01926401777
0014	C Dundee	05/06/2009	13.51	8903887	KM58HKK	0000063830	M & H SMITH	791 534
0320	Michael Fallows	05/06/2009	11.55	8903890	BN07GHF	0000064750	Gilow Willow CL9000 CC...	01524 735853

About Mechanic Availability (Alt F9)

Default Start time will be current time when icon selected. Enter a required duration time and/or Skill group and/or Authority code (double click for tick) for plan and select 'Refresh'.

Mechanic Availability - 2011.02.17 (Thursday) - Branch 000002 for UCHP

Branch: Branch 000002 for UCHP

Start Time: 9.75

Duration: 2.00

Refresh

Skill Group:

- 1 Service
- 2 Engine
- 3 Electrical
- 4 Transmission
- 5 Brakes

Authority Code:

- ELECT Electrical Repairs
- MAINT General Maint & Inspection
- REPAIR1 Basic Repair work
- REPAIR2 Skilled Repair work
- TACHO Tacho Work

Mechanic	Mechanic Name	Branch	Shift	Earliest Start Time	Duration
0002	Alan Bohdanuk	Branch 000002 for UCHP	Days with Fixed breaks	9.75	6.25
0008	Chris Atkinson	Branch 000002 for UCHP	Days with Fixed breaks	9.75	6.25
0004	Jack Daniels	Branch 000002 for UCHP	Days with Fixed breaks	13.00	3.75
0025	Alec Jones	Branch 000002 for UCHP	Night 1800-0500	18.00	9.50

A list of mechanics will be displayed based on available planned time, skill group and/or authority code based on the earliest start time.

Icons will denote; Shift has not started.

Shift has started but no clocking

Currently clocked onto a Productive order

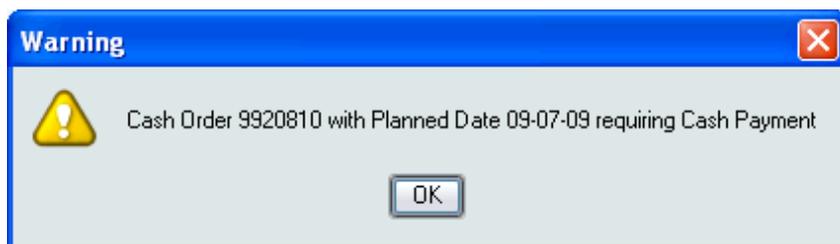
Currently clocked onto a Non productive code

Hover help on Mechanic will display shift clocking, skill grades and authority codes etc

Note1; See Branch Group set up for selected drop down list box.

Note2: Authority code selection will not be displayed if Control file is not populated.

About the Cash Customer Warning Message



Based on parameter PLN008 every nnn minutes Cash Customer orders will be checked and where these are flagged by the mechanic as 'completed' (parameter REC201) a warning message will be displayed.

These Orders can then be reviewed in Customer details screen and then Invoiced.

Planning - Customer Details

The Customer details screen highlights the current date and displays ALL Order/Quotations and schedules for the date selected. Order can be assigned to Teams within this function which will also update the Planned time on the Diary screen. The screen displays a weekly view.

← ↓ → Arrows on the top right allow the user to move forward and backward a week at a time.

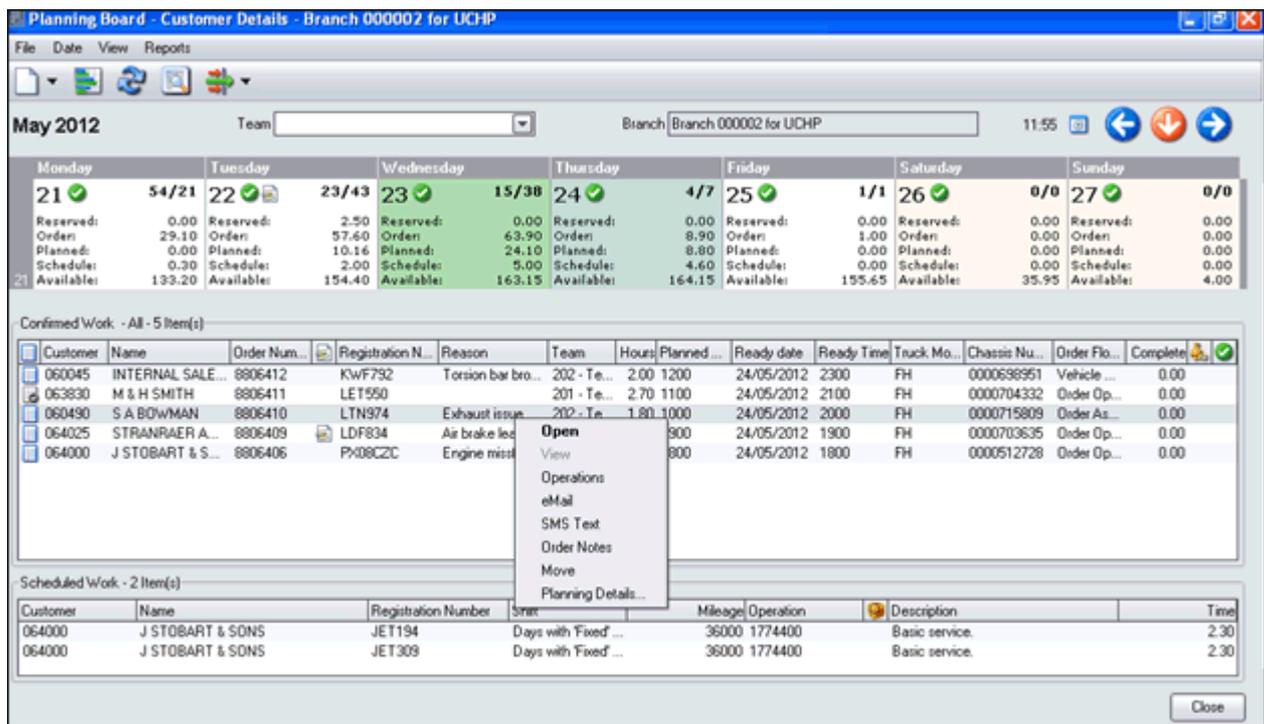
 Allows the creation of Orders and Quotations.

 Allows the user to show the Planned details screen

 Refresh icon, after any new orders are created or changed.

 Show Hide Schedule details.

 Filter on 'Completed Orders' (Where REC201 = 1 or 2)



Confirmed Work - All - 5 Item(s)

Customer	Name	Order Num...	Registration N...	Reason	Team	Hours	Planned ...	Ready date	Ready Time	Truck Mo...	Chassis Nu...	Order Flo...	Complete
060045	INTERNAL SALE...	8806412	KWF792	Torsion bar bro...	202 - Te...	2.00	1200	24/05/2012	2300	FH	0000698951	Vehicle ...	0.00
063830	M & H SMITH	8806411	LET590		201 - Te...	2.70	1100	24/05/2012	2100	FH	0000704332	Order Op...	0.00
060490	S A BOWMAN	8806410	LTN974	Exhaust issue...	202 - Te...	1.80	1000	24/05/2012	2000	FH	0000715809	Order As...	0.00
064025	STRANRAER A...	8806409	LDF834	Air brake led...	Open	800		24/05/2012	1900	FH	0000703635	Order Op...	0.00
064000	J STOBART & S...	8806406	PN08C2C	Engine mist...	View	800		24/05/2012	1800	FH	0000512728	Order Op...	0.00

Scheduled Work - 2 Item(s)

Customer	Name	Registration Number	Sme	Mileage	Operation	Description	Time
064000	J STOBART & SONS	JET194	Days with Fixed ...	36000	1774400	Basic service.	2.30
064000	J STOBART & SONS	JET309	Days with Fixed ...	36000	1774400	Basic service.	2.30

The Confirmed Work area displays all orders and quotations based on planned date, with information such as icon, to denote status, Order notes, Completed as well as Reason details, Team, Order Flow code and Percentage complete. (Order level).

The Schedule Work area displays all schedules based on planned date.

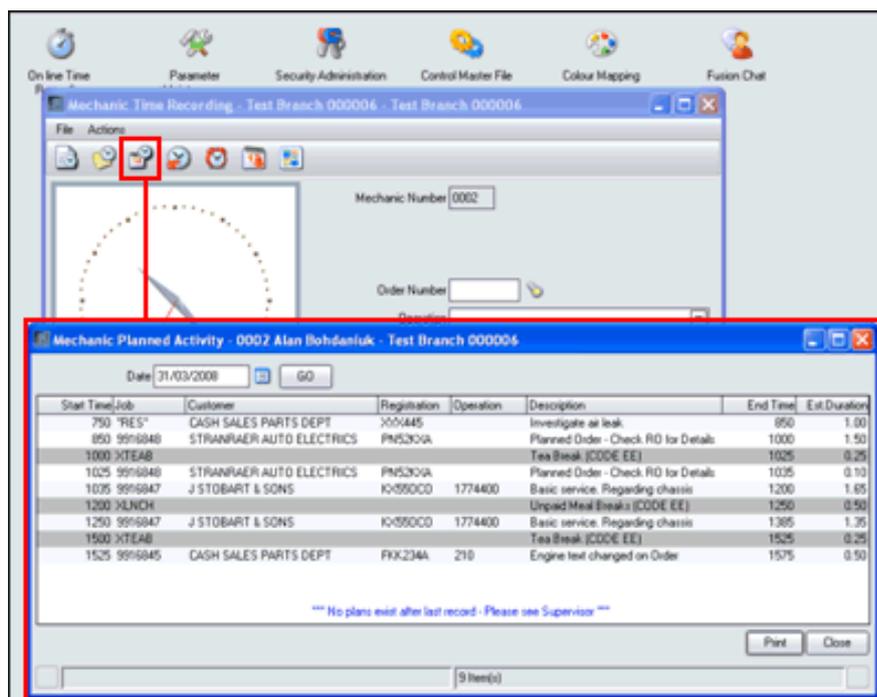
Customer Details – Right Mouse Button Options:

Option	Purpose / Description
Open	Opens an Order or Quotation.
View	Allows an Order to be viewed where invoiced.
Operations	This screen displays all operations on the order that are planned at either Order or Operation level.
Convert to Order	Allows an Order to be created from schedule Work details. Displayed, and will update schedule file with Order number once created.
eMail	Allows an email to be sent to the Customer. email address default from the Customer Master file.
SMS Text	Allows a SMS text message to be sent to the Customer. Pricing agreements need to be discussed.
Order Notes	Allows the display and amendment of Order notes.
Move	Allows record to be moved to another date where not already assigned to a mechanic.
Planning Details	Allows the Order Flow code to be amended along with Planned dates where Reason details can be added/amended and Team can be allocated (only where plan is unassigned).

Planning - On Line Time Recording

A new icon has been introduced in OLT so that a mechanic can check and print a list of planned work.

Select print button to generate report. Use Calendar icon and 'GO' button to view another date



About Time Card Enquiry

A new icon and RMK is available in Time card enquiry to view Actual clockings v Planned details per Mechanic.

Actual And Planned Time Analysis - 0002 Alan Bohdaniuk - Test Branch 000006

Date: 31/03/2008

Actual Time											
Job	Customer	Registration	Operation	Description	Start Time	End Time	Elapsed Time	Payment Category	Description	Source	Complete
X\WAIT				Idle Time	7.00	8.50	1.50	AA	Normal Time	M	
9916848	STRANRAER AUTO EL...	PN52KXA		STRANRAER AUTO E...	8.50	9.00	0.50	AA	Normal Time	M	
9916847	J STOBART & SONS	KX550CD	182	STEAM CLEAN	9.00	13.00	4.00	AA	Normal Time	M	
9916851	STRANRAER AUTO EL...	SF53KVB	641	STEERING COLUMN	13.00	14.72	1.72	AA	Normal Time	M	
X\CLEN				Workshop Cleaning	14.72	15.03	0.31	AA	Normal Time	O	
9916847	J STOBART & SONS	KX550CD	182	STEAM CLEAN	15.03	15.08	0.05	AA	Normal Time	M	
9916847	J STOBART & SONS	KX550CD	320	CHARGING CIRCUIT	15.08	15.43	0.35	AA	Normal Time	O	
X\TRNG				Training	15.43	15.75	0.32	AA	Normal Time	O	
X\WAIT				Idle Time	15.75	17.00	1.25	AA	Normal Time	O	
X\WAIT				Idle Time	17.00	24.00	7.00	AA	Normal Time	O	

Planned time										
Job	Customer	Registration	Operation	Description	Start Time	End Time	Elapsed Time			
RES	CASH SALES PARTS DE...	XYX445		Investigate air leak	750	850	1.00			
9916848	STRANRAER AUTO ELE...	PN52KXA		Planned Order - Check ...	850	1000	1.50			
9916848	STRANRAER AUTO ELE...	PN52KXA		Planned Order - Check ...	1025	1035	0.10			
9916847	J STOBART & SONS	KX550CD	1774400	Basic service, Regardin...	1035	1200	1.65			
9916847	J STOBART & SONS	KX550CD	1774400	Basic service, Regardin...	1250	1385	1.35			
9916845	CASH SALES PARTS DE...	FKK234A	210	Engine text changed on...	1525	1575	0.50			

*** No plans exist after last record - Please see Supervisor ***

Close

Planning - Shift Exceptions

Create Shift Exception - 0003 - A.C

Shift: [Dropdown]

Non-productive: Holiday (CODE DD) [Dropdown]

Apply to entire day

Date from: 05/05/2009 [Calendar]

Time From: 8.00

Date To: 05/05/2009 [Calendar]

Time To: 16.00

Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday

OK Cancel

A new check box has been added to the Shift exception dialog box.

This displays the whole day as unavailable 'greyed out' on the planning board where the time From/To is passed to the payroll interface.

This allows for circumstances where the mechanic might be paid for an 8 hour course but normally works a 12 hour shift etc.

Planning - Set up

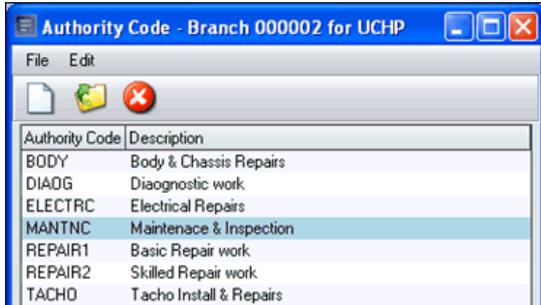
Parameters	Purpose / Description
PLN001	Number of days to retain for planning (62)
PLN002	Number of Days to Plan Forward (31)
PLN003	Use Fusion Planning (Set to POS)
PLN004	Order Planned Time Over-estimate %
PLN005	Order Planned time Under-estimate %
PLN006	W/S Planning Capacity Error Percentage
PLN007	W/S Planning Capacity Error Percentage
PLN008	Cash Customer Refresh Interval (015 mins,'000' not used)
REC201	Completed Flag in Time Recording (0=None, 1=Order, 2=Line)
RES002	Pick parts at line addition (should be set to NEG for planning)
RES004	DSP Stock Order Lead Time (Branch)
RES005	Create purchase order
RES006	Confirm Vehicle due in as planned (Branch)

New Trigger program	PLANNING Fusion planning updates 'Active'
New Privilege	'Allow Access to Planning Board' (from Fusion world)
Data Area	THDA1500 Next Planning Reference Number
Mechanic file	Mechanics 'flagged' for planning Assigned Shift and Clocking patterns Exceptions registered for holidays etc Assign skill grades and authority codes
Daily Batch command	CALL THC559 PARM('''''''M') to update Available Hour's on Diary screen.
Email set up	THF079, Program TH3R1500, Printer File *None
File Re-org	Re-org option for Planning File THF498 based on current parameter PLN002 (Available hours in THF559) Note; Parameter PLN002 "Number of days to retain for planning" (recommended 062) Command to add to Daily Batch ' CALL TH3R0705'
Conversion routine	New CNR498 conversion routine to update Planning file THF498 from Schedule file THF492.

Planning – Control Files

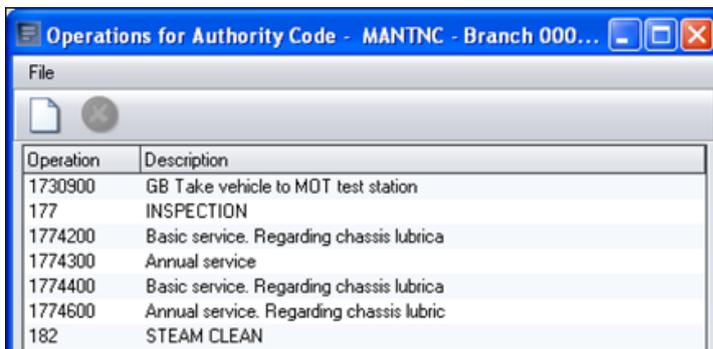
Authority Code:

Authority code table (THF717) holds code and description.



Authority Code	Description
BODY	Body & Chassis Repairs
DIAOG	Diagnostic work
ELECTRC	Electrical Repairs
MANTNC	Maintenance & Inspection
REPAIR1	Basic Repair work
REPAIR2	Skilled Repair work
TACHO	Tacho Install & Repairs

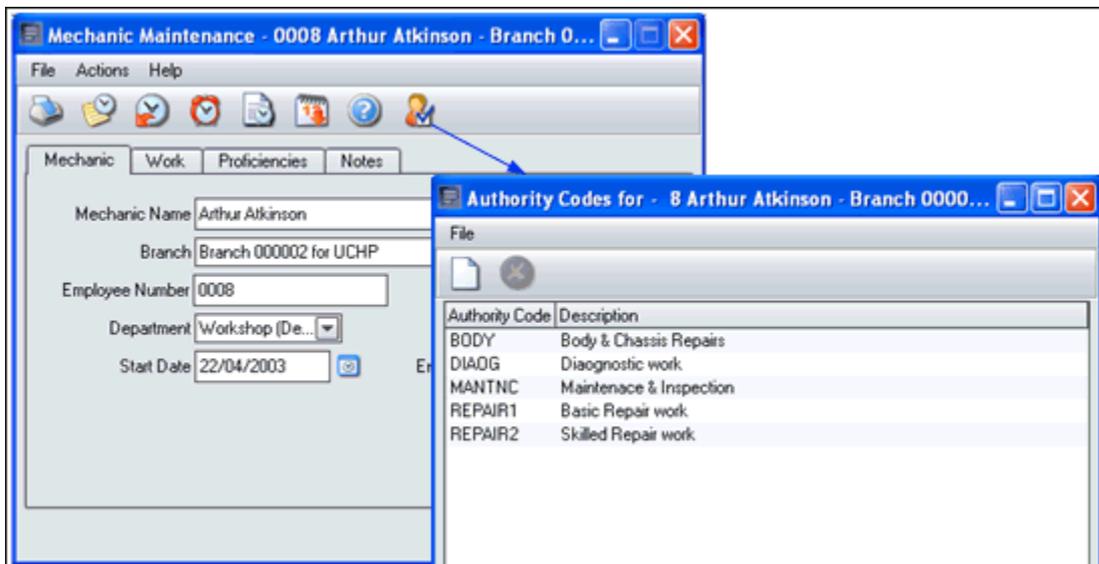
The right mouse button Operation Details allows the user to allocate specific Operations against each authority code (THF719)



Operation	Description
1730900	GB Take vehicle to MOT test station
177	INSPECTION
1774200	Basic service. Regarding chassis lubrica
1774300	Annual service
1774400	Basic service. Regarding chassis lubrica
1774600	Annual service. Regarding chassis lubric
182	STEAM CLEAN

Mechanic Master File

A new icon has been introduced to allow the user to assign authority codes against a mechanic (THF718), these are then used along with proficiencies (skill grades) to validate operations when assigned in planned details.



The main window shows a form for a mechanic's details:

- Mechanic Name: Arthur Atkinson
- Branch: Branch 000002 for UCHP
- Employee Number: 0008
- Department: Workshop (De...)
- Start Date: 22/04/2003

The overlaid window shows the 'Authority Codes for - 8 Arthur Atkinson - Branch 0000...' table:

Authority Code	Description
BODY	Body & Chassis Repairs
DIAOG	Diagnostic work
MANTNC	Maintenance & Inspection
REPAIR1	Basic Repair work
REPAIR2	Skilled Repair work

Branch Group Type

Branch Group Type	Description	Multi-Branch...
EX	Shift Exceptions	
PL	Planning	✓

Branch Groups are used in conjunction with both ‘CAP’ planning and time recording exceptions, to allow branches to be regionalized.

THF791 will be ‘shipped’ with two defaults for planning and exceptions, which the user can then add their own description/translation.

Branch Group

Branch Group allows a header description to be created and then a list of branches to be used within the selected table. (Files THF790 and THF792).

Maintain Branch Group - Branch 000002 for UCHP

Branch Group	Description	Group Type
A1	Pln Group A1 (2 & 6)	Planning
EB	SE Branch 2 & 5	Shift Exceptions
E6	SE Branch 6	Shift Exceptions
OT	Pln Other Branches (3 & 5)	Planning
RU	SE Branch 3 Russia	Shift Exceptions

Branch Group OT Pln Other Branches (3 & 5) - Branch 000002 for UCHP

Branch Group Type:

Select branches for this branch group

Full Branch List

Available Branch	Applied Branch
Branch 000002 for UCHP	Branch 000003 (Russia UCHP)
Branch 000003 (Russia UCHP)	Branch 000005
Branch 000004	
Branch 000005	
Branch 000006	

Buttons: Add-> | <-Remove

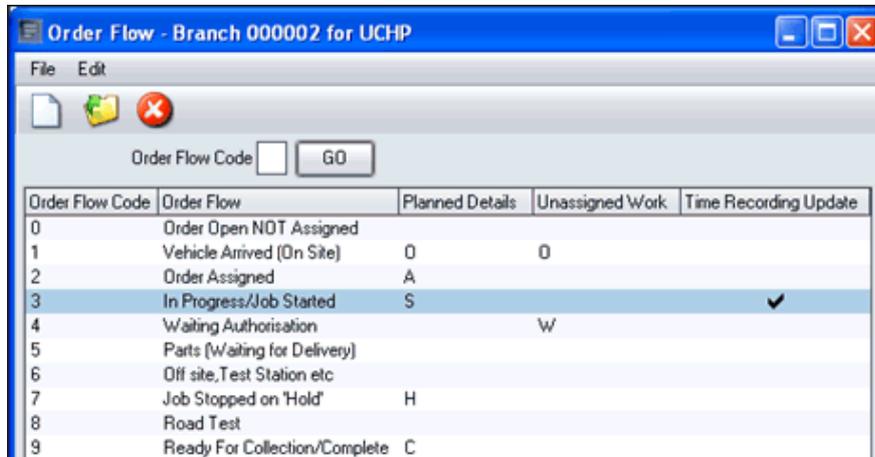
Buttons: OK | Cancel

Order Flow Codes

The Order Flow code control file allows codes to be 'marked' for use within the Planned details screen. Codes can be 'marked' so when displayed in Planned or Unassigned work these records will be highlighted.

Also ONE record can be 'marked' for update when the user clicks onto the order the first time, this will then change the Flow code on the Order

When a plan is marked as completed in either On line Time recording or Manual Time recording this is then displayed in a different colour on planned details.



Order Flow Code	Order Flow	Planned Details	Unassigned Work	Time Recording Update
0	Order Open NOT Assigned			
1	Vehicle Arrived (On Site)	0	0	
2	Order Assigned	A		
3	In Progress/Job Started	S		✓
4	Waiting Authorisation		W	
5	Parts (Waiting for Delivery)			
6	Off site, Test Station etc			
7	Job Stopped on 'Hold'	H		
8	Road Test			
9	Ready For Collection/Complete	C		

 **Note!** It is not recommended that all codes are marked just those important within the process

Real-time Automatic Fixed Breaks

Why:

GDS provides functionality to automatically add fixed meal breaks to mechanic time recording at the end of the day (XFNSH). The problem with this approach is that a fixed break is not applied if it overlaps a new time booking. In this case the fixed meal break is abandoned. When the order is then invoiced, booked hours are overstated because the fixed break is not applied. This has the effect of reducing charging efficiency, one of the key workshop controls provided by GDS.

A change has been introduced to give the option to create fixed breaks in 'real-time' with the goal of ensuring that booked hours are accurately recorded.

New Scheduled Monitoring Job for Real-time Fixed Breaks

If real-time fixed breaks are to be activated a new entry is needed in Daily Batch Commands (file THF904) to start real-time fixed breaks. The new entry will call program TH3C1120B. This starts auto-scheduling of the job to process real-time fixed breaks. This program is modelled on TH3C1110B Automatic Clocking Off function. The call to TH3C1120B (real-time fixed breaks) should be after TH3C1110B (automatic clocking off) in the daily batch sequence. There is also a new program, TH3C1120A, to manually stop the real-time fixed breaks monitoring job (unlike the automatic clocking off process, no call to TH3C1120A is required in the daily batch, this can be run manually if required).

Amend Daily Batch - Branch 000006 - ADUK Warwick <

Details | Branches

Sequence Number: 6025

Description: Start Real-time Fixed Breaks

As400 Command: CALL TH3C1120B

Command to take should program fail: [Empty]

Run: All [v] Monthly Yearly Company

Action to take should program fail: Skip [v]

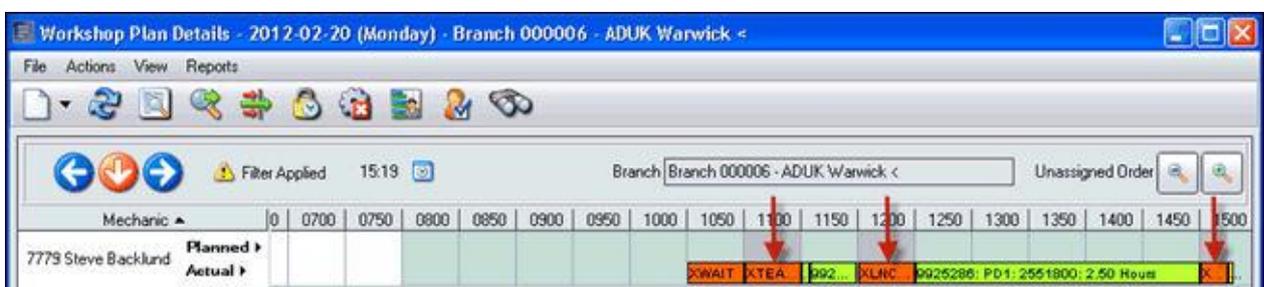
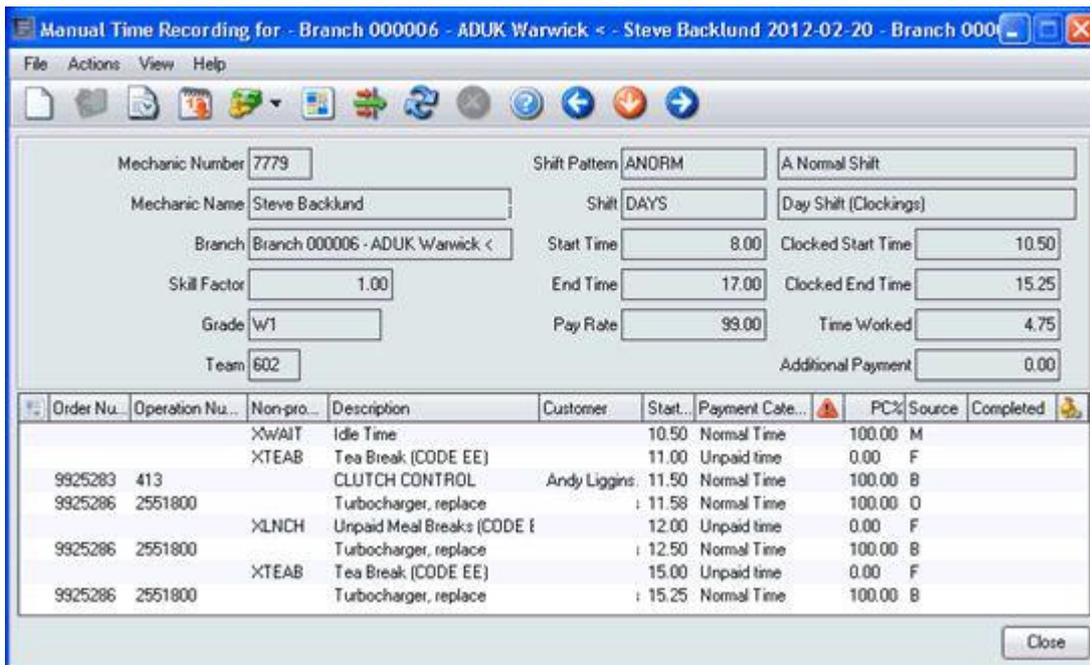
OK Cancel

Use the command 'wrkjob fixedbreak' from a command line to check the scheduled job. The scheduled job automatically checks for fixed breaks in the currently active shifts and creates fixed breaks in real-time for each shift.

When the scheduled job finds an applicable fixed break it makes three updates to the job costing file (THF012):

1. It updates the mechanic's current job with an end time.
2. It creates a job costing record for the fixed break with source code (ALSRCE) = REC504 ('F').
3. It creates a new job costing record to continue the current job after the fixed break with source code = REC505 ('B').

For example, mechanic 7779 clocks onto XWAIT at 10:30am in manual time recording (source = 'M'). At 11am the scheduled job ends the XWAIT clocking, creates a tea break starting at 11am (source = 'F') and creates a 'future' continuation of the XWAIT clocking starting at 11.30am (source = 'B').



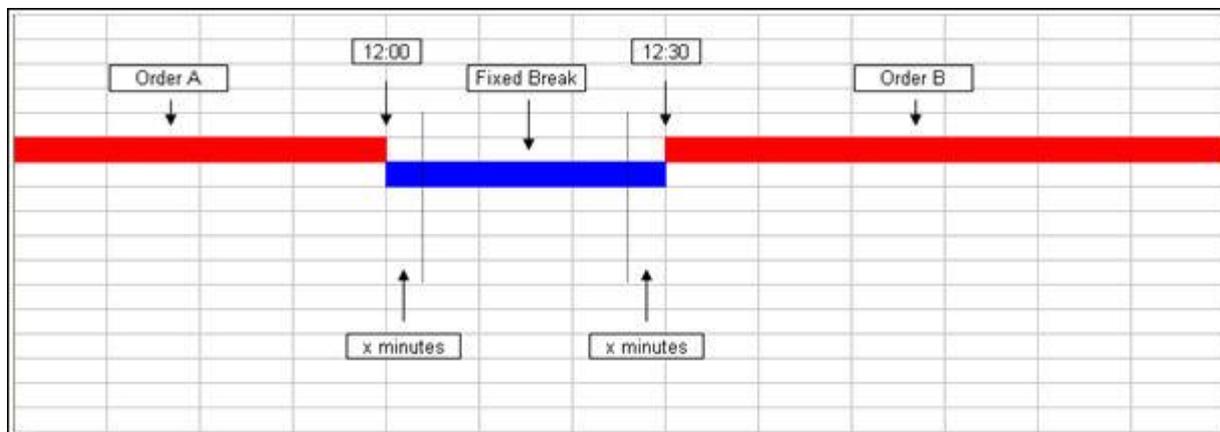
The scheduled job will also create a continuation record for a night shift if a fixed break spans midnight or starts after midnight.

To start the scheduled job, set data area THDA1120 to '00' and call program 'TH3C1120B' from the command line with no parameters.

Changes to Online Time Recording

If a mechanic attempts to book time during a fixed break, then the booking will be moved to the end of the break.

For example, a fixed break for lunch exists from 12:00 to 12:30 and a mechanic clocks onto order A at the beginning of the day (see diagram below).



The mechanic will automatically be clocked onto lunch break at 12:00. Also at 12:00, a record will be created to clock the mechanic back onto the current activity, order A, at 12:30, end of lunch break.

New parameter TIM007 = x minutes from start or end of the fixed break (for example 10 minutes). TIM007 value is in minutes or decimals depending on the value of HME001.

If the mechanic makes no further time bookings, then he will work on order A with a fixed break from 12:00 to 12:30.

If the mechanic clocks onto order B at 12:01 (or 12:21 for example), within the TIM007=10 minute buffer at the start and end of the fixed break, then he will be clocked onto order B at 12:30 at the end of the fixed break.

If the mechanic attempts to clock onto another activity (cleaning XCLEN for example) at 12:07 or 12:27, also within the TIM007=10 minute buffer, this will also be allowed but it will overwrite order B at 12:30. In this case no time would be recorded for order B.

If the mechanic attempts to clock onto an activity during the fixed break between 12:11 and 12:19 (outside the TIM007 buffer), he will be prevented with the message, 'Online time recording is not allowed during a break. If working during a break you should contact the workshop manager'.

If TIM007 = 0, then no time booking is allowed at any time during the fixed break.

If TIM007 = 20 (or a similar high value equal to or greater than 50% of break time), then a time booking can be made at any point during the fixed break. It is the dealer's responsibility to ensure that TIM007 is set to a sensible value. If not, more manual corrections of time recording entries by the workshop supervisor may be necessary using Manual Time Recording.

In this way fixed breaks remain intact, booked hours are accurately reported and mechanics have some flexibility to book time during a fixed break.

If real-time fixed breaks are not activated, then fixed breaks will be applied in the same way as before, at the end of the day (when XFNSH is created).

What else would you like to do?

Learn about "[Manual Time Recording](#)" on page 400

Learn about "[Online Time Recording](#)" on page 410

Parameters:

Parameter	Format	Description	Value
REC505	1A	Future Fixed Break Source Code	'B'
TIM007	3,0	Fixed Break Clocking Buffer	*

* The value will be in either minutes (e.g. 005) or decimals (e.g. 010 = 10% hour = 6 minutes) depending on the value of HME001.

Summary Time by Product Code

Why:

In Fusion it is possible to view or print a list of 'booked' and 'Sold' hours by product code and payment code.

Where:

From the Workshop Order View select **Actions > Summary Time by Product code** and enter a Product Code and Date Range, along with an output source.



The Workshop Order View button

How View or Print a Summary of Booked or Sold Mechanic Hours:

It is possible to view or print a summary or detailed list of 'booked' and 'Sold' hours by product code and payment code. These are also broken down into three categories; Passing Trade, Non Local and Own district.

Related Topics:

Reports on both 'Hours Sold and Taken by Invoice' and 'Invoice Cost Analysis' are available from within the Workshop Order Workbench, Reports submenu.

Supervisor Job Booking

Why:

This option is used to ‘globally’ clock all mechanics off (for example, at lunch times or at the end of the day) by assigning a non-productive code to all or selected mechanics and shifts.

Where:

From the Mechanic View, select **Actions > Supervisor Job Booking**. This will display a Supervisor Job Booking window.



*The Mechanic view
button*

How to Amend Job Bookings:

In the Supervisor Job Booking window select the non-productive code, mechanic number (if required) and shift pattern (if required). Enter a specific time or leave blank to use current system time to end all previous job bookings.

What else would you like to do?

Learn about “[Manual Time Recording](#)” on page 400

Learn about “[Online Time Recording](#)” on page 410

Related Topics:

[Non-Productive Code](#)

Set Up:

The user must have permission to use Supervisor Job Booking in Security Administration.

Time Recording Rules

Why:

The recording of mechanic time in Fusion has been designed to follow certain guidelines. These help to make sure that the correct amount of time is paid for and at the correct rate of pay.

Where:

These rules do not need to be set up in Fusion, it's just important to be aware of them when using any of the time recording functions.

XFNSH Rule:

This can be used multiple times within a 24 hour period but calculations for the automatic payment category will not take place outside the shift core time.

For Example Calculations for automatic payments are only made up to the 1st XFNSH and any subsequent ones are not calculated.

XCLEN = Workshop Cleaning 02:00 AA.

XFNSH (1) = Finishing Time 04:00 EE.

XCLEN = Workshop Cleaning 07:00 AC.

XCLEN = Workshop Cleaning 08:00 AA.

XLNCH = Unpaid Meal Breaks (CODE EE) 12:00 EE.

XCLEN = Workshop Cleaning 13:00 AA.

XCLEN = Workshop Cleaning 17:00 AB.

XFNSH (2) = Finishing Time 18:00 EE.

XCLEN = Workshop Cleaning 21:00 AA.

XFNSH (3) = Finishing Time 23:00 EE.

To make sure that payment categories re-calculate, the first and the second XFNSH must be changed to XSTBY (see below). Because the XSTBY has been inserted select the 'Refresh' icon and the payment categories will re-calculate.

XCLEN = Workshop Cleaning 02:00 AC.

XSTBY = Standby (CODE EE) 04:00 EE.

Changed to XSTBY:

XCLEN = Workshop Cleaning 07:00 AC.

XCLEN = Workshop Cleaning 08:00 AA.

XLNCH = Unpaid Meal Breaks (CODE EE) 12.00 EE.

XCLEN = Workshop Cleaning 13:00 AA.

XCLEN = Workshop Cleaning 17:00 AB.

XSTBY = Standby (CODE EE) 18:00 EE.

Changed to XSTBY:

XCLEN = Workshop Cleaning 21:00 AB.

XFNSH = Finishing Time 23:00 EE.

XSCON Rule:

Please note that time recorded across the hour of midnight, when using XSCON in manual time recording, must be immediately followed by a 00:00 (midnight) clock-in on the subsequent day.

XSCON must be set up with a blank payment category within the non productive table.

Rule for Clocking While on Holiday:

If a mechanic has clocking's whilst on holiday, then these records will be added at the default payment code registered in the Parameter File and these will have to be changed manually. Alternatively the holiday exception should be removed and the appropriate shift clocking pattern should be registered as an exception.

Rule for Clocking Call Outs Over Midnight (Dayshift):

If a mechanic has a call out over midnight within manual time recording, normally only one XFNSH is allowed per day.

When a mechanic shift ends, then XSTBY should be used and an XFNSH record created at 24:00 with a start record of 00.00 the next day.

If a mechanic uses online time recording for a call out over midnight, then an XSCON will be created at 24:00 and the job will be started again the next day at 00.00.

When he clocks off the next morning an XFNSH record will be created.

After any subsequent calls outs are recorded or he completes his shift with an XFNSH, then report THP1035 will be generated listing any days to be reviewed.

From the dates on this report any XSCON should be changed to XFNSH for end of day and any duplicate XFNSH in the same day changed to XSTBY.

Press the Refresh icon on both days to update the data.

Auto Multiple XFNSH Report THR1035:

This report will automatically run if a mechanic uses more than one XFNSH within a 23 hour period and/or a mechanic has a call out that goes over midnight where an XSCON is created in online time recording.

The report will only run for mechanics using online time recording and records on the dates printed should be reviewed.

The report will not run from the manual time recording function, if using manual time recording you should be aware of the rules before using the system!

System Generated XFNSH Report THP666:

This report will run if a mechanic hasn't clocked off within a set period (controlled by parameter TIM 002). The next time a mechanic makes a clocking within online time recording then this report will run.

System Generated Breaks and XFNSH:

Breaks will be inserted automatically (where the start and end time is not within the break spell) when an XFNSH record is added based on parameter TIM006. These cannot be deleted so if a user works through these then these will need to be amended to the previous order/operation.

An XFNSH record will be added at the end of day if the Scheduler is set up within the Daily batch. This can be set to run XXX minutes + rounding after the end of each shift core time.

Core Time Calculation - Overtime Apportionment:

The system can calculate core and overtime apportionment in three very different ways. Depending on a parameter setting, (TIM010) one of the following will apply:

Overtime is only apportioned once core hours are complete.

Populate payment codes on a time basis compared to the shift clocking times. This means that payment categories are applied at the set times within the clocking pattern, regardless of the hours worked. For example if a user clocks on at 16:00 and overtime starts at 17:00, then overtime will be apportioned from 17:00 onwards.

Populate payment codes as mechanic start time equals shift start time at all times. This is similar to the first method. However, regardless of his start time he must complete his core time before the overtime is applied. For example, if the user clocks on at 3:00 and works to 18:00 then the first 8 hours would be basic hours, followed by overtime (in the first option, overtime would be applied between 3:00 and 8:00 and then basic hours applied after that).

How to Create Shifts:

When creating night shifts that start in the evening of one day and end in the morning of another day, then the shift detail must be set as follows:

The hours worked on a Saturday will only be those from Midnight on Friday until 6am Saturday when the person 'clocks off'. When viewing the shift by mechanic it appears that the person only has Sunday off, which of course is not correct.

From	To	Down	Core	Cat	Mon	Tue	Wed	Thu	Fri	Sat	Sun
0000	0600	50	Y	NA	N	Y	Y	Y	Y	Y	N
0000	2400			NC	N	N	N	N	N	N	Y
0600	2200			NB	N	Y	Y	Y	Y	N	N
0600	2200			NC	Y	N	N	N	N	N	N
0600	2400			NC	N	N	N	N	N	Y	N
2200	2400		Y	NA	Y	Y	Y	Y	Y	N	N

The Shift pattern will look like this:

(NITE) Nights - From 22:00 To 24:00 Monday

(NITE) Nights - From 00:00 To 06:00 & 22:00 To 24:00 Tuesday

(NITE) Nights - From 00:00 To 06:00 & 22:00 To 24:00 Wednesday

(NITE) Nights - From 00:00 To 06:00 & 22:00 To 24:00 Thursday

(NITE) Nights - From 00:00 To 06:00 & 22:00 To 24:00 Friday

(NITE) Nights - From 00:00 To 06:00 Saturday non-working day (Works early hours of the morning)

Sunday non-working day

What else would you like to do?

[Shift pattern enquiry](#)

[Shift Clocking details](#)

Related Topics

“[Online Time Recording](#)” on page 410

“[Manual Time Recording](#)” on page 400

Set up:

Parameter TIM 002 controls the number of elapsed hours before GDS should automatically create a finish record for a job when a mechanic does not clock off. (See system generated XFNSH Report above).

Parameter TIM 010 controls the appointment of overtime. (See Core Time Calculation above).

Parameter TIM 005 controls the set up of rounding's within the shift clocking table.

Parameter TIM 006 controls the set up of fixed breaks and also conditions the creation of XFNSH records via the scheduler. (Note based on the setting of TIM005)

Time Recording Using Barcodes

Why:

Using Barcode badges allows mechanics to record their activities via a terminal using a scanner. Depending on a parameter set up described below, this can either be at order or operation line level. If there's no order for a mechanic to clock onto, the system holds a list of codes that describe downtime and the mechanic must clock onto one of these. A user only ever clocks onto an activity. This effectively 'ends' his last activity. The only time that he will clock 'off' is for lunch or at the end of the day.

Where:

From the desktop select the On Line Time Recording button. This will display the Mechanic Time Recording window.



The On line Time Recording button.

How to Use Barcode Badge Time Recording:

Each mechanic has a bar code badge that holds his employee number. He must scan this, along with the bar code printed against the order number and line number (if time recording at operation level) from repair order. If there's no repair order to clock onto, then a list of bar codes for non-productive downtime can be produced and the mechanic can scan one of these.

When a mechanic scans his barcode badge, a number of icons are available:



= Clocking by category.



= Time card enquiry.



= Exceptions enquiry.



= Shift pattern enquiry.



= Non-working days.

After scanning, a message will be displayed confirming the order number or non-productive code that the mechanic is clocked onto, along with a date and time.

What else would you like to do?

Print Bar codes for the Mechanics badges via the 'Mechanic Workbench - Reports sub menu - Print Mechanic Bar Code List'.

Related Topics:

["Clocks by Payment Category Enquiry"](#) on page 399

[Mechanic Exceptions Enquiry](#)

["Mechanic Timecard Enquiry"](#) on page 403

[Non-Working Days Enquiry](#)

[Shift Pattern Enquiry](#)

["Time Recording Rules"](#) on page 443

Set Up:

Branch parameter BOH being set to POS001 means that On Line Time Recording screen displays an 'Activity' field rather than 'Order' and 'Non-productive' fields. This allows the activity to be scanned in regardless of it being productive or non-productive.

Parameter ONA 001 determines if time recording at order line level is in operation. If ONA 001 is set to *LIKE (POS 001) then the order number and line number are used for recording time.

Time Summary by Mechanic

Why:

The report lists each mechanic's details such as booked time against both Open and Invoiced orders, time against each payment category (normal time, overtime etc) and then calculates the utilisation and productivity based on shift and actual worked hours.

Where:

From the Mechanic View, select **Reports > Time summary by Mechanic**. This will display a Time summary by Mechanic Report window.



*The Mechanic View
button*

How to Create a Time Summary by Mechanic Report:

In the Time Summary by Mechanic Report window input the required selection (including team if required) criteria to customise you report.

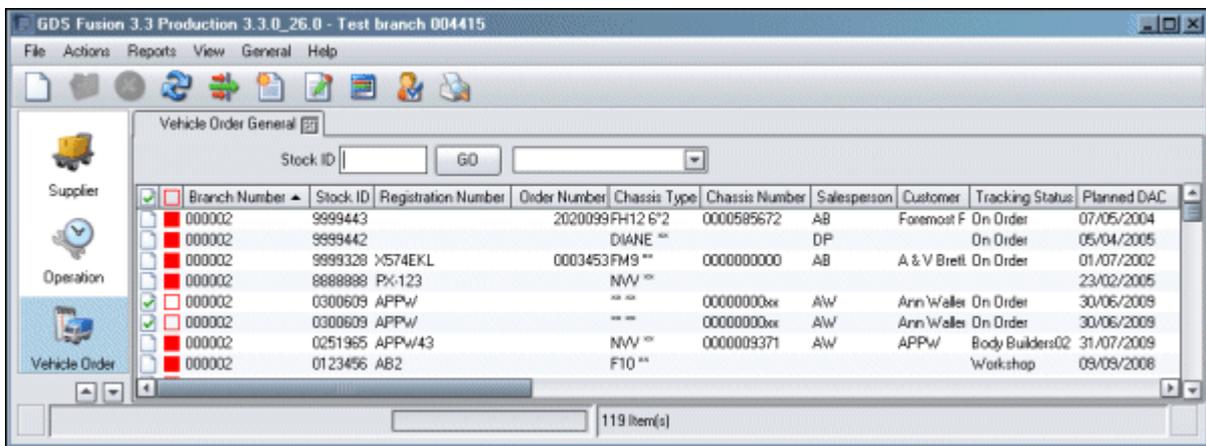
Related Topics:

[Payroll Reports](#)

Vehicle Administration

About Vehicle Administration

This chapter provides information about actions concerning Vehicle Order Administration. The functionality explained herein is available via the screens in the Vehicle Order View.



Vehicle Order View Icon Descriptions:

Column	Purpose / Description
	Uninvoiced: The Order is not yet invoiced to the Customer.
	Invoiced: The Vehicle Order is invoiced to the Customer
	Overdue: The Order is Overdue.
	Unplanned: The order is unplanned.

Actual Costs

Why:

Actual costs are added to a vehicle order as they become available, and can be compared with the estimated costs. The values entered also update the actual gross profit figure shown in the Financial tab of the Vehicle Order Maintenance window.

Where:

From the Vehicle Order View, open the vehicle order you want to work with. This will display the Vehicle Order Maintenance window.



The Vehicle Order View button.

How to Work With Actual Costs:

In the Vehicle Order Maintenance window select the 'Actual Costs' tab. Here, the estimated costs from the financial and extras tabs are displayed automatically.

If workshop and external costs interfaces are active, most actual costs will be added to the vehicle order automatically, or via the Pending Costs routine. However, it's still possible to add actual costs manually if required.

To drill-down to the cost details, open the required item from the Actual Costs tab by right-clicking and selecting Open.

This will display the Vehicle Order Maintenance Actual Costs window. Here you can view the total net variance between the actual and estimated cost.

'Input Date' is the date that the cost was first received by Fusion and 'Audit Number' is the sequence number of the Actual Costs Audit Report on which this cost was printed. Actual Costs can't be deleted once they have been printed on the Actual Costs Audit Report and assigned an Audit Run Number.

The default view in this window is the Summary view, where costs sharing the same document number, document date and accepted date are summarised. Selecting Detail displays all the individual cost details.

To add a new cost record select File > New. This will display the Add Actual Costs window where cost details are input. Once an actual cost has been input here it can't be changed, only deleted.

The 'Fully Allocated' checkbox indicates whether all transactions have been completed for this vehicle and all actual costs input. This checkbox is only available once the vehicle order has been invoiced. Only authorised users can update this and once checked, no more transactions or costs are allowed. Once checked, the Date field is automatically updated with the current days date. The 'Fully Allocated' checkbox can't be unchecked once it has been checked and the vehicle order updated. Depending on a parameter, when an order is 'fully allocated' cost adjustment postings are sent to the general ledger interface and an Automatic Cost Adjustments report is printed.

What else would you like to do?

“[Financial Details of a Vehicle Order](#)” on page 469.

Related Topics:

“[Pending Costs](#)” on page 470.

Adding a Vehicle Extra

Why:

Vehicle extras are any accessories or repairs that are required for a new or used vehicle order. Details of extras can be added manually or selected from a pre-defined list.

Where:

From the Vehicle Order View, highlight the required vehicle and choose **Vehicle Order > Open**. This will display the Vehicle Order Maintenance window.



*The Vehicle Order
View button.*

How to Add Vehicle Extras:

In the Vehicle Order Maintenance window select the Extras tab. Any extras already added to the order are displayed here and can be opened and amended or deleted.

To add a new vehicle extra select File > New > Extra Details. This will display the Vehicle Order Maintenance - Add Extra window.

Select the extra type. For Extra and Repair types, click the Lookup button next to the Description field to select a file-held extra. This will automatically populate the rest of the fields with default values which can be amended if required. However, if the extra you need isn't on file, input your own description and complete the rest of the fields as required.

The Internal/External field indicates whether the extra is to be fitted by an external or internal supplier. An operation number can be input for extras supplied by your own internal workshop.

Vehicle extras can be input, amended or deleted at any time up until the order is invoiced.

Extras will only print on the customer invoice if the 'Print on Invoice' box is checked. If this box is not checked, extras will not appear on the invoice and their value will be hidden in the main vehicle price.

Extras may also be added as type 'Text'. This allows you to add free-text lines if required.

What else would you like to do?

[“Amending a Vehicle Order”](#) on page 453.

[“Financial Details of a Vehicle Order”](#) on page 469.

[“Workshop Requisitions”](#) on page 480.

Related Topics:

[“Copying a Vehicle Order”](#) on page 455.

Adding Trade-In Details to a Vehicle Order

Why:

When a vehicle order is created, details of all vehicles that are being traded-in can be input into the order.

Where:

From the Vehicle Order View, open the vehicle order you want to work with. This will display the Vehicle Order Maintenance window.



*The Vehicle Order
View button.*

How to Add Trade-in Details to a Vehicle Order:

In the Vehicle Order Maintenance window select the Trade-In tab. Here, any trade-in details already input are listed.

To add details of another trade-in, select File > New > Trade-In, or click the down-arrow next to the New icon and select Trade-In. This will display the New Trade-In window where details of the trade-in are input. The Workshop Vehicle File can be searched by using the Lookup button. If the vehicle details already exist in the workshop system, click 'Retrieve' to update the trade-in with these details, and select a Make and Tracking status for the trade-in vehicle. Click OK to create the new trade-in.

If your market uses automatic stock ID allocation, Fusion will allocate a stock ID to the trade-in. Otherwise you'll have to input the desired stock ID. The system may offer a suggested value, but you can enter a different value if you wish.

This trade-in will now be listed in the vehicle order view, where it can be opened and updated.

If you want to add more vehicle details relating to the trade-in, open the record and input the information as required.

Up to 5 trade-ins can be input against a single vehicle order.

Once the vehicle details of the trade-in(s) have been input, you can also input values for the trade-in price and any write-down loss. This is done within the Financial tab.

Click on the Financial tab. All the Trade-Ins against this order are listed in the Trade-In Details section.

To input the purchase price open the Trade-In Price window by right-clicking the trade-in record and choosing Open. Input the tax-exclusive amount offered on the vehicle as well as any write-down value and click OK. Write-down may be negative if the price offered is lower than current market value.

If your system is set-up to post trade-in financial values to the finance system, the default Payment Code, Account Code and Tax Code for the trade-ins are also displayed in the Financial tab. These values can be amended if required.

Trade-in VAT is calculated based on the default VAT code for the trade-in vehicle. This code can be overridden if you need to calculate VAT on the trade-in at a different rate.

Write-down loss may optionally be shown as a deduction from gross profit on the vehicle deal. If this facility is enabled, write-down loss is shown in the financial tab. If a negative value is input in the Write-Down Amount field, it will increase the gross profit.

What else would you like to do?

“[Adding a Vehicle Extra](#)” on page 451.

“[Amending a Vehicle Order](#)” on page 453.

“[Financial Details of a Vehicle Order](#)” on page 469.

Related Topics:

“[Creating a Vehicle Order](#)” on page 458.

Amending a Vehicle Order

Why:

Once a vehicle order has been created in Fusion any of its details can be amended up until the time that the order is invoiced.

Where:

From the Vehicle Order View, highlight the vehicle order you want to work with then select Vehicle Order. This will display the Vehicle Order Maintenance window.



*The Vehicle Order
View button.*

How to Amend a Vehicle Order:

In the Vehicle Order Maintenance window, a series of tabs holds information about the customer, vehicle, trade-in, extras and financial aspects of the deal. Free text can also be recorded.

On the Vehicle (Additional) tab it's possible to group together vehicles of your choice into a single deal, for example a fleet sale consisting of several new units.

This is done by amending the Deal Number and Hierarchy fields in the Vehicle (Additional) tab of the Vehicle Order Maintenance window. This information is used to drive the Deal Number Profit Report which analyses the total deal profit for all vehicles linked to the same deal number.



Note! When an order is created, the deal number and hierarchy are automatically generated. A trade-in is automatically assigned the same deal number as its 'parent' but with a different hierarchy number.

For example:

A. New vehicle, deal number 1234 Hierarchy 0

B. Trade-in against A, deal number 1234 Hierarchy 1

C. Trade-in against B, deal number 1234 Hierarchy 2

On invoiced vehicles you'll no longer be allowed to amend anything except internal free-text. However, if you have sufficient user authority you'll be allowed to amend the Tracking status, Vehicle stock type, Registration number and Registration date.

DAC and CDC dates may be amended via the Planning Detail function.

What else would you like to do?

- “[Adding a Vehicle Extra](#)” on page 451.
- “[Adding Trade-In Details to a Vehicle Order](#)” on page 452.
- “[Copying a Vehicle Order](#)” on page 455.
- “[Creating a Vehicle Order](#)” on page 458.
- “[Deleting a Vehicle Order](#)” on page 466.
- “[Financial Details of a Vehicle Order](#)” on page 469.
- “[Transferring a Vehicle Order](#)” on page 478.
- “[Creating Amending Vehicle Orders](#)” on page 459.

Related Topics:

- “[Creating – Updating Orders from VSS](#)” on page 465.
- “[The VSS – Fusion Interface](#)” on page 478.

Cancel a Vehicle Order

Why:

You can cancel a vehicle order providing it hasn't been invoiced and it hasn't been received into stock or delivered to the customer.

Where:

From the Vehicle Order View, highlight the vehicle order that you would like to work with then right-click and select Cancel.



*The Vehicle Order
View button.*

How to Cancel Vehicle Orders:

In the Cancel Vehicle Order window, input the cancellation date and reason and then click on OK to confirm.

What else would you like to do?

- “[Deleting a Vehicle Order](#)” on page 466

Changing the Stock ID on a Vehicle Order

Why:

You can change the stock ID on an existing vehicle order providing it hasn't been invoiced or credited and has no workshop requisitions or actual costs (current or deleted).

Where:

From the Vehicle Order View, highlight the vehicle order you want to work with then right-click and select Change Stock ID. This will display the Change Stock ID window.



The Vehicle Order View button.

How to Change Stock ID on Vehicle Orders:

In the Change Stock ID window, input the desired stock ID and click OK to confirm.

What else would you like to do?

“[Copying a Vehicle Order](#)” on page 455.

“[Deleting a Vehicle Order](#)” on page 466.

Related Topics:

“[Actual Costs](#)” on page 449.

Copying a Vehicle Order

Why:

Any existing vehicle order, whether invoiced or uninvoiced, can be copied to create a new stock ID, but only if a chassis number has not yet been entered. The Copy facility is designed to save keying time, for example when a customer has ordered multiple units of the same specification.

All copied orders have a status of uninvoiced, even if copied from an invoiced order.

All details are copied from the original order with the following exceptions:

- Trade-In Details
- Actual Cost Details

Where:

From the Vehicle Order View, highlight the vehicle order you want to copy and right-click then select Copy, or select **Vehicle Order** > **Copy**. This will display the Copy Vehicle Order window.



The Vehicle Order View button.

How to Copy Vehicle Orders:

In the Copy Vehicle Order window you'll have to input the stock ID for the copy

if automatic stock ID allocation isn't enabled. The system may offer a suggested value, but you can enter a different value if you wish, click OK to confirm the copy.

The new vehicle order will now be included in the list in the vehicle order view. Most fields will be populated with information from the original order, with the exception of trade-in and actual cost details.

What else would you like to do?

[“Adding a Vehicle Extra”](#) on page 451.

[“Adding Trade-In Details to a Vehicle Order”](#) on page 452.

[“Creating a Vehicle Order”](#) on page 458.

[“Deleting a Vehicle Order”](#) on page 466.

[“Financial Details of a Vehicle Order”](#) on page 469.

[“Transferring a Vehicle Order”](#) on page 478.

Related Topics:

[“Creating – Updating Orders from VSS”](#) on page 465.

[“The VSS – Fusion Interface”](#) on page 478.

Creating a Full Credit

Why:

When a vehicle has been invoiced you have the option create full or partial credit notes. A full credit note is a complete reversal of the original invoice.

Where:

From the Vehicle Order View, highlight the vehicle order you want to work with and select **Vehicle Order > Credit > Full**. This will display a confirmation window. Select ‘Yes’ to create the full credit, or ‘No’ to abandon the routine.



*The Vehicle Order
View button.*

How to Create a Vehicle Order Full Credit :

In the Create Full Credit window the text that was included in the original invoice is displayed and can be changed if required. If 'yes' is selected in the Print Trade-In field, then trade-in details will be shown on the customer's credit note and the value of the trade-in vehicle(s) will be deducted from the credit total amount. If it's a split deal, trade-in details print only on the first credit note.

To change the language of the credit note, right-click the customer line and select Change Language. If more than one customer is displayed, for example on a split-invoice deal, language may be changed independently against each customer. If any partial credits have already been raised against the original invoice, the full credit option will be inaccessible.

Depending on the setup of your system, creation of a full credit note might put the stock ID back into stock, making it available for re-invoicing. If your system isn't set up to work like this, a fully credited vehicle will remain on an invoiced status.

What else would you like to do?

“[Creating a Partial Credit](#)” on page 457.

Related Topics:

Invoicing a Vehicle Order

Creating a Partial Credit

Why:

When a vehicle has been invoiced you have the option create full or partial credit notes. A full credit note is a complete reversal of the original invoice. A partial credit note allows you to credit selected amounts, for example if you have overcharged the customer. Full credit is not allowed once partial credits have been raised, so you should not use partial credit unless you are sure that a full credit will not be required at a later stage.

Where:

From the Vehicle Order View, highlight the vehicle order you want to work with and select **Vehicle Order > Credit > Partial**. This will display the Select Invoice for Partial Credit window.



The Vehicle Order View button.

How to Create Vehicle Order Partial Credit:

In the Select Invoice for Partial Credit window current invoices for the vehicle order are listed. There may be more than one invoice if the primary was split, or if supplementary invoices have also been raised. Double-click the desired invoice to open the Credit Notes Raised for Invoice window.

The Credit Notes Raised for Invoice window lists any credits that have been previously raised against the selected invoice.

To create a new partial credit, select File > New. This will display a Create Partial Credit window. Here, all invoice items are listed. Right-click the required items and select ‘Open’ to input the amounts you want to credit.

Click OK to print the partial credit, then choose whether you would like to print any trade-in details on the partial credit, and the number of copies required.

What else would you like to do?

“[Creating a Full Credit](#)” on page 456.

Related Topics:

Invoicing a Vehicle Order.

Creating a Vehicle Order

Why:

Vehicle orders can be created manually in Fusion or via an automatic link from the Volvo Sales Support system (VSS). This section deals with the manual creation of vehicle orders. Vehicle orders can be created for new or used vehicles. At the time of creation, the vehicle may be on order from the manufacturer or another supplier, or it may actually have been received into stock.

Where:

From the Vehicle Order View, select **File > New** or click on the New button . This will display a Create Vehicle Order window.



The Vehicle Order View button.

How to Create Vehicle Orders:

In the Create Vehicle Order window, input the required details for the vehicle order. The Customer and Workshop Vehicle files can be searched by using the Lookup buttons. If the vehicle details already exist in the workshop system, click the Retrieve button to update the vehicle order with these details. Click OK to create the new vehicle order.

If the chassis number exists on other vehicle records (invoiced or uninvoiced) in any branch, a warning message will be displayed. Click OK to continue, or Cancel to input a different chassis number.

If your market uses automatic stock ID allocation, Fusion will allocate a stock ID to this vehicle order. Otherwise you'll have to input the desired stock ID. The system may offer a suggested value, but you can enter a different value if you wish.

This new order will now be listed in the vehicle order view, where it can be opened and amended.

What else would you like to do?

“[Adding a Vehicle Extra](#)” on page 451.

“[Adding Trade-In Details to a Vehicle Order](#)” on page 452.

“[Amending a Vehicle Order](#)” on page 453.

“[Financial Details of a Vehicle Order](#)” on page 469.

Related Topics:

“[The VSS – Fusion Interface](#)” on page 478.

Creating Amending Vehicle Orders

Why:

When a vehicle order is added in GDS an outline plan is created automatically. The outline includes the milestones DAC and CDC, and creates a framework within which all other tasks can be scheduled.

For new vehicles, an additional milestone is created automatically when the confirmed vehicle order is downloaded in the TDS Enquiry routine. This creates milestone LCD in the plan based on the Build Date indicated by the factory, and the default number of weeks.

Other tasks should be scheduled manually by the vehicle administrator in the Planning Detail routine.

Where:

Planning Detail can be accessed in several different ways.

- Highlight a vehicle order in the workbench, right-click and select Planning Detail.
- Highlight a vehicle order in the workbench and choose Planning Detail from the Vehicle Order menu at the top of the screen.
- Select the Planning icon from the vehicle order maintenance screen. This route is particularly useful if you have just created new items in the Extras tab, because you can then switch immediately to the planning function to plan them in the schedule.
- In the Planning Overview function, right-click a vehicle order in the timeline and select Planning Detail.

How to Work With Vehicle Order Planning:

The Planning Detail screen contains a task list showing planned and actual start and completion dates for milestones and tasks. It also includes a visual representation of this schedule as a timeline, and analysis of the overall lead times from order to DAC and from DAC to CDC.

File Menu - Select File-New then choose External Work, General Task or Internal Work to create a new entry in the plan. Alternatively, click on the drop-down arrow next to the New icon to choose a task type to create.

Edit Menu - Highlight an existing task record, either in the task list, or in the timeline. Select Edit-Open or the Open icon to open the task record. Select Edit-Start to insert today's date as the Actual Start Date on the chosen task. Select Edit-Complete to insert today's date as the Actual Completion Date on the chosen task. Select Edit-Delete to delete an external, internal or general task from the plan.

The Edit menu may also be accessed by right-clicking on a task record in the task list or the timeline.



Note! Start is not available for the milestone CDC: the Actual Start Date for CDC is inserted automatically when Actual Completion Date is entered on milestone DAC.

Delete is not available for any milestone but may be selected for internal, external and general tasks. Deletion of internal task will also delete the associated workshop requisition.

View Menu - Choose the option Show/Hide Statistics to hide or reveal the statistical analysis at the bottom of the screen. Alternatively choose the Show/Hide Statistics icon. Hiding statistics allows you to view more tasks in the task list.

Reports Menu - Select the option Print Planning to print a summary of the vehicle's plan. Alternatively click on the Print icon.

Tracking Status - Tracking Status may be amended in the Planning Detail screen. It is the only place that is may be amended if the required Tracking status is set-up in the Tracking Status table to insist on the entry of Actual DAC Date.

Part Planned Field - Check the Part Planned checkbox if you have stated to set-up the plan for this vehicle order, but have not yet completed it. You can search for part planned vehicles using her Vehicle Order filter in the workbench, and the Alert column in the workbench will also highlight part planned vehicles.

Timeline - The timeline displays a graphical representation of the vehicle plan. Tasks are shown in different colours depending on their status: red means overdue, green means completed and yellow indicates that the task is still on schedule.

Milestones are represented as diamonds marking the planned or actual date of completion. Other tasks are shown as blocks marking the start and completion (planned or actual, depending on the status of the task). Use the mouse to move over the timeline and view the hover-over text for each task.

In the timeline today's date is highlighted (25) and weekend dates are shown in red text. You may scroll backwards and forwards in the timeline up to two years. Clicking on a task in the task list will reposition the timeline automatically to that task.

In some cases, task may overlap, particularly where a general administrative task is scheduled concurrently with external or internal work. In that case the area of overlap will show as a hatched block. In this case the hover-over tool text will show the description of each overlapping task.

When hovering over an overlap area the dominant task is highlighted in bold. The dominant task is the one the action will be performed against should you select an option from the right-click menu. It is also the task that may be selected for drag-and-drop, where applicable.

Drag-and-Drop - You can change the planned dates for a task by using the mouse cursor to drag-and-drop the item.

- Drag-and-drop is possible on milestones provided actual completion date is not present.
- On all other task types drag-and-drop is possible provided neither actual start nor actual completion is present.

Additionally, for external, internal and general tasks it is possible to resize the task by extending the task's right-hand border using the mouse. Resize is not possible on completed tasks.

Auto-Rescheduling - When you change the planned completion date of a task, either in the timeline or in the task maintenance screen, you have the option to reschedule automatically any subsequent tasks.

- Click No to leave subsequent tasks unchanged.
- Click Cancel to leave both subsequent tasks and the instigator task itself unchanged.
- Click Yes to confirm the planned completion date change on the instigator task, and reschedule any subsequent tasks.

If automatic rescheduling is chosen, the system will re-plan tasks with a planned start date greater than the planned completion date of the instigator task, provided those tasks are yet to be started. Rescheduled tasks retain their relative positions to one another.

When rescheduling, the system takes into account non-working days. For example, if Saturday and Sunday are non-working days, and a two-day task starting on Thursday is moved to start Friday, the task block will extend to cover Friday-Saturday-Sunday-Monday. In other words, the same number of working days is always retained in the task.

The only exception to this rule is when a task occupying zero working days is moved, for example you may deliberately have scheduled a task to start and finish on a weekend. In such cases the task is automatically rescheduled to last one day, otherwise it would disappear from the timeline completely.

The system does not recognise personal, local or national holidays, or the working arrangements in force at internal and external suppliers, so if you do choose automatic rescheduling always review the plan afterwards to ensure that it still meets your requirements.

 **Note!** Auto-scheduling is not offered if the start position instigator task is before planned DAC completion date. This is because any task planned prior to DAC would normally be an administrative task, and there for its movement can have no effect on the overall delivery schedule.

Analysis - The statistics at the bottom of the screen measure total lead times from order to DAC, from DAC to CDC and from Order to CDC. Variance shows the difference between Plan Days and Actual Days.

Maintain Task – External Work - A Separate task should be planned for each externally-fitted item in the vehicle maintenance Extras tab.

Choose New – External Work to create an external task.

Description - Select the description from the list of available external extras in the drop-down list. The list excludes items that have already been scheduled in the plan.

Purchase Details - If required enter supplier and purchase order details. Retrieve the supplier name and e-mail address by inputting a known number from the GDS supplier file, or search for the required supplier using the Supplier Selector.

 **Note!** Supplier number is used for retrieval only and is not held on the tasks file.

If the supplier has an e-mail address on the supplier file and the user has an e-mail address on the GDS Name Identity table, an e-mail may be generated form directly within this function. Clicking on the e-mail icon to display the input screen.

Planned Start Date - When creating a new task Planned Start Date defaults automatically to the next free date after DSC completion, taking into account non-working days. General tasks already in the plan are ignored for the purposes of calculating the next free date.

Planned Start Date may be overridden with another date, but it may not be before the order date.

Working Days/Calculate/Planned Completion Date - Planned completion Date may be entered manually or calculated by the system. To calculate the date automatically enter the number of working days required for the task and click on the calculate button. If the task is due to start and finish on the same day enter the planned start date then simply click on Calculate with '0' as the Working Days value to set planned completion to the same date.

 **Note!** The number of working days is entered for calculation only when adding a new task and is not held on the tasks file.

Original Planned Completion Date - If the planned completion date changes at any point in the future, Original Planned Completion Date is populated automatically provided it does not already contain a date.

Actual Start Date/Actual Completion Date - For the planning module to work effectively actual start and completion dates should be entered at the appropriate time. These fields do not accept future deals.

If you enter actual completion date without actual start date present, the system will set actual start date to a default value. Normally this is the planned start date unless the task had been completed ahead of schedule, in which case the actual start date will be set to the same date as actual completion date. Obviously it will give a more accurate picture if start dates are entered by the administrator rather than by default.

Alert - The alert fields store the person designated to receive e-mail alerts relating to the start and / or completion of each task. Choose from Administrator, Salesperson, Both or Neither.

Default values are defined in the parameter file for these fields for each different task type, but the user may override these defaults as required.

Additional Alert E-mail - If required an additional e-mail address may be entered for start and completion alerts. These fields are completely free-format.

Notes - General notes may be entered as required.

Maintain Task – General Task - The Planning Detail screen for general tasks is similar to that for external tasks, except there are no purchase or supplier details. The Description field is free-text or, when adding a new task, you may select from a list of descriptions, as set up the general task table in the GDS Control File.

Maintain Task – Internal Work - Planning internal work is different to other task types because creation of a new internal work task links directly to the Add Workshop Requisition routine and, at the same time the requisition is added, a task is scheduled automatically in the vehicles plan.

Internal tasks may also be planned in the Workshop Requisition function, accessed from the Actions menu or the Vehicle Order menu in the workbench.

To create an internal task from the Planning Detail screen, select New – Internal work

Enter the required workshop branch, planned start and completion date. Alternatively you can calculate the planned completion date by entering the required number of working days and clicking on the Calculate button. When you click OK, you will be taken to the normal workshop requisitions screen where you may select internal extras from the vehicle record.

The Release to Workshop checkbox is available in this screen, and may be checked immediately if you are ready to release this requisitions to the GDS Workshop application. On clicking OK to complete the requisition, you will be returned to the Planning Detail screen and the internal task will be shown in the schedule.

Once internal work has been created in the plan, the task can be opened from the Planning Detail screen and maintained in the normal way. Use the Workshop Requisition icon or take Actions-Workshop Requisition to view the details of the linked requisition if required.

Actual start and completion dates for internal tasks may be maintained in the Maintain Task screen, or in the Workshop Requisition routine. Where the workshop requisition interface is enabled between GDS Vehicle Order and Workshop applications, invoicing the order in Workshop will automatically insert Actual Completion Date the requisition and the task.

Deletion of a requisition via the Workshop Requisition routine will delete the associated task. Re- opening a requisition will remove the actual completion date from the associated task; note, however that removal of actual completion date from the internal tasks in the Maintain Task Routine will not open the associated requisition.

Maintain Task- Milestones - Milestones are created automatically when the vehicle order is added in the case of DAC and CDC, or when the vehicle order is downloaded from the TDS in the case of LCD.

Milestones may be maintained via the Planning Detail screen like any other task, but certain restrictions apply.

On milestone CDC, start dates may not be amended: start CDC is always the same as completion of DAC, therefore planned and actual start dates for CDC are always updated automatically by the system to match the completion dates on DAC.

On milestone LCD, the only amendable date is actual completion date. Planned and actual start and planned completion are inserted automatically when order details are downloaded from TDA. LCD is calculated based on the factory build date retrieved from TDS and a default number of weeks.

Related Topics:

[“Planning Overview”](#) on page 471.

Planning E-mail Alerts

Creating Split Invoices for a Vehicle Order

Why:

For each vehicle order you have the option to create a single invoice or a split invoice (where up to 3 invoices can be created for different customers).

Where:

From the Vehicle Order View, highlight the vehicle order that you would like to work with, right-click then select **Invoice > Primary Invoice**. This will display a Number of Invoices window.



The Vehicle Order View button.

How to Split Vehicle Order Invoices:

The Number of Invoices window is where you indicate if you wish to split the invoice value between 2 or 3 customers.

Select '2' or '3' and input the corresponding customer numbers, then click OK. If you intend to print trade-in details on the invoice, or a prior deposit has been taken, make sure you enter the appropriate customer as the first customer because trade-in and deposit details only print on the first invoice.

Click OK in the Number of Invoices window to proceed to the Create Primary Invoice window. This displays up to 3 tabs, one for each customer selected in the previous window.

Initially the entire invoice amount is attributed to the first customer in the split. You need to reallocate some of the sales value to the other customer(s). To do this select the item you wish to split then right-click and select Change Invoice Amount. Input the amount you want this customer to be invoiced and then choose which of the other customers you wish to be allocated the remaining balance to, then click OK. Do this for each invoice amount that you wish to split.

Tax code and Print on Invoice can be changed on an invoice line by right-clicking and selecting the appropriate option. Make the changes on each invoice tab as necessary.

On each of the tabs, enter the required invoice date and payment terms for the invoice. Check the alternate currency checkbox to print the invoice in another currency. If appropriate, verify/amend the language in which the invoice will print.

The free format text field is where you can input any additional information you want to see printed on the invoice. Hint: select the Show/Hide Text icon  to hide this section of the screen and display more of the invoice lines.

Click on the Preview icon  to see a preview of the printed vehicle invoices.

Click OK to complete the invoices. A Print Invoice window will be displayed. Input the required information and click OK.

A confirmation message will be displayed once the invoices have been printed.

What else would you like to do?

“[Financial Details of a Vehicle Order](#)” on page 469.

“[Registering an Invoice as Paid](#)” on page 474.

“[Reprinting a Vehicle Invoice Credit](#)” on page 475.

“[Supplementary Invoicing](#)” on page 476.

Creating – Updating Orders from VSS

Why:

New VSS (Volvo Sales Support System) order details may optionally be transferred to Fusion where they are held until accepted. Once accepted they are maintained in the same way as all other orders within Fusion.

If the values or customer information changes for an order that was created in VSS, then you have the option to update its corresponding Fusion order automatically.

Where:



The Vehicle Order View button.

From the Vehicle Order View, select **Actions > VSS Orders > New**. This will display the New VSS Orders window. From the Vehicle Order View select **Actions > VSS Orders > Amended**. This will display the Amended VSS Orders window.

How to Create and Update Orders from VSS:

The New VSS Orders window lists all new VSS orders that are awaiting acceptance into Fusion.

To accept a VSS order into Fusion, highlight it, right-click and then select Open to display the Update New VSS Order window. Check that the customer number and model type are correct then update the tracking status. The planned CDC date and quantity can be amended if required.

The engine type, gearbox type, rear axle type and axle combination can all be updated here, but can also be updated from TDS at a later date. Click OK to accept the order into Fusion. The order will now be displayed in the vehicle order view.

The Amended VSS Orders window lists those orders which originated in VSS whose values or customer information has changed since the order was created. To update the corresponding Fusion order, in the Amended VSS Order window highlight the required record, right-click then select Open. This will display the Update Amended VSS Order window. Here, against the order values and customer information fields you have the option to accept the updates. Accepting the updates automatically updates all the relevant information in the Fusion order.

What else would you like to do?

“[Amending a Vehicle Order](#)” on page 453.

Related Topics:

“[The VSS – Fusion Interface](#)” on page 478.

“[TDS Enquiry](#)” on page 477.

Deleting a Vehicle Order

Why:

A vehicle order can be deleted, providing you have been granted the authority to delete and it has no open workshop orders.

Where:

From the Vehicle Order View, highlight the vehicle order that you would like to delete and right-click, then select **Vehicle Order > Delete**.



*The Vehicle Order
View button.*

How to Delete a Vehicle Order:

When the delete function is selected, a confirmation window is displayed. Select ‘OK’ to confirm the deletion. The order will no longer be listed in the vehicle order view.

What else would you like to do?

“[Adding Trade-In Details to a Vehicle Order](#)” on page 452.

“[Copying a Vehicle Order](#)” on page 455.

“[Creating a Vehicle Order](#)” on page 458.

“[Financial Details of a Vehicle Order](#)” on page 469.

“[Transferring a Vehicle Order](#)” on page 478.

Depreciation

Why:

Used vehicle depreciation is calculated in accordance with the depreciation tables set up in the control files.

Calculation of depreciation values and the Depreciation Proposal Report are usually run once a month, at month-end, but can be run at other intervals provided you don't include the same dates more than once.

The posting option updates the actual cost file and, optionally, the general ledger interface.

Where:

From the Vehicle Order View, select **Actions > Depreciation**. This will display the Used Vehicle Depreciation window.



The Vehicle Order View button.

How to Work With Vehicle Order Depreciation:

The Used Vehicle Depreciation window contains a list of all vehicle orders currently held in the depreciation file. At the start of a new depreciation run, this list will contain the vehicles depreciated on the last run.

To calculate a new depreciation proposal for the current month, select **Actions > Calculate Depreciation** or click **Calculate**. This will display the Calculate Used Vehicle Depreciation window which shows the last date range used for calculation. Input the new required date range and click **OK**. If the new date range precedes or overlaps the previous range, Fusion will display a warning.

During calculation, vehicles are selected for depreciation if they have a vehicle type which is eligible for depreciation, they are uninvoiced at the time the calculation is run, they have an actual receipt date on or before the start date selected and they have an actual chassis cost greater than zero. On completion, a Depreciation Proposal Report is printed showing the vehicles selected and their proposed depreciation values. The report is sorted by vehicle type and within vehicle type by stock ID.

If the actual chassis cost has been added or updated since the last time depreciation was posted, the value is highlighted in bold text.

When calculating the proposed depreciation value, the routine compares the age of the vehicle to the breaks defined in the Depreciation Rates table, and obtains the relevant percentage(s). Where a vehicle falls into more than one break period in the same calculation run, the depreciation value is calculated on a pro rata basis.

The calculation is based on the actual cost of the vehicle chassis only; other costs are not included. However, depending on a parameter setting, the calculation uses the actual cost of the vehicle chassis less accumulated actual depreciation. The formula is as follows:

$$\frac{((\text{Base Cost} \times \text{Break \%}) \text{ divided by Number of Days in Break}) \times \text{Qualifying Days This Break}}$$

For example:

Calculation run 1/11 to 30/11, Vehicle first stocked 15/09, Base Cost 25000.00

Breaks: 0-30 days 0%, 31-60 days 2%, 61-90 days 3%, 91-120 days 4% etc.

This means that in the period 1/11 to 30/11 the vehicle qualifies for 13 days in the 31-90 break and 17 days in the 61-90 break.

$((25000.00 \times 2\%) \text{ divided by } 30) \times 13 = 216.67$

$((25000.00 \times 3\%) \text{ divided by } 30) \times 17 = 425.00$

Total 641.67

 **Note!** The 'base cost' is either the actual vehicle cost, or the actual vehicle cost less accumulated depreciation, depending whether your system is configured to use the straight line or reducing balance method of depreciation.

Each record in the proposal can be opened and the depreciation value amended, but you should always input an explanation for this action.

Records can also be deleted, if you don't want them to be depreciated in this run.

To add a new record select File > New. This will display the Add Depreciation Value window. Input the stock ID of the vehicle along with the depreciation value and a comment. Click OK to add it to the proposal.

To post depreciation transactions, select Actions > Post. When the posting is confirmed, records are created automatically on the Vehicle Order Actual Costs File, one per vehicle, with a document reference number pulled from the Number Range table.

If the facility is enabled, these transactions can also be posted to the Finance system. Depending on setup, either one record per stock ID is created or one record is created for each different combination of vehicle type and product code in the run. Note that in the latter case, no document number is written to the Interface File.

Selecting the print icon will print a copy of the last depreciation report. The information it contains is only available for reprint until the next time the depreciation calculation is run.

Export to Microsoft Excel

Why:

Allows you to export details about vehicle sales orders in Excel format so that you can generate your own reports.

Where:

From the Vehicle Order View, select **File>Export to>Microsoft Excel**.



The Vehicle Order View button.

How to Export Vehicle Sales Information to Excel:

The export contains all records currently displayed in the workbench. If required, use the Vehicle Order Filter to select a subset of vehicle orders before running the extract. Select **File > Export to > Microsoft Excel**. You will be prompted to enter a file name, and the location in which you wish to save the file.

Financial Details of a Vehicle Order

Why:

All the financial information relating to the vehicle order can be viewed in the Financial tab of the Vehicle Order Maintenance window. Financial information relating to any trade-in is also maintained here.

Where:

From the Vehicle Order View, open the vehicle order that you would like to work with. This will display the Vehicle Order Maintenance window.



*The Vehicle Order
View button.*

How to Work With Vehicle Order Financial Details:

In the Vehicle Order Maintenance window select the Financial tab.

All the financial information relating to this vehicle order can be amended at any time up until the order is invoiced.

Each financial heading listed in the Financial tab can be opened and updated with the exception of Repair Cost, Extras and Trade-In Write-Down. Estimated cost and retail values for Repair Cost and Extras are pulled automatically from the Extras tab Trade-In Write-Down and Trade-In finance settlement are input in the Trade-In Financial Details window.

To open the Financial Details window highlight the required item then right-click and Open. In the Financial Details window you may input estimated costs, retail values, Payment Codes and Account Codes.

Headings for 'Vehicle Price' and 'Discount' will always be listed in the Financial tab. Other headings displayed here depend on the setup of your system.

Actual Cost values are pulled automatically from the Actual Costs tab. These values can't be amended in the Financial tab.

If your system is set-up to post trade-in financial values to the finance system, the default Payment Code, Account Code and Tax Code for the trade-ins are also displayed here. These values can be amended.

Trade-in VAT is calculated based on the default VAT code for the trade-in vehicle. This code can be overridden if you need to calculate VAT on the trade-in at a different rate.

Write-down loss may optionally be shown as a deduction from gross profit on the vehicle deal. If this facility is enabled, write-down loss is shown in the financial tab. If a negative value is input in the Write-Down Amount field, it will increase the gross profit.

Depreciation and Stocking Interest headings may or may not be enabled or might be displayed as 'memorandum only' depending on the setup of your system. If not memorandum only, the costs are included in the total cost of the deal.

Any deposit received from the customer can be input into the Deposit Paid field.

The Trade-In Vehicles, Trade-In Tax, Totals and the Estimated, interim and Actual Gross Profit fields are displayed as memo-only. Please note that values in

these fields are only recalculated when the Save & Refresh button  is clicked.

Clicking the Show/Hide Profit button  toggles the display between showing and hiding the Totals and Gross Profits.

What else would you like to do?

“[Actual Costs](#)” on page 449

“[Adding a Vehicle Extra](#)” on page 451.

“[Adding Trade-In Details to a Vehicle Order](#)” on page 452.

“[Amending a Vehicle Order](#)” on page 453.

Related Topics:

“[Creating a Vehicle Order](#)” on page 458.

Pending Costs

Why:

A pending cost is a cost received from the workshop, or from an external costs interface, that can't be allocated automatically, either because the direct update option is not enabled, or because insufficient information has been supplied by the source application to allow a direct match to be made.

The Pending Costs option is the maintenance routine used by the vehicle administrator to allocate pending costs to the correct vehicle and cost item.

Where:

From the Vehicle Order View, select **Actions > Pending Costs**. This will display the Vehicles with Pending Costs window.



*The Vehicle Order
View button.*

How to Work With Vehicle Order Pending Cost:

The Vehicles with Pending Costs window displays a list of stock ID's against which pending costs have been received either from the Fusion workshop application, or via the costs interface from an external system.

If the stock ID is present on the Fusion stock order file, the vehicle chassis type and number, registration number, order number, customer number and salesperson code are displayed. The screen may also contain stock ID's that do not exist in Fusion: this occurs as a result of the external costs interface transferring a cost with an incorrect stock ID.

Stock ID 99999999 may also be present. This stock ID is used if the external costs interface has transferred a cost with a blank stock ID and a blank or invalid chassis number.

To allocate pending costshighlight a stock ID in the Vehicles with Pending Costs and select File > Open. This will display the Pending Costs window.

Select a pending cost by highlighting it and clicking once, then click and drag it to the required item in the 'Allocate Selected Costs' section of the screen. The 'Confirm Allocate' message will then display, select Yes to confirm the cost allocation or 'No' to abandon the cost allocation.

Hint: you can select multiple pending costs by holding down the Shift key or Ctrl key and clicking on the desired items.

Right-clicking a Pending Cost allows you to Change Disputed Status, Delete or Transfer. Change Disputed Status changes the Disputed field against the pending

cost to 'Yes', making it unavailable for allocation. Delete allows the pending cost to be deleted, and Transfer allows the pending cost to be transferred to another valid stock ID.

What else would you like to do?

“[Actual Costs](#)” on page 449.

“[Financial Details of a Vehicle Order](#)” on page 469.

Planning Overview

Why:

The Planning Overview screen is used to view the planning timeline for a range of vehicles.

Where:

From the Vehicle Order View, click on the Planning icon or choose **Actions > Planning Overview**.



The Vehicle Order View button.

How to Use the Vehicle Order Planning Overview:

By default the Planning Overview screen displays the same list of vehicles as the workbench from which it was launched. These default filter settings may be changed by selecting Filter from the View menu, or clicking on the Filter icon.

The screen is divided into a left-hand pane showing vehicle details and a right-hand pane showing the planning timeline. The relative sizes of these panes can be adjusted by dragging the vertical bar that divides them.

Vehicle Details Pane - Scroll left and right in the left hand pane to reveal different columns of information. Columns may be re-sequenced by dragging and dropping column headings. The default sort sequence is by descending Days to Completion. This may be changed by clicking on any other column heading. Double-click on a vehicle order in the vehicle details pane, or right-click and select Open, to access the vehicle order maintenance screen.

Timeline Pane - Today's date is highlighted. Use left and right hand scroll bars in the timeline pane to scroll backwards and forwards. Click on the Reset to Today icon to reposition the screen to the current date. Click the task block to populate the notes fields at the bottom of the screen. These fields have the same function as the notes boxes in the Planning Detail screen. Double-click on a vehicle order in the timeline, or right-click and select Planning detail, to access the detail plan for the chosen record.

Related Topics:

“[Creating Amending Vehicle Orders](#)” on page 459.

Post Deposit to THF151

Why:

Some markets require that a deposit value shown on an invoice also be posted to the accounts interface file THF151.

 **Note!** Amendments to 3rd party systems may be needed before this can be utilised.



*The Vehicle Order
View button.*

Where:

From the Vehicle Order View, financial tab when you input a deposit, as long as you have the correct General Ledger Other table string set up and Parameters VAD009 & INT009 are Positive, this will post.

How to Post Deposits to the Accounts Interface:

In the Parameter file set up a FUTRAT description in 910 265 normally DEPOS, and set up Parameter 910 266 as normally VADEP as the key to the file. Make sure that the General Ledger Other Control file table has an entry to match 910 265 DEPOS together with the two account strings you require.

What else would you like to do?

“[Amending a Vehicle Order](#)” on page 453.

“[Financial Details of a Vehicle Order](#)” on page 469.

Post Trade-In VAT Separately to THF151

Why:

Some markets require that VAT is posted separately to THF151 instead of included in with the trade in value.

 **Note!** Amendments to 3rd party systems may be required before this can be utilised.



*The Vehicle Order
View button.*

Where:

From the Vehicle Order View, financial tab when you add a trade in value VAT can be calculated, then as long as you have the correct General Ledger Other table string set up and Parameters VAP017 & INT009 are Positive, this will post separately.

How to Post Trade-in VAT separately to the Accounting Interface:

In the Parameter file set up INT009 = POS & VAP017 = POS. Setup TRA002 & 003 = POS & VAP010 NEG. Parameters 910 251 to 260 & 910 179 to 187 also need to be set up as a FUTRAT description and the key to the file.

Make sure that the General Ledger Other Control file table has an entry to match together with the two account strings you require.

What else would you like to do?

“[Amending a Vehicle Order](#)” on page 453.

“[Financial Details of a Vehicle Order](#)” on page 469.

Print Purchase Invoices

Why:

A Purchase Invoice can be printed for a used vehicle, and optionally posted to the financial interface, depending upon the setup of your system.

Where:

From the Vehicle Order View, highlight the vehicle order that you would like to work with, right-click, then select Print Purchase Invoice.



*The Vehicle Order
View button.*

How to Print Purchase Invoices:

Enter the required invoice date. External Purchase Invoice Reference Number is an optional reference number. If entered, it prints as the customer reference on the purchase invoice print.

Enter the required customer number and click Validate to pull their details from file. Payment Terms and/or Language may be selected, if operational in your system. Vehicle Price defaults automatically from the cost value held on the vehicle order.

Select the required Payment Code, Account Code and VAT Code for the Vehicle Price. Note that Payment Code and Account Code are only required if the facility to post trade-in purchases to the financial interface is enabled.

Extras Value defaults automatically from the Extras cost values held on the vehicle order, but this value can be overridden here. Select the required Payment Code, Account Code and VAT Code for the Extras Value. Note that Payment Code and Account Code are only required if the facility to post trade-in purchases to the financial interface is enabled.

Write-Down Loss is displayed if the facility to post this value to the financial interface is enabled. If the Write-Down Loss value is not zero, select the required Payment Code and Account Code.

Financial settlement is displayed if the facility to post this value to the Financial Interface is enabled. If the Financial Settlement is not zero, select the required payment and account codes.

Enter any required text to print on this invoice into the Free-Format Invoice Text box. Click OK to print the purchase invoice. Depending on the setup of your system, you may be prompted to enter a delivery date.

Creation of a purchase invoice can optionally create an actual cost record for the used vehicle using the Vehicle Net Price value. This is controlled by a parameter. To create a copy purchase invoice, use the same routine. On copies, you will not be allowed to change any of the fields.

Printing an Order Confirmation

Why:

At any time you can print out an order confirmation showing the vehicle details and the retail values from the order.

Where:

From the Vehicle Order View, highlight the vehicle order you want to work with and select **Vehicle Order > Print Order Confirmation**.



The Vehicle Order View button.

How to Print Order Confirmation:

When the option to print order confirmation is selected, it is sent straight to print. There are no selection criteria.

What else would you like to do?

Invoicing a Vehicle Order.

Registering an Invoice as Paid

Why:

The Register Invoice Paid routine allows you to record the date when an invoice is paid by the customer. This information is used to ensure that the correct vehicles are printed on the Vehicles Invoiced Awaiting Payment report.

Where:

From the Vehicle Order View, highlight the vehicle order you want to work with and select **Vehicle Order > Register Invoice Paid** to access the Register Invoice Paid window.



The Vehicle Order View button.

How to Record an Invoice as Paid:

In the Register Invoice Paid window all the invoices that were raised for the selected order are displayed. Right-click the invoice that has been paid, then select Date Paid. This will display a date field where you can input the date that the invoice was paid. It will default to the current days date but can be changed.

Check the Delivery Authorisation checkbox to generate an automatic email to the salesperson if required. To view the details of an invoice, right-click in the invoice list and select open.

What else would you like to do?

Vehicles Invoiced Awaiting Payment Report.

Related Topics:

Invoicing a Vehicle Order.

Reprinting a Vehicle Invoice Credit

Why:

Copy proformas, invoices and credit notes can be printed from Fusion.

Where:

From the Vehicle Order View, highlight the vehicle order that you would like to work with and right-click, then select **Reprint Invoice / Credit**.



The Vehicle Order View button.

How to Reprint Vehicle Invoice Credit:

In the Reprint Invoice / Credit window, highlight the document that you would like to reprint and right-click then select Reprint.

Sharing Information Between Vehicle Order and Workshop

Why:

Fusion can be set up to exchange data between the Vehicle Order Vehicle File and the Workshop Vehicle File.

Where:

If this facility is active on your system, matching vehicle records are updated in Vehicle Order if a vehicle is added or changed in the Vehicle entity. Similarly, if a vehicle is changed in Vehicle Order the corresponding vehicle details are updated in the Vehicle entity.

However, the addition of a vehicle in Vehicle Order doesn't create a corresponding record in the Vehicle entity because at the time the vehicle is ordered, insufficient data is available to populate the mandatory fields. Also this would lead to a redundant record in the the Vehicle entity if the order was subsequently cancelled.

Only uninvoiced vehicles in Vehicle Order are updated. Details are not updated once the vehicle has been invoiced.

How to Share Information Between Workshop and Vehicle Order:

The matching process uses very specific criteria to ensure that the correct vehicles are updated. Matching is based on:

Volvo (Product Code 0)	Product Code
Product Code	
Chassis Series	
Chassis Type	Chassis Type
Chassis Number	Chassis Number

The fields updated are as follows:

Product Code, Registration Number, Chassis Variants, Chassis Type, Chassis Series, Chassis Number, Marketing Type, Mileage, VIN, Wheel Base, Gross Weight Vehicle, Operation Code, Engine Serial Number, Gearbox Serial Number, Rear Axle Serial Number, Second Rear Axle Serial Number, Ignition Key Number, Door Key Number, Tyre Make, Second Tyre Make, Cab Type and Cab Number.

When a vehicle is invoiced, a number of additional details are updated in the Vehicle entity:

- Last Sale Date (if the vehicle type is used)
- New/Used Indicator (if the vehicle type is new or used)
- Salesperson
- Customer

What else would you like to do?

[“Creating a Vehicle Order”](#) on page 458.

Supplementary Invoicing

Why:

The supplementary invoicing routine can be used to create additional invoices after the primary vehicle invoice has been raised. For example, the routine can be used to invoice a customer for an item that was not included on the original invoice.

Where:



*The Vehicle Order
View button.*

On the Vehicle Order workbench highlight the vehicle order you wish to work with. Right-click and select Invoice, then select Supplementary. Note that you may only select invoiced vehicles on which costs have not been flagged as fully allocated.

How to Work With Supplementary Invoicing:

Enter the required customer number and click Validate. This will bring up the customer name and address details. Enter the invoice date and a customer reference, if required. Depending on the setup of your system entry of alternate currency, payment terms and language may be required.

It is possible to enter invoice amounts against the vehicle chassis, or any of the other charge headings.

Payment Code and Account Code default from those entered in the vehicle order's Financial Details window. TAX codes default from the Vehicle Order Default Payment and Account Codes table. These values may be overridden. Headings for other charges 4 – 6 are pulled from the Financial window. If no headings exist for these items, they may be entered here.

You may also invoice additional extras by clicking File > New or the New icon. On invoice completion, these items are added to the Extras window.

To add an extra, enter the required description, values and Account Code. Payment Code and TAX Code default from the Vehicle Order Defaults table but may be overridden. If you have added an extra in error, it can be deleted by highlighting it and clicking Edit > Delete or the Delete icon.

For each vehicle chassis, other charge or extra item you can enter Estimated Cost and Invoice values. These values are added to the Estimated Cost and Invoice values in the vehicle order's Financial window when the invoice is completed.

If the facility is enabled to update actual costs to the financial interface, you may also enter values in the Actual Cost fields.

You may also enter any text that you wish to print on the invoice. The text includes any text lines from the vehicle order's Free Format Invoice Text window. Click OK to print the invoice, or Cancel to abandon the routine.

Depending on the setup of your system, you may be prompted to enter a delivery date.

Related Topics:

Invoicing a Vehicle Order.

TDS Enquiry

Why:

TDS Enquiry allows you to enquire on and download vehicle order information in the importer system TDS.

Where:

On the Vehicle Order View, highlight the vehicle order you wish to work with, right-click and select TDS Enquiry. This will display the TDS Enquiry window for the selected vehicle order.



The Vehicle Order View button.

How to Perform TDS Enquiries:

Enter the required Dealer Number and Factory Stock Order Number and click OK. Depending on the setup of your system, entry of dealer number may not be allowed. If this is the case, Dealer Number will default to the dealer number of the current branch and may not be changed.

This is the number by which TDS will recognise your vehicle order. It is only necessary to enter this number the first time you use TDS Enquiry for a given vehicle. Thereafter, it will be stored within Fusion.

If TDS does not recognise the Factory Stock Order Number, or if the number entered is allocated to another dealer, an appropriate error message will be displayed.

If the order is found, Fusion retrieves the data from TDS. The Chassis Variant Differences window displays the TDS values against the current Fusion values for Chassis Type, Engine Description, Gearbox Description, Rear Axle Type, Axle Arrangement, Chassis Series, Chassis Number, Marketing Type and Variant Codes. Click Next to proceed to the next window.

The Factory Order Details window has two tabs. The Basic Details tab displays TDS values for various factory dates/statuses and prices. The Additional Details tab displays TDS values for the detailed vehicle specification.

Click Update to update Fusion with the following TDS values: Chassis Series, Chassis Number, Marketing Type, Wheel Base, Cab Type, VIN, Factory Status, Factory Status Date, Factory Order Reference and Confirmed Delivery Date. LCD is updated based on the Factory Build Date.

Depending on the setup of your system, the five main vehicle variant descriptions may also be updated. If this facility is enabled, Fusion will attempt to match the TDS Description with the descriptions on the corresponding Fusion Variant Table. If no match can be found, the default variant will be used.

If any of the variants are changed, or the chassis number is updated, or LCD or CDC changes, the administrator will receive an e-mail notification. E-mail notification is also sent if the today order number is no longer in the TDS system.

Depending on the setup of your system, the stock ID of the current vehicle order may be replaced by the Factory Stock Order Number. If this facility is enabled, the stock ID will be changed automatically to the Factory Stock Order Number or the Sales Order Number; except where the number already exists as a stock ID for another vehicle order or where transactions exist for the current vehicle order, in which case the current stock ID will be left unchanged.

Click Close to exit the TDS Enquiry routine without updating Fusion.

What else would you like to do?

[“Creating – Updating Orders from VSS”](#) on page 465.

The VSS – Fusion Interface

Why:

VSS (Volvo Sales Support System) order details may optionally be sent to Fusion when orders are added or amended in that system.

Once details have been transferred from VSS, orders will be held in Fusion in a pending order file awaiting acceptance. Pending orders fall into one of two categories, either new or amended.

Where:

On the Vehicle Order View, select **Actions > VSS Orders**. Select **New** to display the New VSS Orders window or **Amended** to display the Amended VSS Orders window.



*The Vehicle Order
View button.*

How to View VSS Details on Vehicle Orders:

In the New VSS Orders window any orders received from VSS are held until either accepted into Fusion or deleted. In the Amended VSS Orders window any orders amended in VSS are held until either they are accepted or deleted.

What else would you like to do?

[“Creating – Updating Orders from VSS”](#) on page 465.

Transferring a Vehicle Order

Why:

Any uninvoiced vehicle order in Fusion can be transferred to another branch within the same company.

All details are transferred to the new branch with the following exceptions:

- Trade-in details
- Invoice and credit note details



*The Vehicle Order
View button.*

Where:

On the Vehicle Order View, highlight the vehicle order you want to work with and right-click then select Transfer, or select **Vehicle Order > Transfer**. This will display the Transfer Vehicle Order window.

How to Transfer Vehicle Orders:

In the Transfer Vehicle Order window select the destination branch then click OK.

The stock ID of the order being transferred may or may not be retained on transfer depending on the set up of your system.

If automatic stock ID allocation is enabled, you'll just be returned to the vehicle order view once the transfer is confirmed (this will also happen if you use manual stock ID allocation but your system is set up to retain the existing stock ID when a vehicle is transferred).

If manual stock ID allocation is enabled and the existing stock ID isn't retained on transfer, you'll be prompted to input the desired stock ID.

When the transfer is completed, a report showing the details of the transfer will be printed automatically. This report shows the number of the branch to which the order has been transferred, and the stock ID allocated to the vehicle in its new branch.

What else would you like to do?

“[Copying a Vehicle Order](#)” on page 455.

“[Creating a Vehicle Order](#)” on page 458.

“[Deleting a Vehicle Order](#)” on page 466.

Related Topics:

“[The VSS – Fusion Interface](#)” on page 478.

Workshop Requisitions

Why:

The workshop requisitions routine is used to log requests for work to be carried out on stocked vehicles, and to print work requisitions for the workshop.

Where:



*The Vehicle Order
View button.*

To see all current workshop requisitions, from the vehicle order view select **Actions > Workshop Requisitions**. This will display a Workshop Requisition List window. To see requisitions for a particular vehicle order, in the vehicle order view highlight the order and select **Vehicle Order > Workshop Requisitions**. This will display a Workshop Requisitions List window for the selected stock ID.

Workshop Requisitions can also be added from the detail screen of the "[Planning Overview](#)" on page 471.

How to Work With Workshop Requisitions:

The Workshop Requisitions List window lists all open and completed requisitions. Requisitions remain on file until the vehicle order is deleted. To create a new workshop requisition, select File > New. If selected from the Actions menu, you'll have to input the stock ID of the vehicle.

Input the workshop branch that is to carry out the work. Enter the planned start date and planned completion date. Planned completion date may be calculated automatically by entering the required number of working days and clicking on calculate.

Work requisitions can either be input manually or by selecting existing extras held against the vehicle record.

Manual Input - Select File > New. This will display the Add Work Requisition Detail window. Input a description of the work required and a work operation number, if relevant. Input the estimated or agreed cost for the work and click OK.

Select Extras - Select Actions > Select Extras. This will display the Workshop Requisition Details - Select Extras window containing the list of extras held against the vehicle stock record.

From the list of available extras, double-click any that you want to add to the requisition. Items can be de-selected in the same way.

To add all available extras choose Actions > Select All in the Select Extras window.

If the extra you want to add isn't in the list of available extras, you can add it by selecting File > New. This will display the Vehicle Order Maintenance - Add Extra window. When you've input details of the extra it will appear in the list of available extras. You can then add it to the requisition.

In the Work Requisition Details window there's an area where text lines can be added to the requisition, or to add text that's already been recorded in the Text tab of the Vehicle Order Maintenance window select Actions > Copy Free-Format Text. When text has been copied into the requisition you can edit it without affecting the original text in the Vehicle Maintenance window.

To print a workshop requisition, highlight it within the list of workshop requisitions and click on the print icon.

To delete a workshop requisition, highlight it within the list of workshop requisitions and click on the delete icon.

To complete a workshop requisition, highlight it within the list of workshop requisitions, right-click then select complete. This will move the requisition from the open tab to the completed tab.

Related Topics:

“[Adding a Vehicle Extra](#)” on page 451.

Vehicle Extras.

“[Creating Amending Vehicle Orders](#)” on page 459

Glossary of Terms

Claim Handling Button

From the Workshop Order View – Order Details window. Select the Claim Handling Button to display the Claim Summary window.



The Claim Handling Button.

Claim View



The Claim View button. This is one of the entity items selectable after accessing the Fusion Workbench.

Control Master File View



This is the Control Master File button, accessible directly after logon. Here users will access and maintain controlling information such as codes and settings.

Fusion

This is the name given for the Global Dealer System ‘GDS’.

Fusion Chat



The Fusion Chat button.

Fusion Workbench



This is the Fusion Workbench access button, accessible directly after logon. Here, after selecting the appropriate Branch, users gain access to the system entities that govern / apply to that branch. Entities include:

Parts – Parts Orders – Workshop Orders – Mechanics – Customers – Vehicles – Suppliers – Operations – Vehicle Orders and Claims.

Online Time Recording



The Online Time Recording button, found in the initial GDS Fusion start window. Time Recording is documented further in the GDS Time Recording chapter.

Operation Environmental Tax

This tax can be added to an 'external' workshop order as a fixed amount at point of invoice. The file and parameters need to be setup before this becomes available in the print screens.

See GDS Fusion Control Files – Operation Environmental Tax.

Operations View



The Operations View button. Used to access Operation and Package information. See About Operations & Packages.

Parts Order View

The Part Order View is used to access Parts related Order information.



The Parts Order View access button.

Pre-Pick Button



When selected this will display the Pre pick location of parts.

Schedule Template Button



The Schedule Template access button.

Supplier View



The Supplier View button.

Vehicle View

The Vehicle View is used to access Vehicle related information.



The Vehicle View access button.

VOSP

VOSP (Volvo Service Program) is a service program that allows for the creation of vehicle specific service schedules. VOSP calculates the preventive maintenance required, based on vehicle specification and customer operating conditions. It produces a service schedule that may be exported to GDS for workshop planning. See The VOSP Interface and Extracting VOSP Data.

VTC

Volvo Truck Corporation.

Workshop Order View

The Workshop Order View is used to access Workshop related Order information.



The Workshop Order View access button.

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