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AUTOMOTIVE INTELLIGENCE

Enterprise Menu Pricing Set Up Guide

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For any issues relating to any of the items included please contact the Pinewood Helpdesk .

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Overview

Enterprise Menu Pricing allows menu pricing to be enabled across the whole Enterprise. The Enterprise Menu Pricing catalogue is created through an import of an Excel file, giving the functionality for the file to be maintained outside the DMS and easily uploaded so that the menu pricing is up to date. This allows more consistent layout and pricing in the Workshop across the Dealer Group.

Once uploaded the Menu Pricing can be used across the Enterprise within the following areas:

- Menu Pricing Raise Estimate
- Booking – Customer Requirements and Operations
- Jobs – Customer Requirements and Operations
- Vehicle Health Check
- Tech+
- Prepare for PDI in Vehicles
- Invoicing

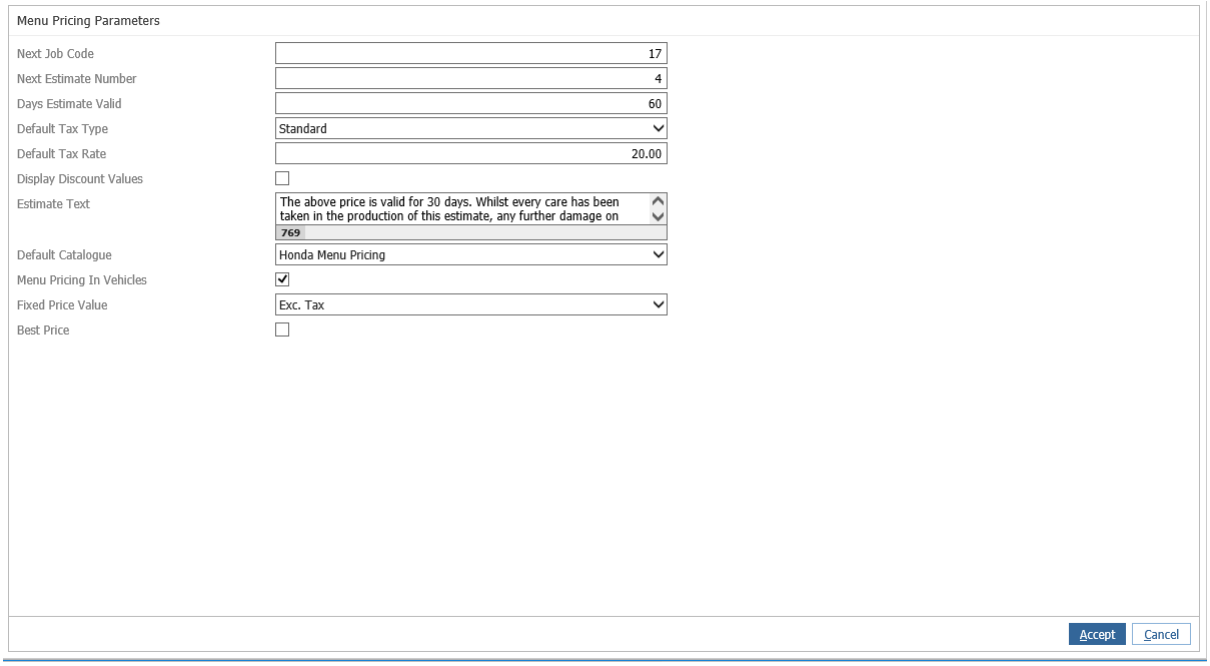
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Set Up

Pinewood DMS

Firstly you will need to contact the Pinewood DMS Support team on support.portal@pinewood.co.uk as the menu item of Workshop > Menu Pricing > Enterprise Maintenance will need to be made visible on your system.

You will also need the Workshop > Parameters > Menu Pricing > Menu Pricing area enabled on your site:



Next Job Code: When creating a menu priced job within the Menu Pricing Maintenance screen each job is given an individual job code. Like a workshop job number or an invoice number you can set the starting count here and it will move up by one as each on is created, at any point you can move this number forward but you cannot move it back.

Next Estimate Number: As above this is the number used when an estimate is created and incremented by one each time. This can be moved forward at any point but cannot be moved back.

Days Estimate Valid: Here you set the number of days an estimate is retained. Once this number of days have passed you can no longer recall this estimate.

Default Tax Type: Here you can set the default tax type that will appear on estimates raised.

Default Tax Rate: Here you can set the default tax rate that will appear on estimates raised. If this does not match the Tax Type specified above then the Tax Type will be used.

Display Discount Values: This is a tick box, when ticked this will show the discount applied to an estimate from the regular retail pricing.

Estimate Text: Here you can specify text that will appear on the bottom right hand corner of the estimate when printed. When you are happy with the parameters set above hit 'Accept' to save the changes.

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Default Catalogue: this defines the default Enterprise menu pricing catalogue to be used for the department

Menu Pricing In Vehicles: with this enabled Vehicle Admin users will able to use the Enterprise Menu Pricing catalogues when creating PDI requests

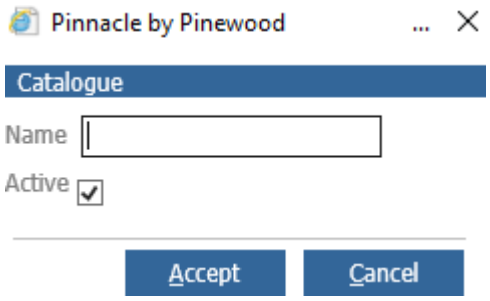
Fixed Price Value: Exc. Tax or Inc. Tax – this will need to be set before exporting the blank Menu Pricing file to edit and then import

Best Price: If best price is selected, and the item is not marked as a promotional price, when the item is a fixed price, the system will use the cheaper value between the calculated price for the operation and the fixed price if this parameter is enabled.

Once the above parameters are setup, you can enter Workshop > Menu Pricing > Enterprise Maintenance area and in the 'Catalogue' screen you will need to click Add:



Enter a name for the Catalogue and ensure this is Active



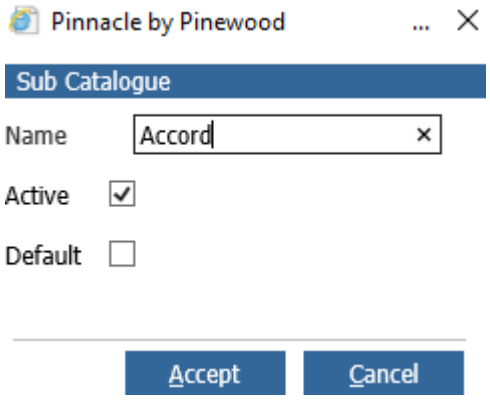
Multiple Catalogues can be entered in this screen.

Once you have added a catalogue these will then be available in all Workshop departments across the Enterprise.

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Double click into a Catalogue, in here you are then able to click Add to add multiple Sub Catalogues, you are also able to set a Default Catalogue



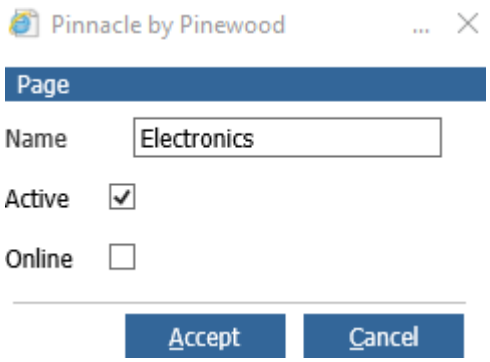
Once you have clicked Accept, then double click into the Sub Catalogue. This

will then take you to the 'Page' screen:

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In here click Add:



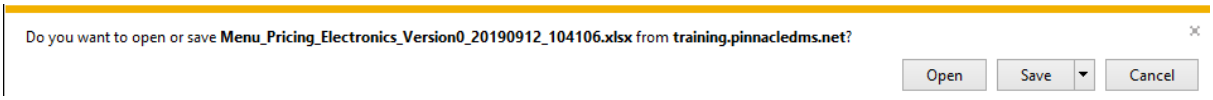
Create a Name for the Page of the Catalogue, this will need to be made active. If your system has Online Bookings enabled then you will need to tick the Online box and this Page will then be available for customers to use when doing an Online Booking. Please see the Online Booking guide for further information.

Once you have added a Catalogue to the Page screen, select this by single clicking:

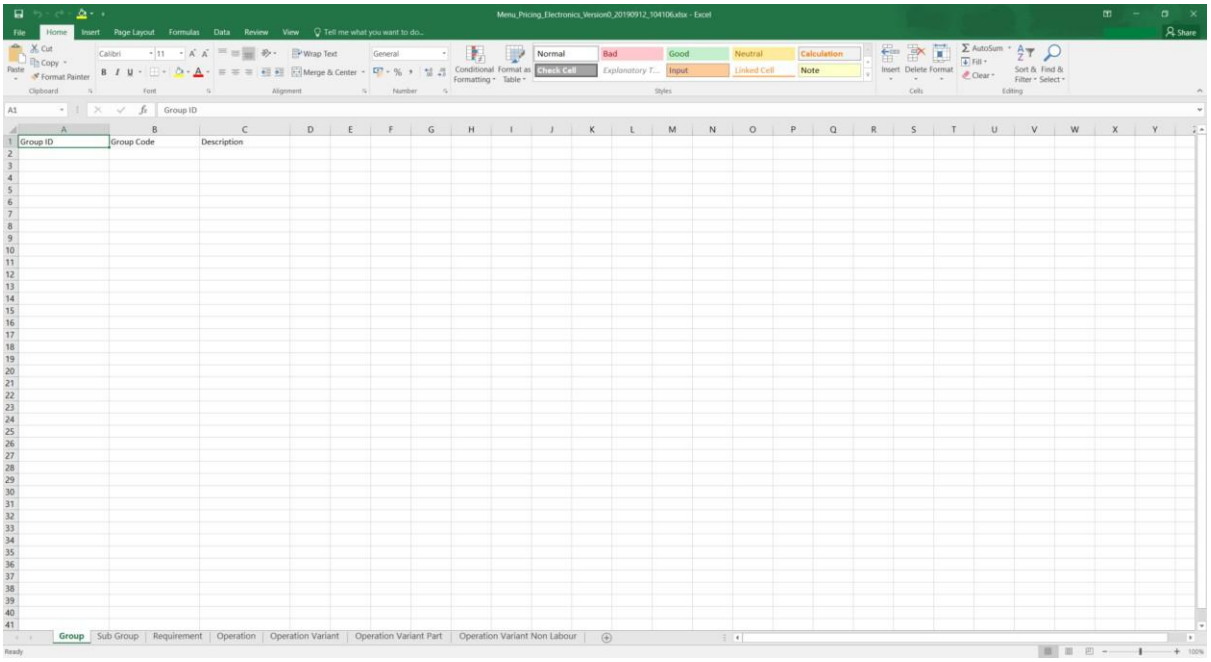
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Then click 'Export':



This will then prompt you to open or save a .xlsx file. Click Open and then once the file is open in Excel, click Enable Editing. You will then have a file that looks as below:

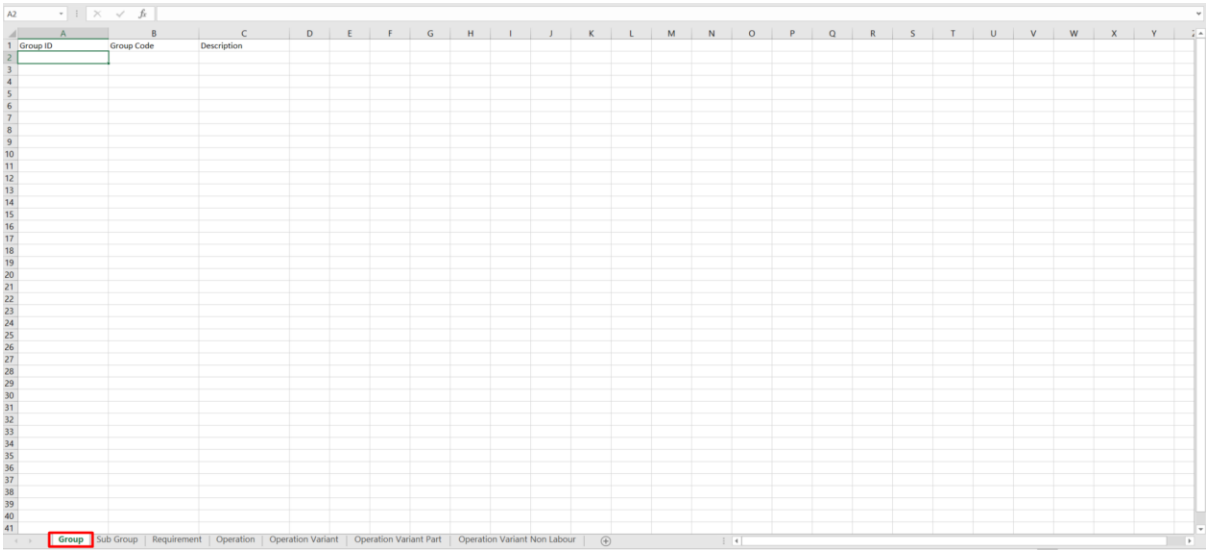


This file will need to be completed to standard.

File Set Up

To set the file up, firstly start on the Group tab:

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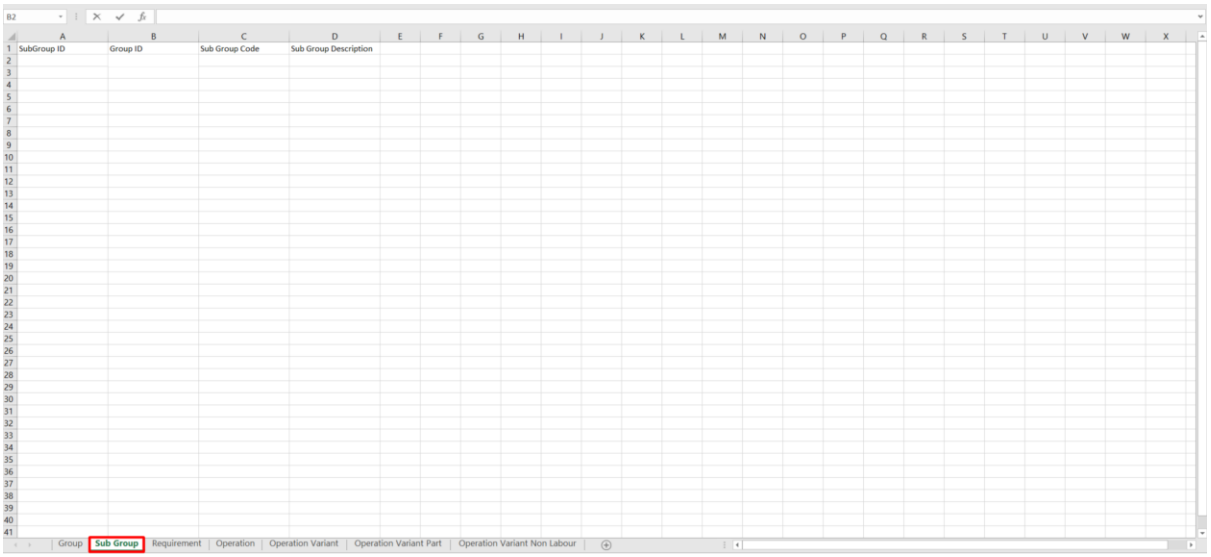
A Group ID will need to be entered – this will need to be a unique ID number to the Group.

The Group Code will be the code that this group will be searched by when using the Menu Pricing in the DMS.

A Description for the Group will need to be entered – please ensure spellings are correct in here. You

are able to set as many groups as needed in here.

Once done, move onto the Sub Group tab:



A SubGroup ID will need to be entered – this will need to be a unique ID number to the SubGroup.

Then the Group ID number will need to be entered – this will be the ID of the Group that the SubGroup will be associated to. For example you can have 2 SubGroups associated to 1 Group through this method.

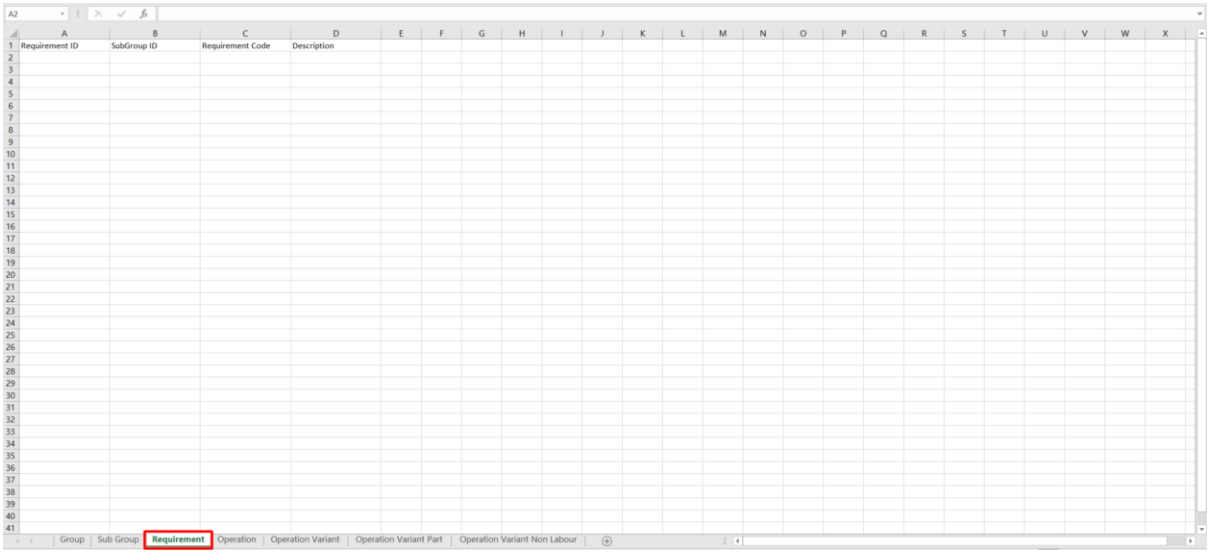
The SubGroup Code will be the code that this group will be searched by when using the Menu Pricing in the DMS.

A Description for the SubGroup will need to be entered – please ensure spellings are correct in here.

Multiple SubGroups can be entered on this tab.

Once complete, move onto the Requirement Tab:

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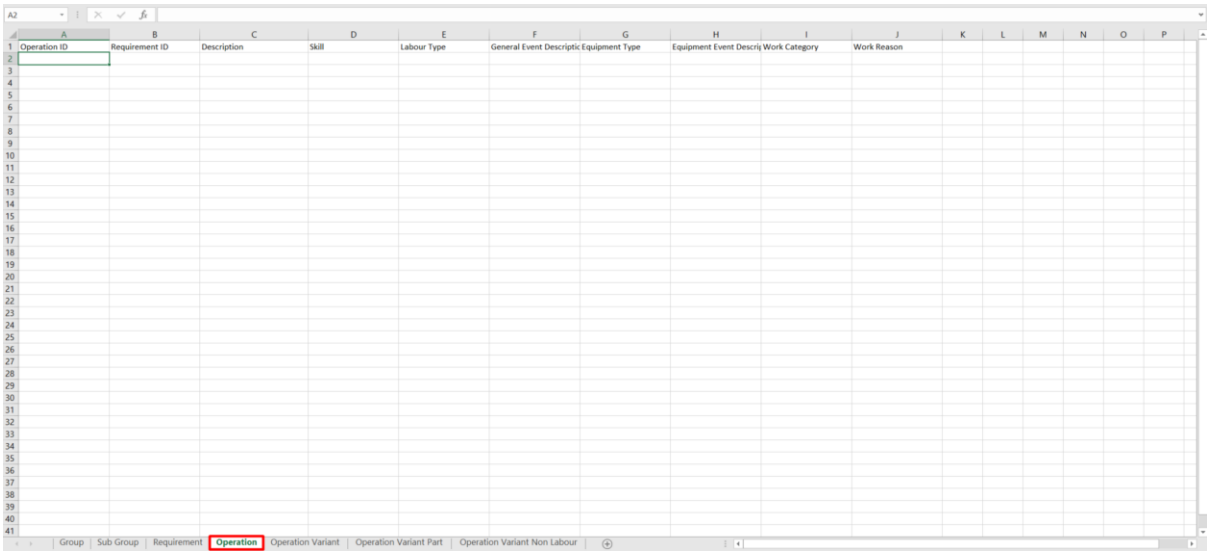
A Requirement ID will need to be entered – this will need to be a unique ID number to the Requirement. This will be a Customer Requirement on a Job.

Then you will need to associate the Requirement to a SubGroup ID from the previous page.

The Requirement Code will be the code that this group will be searched by when using the Menu Pricing in the DMS.

A Description for the Requirement will need to be entered – please ensure spellings are correct in here.

Once complete, the Operation tab can then be filled in:



An Operation ID will need to be entered – this will need to be a unique ID number to the Operation. This will be an Operation on a Job.

Then you will need to associate the Operation to a Requirement ID from the previous page.

The Operation Code will be the code that this group will be searched by when using the Menu Pricing in the DMS.

A Description for the Operation will need to be entered – please ensure spellings are correct in here.

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The Skill entered will need to correspond to the skills entered in Workshop > Parameters > Technician Details > Skills > Enterprise – the skill codes will need to be entered into this column.

Labour Type will need to be entered – this would be either Retail, Trade, Internal or Warranty.

General Event Description – work in conjunction with the General Event Descriptions added in CRM > Dealer Parameters

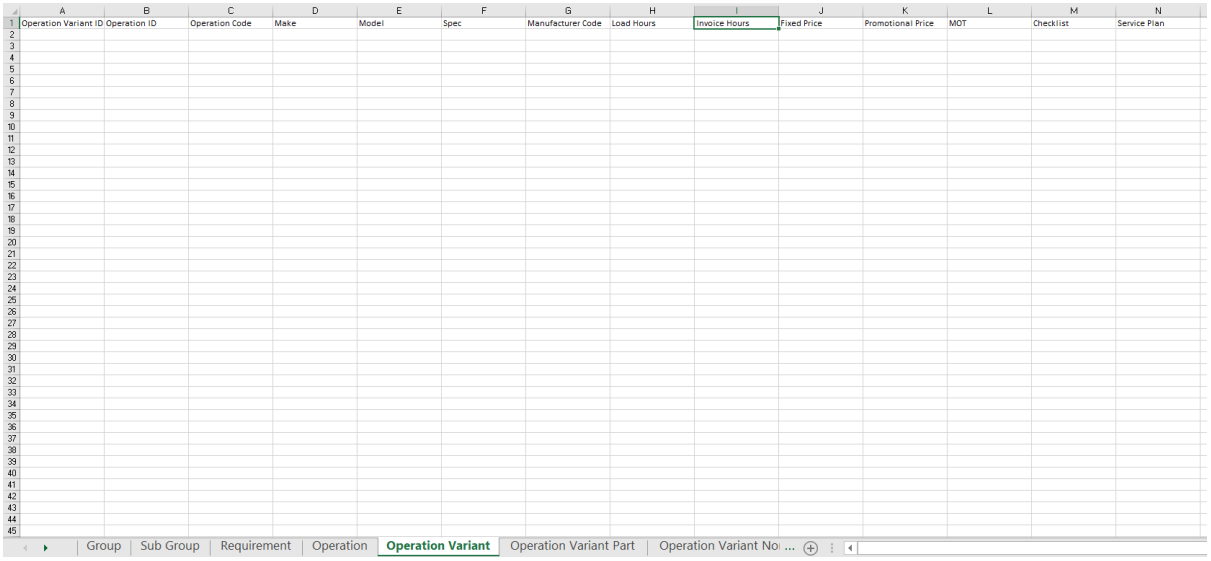
Equipment Type - if you have created equipment types up in CRM for follow-up, you can default the correct type when creating the operation

Equipment Event Description - ASD event to inactive when the operation is created, and then based on if it is re-occurring will be recalculated when the invoice is done.

Work Category - if you have setup work category item in workshop parameters, you can assign this to the operation, if you have setup labour rates by category then correct labour value will then be calculated.

Work Reason - describes the reason for work for future reporting. This is currently only used for international sites, not UK.

The Operation Variant tab can be filled in so that the operations listed in the previous tab can have different variants:



An Operation Variant ID will need to be entered – this will need to be a unique ID number to the Operation Variant.

Then you will need to associate the Operation Variant to an Operation ID from the previous page.

The Operation Code will be the code that this group will be searched by when using the Menu Pricing in the DMS.

The Make, Model and Spec can be entered. These will need to correspond to the Vehicle Price List in the DMS.

Manufacturer Code can be entered to enable OEM vehicle codes, or vehicle codes to be used to filter the available packages that can be used for the selected vehicle during the vehicle repair. It can be left blank, but once entered the system will validate this and prevent if the make option is set to all. The system will also validate and prevent the information if model and specification information have been setup along with the code, as the code will replace these options so they would need to be "All" for the import to work if a Manufacturer code is used. The code length can be no longer than 50 characters.

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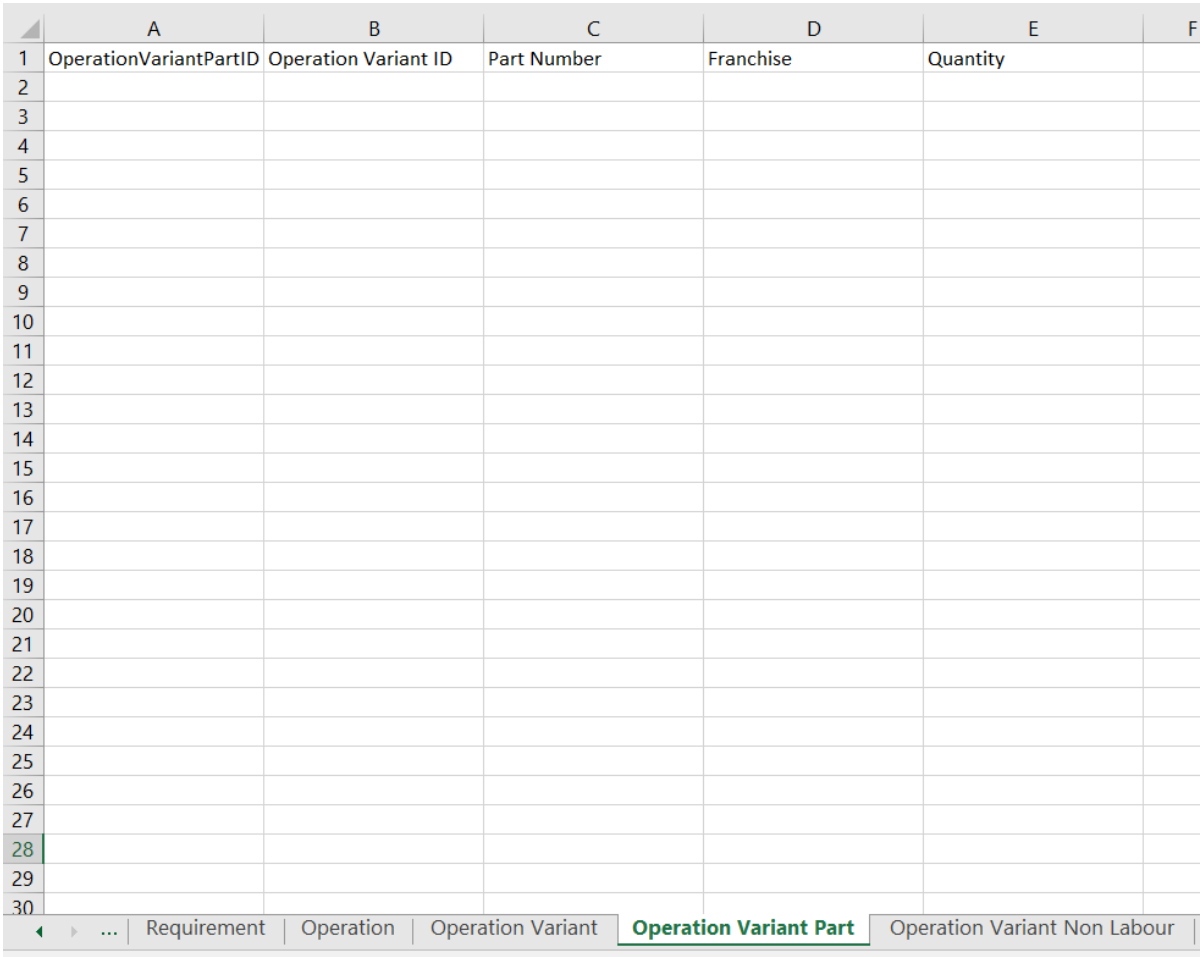
Load hours, Invoice hours, Fixed price, Promotional price will need to be the value that will be on the operation variant. These will then be auto populated if this variant is selected.

MOT column will need to be populated with 0 or 1. 1 will add an MOT onto the operation.

Checklist – if you wish to add a Checklist to the operation, the name of the Checklist will need to be entered here exactly as it is spelled in the DMS.

Service Plan – this column has been added to support future service plan functionality

The Operation Variant Parts tab allows parts to be allocated to the operation.



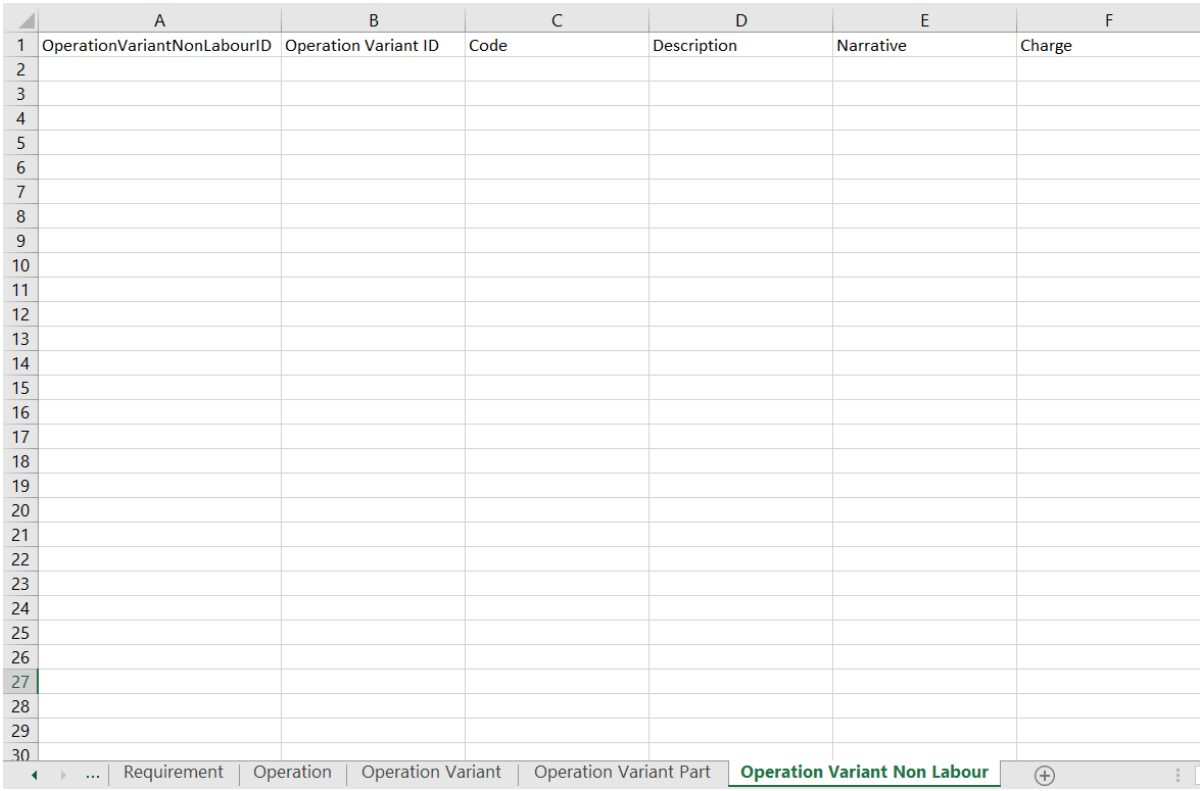
An Operation Variant Part ID will need to be entered – this will need to be a unique ID number to the Operation Variant Part ID.

Then you will need to associate the Operation Variant Part ID to an Operation Variant ID from the previous page.

A part number will need to be entered exactly as it is within the DMS. Along with the Franchise and the Quantity of parts to add.

The Operation Variant Non Labour tab allows Non Labour charges to be added to the operation.

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	A	B	C	D	E	F
1	OperationVariantNonLabourID	Operation Variant ID	Code	Description	Narrative	Charge
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
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19						
20						
21						
22						
23						
24						
25						
26						
27						
28						
29						
30						

... | Requirement | Operation | Operation Variant | Operation Variant Part | **Operation Variant Non Labour**

An Operation Variant Non Labour ID will need to be entered – this will need to be a unique ID number to the Operation Variant Non Labour.

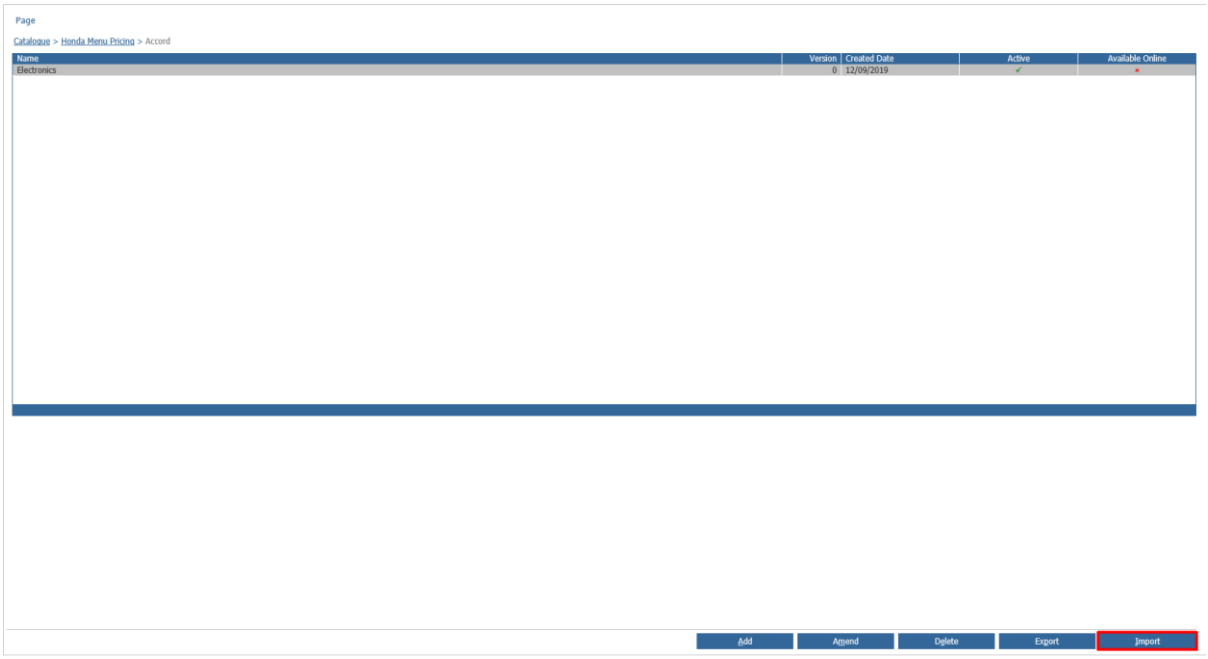
Then you will need to associate the Operation Variant Part ID to an Operation Variant ID from the Operation Variant page.

The Code will be the code that this group will be searched by when using the Menu Pricing in the DMS. A

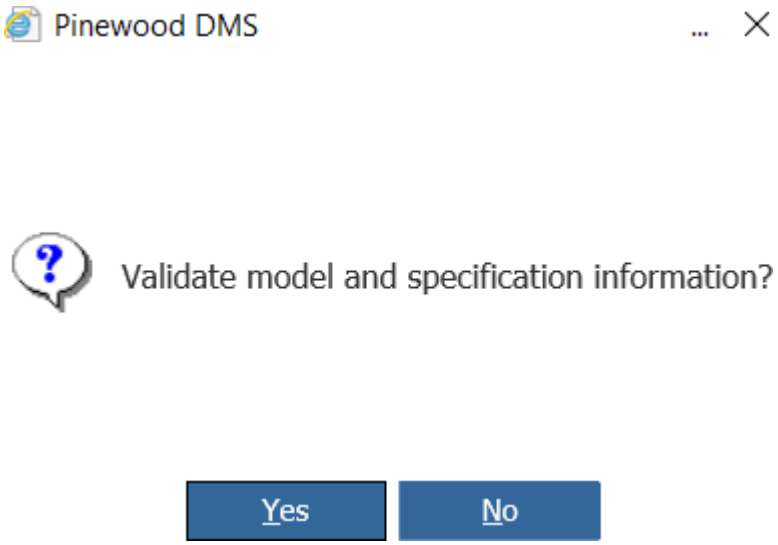
description, narrative and charge for the non-labour will then need to be added.

Once all the above is complete, this will then need to be imported back into the system by returning to the Page screen in Workshop > Menu Pricing > Enterprise Maintenance. Single click the relevant catalogue again and then click Import:

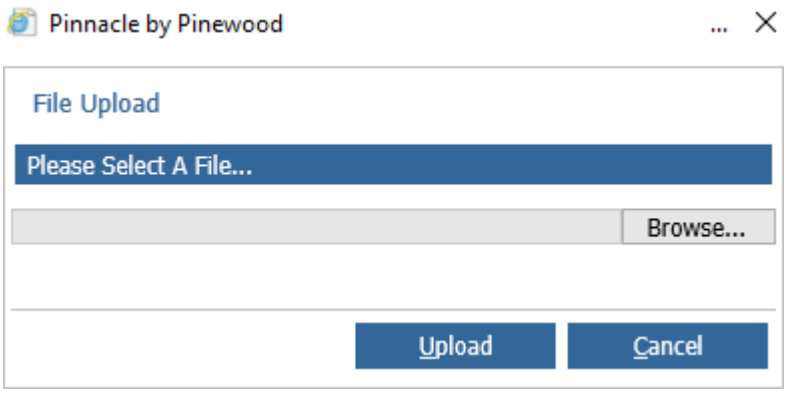
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The following pop up will appear – Yes will then check the Make, Model and Spec information added.



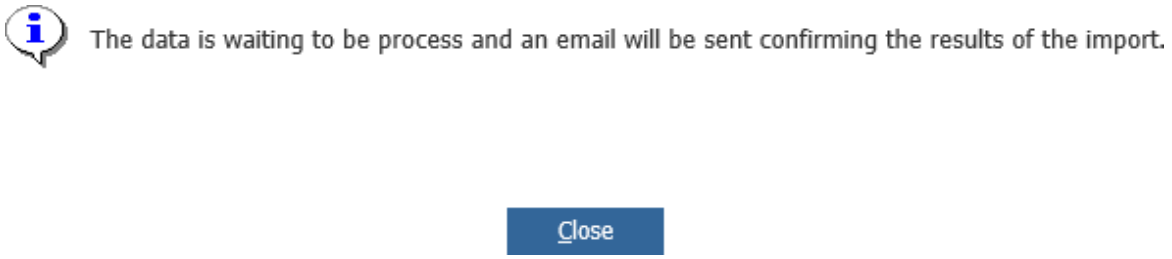
The following popup will then appear:



Select Browse and upload the relevant file.

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Then select Upload – the upload can take up to 15 minutes and once successful this will send an email to the email associated to the user who has uploaded the file into Pinewood DMS. Please do not log out or close the session of Pinewood DMS down whilst the file is uploading.



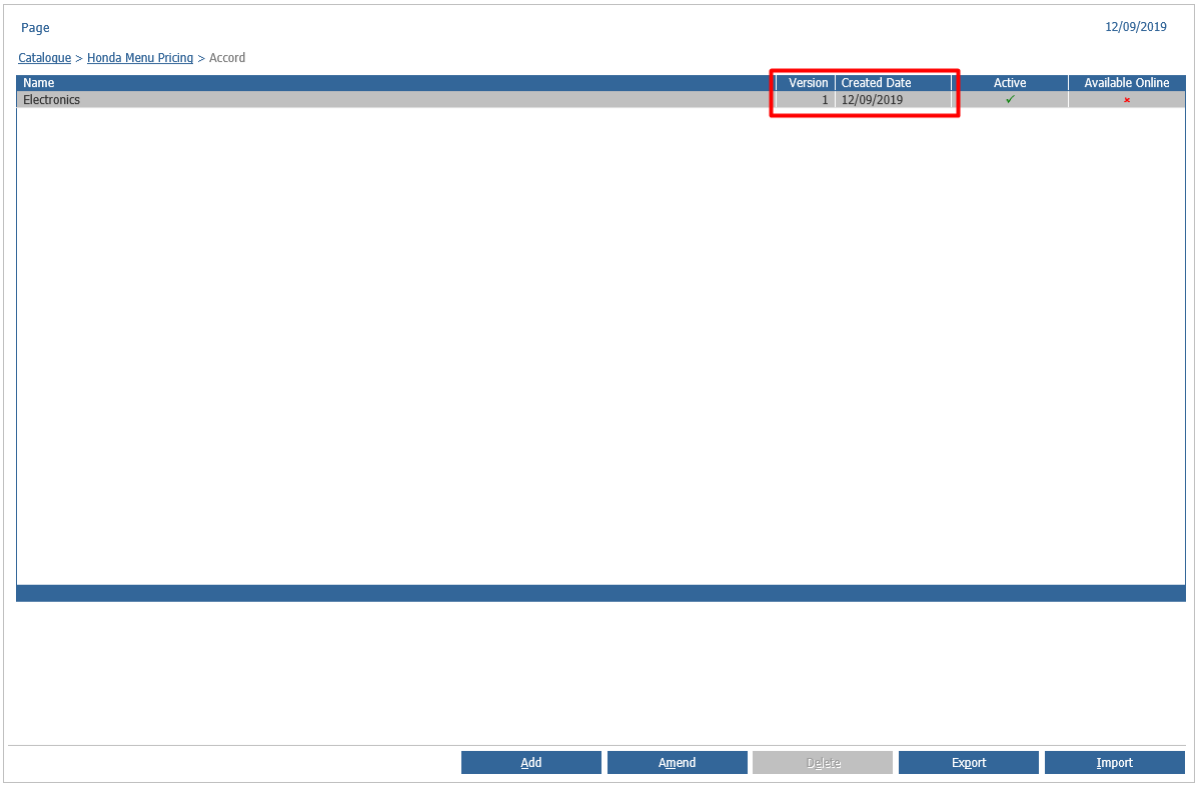
The email will send as below:

The file Menu_Pricing_Electronics_Version0_20190912_104106.xlsx has been processed in Training 1 Workshop. Please check below to see if the file was processed successfully or failed.

Information: Imported succesfully.

Any errors with the import will be described on the import.

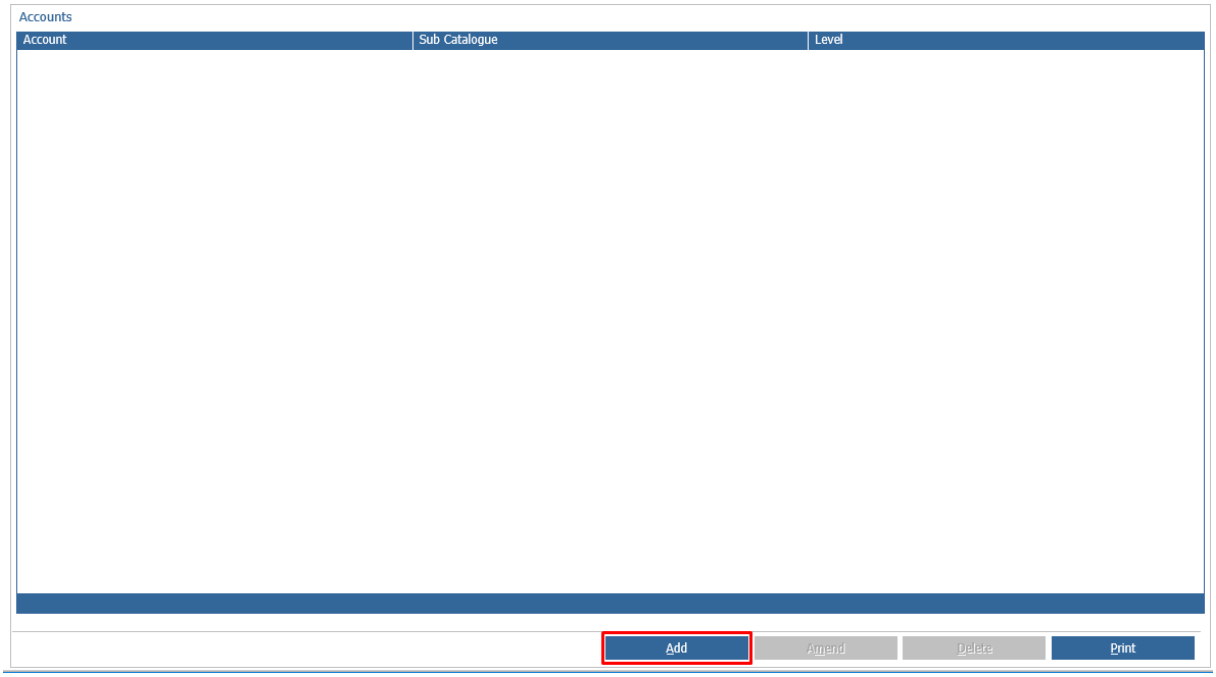
The Page Screen will then display with the Version Number and Created Date:



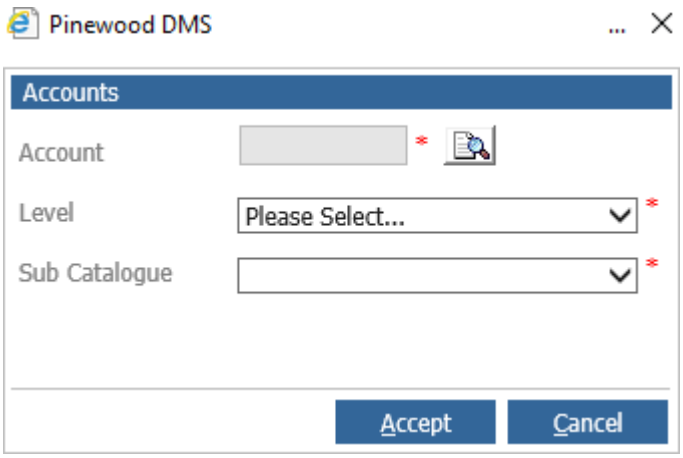
You will then need to return to Workshop > Parameters > Menu Pricing > Menu Pricing and set the default catalogue.

After completing this you can set catalogues to apply to specific Sales Ledger accounts by going to Workshop > Parameters > Menu Pricing > Accounts:

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If you click Add in here the following pop up will then appear:



In here, you will click the Search Icon to search for the Sales Ledger account you want to restrict a Sub Catalogue to. Once selected, you have the option of either Division or Department level to choose from, Division will restrict this to the Division the account is in, so this won't be restricted across the Enterprise and Department will restrict it to the Department. Then select the Sub Catalogue you wish to have against the account, that will have been set up as described above and click Accept.

You are then able to amend or delete these if needed.

This will then be available for use in the following areas:

- Menu Pricing Raise Estimate
- Booking – Customer Requirements and Operations
- Jobs – Customer Requirements and Operations
- Vehicle Health Check
- Tech+
- Prepare for PDI in Vehicles
- Invoicing

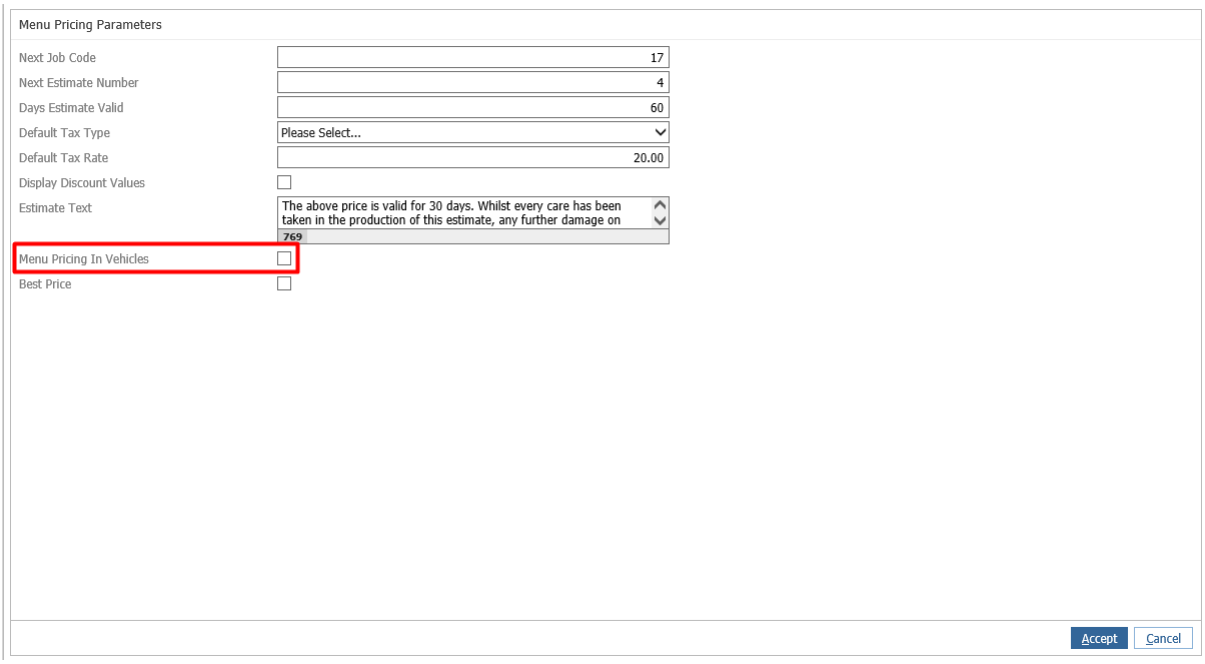
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PDI Requests using Enterprise Menu Pricing

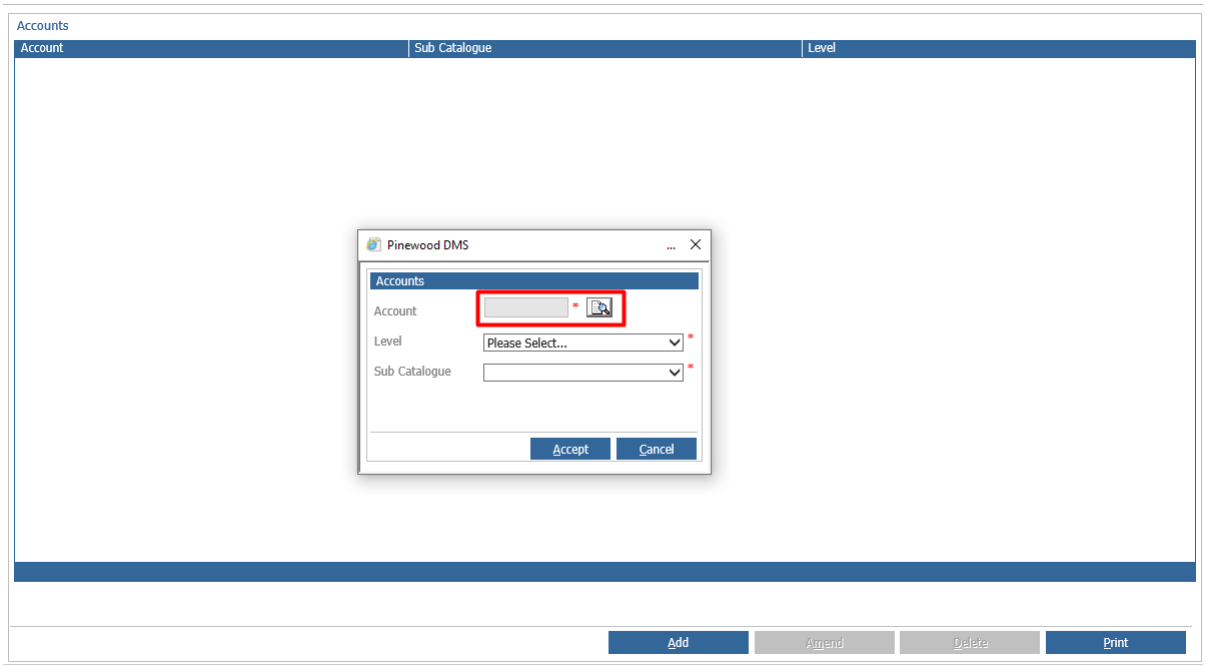
For dealers using Enterprise Menu Pricing, the ability to raise PDI requests using menu pricing requirements is available. This enables the Workshop team to provide a list of available requirements that the Vehicle Admin can select to raise PDI requests with; populating hours, parts and associated non-labour with the ability to fix pricing if required.

Set Up

Within the Menu Pricing parameters, the Menu Pricing In Vehicles box will need to be ticked:



Then a sub catalogue can be setup to hold specific PDI request information, according to the setup described earlier in this guide. This sub catalogue can then be associated to the INTVM account by going to Workshop > Parameters > Menu Pricing > Accounts and clicking Add:



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The Account will need to be filled in as the INTVM account, the level determines if this is available to the Division or just this Department and the Sub Catalogue will need to be the one created for PDI work.

Once this is setup, the catalogue will only show in the PDI process and would not be seen by the Service/Technician teams. This is optional and you are able to just have all the catalogues available to all teams

Version	Comments	Author	Date
1.0	Updated Guide Branding	Harry Tombs	06/11/2024