



Workshop Checklists Guide

For any issues relating to any of the items included please contact the Pinewood Helpdesk at support.portal@pinewood.co.uk

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Overview

The Checklist functionality within the Workshop module has been developed to enable sites with several different franchises to be able to create multiple health check forms. These can also be utilised to create checklists for internal checks for new and used vehicles.

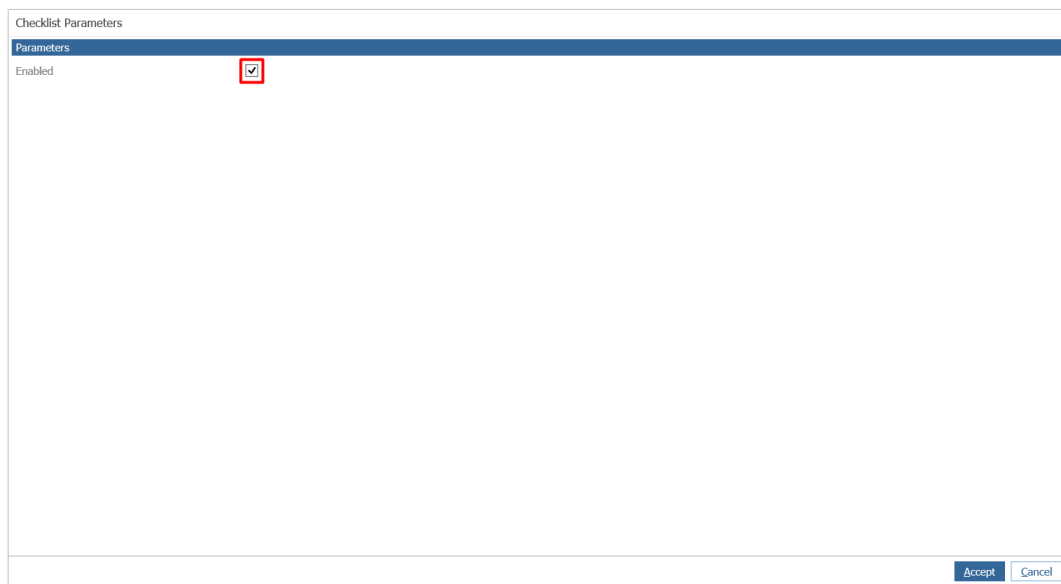
This will also allow for dealerships to use multiple check sheet forms on a job. This will help to then drive Technician's processes on an operation, as departments can create checklists separate to Health Checks (e.g. a service checklist).

Setup

Workshop > Parameters > Health Check > Checklist > Parameters

To enable the functionality of Checklists within your Pinewood DMS system, users will need to go to the following screen:

Workshop > Parameters > Health Check > Checklist > Parameters



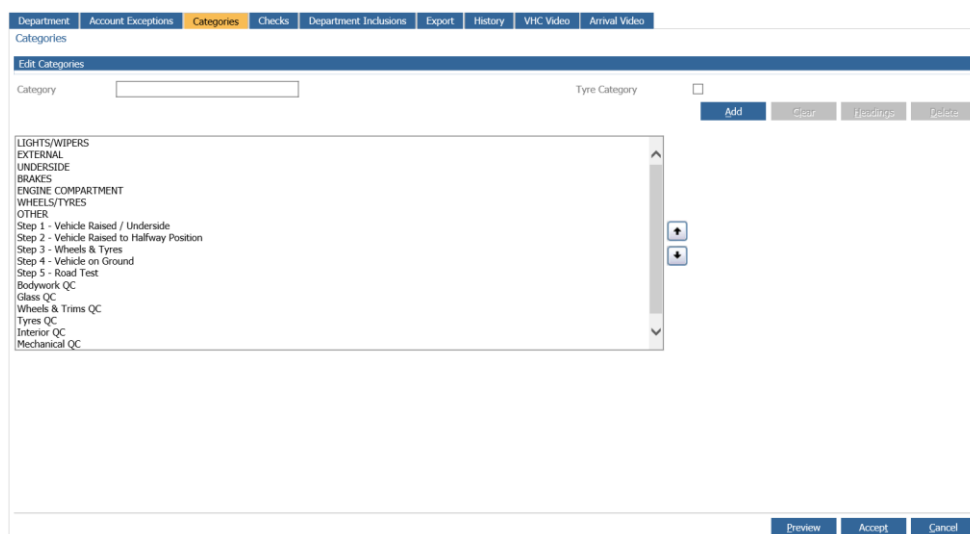
Here there is a parameter to enable the Checklist functionality for the department. This is a Department level parameter and will need to be enabled individually at each Workshop.

Once this is enabled at a dealership, users will be required to set up the Categories they wish to appear on each Checklist.

To begin with – they will need to go to the following screen:

Workshop > Parameters > Health Check > Parameters – Categories Tab

Click the Categories Tab



Within this screen, users will need to add the categories for checks they wish to appear. Users are encouraged to add in any of the categories they wish to appear on any individual check sheet.

This is done by entering in a Category description in the Category field and then clicking Add:

Department Account Exceptions Categories Checks Department Inclusions Export History VHC Video Arrival Video

Categories

Edit Categories

Category Spark Plugs Tyre Category

Add Clear Headings Delete

LIGHTS/WIPERS
EXTERNAL
UNDERSIDE
BRAKES
ENGINE COMPARTMENT
WHEELS/TYRES
OTHER
Step 1 - Vehicle Raised / Underside
Step 2 - Vehicle Raised to Halfway Position
Step 3 - Wheels & Tyres
Step 4 - Vehicle on Ground
Step 5 - Road Test
Bodywork QC
Glass QC
Wheels & Trims QC
Tyres QC
Interior QC
Mechanical QC

Preview Accept Cancel

Once all the required Categories have been defined, departments will be required to add the checks they wish Technicians to do for each Category.

These are created within:

Workshop > Parameters > Health Check > Parameters – Checks Tab

Click the Checks tab

Department Account Exceptions Categories Checks Department Inclusions Export History VHC Video Arrival Video

Checks

Category Please Select...

Edit Checks

Check

Category Please Select... Type Please Select... Labour Type Please Select...

Link

Add Clear Delete

Preview Accept Cancel

Here the questions users wish to be asked for any Category can be added and amended from this screen.

Simply select the Category you wish to alter the Checks for, from the dropdown selection.

Checks

The screenshot shows a dropdown menu for selecting a category. The menu is open, showing a list of options. The first option is "Please Select...". Below it are "LIGHTS/WIPERS", "EXTERNAL", "UNDERSIDE", "BRAKES", "ENGINE COMPARTMENT", "WHEELS/TYRES", and "OTHER". Below these are five steps: "Step 1 - Vehicle Raised / Underside", "Step 2 - Vehicle Raised to Halfway Position", "Step 3 - Wheels & Tyres", "Step 4 - Vehicle on Ground", and "Step 5 - Road Test". Below the steps are several QC categories: "Bodywork QC", "Glass QC", "Wheels & Trims QC", "Tyres QC", "Interior QC", "Mechanical QC", and "Valet QC".

Then type in the details of the Check you wish to add or drill into an Existing Check you wish to amend.

The screenshot shows the 'Checks' management interface. At the top, there is a navigation bar with tabs: Department, Account Exceptions, Categories, Checks (highlighted), Department Inclusions, Export, History, VHC Video, and Arrival Video. Below the navigation bar, there is a 'Checks' section with a 'Category' dropdown menu set to 'LIGHTS/WIPERS'. Below that is an 'Edit Checks' section with a 'Check' text input field containing 'Wiper Blades'. To the right of the 'Check' field are three dropdown menus: 'Category' (set to 'LIGHTS/WIPERS'), 'Type' (set to 'Please Select...'), and 'Labour Type' (set to 'Please Select...'). Below these is a 'Link' text input field. To the right of the 'Edit Checks' section are three buttons: 'Add', 'Clear', and 'Delete'. Below the 'Edit Checks' section is a list of existing checks: 'LIGHTS / LAMPS' and 'WIPERS / WASHER / HORN'. To the right of the list are two arrows: an up arrow and a down arrow. At the bottom of the interface are three buttons: 'Preview', 'Accept', and 'Cancel'.

You can also amend the order in which they will appear on the Check sheet using the 'Up' and 'Down' arrows.

Please Note: As Checks created are added at Enterprise level, this check will appear across all of the Company's Workshop departments.

However, these Checks will not be automatically added to the Default Checklist of a department. This will need to be done manually. Therefore, if any checks do not relate to a department, they will need to be unticked within the 'Department Inclusion' screen.

This can be found via:

Workshop > Parameters > Health Check > Parameters – Departments Tab

Click the Department Inclusions tab

Once all of this has been set up, a user can then begin to define what they wish to appear on each individual check sheet. These are set at Enterprise level and will include all the Check Sheets created by the Dealer Group.

To do this go to:

Workshop > Parameters > Health Check > Checklist > Headings

| Checklist | | | |
|--------------------------------|-----|---------|--------|
| Name | VHC | Default | Active |
| Vehicle Health Check (Default) | ✓ | ✓ | ✓ |
| Approved Used Car QC | ✗ | ✗ | ✓ |
| Checklist Form | ✗ | ✗ | ✓ |
| Used Car Prep | ✗ | ✗ | ✓ |
| Tyre Inspection | ✗ | ✗ | ✗ |

Add Forward

Click Add to create a new check sheet.

This will display the following pop up:

After creating the title of your new Check Sheet, you will be able to define whether this check is a 'Health Check' form. Users can select if you wish to set it as the default for this Workshop department. Users will also have to mark the form as 'Active' if they wish for it to be available to use in the Workshop Department.

The left-hand side displays the Categories.

These can be added to the form as required, either as an entire category by checking the main tick box, or as a single check from that category by using the drop-down option and selecting a single tick box.

As the form is built, this will display the categories and checks you have added on the right-hand side.

Using Checklists within the Workshop

Checklists can be added to Workshop operations when creating a job.

Within the Booking screen having filled in the job details; click Add to load up the information screen for a new operation.

The screenshot displays the 'Customer Requirement' dialog box in the Pinewood DMS software. The dialog has several sections: 'Customer Requirement' (empty text area), 'Operation' (with checkboxes for 'Notes Only', 'Parts', and 'Rework'), and a 'Checklist' dropdown menu. The 'Checklist' dropdown is highlighted with a red box and shows 'Please Select...' as the selected option. Other fields include 'Operation Code', 'Load Hours' (0.00), 'Labour Type' (Please Select...), 'Type' (Please Select...), 'Account Number' (CASHS), and 'Fixed Price' (Inc) and (Exc) (n/a). Buttons for 'Accept' and 'Close' are at the bottom.

Once the Checklists have been enabled, this field will display to select which form you wish to assign to the operation. This is simply then selected by using the dropdown field, highlighted above.

Only Active Checklists will appear in this dropdown, with questions listed against them that have been marked for inclusion in this department.

It is worth noting this field can remain as 'Please Select' if you do not wish to assign a checklist to the operation. If you choose not to enable checklists, this field will not display at all for selection.

As you now have the capability to add multiple forms to a single workshop job, if a form has already been selected against an operation, it will no longer appear in the dropdown for subsequent operations which you create.

Checklists can be assigned to workshop operations through the Booking Screen, when Receiving Jobs, Amending Jobs and the during the Invoicing process if required.

The checklist assigned to an operation can be altered up until the point it is started by a technician. Once the checklist has begun to be filled in, from this point when drilling into an operation, the field will be greyed out and unable to be changed.

The screenshot displays the 'Operation' dialog box in the Pinewood DMS software. The dialog has several sections: 'Operation' (with a dropdown menu showing 'A - Carry out service as required'), 'Notes Only' (checkbox), 'Parts' (checkbox, checked), and 'Rework' (checkbox). Other fields include 'Operation Code', 'Load Hours' (0.00), 'Labour Type' (GEN - General), 'Type' (Service), 'Checklist' (Vehicle Health Check, highlighted with a red box), 'Account Number' (CASHS), and 'Fixed Price' (Inc) and (Exc) (n/a). Buttons for 'Accept', 'Delete', and 'Close' are at the bottom.

If you have a single form assigned to a workshop job, this will be printed based on the pre-existing parameters within the Health Check Parameters screen.

To check these, go to:

Workshop > Parameters > Health Check > Parameters

Department Account Exceptions Categories Checks Department Inclusions Export History VHC Video Arrival Video

Department Details

Parameters

Enabled

Enabled In Time Management

Re-Open Access Level

Prevent Deferral of Urgent Work

Recommended Work Lock Level

Idle Time Reason

Print With Job Card

Print With Invoice

Send Checks To Workshop

Parts Email

Workshop Email

Email Subject

Sender Address

Form Style

Automatically Add Approved Lines

Approval User

Messages

Footer

SMS Message

Signed.....
(Customer)
129

Please click the following link to view details on your vehicle health check that has been carried out today: \$U
47

Preview Accept Cancel

Here you can set this to print off with either the job card, the invoice or both.

If there are multiple check sheets against different operations, regardless of these parameters, the forms will not print automatically. To print these, you will need to go to the Job screen and click the Health Check button.

Customer and Vehicle Job Details Loan Cars WUW Service Advisors Collect and Deliver

Job Details - 1207

Workshop Diary Details

Account Number CASHS Retail Service Sales Service Teams Blue Team

Booking Date Wednesday 04/11/2020 MOT WUW Time Not Allocated Loan Vehicle Not Allocated Service Advisor Time Not Allocated Collect and Deliver

Time In 13:00 Job Type Non Franchise Date Required 04/11/2020 Days Req 1 Mileage 0 Agreed Price 0.00

Time Req 18:00 Greeted By Aftersales Hos Reference Tag Booked By Pinewood (ET)

Requirements

Customer Requirements Operations

| Number | Requirement | Status |
|--------|-------------------------------|--------|
| A | Carry out service as required | Open |
| B | Carry out MOT check | Open |

Summary

| | | | | | | | |
|--------------|---------------------------|-----------------|---|---------------------|---|-------------------|-----|
| Customer | Mr Jake Tarrant | Loan Vehicle | ✗ | Collect and Deliver | ✗ | Fixed Price (Inc) | n/a |
| Vehicle | Kia - Sportage - BV67 ZGE | WUW | ✗ | Service | ✓ | Fixed Price (Exc) | n/a |
| Booking Date | 04/11/2020 | Service Advisor | ✗ | MOT | ✓ | | |

Health Check Required

Health Check Add Accept Exit

This will then ask you which form on the Job you wish to view and drilling into this will display the form.

From here you can select Print in order to get a hard copy of this to pass to technicians or to show the customer.

Please Note: With the Checklist function enabled, there will no longer be a prompt that states 'Does this Vehicle require a Health Check?'. Selecting the checklist associated to the operation, or if that has been pulled from a dictionary will not trigger the health check to be completed.

If no checklist is selected, it will not trigger this to be completed.

If you do not enable the Checklist function, this will continue to prompt as normal.

Pinewood DMS ×

Vehicle Health Check - In Progress

Job Details

Customer: Mr Jake Tarrant Vehicle: Kia SPORTAGE 2 Crdi Isg Mileage:
 Telephone No: Reg No: BV67 ZGE Colour: White
 Job Number: 1207 VIN: U5YPH815LHL355468 Technician: Please Select...
 Dealer: Training Branch 1 Check Completed

| LIGHTS/WIPERS | Red | Amber | Green | Report & Recommendations | Hours |
|------------------------|----------------------------------|-----------------------|-----------------------|--------------------------|--------|
| LIGHTS / LAMPS | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | | 0.00 + |
| WIPERS / WASHER / HORN | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | | 0.00 + |

| EXTERNAL | Red | Amber | Green | Report & Recommendations | Hours |
|-----------------|----------------------------------|-----------------------|-----------------------|--------------------------|-------|
| DRIVE / FEEL | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | | + |
| MIRRORS / GLASS | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | | + |

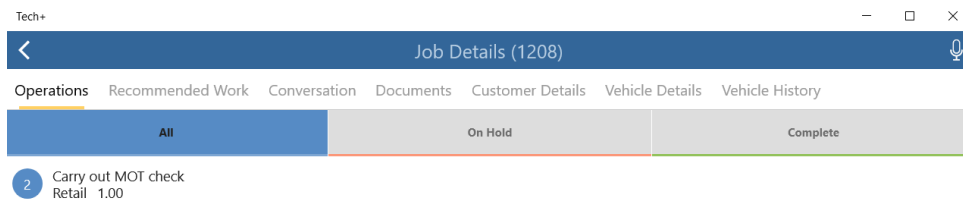
| UNDERSIDE | Red | Amber | Green | Report & Recommendations | Hours |
|-----------------------|----------------------------------|-----------------------|-----------------------|--------------------------|-------|
| EXHAUST | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | | + |
| STEERING / SUSPENSION | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | | + |

| BRAKES | Red | Amber | Green | Pads | Discs | Report & Recommendations | Hours |
|--------------|----------------------------------|-----------------------|-----------------------|------|-------|--------------------------|-------|
| FRONT BRAKES | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | | | | + |

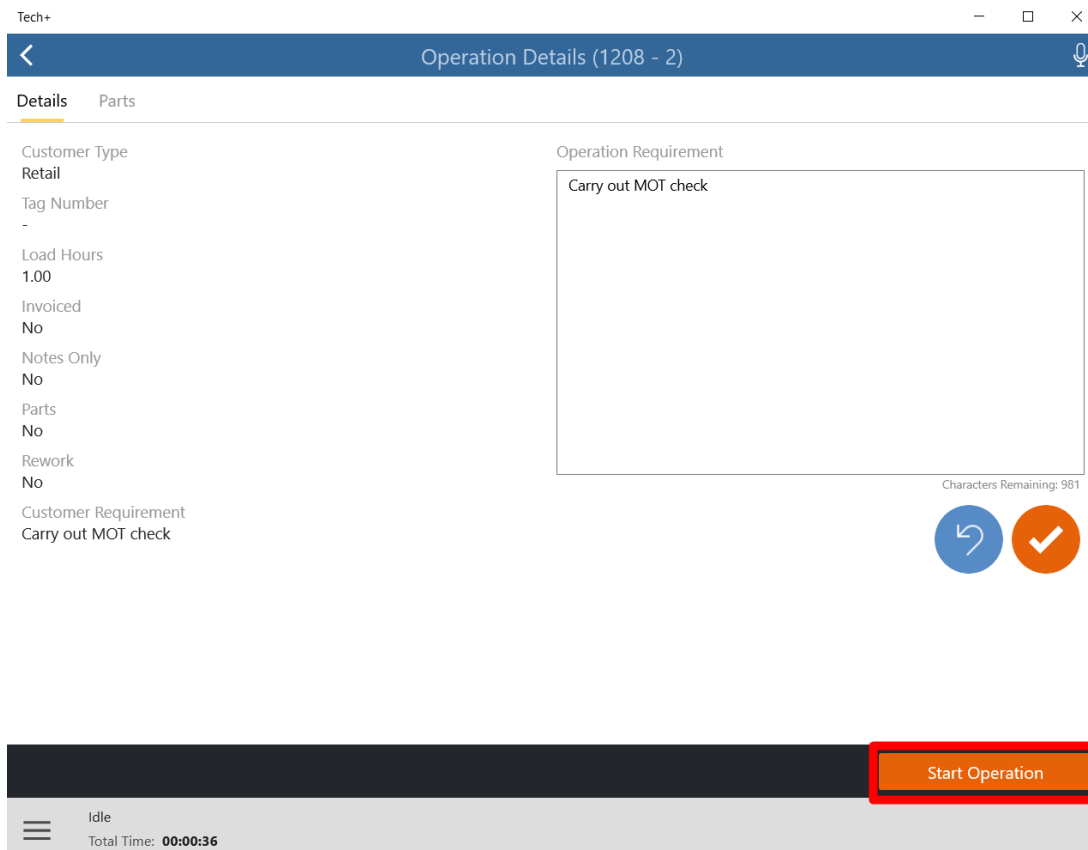
Video Conversation Print Send Save Complete Close

Using Checklists in the Tech+ App

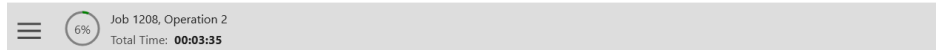
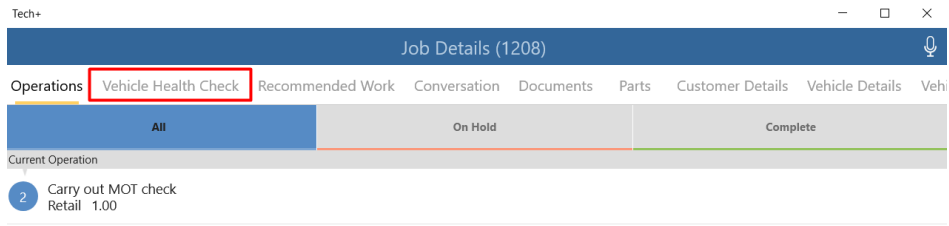
Within Tech+, Technicians will select which operation they wish to clock onto as normal:



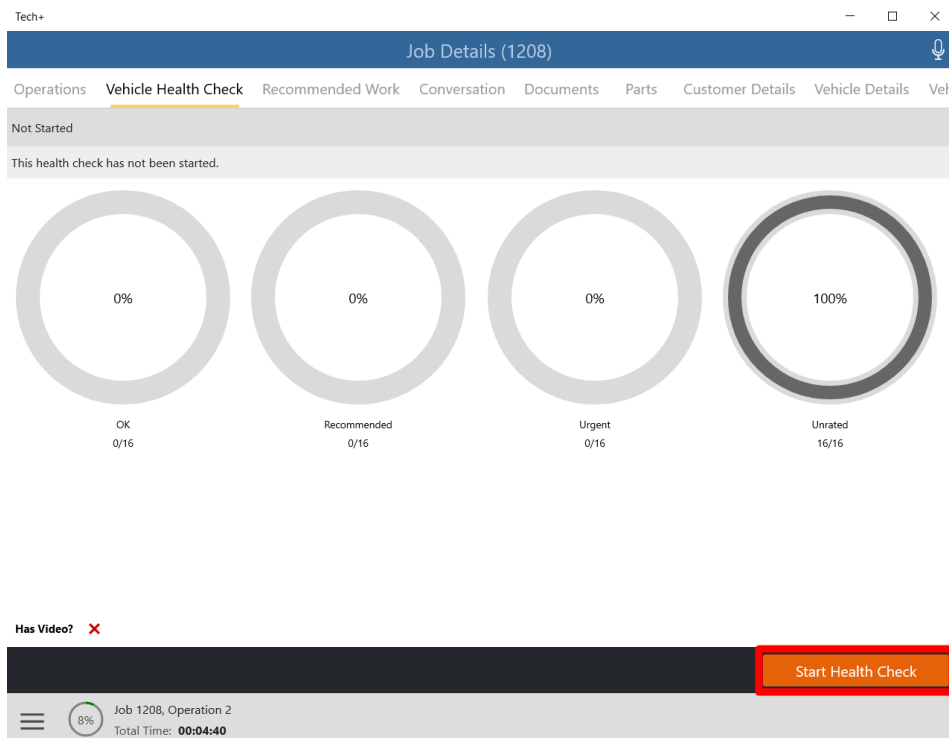
They will then select the 'Start Operation' button:



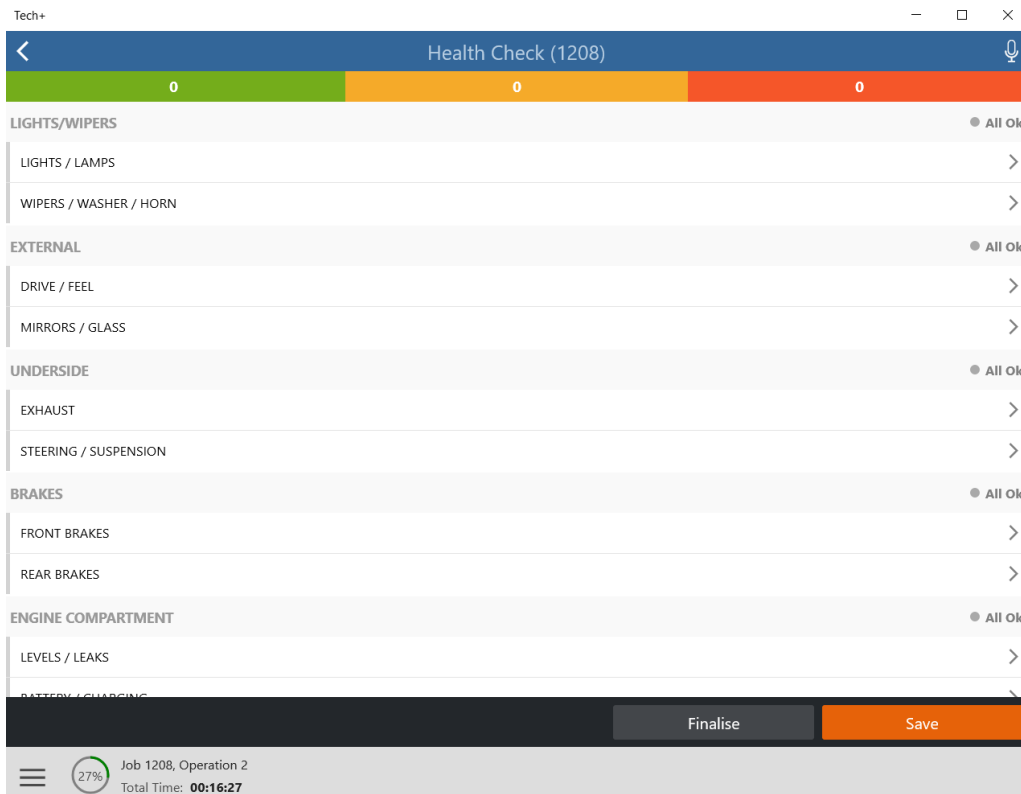
Once this has been selected, click the Vehicle Health Check tab:



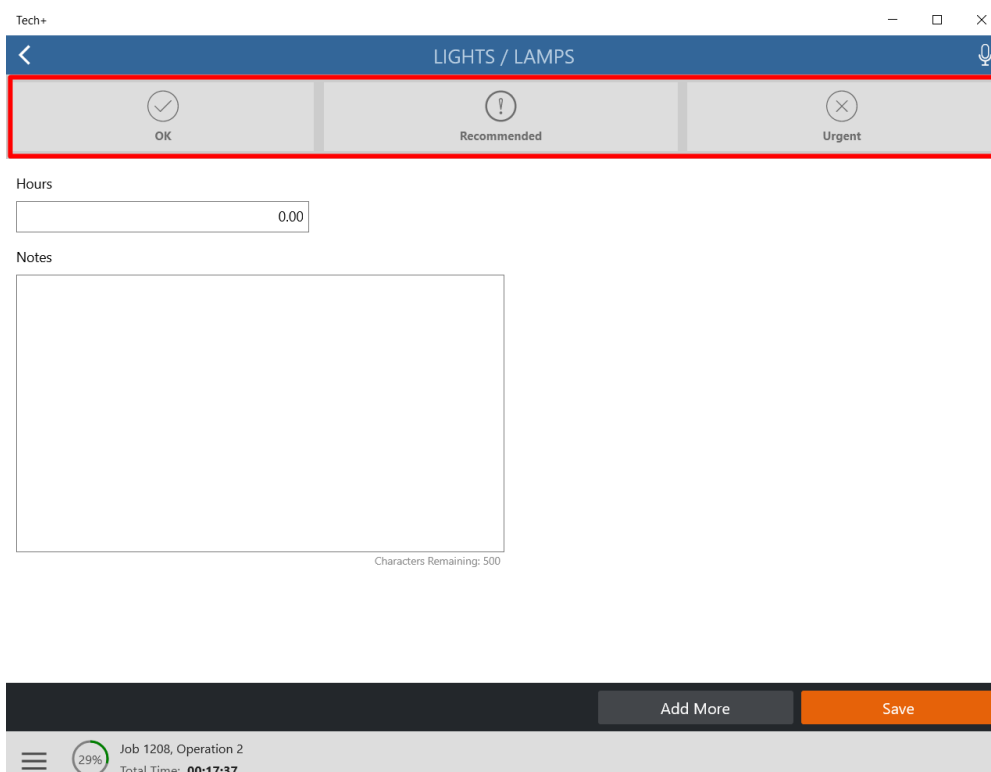
Now select 'Start Health Check':



This will then allow the Technician to complete the form and then Save or Finalise:



Clicking into an item on the Health Check will allow the Technician to mark the work as 'Ok', 'Recommended' or 'Urgent':



The Technician can then either Add More to copy the line or click Save once the check is completed.

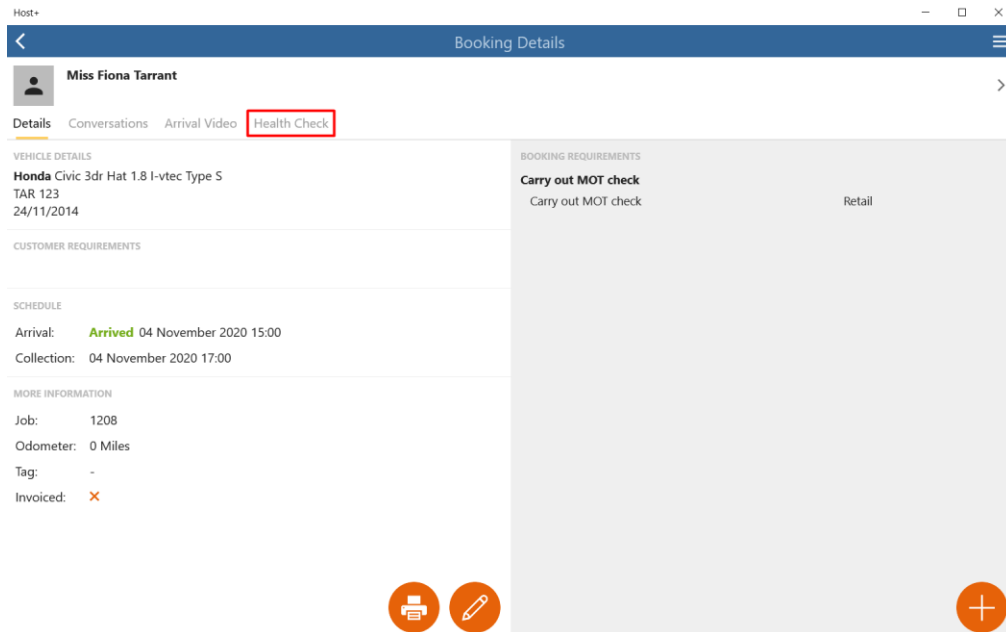
Starting a Checklist within the Host+ App

The Checklist process will integrate with Host+.

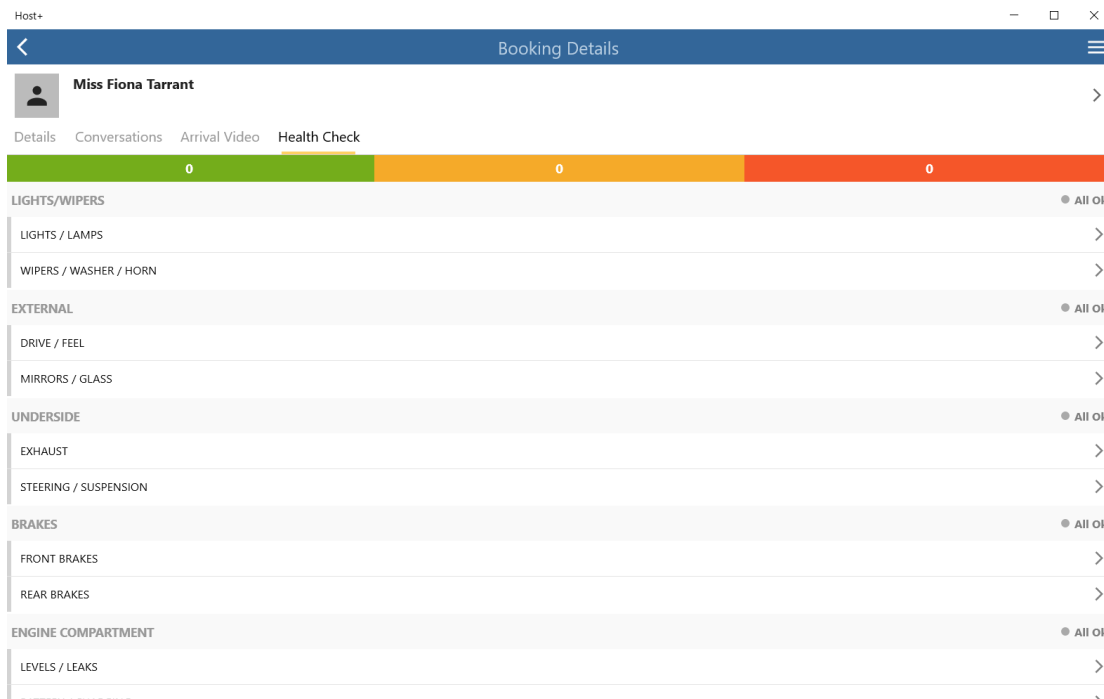
With the Host+ App open, Service Advisors are able to greet the customer at their vehicle and begin the Vehicle Health Check.

In the Main Menu, select 'Service Customers' and then select the relevant booking.

If there is a Health Check associated to the Booking, the Health Check tab will display:



Clicking into here will allow the Service Advisor to begin the Health Check by selecting each line and choosing the appropriate areas and marking them as Ok, Recommended or Urgent.



Please Note: If there are multiple forms against the workshop job, the system will always default to show the one attached to the first operation that has a VHC checklist set against it.

Updating a Health Check within Pinewood DMS

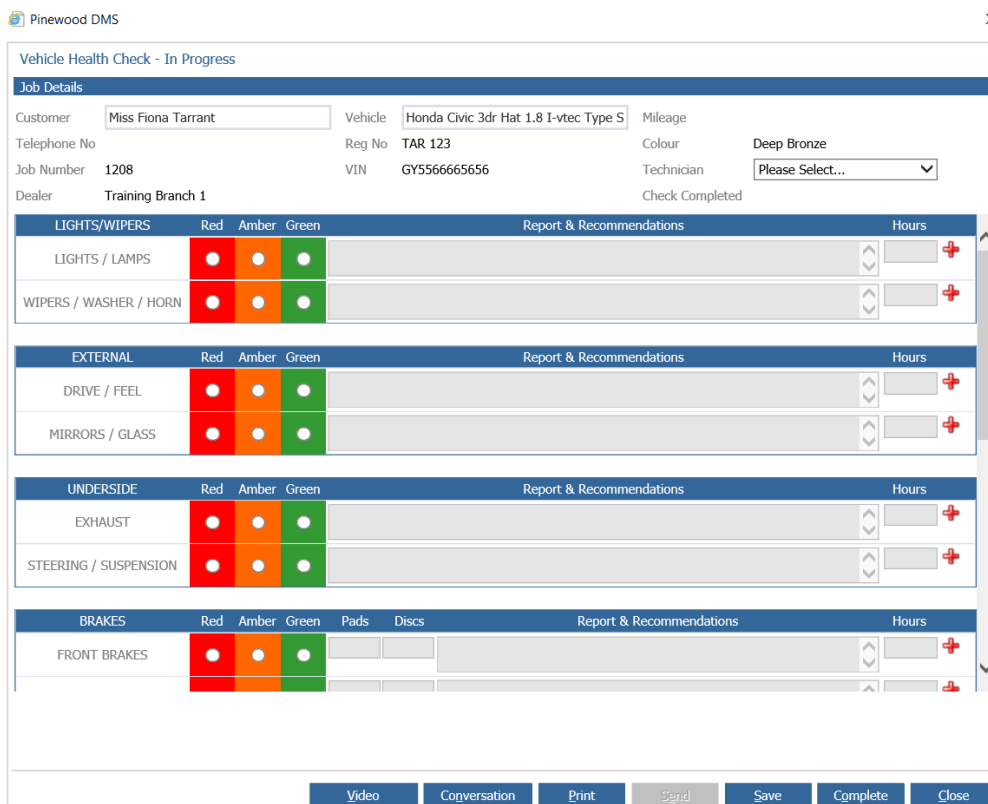
Workshop > Jobs > Additional Work

For departments filling out Health Checks manually, following being passed a paper copy of the forms by their technicians need to go to Workshop > Jobs > Additional Work.

Click the Awaiting Technician tab:



Search or Double Click a Job and within here you will be able to complete the form:



If a Job has multiple checklists listed against its operations, Pinewood DMS will provide a pop-up allowing the user the chance to select which form they wish to view and complete. If a checklist has not been completed and there is only a single checklist left to complete, this will take you directly into the remaining form for completion.

Costing of Vehicle Health Checks

Workshop > Jobs > Additional Work

Within the Workshop > Jobs > Additional Work – Awaiting Estimate tab, users will be able to see the total number or Recommended Work lines raised against a Workshop Job:

| Awaiting Technician | | | | | | Awaiting Parts | | | | | | Awaiting Estimate | | | | | | Awaiting Approval | | | | | |
|---------------------|-----------------|---|-----------------|-----------------|------------------|------------------|--|--|--------------|--|--|-------------------|--|--|--|--|--|-------------------|--|--|--|--|--|
| Awaiting Estimate | | | | | | | | | | | | | | | | | | | | | | | |
| Search Criteria | | | | | | | | | | | | | | | | | | | | | | | |
| Job Number | | | Service Advisor | | | Please Select... | | | Service Team | | | Please Select... | | | | | | | | | | | |
| Job Number | Customer | Vehicle | Reg No | Number Of Lines | Requested | | | | | | | | | | | | | | | | | | |
| 1178 | Mrs Sarah Green | Honda Civic 3dr Hat 1.8 I-otec Type S GT Sn/h | SASA123 | 1 of 1 | 03/01/2020 14:24 | | | | | | | | | | | | | | | | | | |

These can now be split between tabs, so will show users how many lines they must action within this tab, as well as how many identified lines are associated to the job overall. This is the same when viewed in the 'Awaiting Parts' tab.

| Awaiting Technician | | | | | | Awaiting Parts | | | | | | Awaiting Estimate | | | | | | Awaiting Approval | | | | | |
|---------------------|---------------------|-------------------------------------|-----------------|-----------------|------------------|------------------|--|--|--------------|--|--|-------------------|--|--|--|--|--|-------------------|--|--|--|--|--|
| Awaiting Parts | | | | | | | | | | | | | | | | | | | | | | | |
| Search Criteria | | | | | | | | | | | | | | | | | | | | | | | |
| Job Number | | | Service Advisor | | | Please Select... | | | Service Team | | | Please Select... | | | | | | | | | | | |
| Job Number | Customer | Vehicle | Reg No | Number Of Lines | Requested | | | | | | | | | | | | | | | | | | |
| 1179 | Mr E Morse | Honda Civic 1.4i | R275 TJO | 2 of 2 | 28/02/2020 12:28 | | | | | | | | | | | | | | | | | | |
| 1181 | Mr David Simons | Volkswagen Golf Plus Luna Tdi 105 | AYA 568 | 1 of 1 | 16/01/2020 14:37 | | | | | | | | | | | | | | | | | | |
| 1177 | Brightman Transport | Honda Civic 5Dr Hatch 1.8i Vtec Vti | RJ58 KCU | 1 of 1 | 03/01/2020 14:25 | | | | | | | | | | | | | | | | | | |

When these lines are then drilled into, the first major change is that when Checklists are enabled, this will display an extra field so that each line lists the Checklist it was identified on. This will allow a dealership to see where their Recommended Work is being identified from:

Pinewood DMS ×

Estimate Details: Job No - 1181

| | | |
|--------------------------|---------------------------------|----------------------|
| Customer Mr David Simons | Make Volkswagen | Service |
| Company | Model Golf | Warranty |
| Address 11 High Street | Specification Plus Luna Tdi 105 | MOT |
| Post Town Streetley | Registration Number AYA 568 | Air Conditioning ... |
| Postcode B37 6DA | Registration Date 22/09/2006 | Anti Corrosion Check |
| Telephone | VIN WVVZZZ1KZ7W505709 | Brake Fluid Change |
| Mobile | Engine Number BXE 205234 | |

Work

Account CASHS - Cash

| Description | Checklist | Parts | Avail | Alt | Labour | Non-Labour | Total Exc. | Total Inc. | Identified By |
|--|------------------|-------|-------|-----|--------|------------|------------|------------|---------------|
| LIGHTS/WIPERS - WIPERS / WASHER / HORN - ... | Vehicle Healt... | 0.00 | * | * | 0.00 | 0.00 | 0.00 | 0.00 | Sally Spanner |

Total Cost **0.00** **0.00**

If a user wishes to view these Check sheets, they will need to click the Health Check button. The system will then prompt the user as to which checklist they wish to view, if more than one checklist is associated to the job.

Vehicle Health Check Approvals

Workshop > Jobs > Additional Work

When a user goes to Workshop > Jobs > Additional Work and clicks into the Awaiting Approval tab, an SMS or Email can be sent to the customer as each checklist is completed. This means that Approval of Recommended or Urgent work can be obtained using this page.

Awaiting Approval

Search Criteria

Job Number: Service Advisor: Please Select... Service Team: Please Select...

| Job Number | Customer | Vehicle | Reg No | Number Of Lines | Requested |
|------------|------------------|----------------------------------|---------|-----------------|------------------|
| 1130 | Ms Emily Harwood | Honda Accord 4dr 2.2i-dtec Es GT | KL65UQC | 1 of 1 | 04/11/2020 12:20 |

By double clicking a result in here, you are able to click the 'Send' button:

Estimate Details: Job No - 1130

Customer: Ms Emily Harwood
Company: Solihull Parkway
Address: Solihull Parkway
Post Town: Birmingham
Postcode: B37 7YN
Telephone: 01214523657
Mobile: 07458771415

Make: Honda
Model: Accord
Specification: 4dr 2.2i-dtec Es GT
Registration Number: KL65UQC
Registration Date:
VIN:
Engine Number:

Service: 06/01/2021
Warranty:
MOT: 28/03/2020
Air Conditioning ...
Anti Corrosion Check
Brake Fluid Change

Work

Account: CASH - Cash

| Description | Checklist | Parts | Avail | Alt | Labour | Non-Labour | Total Exc. | Total Inc. | Identified By |
|-----------------------|-------------------|-------|-------|-----|--------|------------|------------|------------|---------------|
| UNDERSIDE - EXHAUST - | Vehicle Health... | 0.00 | * | * | 42.50 | 0.00 | 42.50 | 51.00 | Josh Evans |

Total Cost: **42.50** **51.00**

Send Conversation Health Check Job Details Add All Decline All Defer All Close

You are then able to send either an Email or SMS or both to the customer or the required work that needs approving:

Send

Email:

Mobile:

0 of 1,000 used

Accept **Cancel**

Viewing a Completed Health Check via Service Details

CRM Record

When looking at the Service details against a vehicle, you will be able to view all checklists associated to previously invoiced jobs.

Within the Customer record, click the Service Details tab:

Service Details - BV67 ZGE - Kia Sportage 2 Crdi Isg

Service Information

Maintenance and Warranty Plans:

Variable Servicing:

Service Interval Miles: 10,000

Service Interval Weeks: 52

Last Service: 04/11/2020

Miles Last Service: 0

Next Workshop Visit: 03/11/2021

Days Between Visits: 0

Miles Covered: 0

Average Daily Mileage: 0

Days Since Last Service: 0

Yearly Mileage: 0

Calculated Current Mileage: 0

Calculated Next Service - Time: 03/11/2021

Calculated Next Service - Mileage: 0

| Date | Reference | Miles | Cost | Work | Service | Follow Up | CSI Rating |
|------------|-----------|-------|-------|----------------------|---------|-----------|------------|
| 04/11/2020 | 5771 | 0 | 53.00 | MOT and Health Check | ✓ | ✗ | |

Buttons: Variable Servicing, Print History, Amend, History Update, Change Vehicle

Drill into the line of history with the checklist attached. This will allow you to view the Archived Invoice, any Work Required and the Checklists completed on the Health Check tab:

Pinewood DMS

Invoice: **Health Check**

Vehicle Health Check - Completed

Job Details

Customer: Mr Jake Tarrant | Vehicle: Kia SPORTAGE 2 Crdi Isg | Mileage: | Telephone No: | Reg No: BV67 ZGE | Colour: White | Job Number: 1207 | VIN: U5YPH815LHL355468 | Technician: Rachel Ratchet | Dealer: Training Branch 1 | Check Completed: 04 Nov 2020 14:36

| Category | Red | Amber | Green | Report & Recommendations | Hours |
|------------------------|-----|-------|-------|--------------------------|-------|
| LIGHTS/WIPERS | ● | ● | ● | | 0.00 |
| LIGHTS / LAMPS | ● | ● | ● | | 0.00 |
| WIPERS / WASHER / HORN | ● | ● | ● | | 0.00 |
| EXTERNAL | ● | ● | ● | | 0.00 |
| DRIVE / FEEL | ● | ● | ● | | 0.00 |
| MIRRORS / GLASS | ● | ● | ● | | 0.00 |
| UNDERSIDE | ● | ● | ● | | 0.00 |
| EXHAUST | ● | ● | ● | | 0.00 |
| STEERING / SUSPENSION | ● | ● | ● | | 0.00 |
| BRAKES | ● | ● | ● | Pads Discs | 0.00 |
| FRONT BRAKES | ● | ● | ● | | 0.00 |

Buttons: Video, Conversation, Print, Send, Close

Vehicle Health Check Reporting

Workshop > Reporting > Health Check – Summary Tab

Within the above screen, there is a Checks Completed figure. As multiple checks can now be associated to a single job, this number will likely increase if you have not been using the Checklist functionality prior to enabling it.

The calculation will now be as follows; The number of checklists that are associated to a job that have been completed, plus any manual recommended work included as an addition of one check. This is regardless of how many manual lines are identified, they will still only count as a single check.

The second change is the addition of a filter, so that users can filter the report dependent on what checklists have been completed.

Workshop > Reporting > Health Check – Technician Tab

This will have altered to separate the checks that have been completed into either 'VHC Checks' or 'Other Checks'. This will be defined within the setup of the Checklist.

This will give departments a clearer definition of the type of checks that Technicians are completing.

| Health Check Value By Technician | | | | | | | | | | |
|----------------------------------|------------|--------------|----------|--------------|-------------|---------------|-------------|-------------|-----------------|---------------|
| Report Criteria | | | | | | | | | | |
| Health Check Completed Betw... | | 01/11/2020 | And | 30/11/2020 | | | | | | |
| View | Table | Type | All | Vehicle Make | All | | | | | |
| Technician | VHC Checks | Other Checks | Videos | Hrs Found | Hrs Inv | Value Found | Value Inv | % Invoiced | Avg Value Found | Avg Value Inv |
| Harry Hammer | 1 | 0 | 0 | 0.00 | 0.00 | 347.55 | 0.00 | 0.00 | 347.55 | 0.00 |
| Rachel Ratchet | 1 | 0 | 0 | 1.00 | 0.00 | 423.24 | 0.00 | 0.00 | 423.24 | 0.00 |
| Totals | 2 | 0 | 0 | 1.00 | 0.00 | 770.79 | 0.00 | 0.00 | 385.40 | 0.00 |

Workshop > Reporting > Health Check – Outcomes Tab

This report will show the total values that will encompass the sum of all recommended work across all completed checklists associated to workshop jobs and any manually added recommended work that has been identified.

| Health Check Outcomes | | | | | | | | | | |
|--------------------------------|-------------|-------------|---------------|-----------------------|--------------------------|-----------------|-------------|--------------|--------------|--|
| Report Criteria | | | | | | | | | | |
| Health Check Completed Betw... | | 01/11/2020 | And | 30/11/2020 | Category | All | | | | |
| View | Table | Type | All | Technician | Please Select... | Service Advisor | All | | | |
| Vehicle Make | All | VHC Videos | All | Exclude Internal Work | <input type="checkbox"/> | | | | | |
| Checklist | All | | | | | | | | | |
| Advisor | WIP | Invoiced | Deferred | Declined | Deleted | Value | % Invoiced | % Deferred | % Lost | |
| Pinewood Training2 | 0.00 | 0.00 | 476.79 | 0.00 | 294.00 | 770.79 | 0.00 | 61.86 | 38.14 | |
| Totals | 0.00 | 0.00 | 476.79 | 0.00 | 294.00 | 770.79 | 0.00 | 61.86 | 38.14 | |

Adding Checklists to Workshop Dictionary Items

Workshop > Parameters > Dictionary

Users are able to assign Checklists to dictionary items within the workshop. This is essential to departments in order to increase the speed of this feature and the ability to process multiple VHC tests against different types of vehicle with ease.

To do this go to Workshop > Parameters > Dictionary.

New Dictionary items can be created, or you can use existing items within a dealership to assign Checklists to by selecting and amending them.

| Dictionary Maintenance | | Customer Requirement | |
|------------------------|--|----------------------|--|
| Code | 10s | Short Description | 10,000 mile service |
| Notes Only | <input type="checkbox"/> | Description | Carry out 10,000 mile service as per service schedule. |
| Load Hours | 1.00 | | |
| Labour Type | GEN | | |
| Invoice Hours | 0.00 | | |
| Operation Code | | | |
| Cost | 0.00 <input type="checkbox"/> Free of Charge | | |
| Contact Reason | Please Select... | | |
| | | | 445 |
| Workshop Dictionary | | Operation | |
| Work Required Type | Please Select... | Short Description | 10,000 mile service |
| Job Type | Service | Description | Carry out 10,000 mile service as per service schedule. |
| Flagged For Parts | <input checked="" type="checkbox"/> | | |
| Categories | Please Select... | | |
| Reasons | Please Select... | | |
| Checklist | Please Select... | | |
| MOT Hours | Vehicle Health Check (Default) | | |
| MOT Cost | Approved Used Car QC | | |
| | Checklist Form | | |
| | Used Car Prep | | |
| | | | 945 |

Save Cancel

When Checklists are enabled, there will be a checklist heading against the dictionary item. This can be selected from the dropdown, or left as 'Please Select' if you do not wish a Checklist to be linked to a particular Dictionary item (It is expected that the majority of these items will remain without a checklist).

When a Checklist is set on a Dictionary item, this will automatically pull through when using the dictionary item on a Workshop Booking or Job Operation. This will also apply if a dictionary item is used when generating and adding recommended work or any operations added from within the Tech+ application.

Associating a Checklist to a PDI Template

Workshop > Parameters > PDI Operation Template

Within the above screen, PDI Templates can be created to be used when the Sales Admin are requesting internal work on a Vehicle.

When adding or amending an Operation on the PDI Template, a check list can be associated within here:

Pinewood DMS ... X

PDI Operation Template

Template Fields

Description: Carry out Inspection x

Load Hours: 0.50

Invoice Hours: 0.50

Type: Service v

Checklist: Approved Used Car QC v

Save Cancel

Then, when the Template is used in the Vehicles module via Vehicles > Stock Management > Prepare for PDI and the Internal Work is then booked or received in the Workshop Department, the operation will automatically have the Checklist associated to the operation on the Internal Vehicle.

If there is Recommended Work added to the Internal Vehicle Health Check, regardless of the fact they are Internal Jobs this will still be raised against the Default Cash Account for the Workshop Department, as opposed to the INTVM Account.

If this is an Internal Job, users will have the option of changing this to the INTVM account, using the dropdown, however this will need to be done as a **manual** process – prior to accepting any identified work on the job card.

This can be done via Workshop – Jobs – Additional Work, click the Awaiting Approval tab and drill into the Internal Work and within here amending the Account associated to the Recommended Work:

Pinewood DMS X

Estimate Details: Job No - 1130

Customer: Ms Emily Harwood
Company: Solihull Parkway
Address: Solihull Parkway
Post Town: Birmingham
Postcode: B37 7YN
Telephone: 01214523657
Mobile: 07458771415

Make: Honda
Model: Accord
Specification: 4dr 2.2i-dtec Es GT
Registration Number: KL65UQC
Registration Date:
VIN:
Engine Number:

Service: 06/01/2021
Warranty:
MOT: 28/03/2020
Air Conditioning ...
Anti Corrosion Check
Brake Fluid Change

Work

Account: CASH - Cash v

| Description | Checklist | Parts | Avail | Alt | Labour | Non-Labour | Total Exc. | Total Inc. | Identified By |
|-----------------------|------------------|-------|-------|-----|--------|------------|------------|------------|---------------|
| UNDERSIDE - EXHAUST - | Vehicle Healt... | 0.00 | * | * | 42.50 | 0.00 | 42.50 | 51.00 | Josh Evans |

Total Cost: 42.50 51.00

Send Conversation Health Check Job Details Add All Decline All Defer All Close

Viewing a Health Check from a Vehicle Stock Card

Vehicles > Reporting > Stock Cards - Costs Tab

After searching for a Stock Card, within the result, click the Costs tab.

You can select the reference for the work completed and the option to view the invoice and the health check will be displayed on the Health Check Tab.

The screenshot shows the 'Pinewood DMS' interface with a 'Health Check' tab selected. The main heading is 'Vehicle Health Check - Completed'. Below this is a 'Job Details' section with the following information:

- Customer: Mr Jake Tarrant
- Vehicle: Kia SPORTAGE 2 Crdi Isg
- Mileage: (blank)
- Telephone No: (blank)
- Reg No: BV67 ZGE
- Colour: White
- Job Number: 1207
- VIN: U5YPH815LHL355468
- Technician: Rachel Ratchet
- Dealer: Training Branch 1
- Check Completed: 04 Nov 2020 14:36

The main area displays inspection results for various components, each with a status indicator (Red, Amber, Green) and a 'Report & Recommendations' field. The 'Hours' column shows 0.00 for all items.

| Component | Red | Amber | Green | Report & Recommendations | Hours |
|------------------------|-----|-------|-------|--------------------------|-------|
| LIGHTS/WIPERS | ● | ● | ○ | | 0.00 |
| LIGHTS / LAMPS | ● | ● | ○ | | 0.00 |
| WIPERS / WASHER / HORN | ● | ● | ○ | | 0.00 |
| EXTERNAL | ● | ● | ○ | | 0.00 |
| DRIVE / FEEL | ● | ● | ○ | | 0.00 |
| MIRRORS / GLASS | ● | ● | ○ | | 0.00 |
| UNDERSIDE | ● | ● | ○ | | 0.00 |
| EXHAUST | ● | ● | ○ | | 0.00 |
| STEERING / SUSPENSION | ● | ● | ○ | | 0.00 |
| BRAKES | ● | ● | ○ | | 0.00 |
| FRONT BRAKES | ● | ● | ○ | | 0.00 |

At the bottom of the interface, there are buttons for 'Video', 'Conversation', 'Print', 'Send', and 'Close'.