CAPS-ECP Services Instruction Sheet

These instructions are to support repairers updating CAPS and are generally useful for any work where you are sending/receiving CAPS updates.

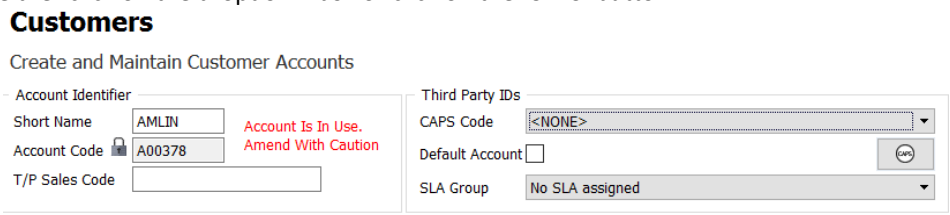
Make sure you have your Eclipse accounts for the work provider set up correctly. When information is sent to/from your system via CAPS, they need to know which work provider the work is being done for. This information comes from the CAPS code that is put inside the Eclipse account information. So, for example your Eclipse account for **Amlin Insurance** data will need to be coded with the '**AMLIN**' CAPS code. If you are unsure what code to use for a work provider account, you will need to contact the work provider directly.

Note: if you also link to an accounting system such as Sage and create new accounts to accommodate your link to CAPS, please ensure that you enter a TP Code to ensure the invoices are posted to the correct place in your accounts system.

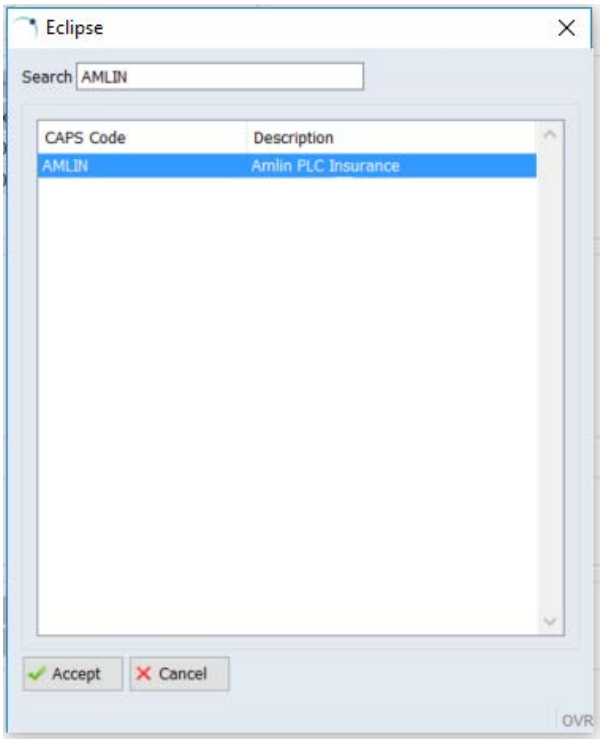
Inserting a work provider CAPS code

To insert a CAPS Code, select the Maintenance button and move to the Customers Tab. Locate and display the required Account. To enter the work provider CAPS code, you will first need to click on the 'Edit' button

you can either click on the dropdown box or click on the 'CAPS' button:

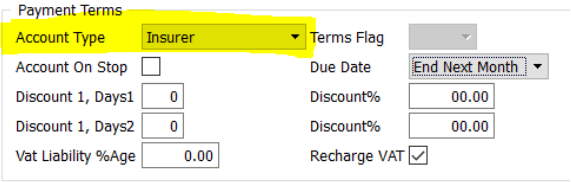


If you clicked on the CAPS button you can then search for the work provider CAPS code:



If you are receiving FNOL's for this work provider you will also need to put a tick in the 'Default Account' box otherwise a new account will be created every time a new FNOL is received by Eclipse.

As CAPS generally only sends CAPS updates for Insurer accounts you will also need to make sure the 'Account Type' is set to 'Insurer':



Correct account selection for jobs

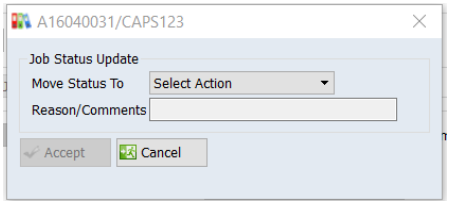
For jobs that need to update via CAPS you will need to ensure you add either an 'Insurer' or 'Work Provider account, otherwise the updates will not get sent to the work provider via CAPS. This account must contain the correct work provide CAPS code as explained in the previous section.

For work providers that send you FNOL's via CAPS (see below) the account will be selected automatically, providing you have ticked the 'Default Account' box in the previous section.

Accepting new FNOL's

If your new work is being sent electronically to your Eclipse system, ensure you accept/reject any new work notifications as soon as possible after you receive them. This is done by clicking the 'Jobs Status' button

at the top of the screen in the Jobs List. The following screen will then be displayed:

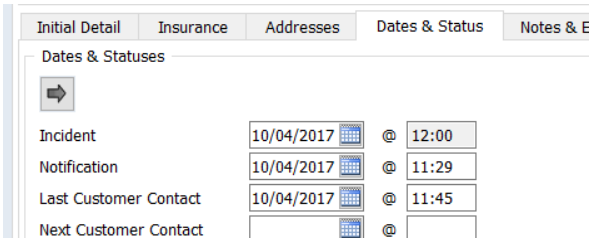


Click the drop down box and select Accept/Reject accordingly. Then click the accept key.

Job status updates via CAPS

Inputting the following dates and job status updates ensures that the Eclipse system communicates correctly with your work provider-services via CAPS. This ensures that the repair progress is automated and reduces the need to utilise the telephone or fill in spreadsheet reports.

Enter the Customer Contact date when you first contact the customer. This can be found on the Dates and Status tab.



When an Estimate is booked be sure to add an Estimate Booked Date to the job. This can be found in the Dates and Status tab. If the date changes, amend it. If it's a no show, use the job communications tab to add a caps communication to that effect (see below).

Once Estimated enter the estimate date. Notification to estimate date is a key measure. The estimated date is entered automatically when an Assessment is imported from Audatex/GT Motive, but it isn't entered automatically, if the estimate is keyed in manually!

Mark as On-Site as soon as the vehicle is on-site – there is a tick box on the dates and status tab, which will populate the onsite date – this can be edited if required.

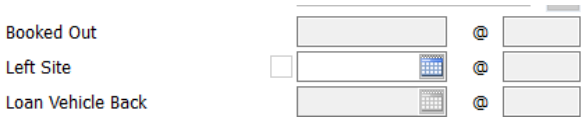
Scheduled return dates to be recorded accurately – this can also be found on the dates and status tab – make sure you keep it up-to-date!

Make sure the job complete date is entered. Don't just complete the ***tasks*** in TRIM complete the ***job*** too. This should be done on the barcode reader, but can also be done manually, in the TRIM details tab on the jobs screen.

Jobs that are to be Cancelled must be marked as Cancelled with appropriate reasons. This done by clicking the Job Status button

and then selecting Cancel from the list of available options shown on the drop-down menu, ensure that you have entered a reason.

Select the "left site" date as soon as the Vehicle leaves the premises – this can be done in the dates and status tab, by filling in the Left Site Date.

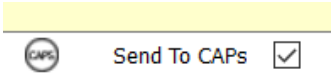


Sending notes via CAPS

Information can be added and communicated via CAPS in both the Job Notes section and the Job Communications section of the job. E.g. Estimate no shows, parts delays any communication with the customer, additional information relating to any changes in scheduled return date.

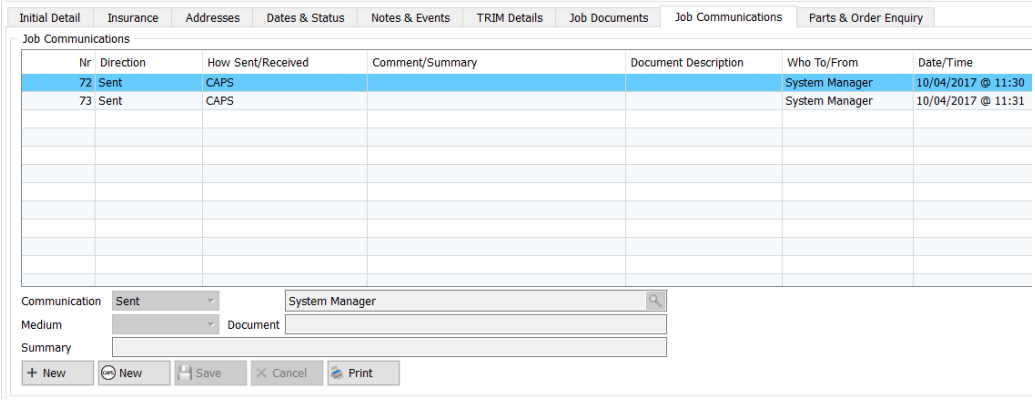
To ensure that relevant information is passed to CAPS, use one of the options below.

If you wish to transmit a note via the Job Notes tab, place a tick in the "Send to CAPS" tick box before saving the note.



Updating the Job Notes in this fashion will also update the last contact date on the Dates and Status tab.

If you wish to transmit a note via the Job Communications Tab, see below:



The + New button on the left side should be used when documenting communication with the customer (Address records – Insured, Driver or Owner) has taken place. It will update the Customer Contact date in the Dates and Status Tab and update CAPS. **NB if you use a different address record, the contact date and CAPS Update do NOT happen.**

The New button should be used to update CAPS only e.g. to advise of a no show for an Estimate, or any other problems that CAPS should be made aware of.

After entering your note, click the Save button.

Below is the list of CAPS codes that need adding to your accounts on Eclipse for CAPS-ECP:

Insurer/Work Provider	**CAPS Code**
Broker Assistance Insurance	BROKER_ASS
IV Assure	IV ASSURE
Managed Fleet Services	MFS_OTHER
Amlin Insurance	AMLIN
Motor Support	MOTORSUPP
Noble	NOBLE_CLAIMS
S and G Response	SANDGRESPONSE
Sports Direct	SPORTS_DIRECT
Surrounding concept	CONCEPT
Inspection Management Services	KBSIMS
Advantage Assistance Ltd	ADVANTAGEASSIST
Elite Insurance	ELITEINS
CL-UK	CUNNINGHAM and CUNNINGHAM_COMM
Providia Agencies (UK) LLP	PROVIDIA
XS Direct	XSDIRECT
Environment Agency	ENVIRONMENT_AGENCY
Horizon	HORIZON

If you have any quires or require any help then please contact our support team:

Web: http://support.bms.co.uk
Email: ticket@bms.co.uk

Phone: 0345 1234 051