

## Chapter 7 Service Sales

The Service R/O Parts menu is used to add parts handled through the Service Department to the repair orders. The first two menu options are used to add parts, sublets, gas, oil, and grease to the repair orders. The third menu option allows you to create sublet purchase orders. The last two menu options are used to manage the repair orders.

Service R/O Parts (ABC Motors)	
Line Parts	OEM Source 1 Service R/O Parts
Gas - Oil - Grease - Sublet	
Sublet Purchase Orders	
View R/O's - Service Parts	
Remove All Parts From An R/O	
Exit	

The amount of information you need to enter for each service part sale depends on if you integrate with the Service Writing module. (You indicated if you integrate with Service Writing on the More Operating Defaults screen in the Parts System Setup.) If you integrate with Service Writing, you can pull a repair order the Service Department entered. If you do not integrate with Service Writing, you will have to manually enter the information for each repair order. Either way, the process for adding parts is quick and easy.

Generally, repair orders are started at the Service Desk, and the hard copy of the repair order is given to the technician. When the technician brings the repair order to the Parts Counter, you use the **Line Parts** button on the Service R/O Parts menu to add parts. If you integrate with the Service Writing Program, you will be able to pull up the repair order and all of the information entered for the service.

When you charge out parts from the inventory to a repair order, the parts' cost and price will default to the information set in the price matrix, and the inventory is automatically adjusted. The reverse is true when parts are returned. The part is removed from the repair order and restocked into the inventory.

If you integrate with the Service Writing module, the parts are automatically printed when the repair order is closed at the Service Desk. The completed document goes to Accounting so it can be posted to the books.

If you use subsource management, you specified the pricing you wanted to use for the subsource and whether the pricing should be applied to parts added to repair orders and body shop repair orders when you created your subsources. This is the information specified under **Pricing** on the Subsource Management screen. When you add a part to one of these documents, the price is calculated based on the pricing specified for the subsource assigned to the part. Similarly, when you update part sales to Accounting, the sales post to the account specified on the Subsource Management screen for the subsource the parts has been assigned. If you did not assign an account to a subsource, the sale will post to the account specified in the Accounting parameters.

## Line Parts

Use this button to open the Service R/O Parts screen. This screen is used to charge parts to service repair orders. If you integrate with the Service Writing module, the repair order must be entered at the Service Desk before you can pull it to this screen. If you do not integrate with Service Writing, this screen automatically opens when you click **Service Part Sales** on the Parts Inventory menu. You must manually enter all of the information on this screen.

Service R/O Parts (ABC Motors)

OEM Source: 1 OEM SOURCE 1

R/O: 48332

Salesman: 1

Price Code: A

Discount Level: 1

Special Parts Discount: %

STEVE SMITH  
03 CHEVR BLAZE  
2G1WH52K739126476

1-(Q) LUBE-OIL-FILTER  
2-(W) RECALL 1245780

LN	Part Number	Qty	R	T	F	Cost	Price	Description	W	C	Fill Ratio	Req	FS	SD	S	O/H	Bin
01	89017342	1	1	Q		3.99	11.17	FILTER	6								

Part Information

PART:  
BIN:  
SS:  
LIST:  
RETAIL:  
TRADE:  
COST:  
CORE:  
O/H:  
O/O:  
B/O:  
O/Q:  
FROM:  
TO:

Exit R/O List Print Parts History Emerg Stock View R/O Clear Save Next

**Tip:** You can click the car icon next to the VIN or press F10 while working on the Service R/O Parts screen or the Lubricants/Sublet screen to view the VIN decoding data. This provides detailed information for the vehicle based on the VIN. The system will warn you if the VIN is invalid.

## Adding Parts to a Repair Order

1. Click **Line Parts**. The Service R/O Parts screen appears. If you do not integrate with Service Writing, this screen automatically opens when you click **Service Part Sales** on the Parts Inventory menu.
2. In **R/O**, type the repair order number. You can also search for a repair order by clicking **R/O List**. A list of repair orders appears. Click on the repair order you want to select.

**Tip:** Once you pull a repair order to the screen, the vehicle's VIN is saved on the Windows Clip Board. This allows you to right-click and paste the VIN to any field, including Web sites, catalogue applications, etc.

3. The information for the selected repair order fills in on the screen. The top section of the screen displays the repair order information entered by the Service Department.
4. If there is memo data in the customer's file, the **Memo** button to the right of the **R/O** field will display a green check mark. If the customer's file contains no memo data, this button displays a red minus sign. To view available memo data, click the **Memo** button. Click **Close** to close Customer Memo screen. To add memo data, click the Memo button, type the information, and click **Save**. The memo block holds up to 512 characters. The memo data will also be available in the Service Writing module on all the repair order screens and on the Customer Information screen.
5. The **Salesman** field fills in with the salesman number based on the user ID entered at startup. Change the number as needed.
6. The **Price Code** field is automatically skipped. If you need to enter a code, click in the field, and type the appropriate code/letter. These codes are set using the **Wholesale Pricing Levels** button on the System Setup & Updates menu (R for retail, W for wholesale, etc.).
7. The **Discount Level** field is automatically skipped. If you need to enter a discount level, click in the field, and type the appropriate level (1-4). Discount levels are set for each discount/price code entered using the **Wholesale Pricing Levels** button on the System Setup & Updates menu. If you are adding a discount in this field, you cannot add a discount in the **Special Parts Discount** field.
8. The **Special Parts Discount** is also automatically skipped. If you need to enter a discount, click in the field, and type the appropriate discount. If you are adding a discount in this field, you cannot add a discount in the **Discount Level** field.
9. If parts have been added to the repair order, they are listed at the bottom of the screen.
10. The program automatically assigns line numbers as parts are added to the R/O and displays the line number in the **LN** field.
11. In **Part Number**, type the part number for the part you are adding to the repair order, and press ENTER. The **Part Information** section displays part information for the part number you enter. Click the **Part Information** label to hide the part information. The information displayed is the same information you can view on the Master Inventory screen. As you add parts, you can display or hide the sales information (pricing hierarchy) of individual parts by clicking the binoculars icon at the bottom of the **Parts Information** section.

**Tip:** If you enter a part number that has supersession information, you can click the "From" or "To" lines in the **Part Information** section (or press F7) to view the supersession history. In the supersession window that appears, you can select which part number you want to use for the part sale. Click the part number, and click **Select**.

12. The **Cost**, **Price**, **Description**, **S** (Source), **O/H** (on-hand quantity), and **Bin** fields automatically fill in from information in the Master Inventory file.
13. In **Qty**, type the quantity of the part needed.
14. In **R**, type the repair number for the part. This number corresponds to the conditions that have been added to the repair order. You must assign a repair number to every part. If the part is for a warranty repair, the **Price** field will adjust based on the cost plus percentage entered for the model year in the Operating Defaults in the Parts system Setup.
15. The **T** field automatically fills in with the repair type for the selected repair number. This field displays **C** for customer pay, **W** for warranty, **I** for internal, **Q** for quick lube, or **N** for new car road ready.

You can change the repair type on a part as long as there is a labor line with the same repair type. If you change the repair type, you are prompted to verify you want to change the repair type. Click **Yes**. The system displays a message indicating the change will not affect parts previously added to the repair. Click **OK** to acknowledge the message.

16. Use the **F** field to identify the failed part. Type an **F** or **X** to mark the failed part.
17. Use the **W** field to indicate if the part is eligible for Wholesale Compensation. Type **Y** for yes or **N** for no. The system keeps a list of all wholesale parts sold.
18. The **C** field pertains to parts with cores. Use it to indicate if a dirty core was returned. The entry in this field determines if a dirty core will be added to the inventory. You can view the dirty cores for parts on the Master Inventory screen, and you can edit the dirty core quantity to ensure the integrity of your dirty core inventory as needed. There are three valid entries for this field.
  - **O** for outstanding: This entry does not affect the dirty core inventory. The system will display a message that there are outstanding cores when the Service Department brings up the R/O on the Close Parts screen in the Service Writing module.
  - **R** for returned: A dirty core will be added to the inventory. If the entry in this field was **R** for returned when the part was added to the R/O and the R/O is edited and the entry changed to **O** for outstanding, a dirty core will be subtracted from inventory.
  - **C** for charge customer.
19. The **Fill Ratio** fields are used to track how you are filling the parts orders. This information is used to generate reports to help you evaluate your fill ratio. These fields are for reporting purposes and do not affect the on-hand quantity. The system will fill in these fields based on the information it finds in your Master Inventory. The accuracy of the default entries depends on the accuracy of your inventory files.

The **Req** field indicates the requested quantity. It defaults to the number entered in the **Qty** field, but you can edit the amount as needed.

Use the **FS** field to indicate if you filled the part order from the shelf. Type **Y** for yes or **N** for no. (The system will fill in this field based on the information it finds in your Master Inventory. The accuracy of the default entry depends on the accuracy of your inventory files.) If you enter **N** for no, you should use the **SD** field to indicate if you were able to get the part and fill the part order the same day. If you enter **Y**, leave the default **N** in the **SD** field.

You can only use the **SD** field if the **FS** field contains an **N** to indicate you did not fill the part order from the shelf. You use this field to indicate if you were able to fill the part order the same day. Type **Y** for yes or **N** for no. (The default entry for this field is **N**.) You cannot enter a **Y** in this field if there is a **Y** in the **FS** field. This field only applies when you did not fill the part order from the shelf.

The **FS** and **SD** fields also accept **U** for unusual sale. If you type **U** in either field, the other field automatically defaults to **U** as well. For unusual sales, both the **FS** and **SD** fields must contain **U**.

Below is a combination of the possible entries for the **FS** and **SD** fields and what the entries mean.

- **FS = Y and SD = N:** This means that you were able to fill the part order from the shelf. The **SD** field will always be **N** when the **FS** field is **Y**.
- **FS = N and SD = Y:** This means that you were not able to fill the part order from the shelf, but you were able to get the part and fill the part order the same day.
- **FS = N and SD = N:** This means that you were not able to fill the part order from the shelf or able to get the part to fill the part order the same day.
- **FS = U and SD = U:** This indicates an unusual sale.

20. Once you complete the **Fill Ratio** fields, the system files the line. The part is displayed in the list on the bottom part of the screen.

**Tip:** Once you enter the part number and quantity, you can press **END** to add the line to the repair order without having to advance through the additional fields. If you press **END**, the **R**, **T**, **F**, and **Fill Ratio** fields automatically fill in with default values. If this information is not correct, click the part line to edit the information.

21. Continue to add part to the repair order as needed. As each part is processed and added to the list, the cursor returns to the **Part Number** field for the next part line.
22. At this point, you have two options:
  - Click **Save** to save the information and clear the repair order from the screen.
  - Click **Next** to advance to the Lubricants/Sublet screen to enter sublet to the repair order.

**Tip:** Use the **QwikLook** button to open the QuickLook screen. Use it to view detailed part information. This information pulls from the Master Inventory file for the part. See page 7:9 for more information.

## Posting Tire Tax

In order to post tire tax, you must make sure that the Integrated Service Sales Parameters in Accounting specify which General Ledger accounts the tire tax should post to and that the Operating Parameters for each inventory source specifies the default tire tax per tire. When you pull the repair order on the Review and Print screen, the system automatically displays the tax in the **Tire Tax** field. The tax prints separately on the repair order. When the Service Department performs the Daily R/O Update, the system posts the tire tax to the General Ledger account specified in the Integrated Service Sales Parameters in the Accounting module.

1. Pull the repair order.
2. In **Part Number**, type, "TIRE TAX" as the part number. In order for the system to calculate the tax, you must type the word "tire" and the word "tax" separated by a space. The system will not recognize any other entry as tax.
3. The **Price** field automatically fills in with the default tire tax entered for the current inventory source.
4. In **Qty**, type the number of tires that need to be taxed. (The system will multiply the tire tax by this quantity to calculate the tire tax, but the total tire tax will not display on this screen.)
5. Type the repair number for the repair that requires the tire tax. The repair type defaults to the repair type set for the selected repair.
6. Save the repair order.

## Editing a Part Line

Once a part is added to the repair order, you can edit the part information as needed.

1. Click the part in the list. The part information fills in the fields on the working line.
2. Click in a field, and edit the information as needed.
3. Press ENTER to advance through the remaining fields until the part is filed, or click END to file the part without advancing through the fields.
4. The part line reflects the changes you made.
5. Click **Save** to save the repair order when you are finished.

## Removing a Part Before Saving the Repair Order

1. Click the part in the list.
2. Click in the **Part Number** field, delete the part number, and press ENTER.
3. The system warns you that you deleted the part number. Click **OK** to continue.
4. The part is removed from the list.

## Removing/Returning a Part from a Saved Repair Order

1. Select the repair order.
2. Click the part in the list.
3. Click in the **Qty** field, and type 0 (zero) as the quantity (or the number returned from a multiple quantity sale).
4. Press ENTER to file the part.
5. Click **Save** to save the repair order. The part is removed from the repair order.

## Returning Dirty Cores

When a customer returns a core, you need to ensure your inventory is updated. If you are returning a core on a repair order that is still open, all you need to do is recall the repair order and edit the **C** field from **O** or **C** to **R**. For core returns on closed repair orders, you will need to process the return on the Counter Parts Sales screen.

## Logging a Lost Sale

Like with counter sales, you can log lost sales from the screen.

1. If a part number is not in your current inventory or the quantity entered for a part is larger than the on-hand quantity, the system displays a "Press Alt+F7 to log lost sales" Message.
2. Press ALT+F7.
3. The system displays a message indicating it has recorded the lost sale. Click **OK** to acknowledge the message.
4. If the part is in your current inventory but you cannot meet the demand for the part, the system adds the lost sale to the part's lost sales totals for the quarter. If the part is not currently in your inventory, the system adds the part number to your inventory records and calls the part "Lost Sale." The bin for the part is LS, and the stocking status for the part is L for lost sale.

## Printing the Part Sales

You can print a list of the parts on a repair order for your reference. This printout is useful since the parts are not printed on the repair order until after the repair order is closed.

1. Select the repair order.
2. Click **Print Parts**.
3. When prompted to verify your printer is ready, select **To Printer** to print the information or **To Screen** to view the information on your screen.
4. Once you select your print type, click **Print**.
5. The printout lists the R/O number, service date, customer's control/account number, and customer's name. For each part on the repair order, the printout lists the part number, quantity sold, part description/name, cost, sale amount, and extended amount. The bottom of the printout displays the total cost and sale for all of the parts on the selected repair order.

ABC Motors						
Parts On R/O 40332						
R/O Parts Sales						
R/O No. 40332						
Control: SMI126476      STEVE SMITH						
P/N	Qty	Desc.	Cost	Ext.	Sale	Ext.
89017342	1	FILTER	3.99	3.99	11.17	11.17
15107205	1	PLUG	2.10	2.10	7.36	7.36
			-----		-----	
			6.09		18.53	



## Using the QwikLook Button

Use the **QwikLook** button to display the QwikLook screen. This button allows you to view detailed part information without leaving the Service R/O Parts screen. The information is intended for viewing only. You may edit the on-hand quantity and bin for a part on this screen if your parameters have been set to allow these edits. However, no other information can be edited on this screen. If you need to edit part information, or if your parameters have been set to restrict on-hand quantity and bin edits from this screen, you must use the Master Inventory screen to edit the part information.

1. Click **QwikLook**.
2. Type the part number, and press ENTER.

You can also enter a partial part number and click **Search**. The system will display the information for the first part that has a number that matches the numbers you entered. Use the arrow buttons on each side of the **Search** button to scroll through the parts list.

3. The information displays on the screen.
4. Click **History** to view the sales history or receipt history for the current part. Click **Back** to close the history.
5. Click **Setting** to view the pricing parameters being used to calculate the pricing information.
6. The **Corrections** button is available based on the **Allow 'On Hand' Quantity Corrections From Quote/Query** field on the More Operating Defaults screen in the Parts System Setup. If this field contains an **N**, the button is unavailable on the QwikLook screen, and you will have to use the Master Inventory screen to edit the quantity and/or bin.

If this field contains a **Y**, the **Corrections** button is available on the QwikLook screen. It allows you to edit the Bin and quantity. Click **Corrections**, and edit the Bin and quantity as needed on the screen that appears. Click **Save** to save the changes.

7. Click **Close** to return to the Service R/O Parts screen.

## Viewing a Customer's Service History

Once you pull a repair order to the screen, the QwikLook button becomes the History button. You can use the History button to view the customer repair history and to view summaries of previous repair orders.

1. Click **History**.
2. A list of repair orders for the customer is displayed. Click a repair order to view the finished R/O. A summary of the repair order opens on your screen.
3. If you select to view a repair order in the list that is too old, you will receive a message indicating that there is no data available for the selected R/O. Click **OK** to acknowledge the message.
4. Click **Back** to return to the Service History list.
5. Click **Close** to close the customer's history.

## Pulling Parts from the Order Que

Use the **Order Que** button to view the Order Que and pull parts to the repair order. This can only be done before you select the repair order, so you will have to pull the Order Que parts before pulling the repair order to the Service R/O Parts screen.

1. Click **Lists**.
2. A list of parts in the Order Que is displayed. The screen lists the part number, quantity, inventory source for the part, document number, order date, customer's name, and order status.

Pull Order Que Orders (ABC Motors)							
"Click" Column Header To Sort							
Part Number	Qty	Source	Document	Date	Customer	Status	Paid
12555492	1	1	191307	03/19/08	STEVE SMITH	Sold	
12563963	1	1	191307	03/19/08	STEVE SMITH	Sold	
15529401	1	1	191307	03/19/08	STEVE SMITH	Sold	
24501259	1	1	191307	03/19/08	STEVE SMITH	Sold	
3764554	1	1	191307	03/19/08	STEVE SMITH	Sold	
10280480	1	1	191308	03/19/08	MARK DAVIS	Stocked In	
10305686	1	1	191309	03/19/08	DELLIA CHRISTOPHER	Stocked In	
12555492	1	1	191310	03/19/08	STACIE TENNYSON	Stocked In	
1234567	1	1	40370	03/24/08	JAMES M WALTON	Stocked In	
24680	1	1	40370	03/24/08	JAMES M WALTON	Stocked In	
9876543	1	1	40370	03/24/08	JAMES M WALTON	Stocked In	

"Click" Document From List To Process		Part Number	Qty	Src	O/H
Document:	<input type="text"/>				
<input type="text"/>	<input type="text"/>				
<input type="text"/>	<input type="text"/>				
<input type="text"/> "Click" Line For Detail -->					
Exit	Pull To Invoice	Print			
Customer Quotes		Parts Kits			

3. The list is sorted by document number. Click the column headers to sort the list by part number, customer name, etc.
4. Click a part to view the detail for the parts on the order. The information displays in the window on the bottom right side of the screen.
5. Click **Pull To Invoice** to pull the part to the repair order.
6. Click **OK** when prompted to verify you want to pull the order.
7. Type the repair order number, or use the **R/O List** button to select the repair order.
8. The parts will be added to the repair order.

## Pulling Customer Quotes

You can pull parts from a customer quote to the repair order. You create customer quotes using the **Quotes** button on the Parts Queries screen. (See Chapter 8 for instructions on using the Parts Queries screen.) The system keeps customer quotes for 30 days before purging them. You can only pull the quote before you add additional parts to the repair order.

1. Click **Lists**.
2. Click **Customer Quotes** on the Pull Order Que Order screen.
3. Click the quote you want to pull. The screen displays the detail for the quote. (Click **Sort** to display the list of quotes again as needed.)
4. Click **Pull To Invoice** to pull the quote to the repair order.
5. Click **OK** when prompted to verify you want to pull the order.
6. Type the repair order number, or use the **R/O List** button to select the repair order
7. When prompted, type the repair number for the repair that requires the parts.
8. Enter the **Salesman Code**, **Price Code**, **Discount Level**, and **Special Parts Discount**.
9. When the cursor advances to the Part Number field, the parts on the kit will be added to the repair order.
10. Add any additional parts as needed.

## Pulling Part Kits

You can pull parts from a part kit to the repair order. You create part kits using the **Parts Kits** option on the Special Inventories menu. You must pull the parts kit before you select the repair order.

### Pulling a Kit

1. Click **Lists**.
2. Click **Parts Kits** on the Pull Order Que Order screen.
3. Click the kit you want to pull. The screen displays the detail for the kit. (Click **Sort** to display the list of parts kits again as needed.)
4. Click **Pull To Invoice** to pull the kit to the counter slip.
5. Click **OK** when prompted to verify you want to pull the order.
6. Type the repair order number, or use the **R/O List** button to select the repair order.

7. When prompted, type the repair number for the repair that requires the parts.
8. Enter the **Salesman Code**, **Price Code**, **Discount Level**, and **Special Parts Discount**.
9. When the cursor advances to the Part Number field, the parts on the kit will be added to the repair order. The Price for the individual parts will be 0.00. The part kit ID will display as the last part line and display the total price for the kit.
10. The W field for parts kits parts displays & to help quickly identify parts kit parts. Parts kits parts do not need to be processed individually like parts added through the Service module (parts that display # in the W field). The parts are automatically processed when the parts kit is pulled to the repair order.
11. Add any additional parts as needed.

### Removing a Single Part from a Kit

1. Click the part in the list to bring the part information to the working line.
2. Type **0** (zero) as the quantity, and press ENTER.
3. This sets the quantity to 0. The parts kit price will be reduced by the cost of the part you removed from the kit. The part will be removed from the list when you save the R/O.

### Removing an Entire Kit

1. Click the part kit line in the part list. This line displays the part kit ID as the part number and lists the price for the total parts kit.
2. Type **0** (zero) as the quantity for the kit, and press ENTER.
3. This sets the parts kit quantity to 0. The kit will be removed from the R/O when you save it.

## Emergency Stock

Once a repair order is pulled, the **Emergency Stock** button appears at the bottom of the screen. Use this button to open the Part Data/Emergency Order screen to view detailed part information or to receipt a part you ordered for the sale into inventory.

**Part Data/Emergency Order**

Part: 25055052    FUEL FLT    Memo:   
 From:    Bin: 037    Shelf: 0    Drawer:   
 To:   
 See Also:

List: 16.95    Limited Special Price: .00   
 Trade: 13.85    Special Cost Plus: %   
 Cost: 9.89    Alternate Cost: 8.50   
 Core: .00    Wholesale Comp: 9.02

On Hand:    Stock Status: V   
 On Order:    Order Code: 6   
 Back Order:    Part Group/Base: 03890   
 Package Quantity: 1    Returnable: N

Emergency Stock This Part Now - Enter Qty:   
 P.O. Number:

Jan:    Feb:    Mar:    Apr:    May:    Jun:    Jul:    Aug:    Sep:    Oct: 17    Nov:    Dec: 1   
 Last Sale

Back    Save

## Viewing Part Information

1. Make sure the correct part number appears in the **Part Number** field on the Service R/O Parts screen.
2. Click **Emergency Stock**.
3. The part information is displayed on the screen. This information is for reference only. No changes can be made on this screen.
4. Click **Back** to return to the Service R/O Parts screen.

## Emergency Stocking a Part

1. Make sure the correct part number appears in the **Part Number** field.
2. Click **Emergency Stock**.
3. In **Emergency Stock This Part Now—Enter Qty**, type the quantity of the part. This is the quantity you ordered and are receipting into inventory.
4. In **P.O. Number**, type the purchase order number for the order. This is the purchase order you wrote to the vendor for the part.

This field is for reference. This does not link the part order to the actual purchase order, and it does not affect the order quantity for the part on the purchase order in the system. Therefore, if you receipt the purchase order into the system later and receipt the part, the part will be added to the inventory again. Make note of parts you emergency stock on this screen, and check for the parts when you are receipting your purchase orders into your inventory to ensure your on-hand quantities are accurate.

<b>Emergency Stock This Part Now - Enter Qty:</b> <input type="text" value="1"/>
<b>P.O. Number:</b> <input type="text" value="063004"/>

5. Click **Save**.

## Viewing the Finished Repair Order

Use the **View R/O** button to view the finished repair order. This allows you to view the totals for the information that has been posted to the repair order up to this point.

## Gas–Oil–Grease–Sublet

Use this button to open the Lubricants/Sublet screen. This screen is used to charge bulk lubricants and other non-parts inventory items to a repair order. You can use the **Previous** button to return to the Service R/O Parts screen and the **View R/O** button to view the finished repair order.

The screenshot shows the 'Lubricants/Sublet (ABC Motors)' window. At the top, it displays 'R/O: 40332 STEVE SMITH 2003 CHEVROLET BLAZER'. Below this is a 'Lubricants' section with a table for entering items. The table has columns for Lubricants, Qty, R, T, Cost, Ext., Sale, and Ext. The first row is 'WASTE DISPOSAL' with Qty 1, R 1, T Q, Cost 1.95, Ext. 1.95, Sale .00, and Ext. 3.00. The second row is 'ENGINE OIL UP TO 6QT' with Qty 5, R 1, T Q, Cost .97, Ext. 4.85, Sale 1.75, and Ext. 8.75. The third row is 'TRANSMISSION FLUID' with empty fields. Below the table are buttons for 'Exit', 'R/O List', 'View R/O', 'Clear', 'Previous', and 'Save'. To the right of the table is a 'Sublet' section with a 'Sublet Codes' dropdown and a table for entering codes, vendor descriptions, and other details.

Lubricants	Qty.	R	T	Cost	Ext.	Sale	Ext.
WASTE DISPOSAL	1	1	Q	1.95	1.95	.00	3.00
ENGINE OIL UP TO 6QT	5	1	Q	.97	4.85	1.75	8.75
TRANSMISSION FLUID							
GEAR LUBE							
PAINT & MATERIAL							

1. Click **Gas–Oil–Grease–Sublet**. (You can also press **Next** on the Service R/O Parts screen.). The Lubricants/Sublet screen appears.
2. In **R/O**, type the repair order number, or search for a particular repair order by clicking on the **R/O List** button (or by pressing the F3 key). A list of repair orders appears. Click on the repair order you want to select. (If you advanced to this screen by clicking **Next** on the Service R/O Parts screen, the repair order information is automatically displayed on the screen.)
3. The repair order information fills in on the screen.
4. Under **Lubricants**, type the quantity (**Qty**) of each lubricant. The cost and sale amounts automatically fill in based on the quantity entered.
5. In **R**, type the repair number for the repair that required the lubricant.

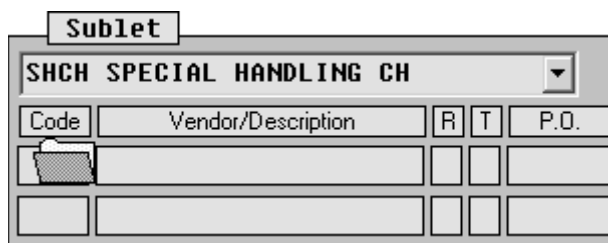
This is a close-up of the 'Lubricants' table from the screenshot. It shows the same data as the table in the screenshot above.

Lubricants	Qty.	R	T	Cost	Ext.	Sale	Ext.
WASTE DISPOSAL	1	1	Q	1.95	1.95	.00	3.00
ENGINE OIL UP TO 6QT	5	1	Q	.97	4.85	1.75	8.75
TRANSMISSION FLUID							
GEAR LUBE							
PAINT & MATERIAL							

6. Under **Sublet**, use the drop-down list to select the sublet.



7. The cursor becomes a yellow folder. Click in a **Code** field to drop the item.



8. The **Description**, **LOP**, **Sale**, and **Cost** fields automatically fill in with the information entered for the sublet code in the Parts System Setup.
9. In **R**, type the repair number for the repair that required the sublet.
10. In **P.O.**, type the purchase order number. If you press ENTER to advance through this field, the repair order number defaults as the purchase order number.
11. Type the sales tax percentage (**Tax %**), labor operation (**LOP**), fail code (**Fail**), and daily rental days (**DRD**).
12. When you are finished entering information, click **Save**.



## Sublet Purchase Orders

You use this screen to post sublet purchase orders. You may exit this screen while a partial purchase order is posted. The system displays a message when you exit and warns you that you have not saved the entry. You may exit the screen or choose to clear the transaction at this time. If you exit, the partial purchase order will automatically display when you return to the screen. This function is “client” dependant, so the purchase order is only saved on this computer and for this operator ID. The transaction remains until you complete and save it or until you clear it.

**Sublet Purchase Orders (ABC Motors)**

P.O. Number:   
P.O. Date: 03/19/2008  
Requested By: J. JACOBS  
Ship Via:   
Memo: TOWING  
R/O Number: 40328 Repair Number: 1

Vendor: ARN034  
Name: ARNOLD'S TOWING  
Address: 3421 EAST AVE  
City: WEST MIDDLESEX PA 16159  
Phone: 724 555 0078

Total PO: 60.00

Line	Item	Qty	Description	Amount	Extension	G/L
01	TOWING	1	TOW FROM CUSTOMER'S HOME	60.00	60.00	246

Exit PO List Vendors R/O List Print Save Only Clear Screen Delete PO

## Generating a New Purchase Order

1. Click **Sublet Purchase Orders**. The Sublet Purchase Orders screen appears.
2. The system automatically assigns a purchase order number when you save the transaction. The number will display in the P.O. Number field.
3. The system date automatically fills in the **P.O. Date** field. You can edit the date as needed.
4. In **Requested By**, type the name of the person who requested the purchase. This is a required entry.
5. In **Ship Via**, type the shipping method.
6. Use the **Memo** field to enter any additional information about the purchase as needed.
7. In **R/O Number**, type the repair order associated with the purchase. This must be a valid repair order number.

You can click **R/O List** to select the repair order from a list. Click the repair order. The bottom of the list screen displays the repairs on the repair order. Click **Back**, and the repair order number fills in the **R/O Number** field.

8. In **Repair Number**, type the repair from the repair order that requires the sublet.
9. The fields on the top-right part of the screen are for the vendor information. If this is a new vendor, type the vendor's information in each field.

You can pull a vendor's information from the vendor's record in the Accounting module by clicking **Vendors**. Type the letter for the vendor's name. The list screen displays a list of vendors whose name begins with the letter. Click the vendor, and the vendor's information fills in on the screen.

10. The system automatically generates the **Line** number as you add items to the purchase order.
11. The **Item** field is optional. Use it to identify the sublet item or to record the vendor's stock number.
12. In **Qty**, type the quantity of the item purchased. This is a required entry.
13. Use the **Description** field to type a description of the sublet.
14. In **Amount**, type the amount of the item. The **Extension** field automatically fills in based on the values entered in the **Qty** and **Amount** fields.
15. When you advance to the **G/L** field, a list of the available General Ledger accounts is displayed. (The accounts pull from the Sublet Purchase Order Setup in the Cashier module.) Click the account you want to select.
16. The line is automatically "filed."
17. Continue to add lines as needed. As you add lines, the **Total PO** field automatically calculates the total.
18. When you are finished, click **Print** to save and print the purchase order, or click **Save Only** to save the purchase order without printing.

## Editing a Purchase Order

1. Click **PO List** to display a list previously saved purchase orders.
2. Click on the purchase order you want to edit. The information fills in on the screen.
3. Click the line in the list you want to edit.
4. Click **Edit** when prompted to indicate what you want to do with the line.
5. The information fills in the “working” line.
6. Click in a field, and edit the information.
7. Click **Print** to save and print the purchase order, or click **Save Only** to save the purchase order without printing.

## Removing a Line from a Purchase Order

1. Select the purchase order that contains the line.
2. Click the line.
3. Click **Remove** when prompted to indicate what you want to do with the line.
4. The line is removed from the purchase order.

## Deleting a Purchase Order

1. Select the purchase order.
2. Click **Delete PO**.
3. Click **Gonzo** when prompted to verify you want to delete the purchase order.

## View R/O's – Service Parts

Use this button to view a list of repair orders and the parts on each repair order.

1. The screen automatically displays the list of repair orders that have been entered by the Service Department (but not repair orders that have been updated to Accounting) and the parts that have been added to each RO.
2. If you want to find a specific part, type the part number in the **Search R/O's For Part** field. The screen displays the RO number and customer name for all repair orders that contain that part.
3. Click an RO number in the list to view a summary of the repair order. Click **Back** to close RO.
4. Click **Back** to close the lists screen.

## Remove All Parts From an R/O

Use this button to remove all of the parts from a specific repair order. This feature is usually used when a repair order with parts already charged to it must be voided, but Service has been restricted from making changes to parts on repair orders. All parts are removed from the repair order and restocked to the correct inventory source.

1. Click **Remove All Parts From An R/O**.
2. Type the repair order number.
3. Indicate if you want to restock the parts. Type **Y** for yes or **N** for no.
4. Click **OK** when prompted to verify you want to remove the parts.