Chapter 5 Repair Orders

The **Repair Orders** button on the Service Writing menu opens the Repair Orders menu. This menu is divided into two parts. The left side of the menu is used to generate the repair orders, and the right side of the menu is used to manage the repair orders and other service information.

Repair Orders   (ABC Motors)

Repair Orders

Start Repair Order	Utilities
Start Conditions	Warranty Interface
Close Lubricants–Sublet	Warranty Interface
Close Service	Active R/O List
Close Parts	Continuations
Review & Print	Customer History
Back	Prewrites

Understanding the Workflow

Below is the basic workflow for creating repair orders. In some case, the steps for approving work may not apply if the work and price have been pre-approved.

1. The service advisor creates the repair order.

2. The repair order is issued to a technician.

3. The technician diagnosis the problem and writes comments on the back of the repair order.

4. The technician returns the repair order to the service advisor, and the advisor advises the customer of the work that needs to be performed.

5. When the customer approves the work, the advisor returns the repair order to the technician.

6. The technician takes the repair order to the Parts Department so the Parts Department can add parts to the repair order.

7. When the job is complete, the technician returns the repair order to the advisor, and the advisor closes the repair order.

> **Note:** The right side of the menu contains options for the manufacturer warranty programs available. The warranty programs available from this menu are based on the warranty parameters set in the Service Writing System Setup and on the license agreements set for your Autosoft DMS system. You use the warranty programs to process the finished repair orders for downloading to the manufacturer.

Generating Repair Orders

To generate repair orders, you will use the six buttons on the left side of the Repair Orders menu. Each button opens an entry screen that is used to add specific information to the repair order. You can also access each of the screens by clicking the **Next** and **Back** buttons on the bottom of each entry screen. (You can also press PAGE UP to return to the previous screen and PAGE DOWN to advance to the next screen.) For example, if you are on the Start Conditions screen, you can click **Back** (or press PAGE UP) to return to the Start Repair Order screen, or you can click **Next** (or press PAGE DOWN) to advance to the Close Lubricant screen. This allows you to maneuver through the screens as needed without having to return to the Repair Orders menu.

Once you start the repair order, you do not have to go the start repair order screen to add information to the R/O or to close it. Instead, simply click the button that corresponds to the R/O information you need add or close. For example, if you wanted to add a repair line to the R/O, you would click **Start Conditions**, select the R/O, and add the repair. If you wanted to close the R/O, you would click **Close Service**, select the R/O, and close it.

> **Tip:** You can click the car icon next to the **VIN** field or press F10 on any screen while generating or viewing the repair order to view the VIN decoding data. This provides detailed information about the vehicle based on the VIN.

Viewing a Summary of the Repair Order

At any time during the processing of the repair order, you can view a summary of the repair order by clicking the **View R/O** button on the bottom of each entry screen. The repair order summary is displayed on the screen for your review. You cannot edit information on the summary. If there are errors, you must make the corrections on the appropriate entry screen.

Start Repair Order

The Start Repair Order screen is the first entry screen used when starting a new repair order. The purpose of this screen is to enter customer and vehicle information.

Starting a Repair Order for a New Customer

If you are starting a repair order for a new customer, you must enter the customer and vehicle information in the required fields.

1. The system automatically generates the repair order number once the Start Repair Order screen is complete, and you advance to the Enter Conditions screen.

2. In **Customer Number**, type the first three letters of the customer's last name only. Proceed to enter the customer information. Be sure to enter the full VIN number in the **VIN** field. The customer number will be assigned when the repair order is created. The customer number consists of the first three letters of the customer's last name and the last six digits of the VIN.

3. Both the **Writer** and **Advisor** fields default to the operator ID entered on the start-up screen. You can change the writer or advisor ID by typing over the existing ID numbers.

4. The **Date** field defaults to the system date. Edit the date as needed. This should be the actual service date. If the date is earlier or later than the current date, the system will display a warning informing you of the situation. Click **OK** to continue or **Cancel** to edit the date.

5. In **Name**, Type the customer's name. If a new customer is created on this screen, the system will separate the customer's name and fill in the first name, middle initial, and last name fields on the Customer Information screen and Customer History screen. In order for the system to break up the customer's name, the name must be entered in one of the following formats:

   - [First Name] [Last Name] = Steve Smith

   - [First Name] [Middle Initial] [Last Name] = Steve S Smith

6. The **Individual** field is required for Canadian GM dealers. Use this field to identify the customer as an individual or a company. By default for new customers, a check mark appears in this field to flag the customer as an individual. If the customer is an individual, leave the field selected. Use the three fields to the right to re-enter the customers first name, middle initial, and last name. This ensures you have entered the customer's name correctly.

   If the customer is a company, click to clear the field. Ensure you type the company name correctly in the **Name** field above. You can use the three fields to the right to enter the driver's first name, middle initial, and last name. This name will appear in the first set of name fields in the customer's file

7. In **Address**, type the customer's street address (house number and street name).

8. In **City**, type the customer's city, state, and ZIP Code/Postal Code.

   If you entered **Y** on the Default Cities screen in the Service System Setup to set the first city entered in the parameters as the default, the fields automatically display the city, state, and ZIP Code/Postal Code entered.

   If this field is blank, you can press ENTER while in this field to display a list of the default cities entered in the parameters. Click the city in the list you want to select. The state, ZIP Code, and area code for the city fill in the corresponding fields.

9. Use the **E-Mail** field to record the customer's e-mail address.

10. In **Phone**, **Work**, and **Cell**, type the customer's home, work, and cellular phone numbers. If a default area code was set in the setup, it is automatically fills in the first box for the home and work phone numbers.

11. Indicate if this customer is on the Do Not Call list. Type **Y** for yes or **N** for no. **N** is the default. This determines if the customer is pulled to the phone survey list in CSI/SSI. However, this does not prevent the customer from being pulled to the Daily Followup lists in Service Writing for closed repair orders.

12. Use the **Send Marketing Follow-up Letter** field to indicate if you want a follow-up letter sent to the customer. Type **Y** for yes or **N** for no. **N** is the default. This field does not determine if the system will pull the customer to the follow-up list in the CSI/SSI module, to the marketing list in the Marketing module, or to the Daily Follow-Up List in the Service Writing module. The field is available, however, when creating a service report in the Report Generator.

13. In **Odometer In**, type the vehicle's odometer reading. For reference, the odometer reading from the last service will be displayed. If the **Allow an R/O to be Started Without Odometer In** field on the Miscellaneous Parameters screen is set to **N** for no, you must enter the odometer reading before advancing to the Enter Conditions screen. If you click **Next** to advance to the Enter Conditions screen without entering the starting mileage when required, a red X will appear next to this field indicating you cannot continue until you enter the mileage.

14. The **Time In** automatically fills in from the computer clock.

15. In **Promised**, type the promised completion time. This is an optional entry. If there is no promised time, leave the default zeros to indicate there is no promised time. If the **Require Promise Time on R/O At Open** field on the Miscellaneous Parameters screen is set to **Y** for yes, you must enter the promised time before advancing to the Enter Conditions screen.

16. Use the **When Finished (C/W/E/D/P)** field to indicate how the customer will be notified when the service is done. Type **C** for call customer. Type **W** if the customer is waiting at the dealership. You can view the repair orders flagged **W** for waiting on the **Waiting** tab on the repair order list. Type **E** for send customer an e-mail message. Type **D** for deliver vehicle. Type **P** for customer will pick up. Type **N** if none of these options/another scenario exists. This is the default entry.

17. Use the **Cash/Recv** field to indicate the type of payment. Type **C** for cash payment or **R** for receivable. Accounting may control receivables. **C** is the default.

18. In **Job Number**, type the job number, if needed. The job number will default to the repair order number. If you use "lot hats" or other devices, use the number from that device.

19. Use the **Taxable** field to indicate if the service is taxable. You have four options.

    - Type **Y** for yes. This applies all of the applicable sales tax (both Sales Tax and the Other Tax as set under Tax Rates/Cost Codes in the Service parameters).

    - Type **N** for no. No tax is applied to the service.

    - Type **1** if you want to apply only the Sales Tax (as set under Tax Rates/Cost Codes in the Service parameters). The tax amount appears in the **Tax 1** field on the Review & Print screen.

    - Type **2** if you want to apply only the Other Tax (as set under Tax Rates/Cost Codes in the Service parameters). The tax amount appears in the **Tax 2** field on the Review & Print screen.

20. Use the **Service/Body/Contract/Quick Lube** field to indicate the repair order type. Type **S** for service, **B** for body shop, **C** for contract (outside service contract), or **Q** for quick lube. The default entry for this field can be set on the Miscellaneous Parameters screen in the Service Setup.

21. In **VIN**, type the vehicle identification number. Seventeen-character VINs are checked for accuracy. You can click the car icon next to the field or press F10 to view the VIN decoding data. This provides detailed information about the vehicle based on the VIN.

22. In **Year**, type the vehicle's model year. This field automatically fills in based on the VIN in the previous field.

23. The **Make** field should fill in based on the VIN. Otherwise, type the vehicle's make. If you leave this field blank and press ENTER, a list of vehicle makes and models appears. This list pulls from the Default Makes/Models parameters in the System Setup. Click the make/model you want to select.

24. The **Model** field should also fill in based on the VIN. Otherwise, type the vehicle's model. If you selected a make/model from the default list in the previous field, this field automatically fills in with the selected model.

25. Use the **N/U/O** field to indicate the type of vehicle. Type **N** if the vehicle was sold as new at this dealership. Type **U** if the vehicle was sold as used at this dealership. Type **O** if the vehicle was not sold by this dealership. **O** is the default.

26. In **License**, type the vehicle's license plate number. Use the second field to the right to record the licensing state.

27. In **First Use**, type the date the vehicle was placed into active service for warranty purposes. This is a very important date for the Service Department. This date identifies when the warranty terms (months/mileage) began and helps identify when the extended warranty goes into effect. *This date may be different from the delivery date.*

28. In **Delivered**, type the date the vehicle was purchased by the current customer.

29. In **Inspection**, type the month the vehicle state safety inspection is due, if required.

30. In **Color**, type the color of the vehicle.

31. The **Cust Code** field is for Ford customers enrolled for special Ford incentive programs. Type the customer code in this field.

32. In **Car Line**, type the line number for the integrated service posting parameters line Accounting will use to post this service sale. For example, if this is a body shop repair and this field contains a 2, the sale will go to Accounting with the posting parameters set in the integrated service sales parameters for B2. If the customer purchased the vehicle from your dealership, this field defaults to the car line the vehicle was originally assigned.

33. The **Warranty Parts** field defaults to the pricing level set in the Miscellaneous Parts Parameters in the Part Inventory Setup for the vehicle's model year. You should leave the default entry for warranty purposes. However, you must manually type **L** if you will be using the list price for parts, such as for warranty contracts, or **N** if you will be using the net price/cost. You can leave this field alone for customer pay repair orders because the parts will be priced according to the parameters set in parts.

34. Use the **Warranty Manufacturers** list to select the manufacturer for warranty repairs. If you set the default manufacturer in the Miscellaneous Parameters, this field automatically displays the manufacturer.

35. In **Contract**, type the name of the extended contract provider. This is an optional entry.

36. If you entered a contract, type the term of the contract in months in **Term**, the month and year the contract expires in **Expires**, and the covered mileage in **Contract Mileage**.

37. Click **Next**. This saves the information and generates the repair order number.

Starting a Repair Order for an Existing Customer

When you select an existing customer for the repair order, the customer and vehicle information automatically fill in on the screen. If you edit the customer's name, address, e-mail address, or telephone numbers, the changes will be saved in the service customer database.

1. Click **Search**. There are four ways to pull an existing customer.

   a. Type the first one to three letters of the customer's last name in the **Name** field. The system actually searches the first thee characters in the **Customer Number** field in the customer's file for the letters specified, so the accuracy of the search results with this search option depend on you properly entering customer numbers in the system. The customer number should consist of the first three letters of the customer's last name followed by the last six digits of the VIN.

   b. Type the last four digits of the customer's home phone number in **Phone**.

   c. Type the customer's full or partial license plate number in **License**.

   d. Type the customer's full or partial first name in **First Name**, and press ENTER.

   e. Type the customer's full or partial last name in **Last Name**, and press ENTER.

   f. Type the customer's full or partial full name in **Full Name**, and press ENTER.

2. A list of the customers who meet the criteria you entered appears. If you hold the right mouse button down on a customer in the list, you can view the following customer information: name, full address, last service date, VIN, VIN decoding, and the repair history. In order to keep the customer information on the screen, you must hold down the right mouse button and slide the pointer on to the customer information displayed. Then, the information will stay on the screen so you can view the repair history or VIN decoding data. You can view an R/O by clicking an entry in the repair history.

3. Click the customer you want to select. The customer's information automatically fills in on the screen.

4. For existing customers, the **Individual** field automatically populates based on the information entered for the customer when creating the customer's file or when creating the first repair order for the customer. If necessary, you can use the three **Individual** fields to edit the customer's name if it does not appear correctly. This will edit the name in the customer's file.

5. Enter any additional information as needed.

Tip: If you selected the wrong customer for the R/O, when you click **Search** to bring up the Customer Search Criteria screen again, there will be a **Prev List** button. Click this button to bring up the previous list of customers. The system will remember the criteria entered on the Customer Search Criteria screen until you leave the Start Repair Order screen.

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6. If there is memo data in the customer's file, the **Memo** button 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 Parts Inventory module on the Service R/O Parts screen.

7.   When all information is complete, click **Next** to continue to the next entry screen.

Tip: Click the **Customer** button at the bottom of the Start Repair Order screen to view the Customer Information record for the selected customer.

Using the Names Button

Use the **Names** button on the bottom of the screen to pull an exiting customer's name, address, and phone number to the current repair order. This allows you to add the same customer name, address, and phone number to any VIN brought into the dealership. For example, if you service vehicles for a car rental company, you can pull the company's name, address, and phone number to each vehicle/VIN when vehicles are brought in for service. This saves you from having to manually type the name, address, and phone number for each vehicle as it is brought into the dealership.

1.   Click **Names**.

2.   Type the last four digits of the customer's phone number or first three characters of the customer's last name.

3.   The screen will display all the entries in the service history that match your search criteria. Click an entry to select the customer.

4.   Click **OK** to pull the name to the repair order. *Only* the customer's name, address, and phone number will pull to the current repair order.

5.   Enter the remaining information on the Start Repair order screen as needed.

6.   When all information is complete, click **Next** to continue to the next entry screen.

Starting a Repair Order for an Internal

When you start a repair order for a vehicle in your inventory (internal), use the vehicle's stock number as the customer number. ***Do not use the last eight characters of the VIN*** for internal repair orders because this may mix up the vehicle's stock number (control number) in the system.

When the repair order for the internal is closed, it is updated to Accounting with the Daily R/O Update. When Accounting finally posts the internal repair order to the vehicle, the system checks the pending total against the actual repair total. If the totals are within $10, the system clears the pending total to zero. If the totals are not within $10, the system keeps the difference of the repairs as the pending total. The repair total for the vehicle is added to the Internal amount, which is the total value of all internal repairs for the vehicle.

1. In **Customer Number**, type the vehicle's stock number.

   You can also search for the vehicle by clicking **Names** and then clicking **Vehicle Inventory**. Click a car line in the list that appears at the top of the screen. A list of vehicles in the car line displays on the screen. Click the vehicle you want to select

2. The Estimated Internal Repairs screen appears.

3. The **Current Estimated Repair Cost** field displays the amount of any repairs currently pending for the vehicle.

4. In **Add To Above**, type the amount you anticipate spending on the repairs, and press ENTER. You must enter a value, even if it is .01. This becomes the "pending" repair amount.

5. The **Name** field identifies the repair order as an internal.

6. Type any additional information on the screen as needed.

7. A "Certified/Pre-Owned" flag will appears next to the **N/U/O** field to indicate this is a certified used vehicle if the **Certified** field on the Vehicle Information screen in the Accounting module contains a **Y** for yes.

8. Click **Next** when you are finished.

Starting a Repair Order for a Customer with Prewrite Information

Prewrite information is information entered into the system before the customer arrives for service—usually when the customer is scheduling the appointment. Using prewrite information saves you time when you are generating the repair order because the customer information and vehicle information will already be entered, and you will only have to fill in any additional information that was not obtained when the prewrite was created. (See page 5:37 for information about adding prewrites to the system.)

1. Click **Prewrite**. A list of all of the prewrite entries appears. Click the tabs at the top of the list screen to filter the prewrite list, or filter the list by typing the last four digits of the customer's phone number in the **Filter by Phone Number** field.

2. Click the car icon next to each prewrite line to view the VIN decoding data. This provides detailed information about the vehicle based on the VIN.

3. Click the magnifying glass icon to the left of the prewrite number to view a summary of prewrite information. Click **Hide Details** to close the summary.

4. Click the customer you want to select, and click **OK** to pull the information to the Start Repair Order screen. The information entered for the prewrite fills in on the screen. Type any additional information as needed.

5. Click **Next** when you are finished.

Recalling a Repair Order

Use the **R/O List** button on the bottom of any R/O screen to pull an open repair order. There are several ways to work with the list.

- Type the letter of the customer's last name. The list will display the customers whose last name begins with that letter.

- By default, all repair orders display in the list. Use the **Service**, **Body Shop**, **Service Contract**, and **Quicklane** tabs to view just the selected repair orders. Click the **All R/O's** tab to view all repair order again.

- The **My R/O's** tab displays just the repair orders for the current user ID/writer number.

- The **Waiting** tab displays just the repair orders flagged **W** for waiting in the **When Finished** field on the Start Repair Order screen.

- By default, all repair types are displayed in the list. Use the last five tabs on the top of the screen to filter the list based on the repair type: customer pay (C/P), warranty (W/C), internal (I/R), or quick lane (Q/L). If there are multiple repairs on the repair order with multiple repair types, the system uses the repair type for the first repair added to the repair order to determine the sort.

- By default, the list is sorted by R/O number. Click any column header on the screen to sort the list by the R/O number, job number, customer's name, etc.

- Click **Print** on the bottom of the Active R/O's screen to print the list.

- When viewing the R/O list, you can view the detail for a repair order by holding down the right mouse button on the repair order in the list.
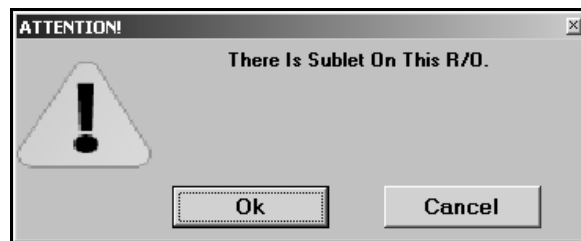
Voiding a Repair Order

Once you generate a repair order, you can void it if there are mistakes on the repair order. You can only void the repair order on the Start Repair Order screen. The system will mark the repair order as voided and print a copy of the repair order for your files.

> **Tip:** If a password is set in Accounting for deleting service documents, you will be required to enter the password in order to void the repair order.

1. Select the repair order you want to void by typing the repair order number in the **R/O** field or by clicking **R/O List** and selecting the repair order from the list. The information for the repair order fills in on the screen.

2. Click **Void**.

3. Click **OK** when prompted to verify you want to void the repair order. The system prints a copy of the voided repair order and marks the repair order "Voided R/O" in the R/O list.

Voiding a Repair Order with Sublet

If you select to void a repair order that has sublet on it, the system displays a warning to indicate there is sublet on the repair order. Click **OK** to continue with the void or **Cancel** to cancel the void.

Voiding a Repair Order with Restricted Access to Parts

If the Parts Department has restricted Service from making parts changes on the repair orders, you cannot void a repair order if there are parts on it. The system displays a warning when you attempt to void a repair order that contains parts. Click **OK** to acknowledge the message. The Parts Department must remove the parts from the repair order before you can void the repair order.
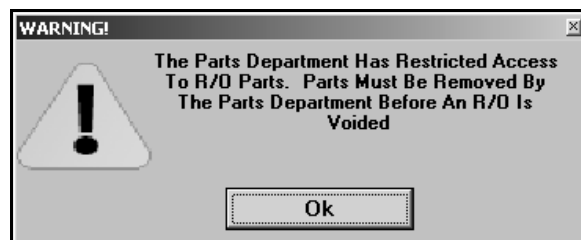
Start Conditions

The Enter Conditions screen is the second entry screen used when generating a repair order. The purpose of this screen is to enter a list of complaints or repairs needed. You can enter up to 12 repairs per repair order.

Tip: This screen is integrated with DaimlerChrysler VIP and General Motors VIS. A **Get VIP** or **Get VIS** button will appear if the VIN is for a DaimlerChrysler or General Motors vehicle and you have your DaimlerChrysler or General Motors user name and password entered on the appropriate DCS integration setup screens.

Adding Repairs

1. If you advanced to this screen by clicking **Next** on the Start Repair Order screen, the **R/O** field automatically fills in with the repair order number. Otherwise, type the repair order number you want to retrieve for editing, or click **R/O List** to select the repair order.

2. In **Repair**, type the number for the repair you are entering. Number each repair (condition) separately. You can add up to 12 repairs per repair order. Enter the repairs as a number from 1-9 and as the letters X, Y, or Z (for repairs 10, 11, and 12).

Tip: You have the option of using menu items and/or trouble/fail codes on this screen. The choice is up to you. However, if you use a third-party marketing vendor, keep in mind that the Service History you manually download to disk in CSI & SSI for vendors *does not* include menu items, but it does include trouble/fail codes.

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3. The **Menu** field is an optional entry. If you entered menu items using the **Enter Service Menu Operations** option in the Service Writing System Setup, you can pull the information to the repair order. Type the menu code, or click **Menus** to choose from the available menu items. Use menu codes for common maintenance repairs. You can view the detail for any code in the menu item list by holding down the right mouse button on the menu item

4. In **Trouble/Fail Code**, type the trouble code or fail code. These codes can be established by the manufacturer or service manager. If you entered trouble/fail codes in the Service Writing System Setup, click **Fail Codes** to select the codes from a list. These are not required entries, but if you do not use the codes and use a third-party marketing vendor, the vendor will not be able to determine the type of customer pay work performed on the vehicle.

Tip: Use the tabs at the top of the lists to sort the menu items and fail codes. The default sort for these items is based on the sorting parameter set in the System Setup using the using the **Trouble/Condition Codes** menu option. The usage sort will sort the list by the frequency that the codes are used. The code sort will sort the list by the code (numerically and then alphabetically). The name sort will sort the list by the description (numerically and then alphabetically).

5. Click to select the **Customer Pay Repair Is NON-Taxable** box if the repair is non-taxable.

6. Use the **Complaint** lines to type a description of the complaint or the repair to be done. If you entered quick complaints in the Service Writing System Setup, click **Q Comp's** to select the complaint from a list. Drag a complaint from the list to the description line.

7. In **Technician**, type the technician's ID number. You can select the technician from a list by clicking **Tech's**. Click a technician in the list, and the field automatically fills in with the technician's ID number. This is an optional entry on this screen.

8. The **Writer** defaults to the service writer entered on the Start Repair Order screen. You can change the writer by entering a different writer's ID number. You can also select the writer from a list by clicking **Writers**. Click the writer in the list, and the field automatically fills in with the writer's ID number.

9. Use the **C/W/I** field to indicate the type of sale. Type **C** for customer pay, **W** for warranty, **I** for internal, **N** for new car road ready (PDI), or **Q** for quick lube.

10. Type the labor level code (A-J). The labor level codes represent labor rates, which are defined using the **Labor Rates** option on the Service System Setup menu. The actual labor rate will differ based on the type of repair (customer pay, warranty, internal). Level F is used for flex rate.

11. In **Estimated Labor Time**, type the labor units required for the repair. Do not enter decimal points. For example, 1.0 should be entered as 10.

12. The **Labor Sale** is calculated based on the labor level and labor time entered unless you selected a menu item. For menu items, the labor sale defaults to the labor sale entered when creating the menu item using the **Enter Service Menu Operations** option in the Service Writing System Setup.

13. In **LOP**, type the labor operation code set by the manufacturer. This is an optional entry on this screen.

14. In **Complaint Code**, type the customer complaint code, if required. This is an optional entry on this screen.

15. Click **Save Repair** to add the repair to the repair order. The repair is displayed in the list on the right side of the screen.

16. Add additional repairs as needed.

17. If necessary, use the **Print LOF Window Sticker** button to print a static windshield label to remind the customer of the next service date. This option requires a thermal transfer printer and preprinted labels available from Autosoft's Forms division. You set the default thermal printer by clicking Utilities on the DMS main menu and clicking Service. Use the Static Label list to select the printer. You can also print the LOF window sticker when closing the repair order on the Close Service screen

18. Click **Next** when you are finished adding all of the repairs to the repair order to advance to the next screen.

Tip: The time for each repair will not pull to the payroll time flags until the repair is saved on the Close Service screen.

Editing a Repair

1. Type the repair order number you want to retrieve for editing, or click **R/O List** to select the repair order.

2. Type the repair number, or click the repair in the list on the right side of the screen. The information for the repair is displayed.

3. Click in a field, and edit the information as needed.

4. Click **Save Repair** to save the changes.

Removing a Repair

Once you apply time to a repair and close the repair on the Close Service screen, you cannot remove the repair on the Enter Conditions screen until you remove the time from the repair. You will have to remove the time on the Close Service screen and save/close the repair again. You will then be able to remove the repair using the Enter Conditions screen.

1. Select the repair.

2. Click **Remove Repair**.

3. Click **OK** when prompted to verify you want to remove the repair from the repair order. The repair no longer appears in the list on the right side of the screen.

Adding Customer Presentation to a Repair Order

While viewing the customer's service history from this screen, you can add the customer presentation text for any menu item (created using the **Enter Service Menu Operations** option on the Service Writing System Setup menu) to a repair order. This allows you to recommend a service to the customer. The hard copy of the repair order prints the customer presentation text, the price of the recommended service (based on the information entered for the menu item), and a line the customer must sign to authorize the repairs.

1. Click **History**. The history screen displays all of the repair orders in the customer's service history. Click a repair order to view the repair order. This allows you to research the customer's history to see what services might be due.

2. The right side of the Service History screen displays all of the menu items entered in the Service Writing System Setup. Click the menu item in the list you want to add to the repair order.

3. The R/O Data list on the right side of the Enter Conditions screen displays "Upsale Menu" followed by the code for the menu item you selected.

Printing the Hard Copy

You can print the hard copy of the repair order from this screen. If you return to this screen and add repairs to the R/O, you have the option of printing the entire repair order or just the add-on repairs when you select to print the hard copy.

1. Click **Print**.

2. Click to select what you want to print. The **Print** button prints the hard copy of the repair order. The **Add-ons Only** button is only available if you have already printed the original repairs added to the repair order.

Tip: If you use mirror hangers and set the **Print Mirror Hanger with Hard Copy** setting on the Miscellaneous Parameters screen to **Y** for yes, the mirror hanger prints when you print the hard copy. If there is prewrite information for the customer/vehicle, the prewrite information prints on the mirror hanger.

Close Lubricants—Sublet

The Lubricants/Sublet screen is the third entry screen used when generating a repair order. The purpose of this screen is to enter the quantity of lubricants needed for a repair. You also use this screen to select any sublet used for the repair.

Tip:	If you assign the first line of the Lubricants section to a repair, the system automatically charges the shop supplies to that repair type. If you do not assign the first line of the Lubricants section to a repair, the system charges the shop supplies to the customer pay total if a customer pay repair exists on the repair order. Otherwise, the system will charge the shop supplies to the internal total if internal repairs exist on the repair order. If the repair order only has warranty repairs, the system will not charge for shop supplies.

Adding Lubricants

1. If you advanced to this screen by clicking **Next** on the Enter Conditions screen, the **R/O** field automatically fills in with the repair order number. Otherwise, type the repair order number you want to retrieve for editing, or click **R/O List** to select the repair order.

2. The **Shop Supplies/ Hazardous Waste** label is based on the option selected on the Miscellaneous Parameters screen in the Service Writing System Setup. The system calculates the shop supplies/ hazardous waste based on the parameters set on the Miscellaneous Parameters screen. If you want to override these calculations for a repair, type the shop supplies/hazardous waste charge in the corresponding field (warranty, internal, or customer). The amount will be added to the first Lubricants line if it corresponds to the repair type (W, I, or C).

3. The lubricant descriptions are pre-entered on the first five lines. These entries are defined in the Parts Inventory System Setup.

   The first line defaults to Shop Supplies (or Paint & Material if it is a body shop repair order). This line can be set to go to a specific general ledger account in the Accounting module. You set the account in the Accounting Integrated Service Posting Parameters in the **S/S-Tires** field. The Shop Supplies are set in the Miscellaneous Parameters will also go to that account. The last line is blank and may be used based on individual needs. Type in a description of material used.

4. In **Qty**, type the quantity needed for the repair.

5. In **R**, type the repair number that corresponds with the repair that needs this item, or click the repair in the repair list to the right. This is the number assigned to each repair on the Enter Conditions screen (1 -9 and X, Y, or Z).

6. The **T** field fills in with **C** for customer pay, **W** for warranty, **I** for Internal, **N** for new car road ready (PDI), or **Q** for quick lube. This field defaults to the repair type entered for the repair number entered in the previous field.

7. The individual cost and sale price and the total cost and sale price automatically fill in the **Cost/Ext** and **Sale/Ext** fields. These values pull from the R/O Lubricant Pricing set in the Parts Inventory System Setup.

8. Click **Next** when you are finished entering information to advance to the next screen.

Removing a Lubricant

1. Click in the **Qty** field.

2. Delete the quantity, and press ENTER.

3. The lubricant line is removed.

Adding Sublet

1. Type the sublet code, or click **Options** to select the code from the sublet list.

2. The remaining fields for the line fill in based on the information entered for the sublet in the setup. Enter additional information as needed.

3. In **Vendor/Description**, type the vendor for the service or a description of the service if a default description does not fill in for the sublet.

4. In **R**, type the repair number that corresponds with the repair that needs this item, or click the repair in the repair list above. This is the number assigned to each repair on the Enter Conditions screen (1 through 9 and X, Y, or Z).

5. The **T** field fills in with **C** for customer pay, **W** for warranty, **I** for Internal, **N** for new car road ready (PDI), or **Q** for quick lube. This field defaults to the repair type entered for the repair number entered in the previous field.

6. In **P.O.**, type the purchase order number. Otherwise, this field automatically fills in with the repair order number.

7. Use the **TX** field to specify if the sublet is taxable. If you specified the default taxing when creating the sublet in the Service System Setup, the default tax parameter automatically fills in this field. The entry in this field determines both if the sublet is taxable and which tax will be applied.

   - Type **Y** for yes. This applies all of the applicable sales tax (both Sales Tax and the Other Tax as set under Tax Rates/Cost Codes in the Service parameters).

   - Type **N** for no. No tax is applied to the service.

   - Type **1** if you want to apply only the Sales Tax (as set under Tax Rates/Cost Codes in the Service parameters). The tax amount appears in the **Tax 1** field on the Review & Print screen.

   - Type **2** if you want to apply only the Other Tax (as set under Tax Rates/Cost Codes in the Service parameters). The tax amount appears in the **Tax 2** field on the Review & Print screen.

8. Type the tax rate for the service in **Tax %**. If you entered a tax rate in the sublet setup, this field automatically defaults to that rate. If the tax needs to be different from the tax rate set in the parameters, type the rate you want to use.

9. In **LOP**, type the labor operation code for the sublet. If you entered a default code in the sublet setup, this field automatically defaults to that labor operation code.

10. In **Fail**, type the fail code. This is the code set by either the manufacturer or the dealer.

11. In **DRD**, type the daily rental days for a loaner car. This is required for Chrysler and Ford. This field should not be used to record rental days for general car rental use.

12. In **Cost**, type the cost of the sublet. If you entered a default cost in the sublet setup, this field automatically defaults to that cost.

13. The **Sale** amount is automatically calculated based on the cost. If you entered a default sale amount in the sublet setup, this field automatically defaults to that sale amount. If you did not enter a default markup in the parameters, you can manually enter the sale amount.

14. Click **Next** when you are finished entering the information to advance to the next screen.

Removing a Sublet

1. Click the **Options** button next to the line you want to remove.

2. Click **Clear Line**.

Close Service

The Close Service screen is the fourth entry screen used when generating a repair order. You use this screen to record the labor time and sale for each repair and to close the repair.

1. If you advanced to this screen by clicking **Next** on the Lubricants/Sublet screen, the **R/O** field automatically fills in with the repair order number. Otherwise, type the repair order number you want to retrieve for editing, or click **R/O List** to select the repair order.

2. The **Odom In** field automatically fills in with the odometer reading as the vehicle is brought in for service. The odometer reading for the last service is displayed to the right of this field.

3. In **Odom Out**, type the odometer reading at the end of service. If the **Odometer Out** field is less than or equal to the **Odometer In** field, the system will prompt you to indicate what you want to do about this situation. If you click **Fine**, the system ignores the odometer readings. If you click **Add 2**, the system automatically adds two miles to the **Odometer Out** field. You can manually edit the odometer out as needed. If you bring the repair order up second time and the mileage is the same, the system will prompt you again, but this time, your option will be to add one mile.

4. The **VIN** field automatically fills in with the vehicle identification number. This pulls from the information entered on previous screens.

5. The **Inspection Month** also fills in if an inspection month was entered on the Start Repair Order screen.

6. Use the **Scheduled Maintenance** field to indicate if you want to print a reminder on the repair order for the customer to schedule maintenance in the future. This determines if the customer will be included when you compile the marketing list to send reminder postcards. Type **Y** for yes or **N** for no. The default entry is **N**. You must change the default **N** to **Y** as needed to ensure an accurate marketing list. If one of the words "lube," "oil," or "filter" appear in the service description, this field will automatically default to **Y**. The miles driven per month will be calculated and displayed to the right of this field.

7. If you type **Y** in the **Scheduled Maintenance** field, the **Next Service** field defaults to a description of "Lube-Oil-Filter." Leave this entry, or type the description for the next service.

8. In **Next Svc Date**, type the date (month and year) for the next service. If you entered **Y** in the **Scheduled Maintenance** field, this field defaults to a suggested return service date. Edit the date as needed.

9. If you use static windshield labels, click **Print LOF Window Sticker** to print a label to remind the customer of the next service date. This option requires a thermal transfer printer and preprinted labels available from Autosoft's Forms Division. (You set the default thermal printer by clicking **Utilities** on the DMS main menu and clicking **Service**. Use the **Static Label** list to select the printer.)

10. The **Line** field defaults to the line entered on the Start Repair Order screen. The car line determines which General Ledger accounts the information will post to in Accounting. If you edit the line on this screen, the line will be saved to the customer's file.

11. In **Repair**, type the repair number, or click the repair in the list on the right side of the screen. Typing a new repair number will start a new repair. The system warns you that selecting a new repair number will starts a new repair. Click **OK** to acknowledge the message.

12. Click to select the **Exclude S/S** box if you want to exclude shop supplies for this repair. A check mark will appear in the box to indicate it has been selected. Click the box again to clear it.

13. In **Fail Code**, type the fail code, or click **Fail Codes** to display a list the codes. Click the code you want to select. If you entered a code on the Enter Conditions screen, the code automatically fills in this field. Use the tabs at the top of the list to sort the list by usage, code, or name.

14. In **Complaint Code**, type the complaint code (if needed). If you entered a code on the Enter Conditions screen, the code automatically fills in this field.

15. In **Labor Op**, type the labor operation code set by the manufacturer. If you entered a code on the Enter Conditions screen, the code automatically fills in this field.

16. The repair type should automatically fill in the **C/W/I/N** field. It displays **C** for customer pay, **W** for warranty, **I** for internal, **N** for new car road ready, or **Q** for quick lube.

17. The **Labor Level** should automatically fill in with the labor level entered on the Enter Conditions screen, but you can edit it as needed.

18. In **Technician**, type the technician ID number for the technician who completed the repair, or click **Techs** to display a list of technicians. Click the technician you want to select. If you selected a technician on the Enter Conditions screen, the technician's ID number automatically fills in this field.

    If you need to assign more than one technician to a repair, press F4 or click the **Additional Tech's** button. The Add Technician screen that appears allows you to add up to 25 technicians and labor lines to each repair. The number of labor lines allowed for warranty repairs is determined by the limits set by the manufacturer. If a warranty interface is available for your manufacturer (excluding General Motors), you must enter additional labor time on the warranty screen.

    The field to the right displays the technician's name. It will display the name entered in the **Short Name** field on the Technician Information screen in the Service Writing setup. If there are multiple labor lines for the repair, this is the technician assigned to the first labor line.

19. In **Labor Time**, type the labor time in time units. Do not use decimal points. If you entered labor time on the on the Enter Conditions screen, the time automatically fills in this field.

    The **Total Labor Time** field to the right displays the total labor time for the repair. If there is only one labor line on the repair, this field will be the same as the **Labor Time** field. If you use the **Additional Tech's** button to add time for multiple labor lines to the repair, this field will display the total labor time for all labor lines.

20. In **Other Time**, type the labor units for any other time you want to record for the repair.

21. The **Actual Time** field defaults to the value entered in the **Labor Time** field. The labor values are used to generate technician time reports.

    The **Total Actual Time** field to the right displays the total actual labor time for the repair. If there is only one labor line on the repair, this field will be the same as the **Actual Time** field. If you use the **Additional Tech's** button to add time for multiple labor lines to the repair, this field will display the actual labor time for all labor lines.

22. The **Sale** field displays the sale amount. The system automatically calculates the sale amount based on the labor units in the **Labor Time** field and the labor level selected for the repair.

23. The **Total Sale** field displays the total sale amount. The system automatically calculates the total sale amount based on the labor units in the **Total Labor Time** field and the labor level selected for the repair.

24. Use the **Comeback** field to indicate if this is a repeat repair. Type **Y** for yes or **N** for no. If this is a repeat repair, you will be prompted to enter the original repair order number, repair date, repair number, and technician number. Click **History** to view past repair orders. (You must flag a repair in order for it to appear on the Comeback report.)

25. The **Declined** box lets you track declined repairs. You can track declined repairs for future up sales using the **Declined Service** report available on the Miscellaneous Lists menu in the Service Followup & Marketing section. Click the box to select it. A check mark will appear in the box to indicate it has been selected. Click the box again to clear it.

26. The **Complaint/Cause/Cure** Section displays the customer complaint entered on the Enter Conditions screen. Type additional information as needed.

27. When all of the information for the repair is entered, press the END key on your keyboard, or click the "**Press END Save Repair**" message.

Tip: The time for each repair will not pull to the payroll time flags until the repair is saved on this screen.

28. If Autosoft provides a warranty interface for your manufacturer, the corresponding warranty screen appears. Add information as needed. Click **Save** to save the warranty information. (Please refer to your manufacturer warranty manual for complete instructions on completing the additional warranty screens.)

29. Repeat steps 11-26 for each repair on the repair order you need to close. Click **Next** when you are finished closing all of the repairs to advance to the next screen.

Tip: The **Time Guides** button allows General Motors dealers to access labor time guide information. For other manufacturers, you can access the labor time guide information on the warranty screen. Refer to your manufacturer-specific warranty manual provided by Autosoft for information about using the labor time guides for your manufacturer.

Parts

Clicking the **Parts** button opens the Edit Parts screen. This screen is used to edit parts on the repair order. You can use this screen to switch parts between conditions and to mark the failed part.

1. The top of the screen lists all of the parts that have been added to the repair order. A list of the conditions is displayed on the bottom-right side of the screen.

2. Click a part in the list. The part number is displayed in the first field on the bottom of the screen, and the **Condition** field indicates the corresponding repair number (condition). Edit this field if the part needs to be assigned to a different repair. You can select a repair by clicking the repair in the list on the bottom-right side of the screen. The repair number will fill in **Condition** field.

3. Use the buttons next to the **Failed Part** field to indicate if the selected part is the failed part. Click **Yes** to mark the failed part, and click **No** to mark the remaining parts. You can only mark one part as the failed part.

4. Click **Back** to return to the Close Service screen.

Tip: If you switch parts between repairs (conditions) that have different repair types, you are prompted that some of your parts are flagged improperly. You must re-close parts to ensure the pricing information is correct. For example, if you switch a part from a customer pay repair to a warranty repair, you are prompted the parts are flagged improperly. Click **OK** to acknowledge the message, and re-close the parts section of the repair order to ensure that the parts for the warranty repair are charged with the warranty price and that the parts for the customer pay are charged with the customer pay price. If the Parts Department has restricted automatic re-pricing of parts switched between repairs, you cannot switch the parts between conditions. You will have to inform the Parts Department about the corrections that need to be made to the repair order.

Close Parts

The Close Parts screen is the fifth entry screen used when generating a repair order. You can use this screen to switch parts between conditions, to mark the failed part, to add quick lube parts to quick lube repair, and to add body shop parts to body shop repair orders. For warranty repairs, the screen displays the warranty parts markup percentage. This value is set in the Operating Defaults of the Parts Inventory System Setup.

Closing Parts

1. The screen displays a list of parts on the repair order.

2. To edit a part, click a part in the list. This opens the Edit Parts screen. You use this screen the same way you use the Edit Parts screen that opens when you click **Parts** on the Close Service screen.

3. Click **Next** when you are finished reviewing all of the parts to advance to the next screen.

> **Tip:** If Parts has restricted automatic re-pricing of parts switched between repairs, you cannot switch the parts between conditions. If you attempt to switch the parts, the system will prompt you that some parts are improperly flagged for condition and that the Parts Department must make the necessary changes. Click **OK** to acknowledge the information, and inform the Parts Department about the changes that need to be made to the parts.

Adding Quick Lube Parts

If an individual repair is flagged Q for quick lube, you can click **Quick Lane Parts** to add quick lube parts. This button is only available if there are quick lube repairs on the repair order. Quick lube parts are added to the system on the Special Inventories menu in the Parts Inventory module. The screen displays the quick lube parts in a list on the right side of the screen. You can only add parts that appear in the quick lube list, and you can only add parts to repairs flagged Q. The screen also lists any parts already added to the repair order. You cannot edit these parts.

Adding a Quick Lube Part

1. Click **Quick Lane Parts**. The Quick Lube Parts screen appears.

2. Type the part number, or click the part in the list on the right side of the screen. The description and pricing for the part fill in on the line.

3. Type the quantity.

4. Click **OK** to file the line.

5. Continue to add parts.

6. Click **Save** when you are finished.

Removing a Quick Lube Part

1. Click the part to bring the information to the "working line."

2. Delete the quantity.

3. Click **OK**. The part line is removed.

4. Click **Save**.

Adding Body Shop Parts

If the repair order is flagged B for body shop, you can click **Body Shop Parts** to add body shop parts. This button is only available for body shop repair orders. Since you may receive body shop parts for work that you do not want to add to your regular parts inventory, you can enter a part number that does not exist in your master inventory. The parts will update to the general ledger account specified in the Accounting Integrated Service Sales parameters.

Adding a Body Shop Part

1. Click **Body Shop Parts**. The Body Shop Parts screen appears.

2. Type the part number, quantity, repair number, cost, and price. The extended amount automatically fills in based on the price.

3. Type a description of the part. This field holds 15 characters.

4. Click **OK** to file the line.

5. Continue to add parts.

6. Click **Save** when you are finished.

Removing a Body Shop Part

1. Click the part to bring the information to the "working line."

2. Delete the quantity.

3. Click **OK**. The part line is removed.

4. Click **Save**.

Verifying Dirty Cores

If cores have been flagged as outstanding by the Parts Department, the system will display a message that there are outstanding cores when you bring up the R/O on the Close Parts screen in the Service Writing module. You must click **OK** to acknowledge the message.
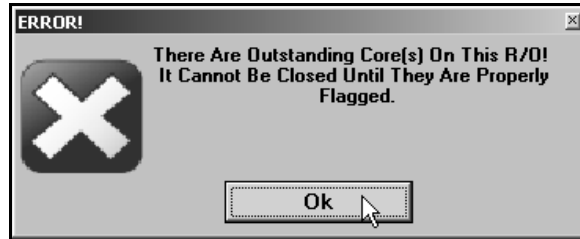
In addition, a **Cores** section will appear on the Edit Parts screen for parts with cores. Use the three options in this section to indicate if a dirty core has been returned. The default entry is based on the entry in the **C** field on the Service R/O Parts screen in the Parts Inventory module. You can check the dirty core inventory for a part on the Master Inventory screen.

- **Returned:** Click to select this field if a dirty core was returned. A dirty core will bed added to the inventory. If the entry in the **CR** field was initially **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 (either here or on the Service R/O Parts screen), a dirty core will be subtracted from inventory.

- **Outstanding:** Click to select this field if the dirty core is still outstanding. This entry does not affect the dirty core inventory. The system will display a message that there are outstanding cores if you select this option. Click **OK** to acknowledge the message.

- **Charge Customer:** Click to select this field if the customer needs to be charged for the dirty core.

Review & Print

The Review & Print screen is the sixth and final screen used when generating a repair order. The purpose of this screen is to apply discounts, close out the repair order, and print the soft copies. Some of the information on this screen will automatically fill in based on information entered on previous screens. Verify the information is correct.

Tip: Click **Time Flags** to view the time flags for the repair order.

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1. The **R/O** field displays the selected repair order number. You can also select a repair order by typing the R/O number in this field.

    The flag below this field displays the repair order status (Open, Reclose, Closed, WC Open, etc.). This allows you to verify the status without having to open the repair order list. The fields to the right list the customer's name, the vehicle make and model, and the VIN.

2. The fields on the right side of the screen display the total warranty cost, internal amount, and customer pay amount. You cannot edit these fields on this screen. If there is an error, click **Back** to return to the appropriate screen, and edit the information as needed.

3. The **See Also** field displays any additional repair order numbers associated with this repair if they exist. This field is for reference only. No information can be entered in this field.

4. Use the **Overall Taxable** and **Warranty Taxable** fields to indicate if the service is taxable. You have four options for each. Click to select the tax option.

    - **No Tax:** No tax will be applied to the repair order.

    - **Full Tax:** This applies all of the applicable sales tax (both the Sales Tax and the Other Tax as set under Tax Rates/Cost Codes in the Service System Setup).

    - **Tax 1 Only:** This applies only the Sales Tax (as set under Tax Rates/Cost Codes in the Service System Setup).

    - **Tax 2 Only:** This applies only the Other Tax (as set under Tax Rates/Cost Codes in the Service System Setup).

5. Use the **Charge Shop Supplies** box to indicate if you want to charge shop supplies to the repair order. By default, the box is selected. Click to clear the box as needed. The shop supplies will be charge according to the parameters set on the Miscellaneous Parameters screen in the Service Writing System Setup.

6. The **Warranty Manufacturer** field indicates the manufacturer responsible for any warranty repairs.

7. The **Date Closed** automatically fills in using the current system date. This will be the closing date for the R/O. The system uses this date to run most of the service reports, so if this date is not correct edit it. The system holds the closing date as soon as you print the R/O, even if you don't close the R/O at the time of printing. If you recall the R/O on a different day, this field will still display the closing date as the date when you printed the R/O. In this situation, you must edit the closing date to the current date if this date needs to be the closing date. When you print the R/O, the system compares the close date to the system date. If the dates differ by more than seven days, the system prompts you to confirm the close date. The system checks to ensure the closing date is not earlier than the open date. The system will warn you if this situation occurs. If you indicate you want to change the date, the system defaults the date to the current system date. You can also manually edit the date as needed.

8. Use the **Warranty Deductible** field to specify the deductible amount that applies to the repair order. There must be a warranty claim (W) on the repair order to use this field.

9. The **Additional Customer Pay Non-Taxable** field allows the writer to reduce the amount of tax a customer is charged. This applies to special circumstances that you cannot adjust through normal R/O settings. The system uses the dollar amount entered here to reduce the amount used to calculate the tax.

   For example, the customer pay total is $100.00, and the tax is $6.00. The total is $106.00. For some reason, one line or something of the R/O is non-taxable, and that line total is $50.00. You would type "50.00" into the **Additional Customer Pay Non-Taxable** field. That $50.00 will not add or subtract any value from the total, but the system will recalculate the tax excluding this amount, making the new tax amount $3.00.

10. If applicable, use the **Special Customer Pay Tax Rate** field to specify the special tax rate that applies to the repair order.

11. The **Cash/Receivables** field indicates the payment type for the service. The payment type was initially entered on the Start Repair Order screen. It displays **C** for cash or **R** for receivable. You can edit the payment type as long as Accounting hasn't restricted the Service Department from changing payment types.

   A service customer must have an existing Accounts Receivable account set in the Accounting module in order to charge. The field to the right displays the customer's AR account number. Verify this is the correct Accounting control. The system will not let you post charges to an invalid AR account. If the customer has an existing control in Accounting, click **A/R List** to select the control.

12. Use the **Discounts** button to apply discounts. If discounts have been assigned to fail codes applied to the repair order or to customer's record, a message will appear in the bottom-left side of the screen indicating discounts apply. Use the **Discounts** button to review the discounts. The system automatically calculates and applies these discounts when you open the Discounts screen. See page 5:30 for instructions on manually entering discounts.

13. Click **Print** when you are finished entering and verifying the information on this screen.

Tip: If there are discounts set in a wholesale customer's file, the system will remind you that discounts apply for the customer when you attempt to print the R/O. If you click **Continue**, the print dialog appears. If you click **Discounts**, the Discounts screen appears.

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14. You are prompted to indicate what you want to do with the repair order. Click the button that corresponds with the option you want to select.

- **(Y) Print & Close R/O:** Print and close the repair order. This closes all repairs.

- **(P) Print & Close C/P:** Print and close the customer pay. This closes the customer pay and internal repairs and leaves the warranty repairs open. You can select to print the warranty copy at this time by selecting the **Print Warranty Copy Now** box.

- **(C) Customer Copy:** Print a customer copy of the repair order. All repairs remain open.

- **Invoice R/O:** Invoice the repair order to the Cashier. This closes all repairs and sends the repair order to the Cashier. The repair order is not updated to Accounting until the Cashier prints the repair order and the Service Department performs the Daily R/O Update. You can select to print the customer copy at this time by selecting the **Print Customer Copy Now** box. If you do not print the customer copy at this time, all copies of the repair order print when the cashier prints the repair order.

- **(W) Invoice C/P:** Invoice the customer pay repairs to the Cashier. The customer pay and internal repairs are closed and sent to the Cashier, while the warranty repairs remain open. You can select to print the customer copy at this time by selecting the **Print Customer Copy Now** box. If you do not print the customer copy at this time, all copies of the repair order print when the cashier prints the repair order. The customer pay and internal repairs are updated to Accounting when the Cashier prints the repair order and the Service Department performs the Daily R/O Update. When the warranty repairs for the corresponding repair order are ready, they should be closed with an I. If the corresponding customer pay and internal repairs have already been closed and updated to Accounting, the warranty repairs will be closed and updated during the next daily update. If the corresponding customer pay and internal repairs have not been closed and updated to Accounting, the warranty repairs will be closed and updated at the same time as the Customer Pay and Internal repairs.

- **(M) Print Memo:** Print a memo copy of the repair order. All repairs remain open. The memo copy prints everything for the repair order, including the cost. Therefore, the memo copy is usually printed as an internal copy that can be referenced while the technician completes the work.

- (**N) No Action:** Take no action at this time. This cancels the print and returns you to the Review & Print screen.

- **Ooops:** This button appears on the right-hand side of the **No Action** button. Use this button to reactivate the warranty repairs or an entire R/O.

15. The system prints the appropriate copy and closes the repairs accordingly.

Tip: If a password is set to reactivate repair orders and you try to change the status of a repair order on this screen, you will have to enter the password before you can change the status.

Applying Discounts to Repair Orders

Click **Discounts** on the bottom of the Review & Print screen to apply discounts. The top-left part of the Discounts screen displays a list of discounts entered in the Service Writing System Setup. The top list displays the discounts that apply to the entire repair order, and the bottom list displays the discounts that apply to individual repairs.

Tip: If discounts have been assigned to fail codes applied to the repair order or to customer's record, a message will appear in the bottom-left side of the Review & Print screen indicating discounts apply. The system automatically calculates and applies these discounts when you open the Discounts screen.

Applying a Discount to a Selected Repair

Once you set a repair to be discounted to a flat rate, it will not be discounted further if you select to apply a repair order discount.

1. Click the repair you want to select in the list on the right side of the screen.

2. Type the repair discount code, or click the repair discount code in the **Discount By Repair** list (the blue section). You must click the code in the **Code** column to select the code. If you click and hold down the mouse button on the discount description, you can review the details for each discount.

3. The system uses the discount information entered for the repair discount in the Service Writing System Setup to determine how much labor and parts need to be discounted to reach the discounted repair total specified for the discount code. The **Total Discounts** fields display the discount amounts, and the **Customer** fields reflect the new discounted charge. If you selected a discount that has a flat rate of .01, the system discounts the repair 100%, making the repair free.

4. Click **Save Changes** to save the discount. (If you try to exit the screen without saving changes, the system prompts you to indicate if you want to save the changes.)

Applying a Discount to the Entire Repair Order

When you apply a discount to the entire repair order, it will not affect any repairs set to be discounted to a flat rate. All other repairs, however, are affected by the repair order discount.

1. Type the R/O discount code, or click the R/O discount code in the **Discount Total R/O** list (the green section). Be sure you select a discount that applies to the entire repair order. You must click the code in the **Code** column to select the code. If you click and hold down the mouse button on the discount description, you can review the details for each discount.

2. The **Total R/O Customer Pay** fields calculate and display the discount amount, and the **Customer** fields adjust to reflect the new discounted charge. If you select a discount with the labor and parts discount amounts set for .01, you can manually edit the labor and parts discounts to the desired amount.

3. Click **Save Changes** to save the discount. (If you try to exit the screen without saving changes, the system prompts you to indicate if you want to save the changes.)

> **Tip:** If you apply a discount but the parts total does not reflect the discount, have the Parts Department check the R/O Lubricants Pricing parameters to verify if you are permitted to apply discounts to parts on an R/O.

Manually Applying Discounts

If the **Labor Discounts Amount** and/or **Parts Discounts Amount** on the Define Discount Codes screen in the Service Writing System Setup contains .01 as the labor or parts discount amount, you can manually edit the discount amount when applying the discount. However, you can only manually edit discounts for the customer pay total.

1. Click the discount code for the discount to be applied.

2. Use the **Labor Discount** and **Parts Discount** fields to type the discount.

3. Click **Save Changes**.

Using the "NONE" Discount

A "NONE" discount appears in the **Discount By Repair** discount list. You would select this discount for a repair when you want to restrict the repair from being discounted. For example, this may apply if you are running a lube-oil-filter special and do not want the special price to be discounted any further. If you set a repair to "NONE," the repair will not be discounted when an R/O discount is applied.

Removing the Current Discount Code

You can remove discounts as needed from the repair order or individual repairs. The following instructions walk you through removing discounts. If you want to remove all discounts that have been applied, use the instructions under "Removing All Discounts" in the next section.

1. If you are removing a repair discount, select the repair.

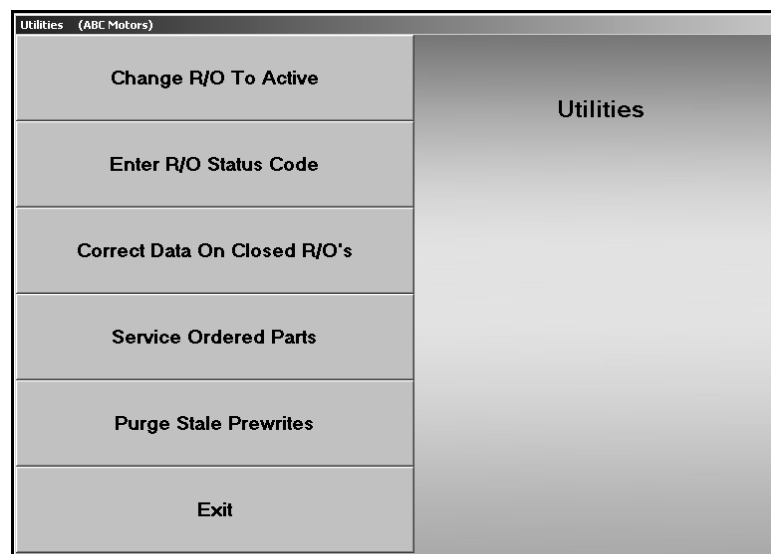2. In the discount list, click the blank code field next to the "Remove Current Discount Code" discount.

3. The discount is removed.

Removing All Discounts

Use the following instructions to remove all discounts applied to the repair order. This will remove all discounts. You will have to reapply any discounts as needed.

1. Click **Remove All Discounts**.

2. Click **OK** when prompted to verify you want to remove the discounts.

3. Click **Save Changes** to save the edit.

Utilities

The **Utilities** button on the Repair Orders menu opens the Utilities menu. This menu contains three options that allow you to make changes to both open and closed repair orders. The last option allows you to view parts orders for service customers. Click the button that corresponds to the menu option you want to select, and the appropriate prompt or screen appears. Click **Exit** when you are finished on this menu to return to the Repair Orders menu.

Utilities (ABC Motors)	
Change R/O To Active	Utilities
Enter R/O Status Code	
Correct Data On Closed R/O's	
Service Ordered Parts	
Purge Stale Prewrites	
Exit	

Change R/O To Active

Use this utility to change a repair order from closed to active. You cannot use this option on a repair order that has been closed and updated to Accounting. This utility only applies to repair orders currently in the active repair order list. It is possible to set a password for this feature in the Service Writing System Setup. If a password is set, you will have to enter the password before you can reactivate a repair order.

1. Click **Change R/O To Active**.

2. Type the repair order number, or search for the repair order by clicking the "**Click For List**" message. Click the repair order you want to select.

```
Change R/O To Active
Click          R/O Number: 40335
for list
               ROGER CRIM
```

3. Press ENTER if necessary.

4. Click **OK** when prompted to verify you want to make the change.

Enter R/O Status Code

Use this button to change the status code for a repair order in the active repair order list. The status you select appears as the status in the repair order list.

1. Click **Enter R/O Status Code**.

2. Type the repair order number, or search for the repair order by clicking the "**Click For List**" message. Click the repair order you want to select.

3. Type the status code for the repair order. A list of codes is provided for your reference.

```
Enter R/O Status Code
Click          R/O Number: 40336
for list            Status: 1
               EMILY CASSIDY
               1: Waiting For Parts
               2: Authorization
               3: Technician
               4: Hold
               5: Other
```

4. The status of the repair order will be changed to the status you selected.

Correct Data on Closed R/O's

Use this button to make corrections to customer or vehicle information on closed repair orders. This utility only applies to closed repair orders in the active repair order list.

1. Click **Correct Data On Closed R/O's**. The Correct R/O Data screen appears.

2. Type the repair order number, or click **List** to displays a list of repair orders. Click the repair order you want to edit.

3. The information is displayed in the appropriate fields.

4. Press ENTER to advance through the fields, and edit the information as needed.

5. Click **Save** to save the information.

6. Click **Exit** to return to the Utilities menu.

Service Ordered Parts

Use this button to view a list of service customers who have parts on order. Once the Parts Department pulls the parts order to a purchase order, this screen displays the orders and flags them as "Order." When the Parts Department receipts the stock, the orders are flagged "Stock."

When you open a repair order for a customer on this list, the system prompts you there are parts on order or parts stocked in for this customer. If a repair order was started and the repair order number was included on the order, you can click the customer in the list to view the repair order. If no repair order exists, the system prompts you that it cannot find the repair order.

1. Click **Service Ordered Parts**.

2. The screen displays the list of ordered parts.

3. Use the list at the bottom of the screen to specify the grouping order you want to use for the list: part number, description, order que document, order date, customer name, customer phone number, order status, or service writer. You can also select to sort the list by clicking on the column header you want to use for the sort.

4. If an R/O was started and the R/O number was included on the order, you can click the customer in the list to view the repair order. If no R/O exists, the system prompts you that it cannot find the R/O.

5. Use the **Print** button to print the list as needed.

6. Click **Back** to close the screen.

Purge Stale Prewrites

Use this button to remove prewrites from the system. You should run this utility periodically to keep the service schedule files clean. This will save space and improve the service scheduler's performance.

1. Click **Purge Stale Prewrites**.

2. Use the drop-down calendar to select the date you want to use as the cutoff point for the purge. All of the prewrites before this date will be removed.

3. Click **Go**.

4. Click **OK** when prompted to verify you want to purge the old prewrites.

Continuations

Use this button to open the Continuation R/O screen to create an additional repair order for the same vehicle. Each repair order will hold up to 12 repairs (conditions). A continuation repair order will be required for additional repairs.

1. Click **Continuations**.

2. Type the repair order number, and press ENTER.

3. Click **OK** when prompted to verify you want to generate the continuation.

4. The continuation R/O number will display. Click **OK** to continue.

5. The Enter Conditions screen opens. Enter additional repairs or conditions as needed.

Customer History

This button opens the Customer Information screen. The same screen opens when you select Customer Information on the Service Writing menu. This screen is used to enter, view, and edit customer information. Refer to Chapter 3, "Customer Information," for instructions on using this screen.

Prewrites

The **Prewrite** button allows you to prewrite a repair order before the customer/vehicle arrives for service. The information can be pulled when the repair order is started for the customer on the service date. The Prewrite feature is also available on the Service Scheduling menu. The screens that appear are the same screens that appear in Service Scheduling. Please refer to Chapter 4 for complete instructions on entering, editing, and deleting prewrite information.

Printing the Prewrite List

When viewing the prewrite list using the Prewrite option on the Repair Orders menu, you can print the prewrite list as needed. (This feature is also available when viewing the prewrite list on the Start Repair Order screen.) This feature is not available when viewing the prewrite list in the Service Scheduler.

1. Click **Prewrites**. The Service Prewrite screen appears.

2. Click **Prewrite List**. The Prewrite List opens.

3. Click the tabs at the top of the list screen to select the prewrite list you want to print.

4. Click **Print**.

5. When prompted to verify your printer is ready, select your print criteria.