

Chapter 3 Service Quoting

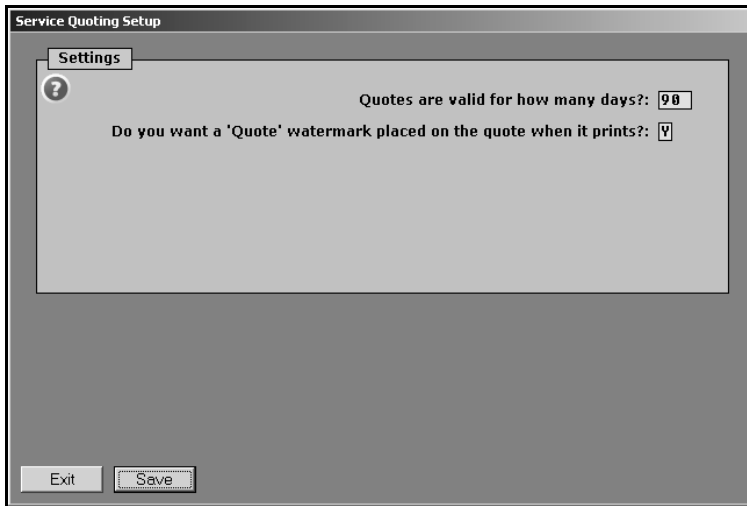
Service Quoting allows you to create a service quote that includes labor, parts, and lubricants/sublets so you can provide a complete quote rather than an estimate. The quote entry screens resemble the repair order entry screens so you record the important information. When the customer brings the vehicle in for service, you dump the quote to a repair order. This eliminates redundant entry since you recorded the relevant information when creating the quote.

Service Quoting (ABC Motors)	
Start Quote	Service Quoting
Add Labor	
Add Parts	
Add GOG / Sublet	
Review & Print	
Setup	
Exit	

Setting up Service Quoting

The Service Quoting setup requires two pieces of information. You need to determine how long you want the quotes to remain in the system before being purged and how you want the quotes to print.

1. Click **Service Quoting** on the Service Writing main menu.
2. Click **Setup** on the Service Quoting menu. The Service Quoting Setup screen appears.



3. First, type the number of days you want to keep quotes in the system. The system automatically purges quotes older than the specified number of days. The default entry is 90 days.
4. Next, indicate if you want a "Quote" watermark to print on the quote. Type **Y** for yes or **N** for no. **Y** is the default setting.
5. Click **Save**.
6. Click **OK** when prompted the setting have been saved.
7. Click **Exit** to close the screen.

Creating a Quote

Starting a Quote for an Existing Customer

When you start a quote for an existing customer, the information pulls from the customer's master file in the Service Writing module. Changes you make to an existing customer's information **will not** be saved to the customer's master file until the quote is dumped to a repair order.

1. Click **Service Quoting** on the Service Writing main menu.
2. Click **Start Quote** on the Service Quoting menu. The Start Quote screen appears.

3. Type the customer number in the **Customer Number** field. You can also click **Search** to search for the customer. Enter your search criteria. The screen displays a list of customers. Click the customer you want to select.
4. The customer's information automatically fills in on the screen.
5. Enter any additional information as needed.
6. When all the information is complete, click **Next** to continue to the next entry screen.

Starting a Quote for a New Customer

The information you add for a new customer is not added to a customer master file until the quote is dumped to a repair order.

1. Click **Service Quoting** on the Service Writing main menu.
2. Click **Start Quote** on the Service Quoting menu.
3. Press ENTER to skip the **Customer Number** field.
4. Type the customer and vehicle information.

5. In Quote Type, indicate the quote 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.
6. Use the Warranty Parts Pricing field to specify the line number that corresponds with the integrated service posting parameters line in Accounting that is used to post the service sales for this customer. 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. If you press ENTER to advance through this field while it is blank, a list of available lines appears on the left side of the screen. Click the line you want to select.
7. When all the information is complete, click **Next** to continue to the next entry screen.
8. When you dump the quote to a repair order, the system will automatically add the first three letters that appear in the **Name** field to the **Customer Number** field on the Start Repair Order screen. You can edit the field at that time if necessary.

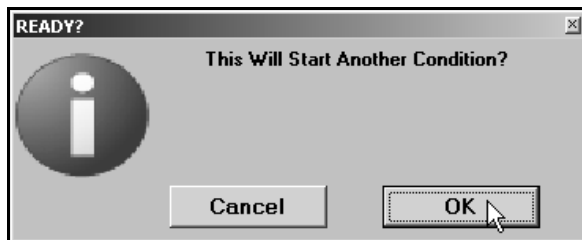
Tip: Once you advance past the Start Quote screen, you can view a copy of the quote by clicking **View Quote** on the bottom of the subsequent entry screens.

Adding Labor

The Add Labor screen is the second entry screen used to create a quote. You can also access this screen by clicking **Add Labor** on the Service Quoting menu. Type the quote number, or click **Quote List** to select the quote. You use this screen to add repairs and corresponding labor information to the quote.

1. When you advance to this screen from another screen, the fields at the top of the screen display the quote number, customer name, and vehicle information.

2. The **Repair** field defaults to appropriate repair number. Press ENTER, and click **OK** when prompted you want to start another condition.



3. Click to select the **Exclude S/S** box if you want to exclude shop supplies for this quote.

- The **Menu** field is an optional entry. Type the menu code, or click the code in the menu code list that displays on the right side of the screen.

Add Labor (ABC Motors)

Quote: 00001

STEVE SMITH
2003 CHEVROLET BLAZER
2G1WH52K739126476

Press END
Save Repair

Usage	Code	Name
15K	15,000	MILE SERVIC
1TIRE		REPLACE 1 TIRE
2TIRE		REPLACE 2 TIRES
30K	30,000	SERVICE ME
3K	3,000	MILE SERVIC
3TIRE		REPLACE 3 TIRES
4TIRE		REPLACE 4 TIRES
ALIGN		ALIGNMENT NEEDED
BRABK		REPLACE BACK BRAK
BRAKE		REPLACE ALL BRAKE
BRABF		REPALCE FRONT BRA
C.U.S		SALE DECLINED
CHAIR		CHARGE AC
DECLI		CUSTOMER DECLINED
DTAIL		DETAIL VEHICLE
INSPE		INSPECTION
LOF		LUBE-OIL-FILTER
ROTAT		ROTATE TIRES
SI		STATE INSPECTION
TUNE		TUNE UP

Click Line from List to Process

Remove Repair Save Repair

Exit Quote List View Quote Clear Back Next

- Type the **Labor Op** code as needed.
- Indicate the type of sale. Type **C** for customer pay, **W** for warranty, **I** for internal, **N** for new vehicle prep, or **Q** for quick lube. If you selected a menu code, this field automatically fills in based on the code assigned to the menu code.
- The labor level defaults to the labor level set on the Tax Rates/Cost Codes screen in the Service Writing Setup. If you selected a menu code, this field automatically fills in based on the level assigned to the menu code. Edit the level as needed.
- In **Labor Time**, type the number of units required for the repair.
- The **Sale** field identifies the total labor sale for the repair. This is based on the labor level and the labor time.
- Click to select the **C/P Repair Is NON-Taxable** box if this is a non-taxable customer pay repair. The system will not include this repair when calculating the tax for the quote when this box is selected.
- If you selected a menu code, the **Complaint/Cause/Cure** section displays the information. Otherwise, type a description of the complaint or the repair to be done.
- When you are finished closing all of the repairs, click **Next** to continue to the next entry screen.

Editing a Repair

1. Click a repair in the repair list on the right side of the screen, or type the repair number in the **Repair** field. The repair information fills in on the screen.
2. Edit the repair information as needed.
3. Click **Save Repair** to save the information.

Removing a Repair

1. Click a repair in the repair list on the right side of the screen, or type the repair number in the **Repair** field. The repair information fills in on the screen.
2. Click **Remove Repair**.
3. Click **OK** when prompted to verify you want to remove the repair. The repair is removed from the repair list.

Adding Parts

The Add Parts screen is the third entry screen used to create a quote. You can also access this screen by clicking **Add Parts** on the Service Quoting menu. Type the quote number, or click **Quote List** to select the quote. You use this screen to add parts to the quote.

1. When you advance to this screen from another screen, the fields at the top of the screen display the quote number, customer name, and vehicle information.

2. If parts have already been added to the quote, they are listed at the bottom of the screen.
3. In **Part Number**, type the part number for the part you are adding to the repair order, and press ENTER.
4. Type the quantity required in the **Qty** field.
5. In **R**, type the repair that requires this part.
6. The repair type (T) automatically fills from the repair. This field displays **C** for customer pay, **W** for warranty, **I** for internal, **N** for new vehicle prep, or **Q** for quick lube.
7. Use the **F** field to flag the failed part. Type an **F** or **X** if this is a failed part.
8. The **O/H** field displays the on-hand quantity for the part.
9. The **Price** field automatically fills in based on the part number entered.
10. The name/description of the part automatically fills in the **Description** field.
11. The **W** field indicates if the part is eligible for Wholesale Compensation. It displays **Y** for yes or **N** for no.
12. The **C** pertains to parts with cores. Use it to indicate if a dirty core will be returned. Type **O** for outstanding, **R** for returned, or **C** for charge customer.

13. The part is displayed in the list on the bottom part of the screen.
14. As each part is processed and added to the list, the cursor comes back to the **Part Number** field for the next part line.
15. Add additional parts as needed.
16. Click **Next** to advance to the next screen.

Removing Parts

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. The quantity will reflect 0, and the system will remove the part from the quote as soon as you advance to another screen.

Adding Sublet

The Add GOG/Sublet screen is the fourth entry screen used to create a quote. You can also access this screen by clicking **Add GOG/Sublet** on the Service Quoting menu. Type the quote number, or click **Quote List** to select the quote. You use this screen to add shop supplies (or hazardous waste) and sublet to the quote.

Adding Shop Supplies/Hazardous Material

1. When you advance to this screen from another screen, the fields at the top of the screen display the quote number, customer name, and vehicle information.

2. The **Shop Supplies/ Hazardous Material** 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 material 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 material 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 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 Add Labor 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 Shop Supplies/Hazardous Material

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.

Code	Description	Y/N	Price	Quantity	Ext	Ext
<CANCEL>	<CLEAR LINE>					
A1	Alignment	Y	0.00		.00	.00
ACC	ACCESSORIES	N	0.00		.00	.00
B1	Tire Balance	Y	0.00		.00	.00
B2	Body Work/Repair	Y	0.00		.00	.00
BTTX	BATTERY TAX	N	0.00		2.00	2.00
C1	Customer Reimbursene	Y	0.00		.00	.00
C2	USC Deductible(Goodw	Y	0.00		.00	.00
D&M	DEALER MATER.	Y	0.00		.00	.00
FRT	FREIGHT CHARGES	Y	0.00		.00	.00

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 Add Labor screen.
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 fills in with the quote 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**.

Printing the Quote

The Review & Print screen is the last screen used to create a quote. You can also access this screen by clicking **Review & Print** on the Service Quoting menu. Type the quote number, or click **Quote List** to select the quote. You use this screen to review the totals for the quote and to print the quote.

1. When you advance to this screen from another screen, the fields at the top of the screen display the quote number, customer name, and vehicle information.

Review & Print (ABC Motors)

Quote: 00001 STEVE SMITH
 Status: 2003 CHEVROLET BLAZER
 2G1W52K739126476

Overall Taxable: No Tax, Full Tax, Tax 1 Only, Tax 2 Only
 Warranty Taxable: No Tax, Full Tax, Tax 1 Only, Tax 2 Only

Charge Shop Supplies
 Warranty Manufacturer: GM
 Date Closed: 01/26/2011
 Warranty Deductible: .00

W/C	Int.		C/P
.00	.00	Labor	16.50
.00	.00	Parts	10.00
.00	.00	Sublet	.00
.00	.00	S/Sup	4.82
.00	.00	G-O-G	3.00
.00	.00	W/Ded	.00
.00	.00	Subtotal	34.32
.00	.00	Tax 1	2.40
.00	.00	Tax 2	2.06
.00	.00	Tire Tax	.00
			Cash 38.78

Dump to R/O Print

Exit Quote List View Quote Clear Back

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. Verify the information on the left side of the screen. Edit it as needed.
4. When you are finished entering and verifying the information on this screen, click **Print**.

Recalling a Quote

1. Click **Quote List** on the bottom of an entry screen.
2. The Active Quotes list displays all the quotes in the system. Quotes remain in this list until they reach the cutoff designated in the Service Quoting Setup.

Active Quotes						
Open		Closed	All			
Quote	R/O	Date	S/W	Name	Phone	Vehicle
00001		01/19/2011	01	STEVE SMITH	(724) 555-1234	2003 CHEVROLET
00008		01/20/2011	01	ELIZABETH PARKINSON		2003 HONDA
00009		01/20/2011	01	ROGER CHRISTOPHER		1992 CHVERDLET

Back Search Phone Number: From: 10/28/2010 To: 1 /26/2011 Clear Search

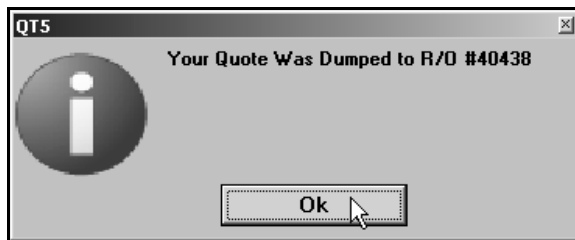
3. If necessary, type the last four digits of the customer's phone number in the **Search Phone Number** field. The lists displays only the customer's whose phone number meet the criteria. (Click **X** to view the complete list again.)
4. You can also use the tabs at the top of the list screen and the **From** and **To** date boxes at the bottom of the screen to filter the list as needed.
5. Click a quote in the list to select it. The information fills in on the screen.

Deleting a Quote

1. Click **Start Quote**.
2. Select the quote.
3. Click **Delete**.
4. Click **Yes** when prompted to verify you want to delete the quote.

Dumping the Quote to a Repair Order

1. Click **Review & Print** on the Service Quoting menu.
2. Type the quote number, or click **Quote List** to select the quote from the active quote list.
3. Verify the information on the screen is correct.
4. Click **Dump to R/O**.
5. The system displays a message indicating the repair order number assigned to the quote. Click **OK**.



6. The system advances you to the Start Repair Order screen. The customer's information automatically fills in on the screen. You can now add any additional information required for the repair order as needed.

Start Repair Order (ABC Motors)	
R/O: 40438	Schedule Xpress
Customer Number: SH126476	Memo
Writer: 01 PAUL	Date: 01/26/11
Advisor: 01 JIN	
Name: STEVE SHITH	
Individual: <input checked="" type="checkbox"/> STEVE <input type="checkbox"/> SHITH	
Address: 555 MAIN STREET	
City: WEST MIDDLESEX PA 16159	
E-Mail:	
Memo:	
Phone: 724/555/1234	Work: 724/555/9876
Cell: 724/555/0001	
On Do Not Call List: <input type="checkbox"/> N	
Send Marketing Followup Letter (Y/N): <input type="checkbox"/>	
Odometer In: <input type="text"/>	When Finished [C/W/E/D/P]: <input type="checkbox"/>
Last Odom: 7132	
Time In: 16:07	Cash/Recv.: <input type="checkbox"/>
Promised: 00:00	Job Number: <input type="text"/>
	Taxable: <input type="checkbox"/>
Service/Body/Contract/QuickLube (S/B/C/Q): <input type="checkbox"/> Q	
VIN: 2G1MH52K739126476 Year: 2003 Make: CHEVROLET Model: BLAZER N/U/O: <input type="text"/> License: <input type="text"/> First Use: 00/00/00 Delivered: 00/00/00 Inspection: <input type="text"/> Color: <input type="text"/> Cust Code: <input type="text"/> Car Line: <input type="text"/> Warranty Parts (A/B/C/L/N): <input type="checkbox"/> B Warranty Manufacturers: GH Warranty Repair: <input type="text"/> GH	
Contract: <input type="text"/>	Term: 36 Expires: 11/08 Contract Mileage: <input type="text"/>
Exit	R/O List
Search	Names
Void	Clear
History	Customer
Next	

- The quote remains in the quote list but is moved to the **Closed** tab. (Closed quotes appear in gray on the **All** tab in the Active Quotes list.) The **R/O** column in the quote list displays the R/O number assigned to the quote.

Quote	R/O	Date	S/W	Name	Phone	Vehicle
00001	40438	01/19/2011	01	STEVE SMITH	(724) 555-1234	2003 CHEVROLET
00003	40431	01/19/2011	01	ADAM WALKERS		2010 CHEVROLET
00005	40432	01/20/2011	01	PAUL HARTLEY	(724) 555-4123	2008 CHEVROLET
00006	40433	01/20/2011	01	TESS WILLIAMS		

- You can no longer view the quote through the Service Quoting feature. The system will display a message indicating a quote is closed if you attempt to pull a closed quote on one of the Service Quoting screens.

