


Chapter 1 System Setup

Before you begin using the Service Writing module, you must set the system parameters. Click System Setup on the Service Writing menu to open the System Setup menu. You will use this menu to enter the parameters. The System Setup menu contains 15 options used to enter the setup information. The parameters entered through this menu determine information that will automatically fill in on certain screens. The parameters save you the time of having to repeatedly enter standard information. Although the parameters automatically fill in certain information in the Service Writing module, in most cases, the default entry can be edited if another entry needs to be made instead.

Each of the 15 menu options will be covered in this chapter. To select a menu option, click the button that corresponds to the option you want to select, and the appropriate screen or submenu appears. Work your way through the System Setup menu, entering information as needed. When you are finished entering information for each area, click **Back** to return to the Service Writing menu.

System Setup (ABC Motors)	
Trouble/Condition Codes	 System Setup
Service Advisors/Writers	Special Customer Parameters
Service Technicians	Quick Complaints
Labor Rates	Default Cities
Miscellaneous Parameters	Default Makes/Models
GOG/Sublet Pricing	Default Sublet
Tax Rates/Cost Codes	Define Discounts
Warranty Parameters	Passwords & Data Utilities
Back	Enter Service Menu Operations

Trouble/Condition Codes

Use this button to open the Trouble/Fail Codes screen to set up codes that will be used when entering repairs. The codes you enter here are available in a list on the Enter Conditions screen when adding repairs to the repair order. Instead of typing the code to add it to the repair order, you can click the **Fail Codes** button on the bottom-right side of the screen to select the code from the list.

You do not have to use trouble/fail codes on repair orders; however, these codes can be valuable tools for followup activities. The Service History you manually download to disk in CSI & SSI for your third-party marketing vendor includes the trouble/fail codes. If you do not set up these codes, the vendor will not know what your customer pay codes are, and if the Service Department does not add trouble/fail codes to the repair order, the vendor will not be able to use this information as part of the followup activities.

You may want to wait to enter the trouble/fail codes until after you enter your labor rates and service technicians. You can assign each code a specific labor level that automatically calculates the labor

sale when you select the code, and you can assign a default technician. You can create the codes now and edit the codes to add the labor levels and technicians later, or you can wait to create the codes until you finish adding the labor levels and technicians to the setup.

Adding a New Code

1. Click **Trouble/Condition Codes**. The Trouble/Fail Codes screen appears.

The screenshot shows the 'Trouble/Fail Codes (ABC Motors)' window. At the top, there are two checkboxes: 'Default Sort For Trouble Codes & Menus On R/O Screens' (unchecked) and 'Code Sort' (checked). Below this is a checkbox for 'Usage Sort' (checked). The main form contains the following fields and options:

- Code:** [Text input field]
- Desc.:** [Text input field]
- Special Labor Sale:** [Text input field] with an **Exclude Shop Supplies** checkbox.
- Default Labor Units:** [Text input field]
- Customer Complaint Code:** [Text input field]
- Labor Operation:** [Text input field]
- Labor Rate (A thru J) ... Svc:** [Text input field] with **Contract**, **Body**, and **Q/L** checkboxes.
- Repair Is Usually (C/Q/W/N/I):** [Text input field]
- Most Qualified Technician:** [Text input field]
- Commissionable:** [Text input field] with a **00%** label.
- Commissionable:** [Text input field]
- Special Labor Posting Accounts:**
 - Labor Sale Account:** [Text input field]
 - Labor Cost Account:** [Text input field]
 - Labor Inventory Account:** [Text input field]
- Statistical ...** with **From:** [Text input field] and **To Current** checkbox.
- Volume MTD:** [Text input field] with **Units:** [Text input field]
- YTD:** [Text input field] with **Units:** [Text input field]

At the bottom, there are four buttons: **Exit**, **Print**, **Delete**, and **Save**.

2. Indicate the default sort order you want to use for the fail code list and menu items list on the repair order screen. The name sort will sort the list by the description, and the usage sort will sort the list by the frequency that the codes are used.
3. In **Code**, type the code you are adding. This field accepts up to five alphanumeric characters. For example, you might create a code LOF for Lube-Oil-Filter.
4. Use the **Desc.** field to type a description of the code. The description fills in as the complaint when you select the code for a repair.
5. If there is special pricing for this service, type the amount in **Special Labor Sale**. This amount becomes the default labor amount on the repair order.
6. The **Exclude Shop Supplies** box allows you to exclude shop supplies for this code. Click to select the box. A check mark will appear in the box. Click again to clear the box. When adding repairs to an R/O, shop supplies will not be added to repairs that use this code if this box is selected.
7. In **Default Labor Units**, type the number of labor units needed to complete the repair.
8. In **Customer Complaint Code**, type the customer complaint code associated with the code you are creating. Customer Complaint Codes are pre-set by the manufacturer. The Customer Complaint Code must match the entry in the **Code** field. This ensures third-party vendors can identify the code. If you do not fill in the Customer Complaint Code, the code will not transfer to third-party vendors.
9. Use the **Labor Operation** field to specify the labor operation code used for the trouble/fail code. These are manufacturer codes.

10. In **Labor Rate Level**, type the labor level code (A through J) for service, contract, body shop, and quick lube. The labor level codes represent labor rates you define under Labor Rates on the System Setup menu. The actual labor rate could differ based on the repair type (Customer Pay, Warranty, Internal).
11. Use the **Repair Is Usually** field to identify the repair type most commonly used with this code. Type **C** for customer pay, **Q** for quick lube, **W** for warranty, **N** for New Car Road Ready (PDI), or **I** for internal. When you select the code for a repair on a repair order, the repair type defaults to the repair type you enter here. You can edit the default as needed.
12. In **Most Qualified Technician**, type the ID number for the most qualified technician to complete this type of repair. You can leave this field blank and enter the technician when generating the repair order. Similarly, if you enter a technician, you can edit the entry when generating the repair order. You must enter technicians to the system using the **Service Technicians** menu option before you can enter them in this field.
13. If the advisor is paid commission based on a percentage, type the commission percentage in the **Commissionable%** field. If the advisor is paid a flat rate commission, type the amount in **Commissionable**.
14. The **Special Labor Posting Accounts** section allows you to specify the general ledger accounts used to post the labor sale, cost, and inventory for this code. If you set accounts for the code, the system will use the accounts regardless of the repair type (customer pay, warranty, etc.). If you do not set accounts, the system will post the sale, cost and inventory to the accounts set in the Integrated Service Sales setup in the Accounting module.
15. The **Statistical** section automatically fills in as you begin using the system.
 - The **From** field automatically tracks the date, but you can edit it as needed.
 - The **MTD Units** fields display the month-to-date units sold and the total labor sale for the code. The system updates this information during the monthly summary update.
 - The **YTD Units** fields display the year-to-date units sold and the total labor sale for the code. The system updates this information during the monthly summary update.
16. Click **Save** to save the information. The code you entered appears in the list on the right side of the screen.
17. When you are finished, click **Exit** to return to the System Setup menu.

Editing an Existing Code

1. In **Code**, type the code you want to edit, or click the code in the list on the right side of the screen. The information entered for the code is displayed on the screen.
2. Click in a field, and edit the information as needed.
3. Click **Save** to save the changes.

Deleting a Code

1. Select the code.
2. Click **Delete**.
3. Click **OK** when prompted to verify you want to delete the record.

Printing the List of Codes

When you are finished entering the codes on this screen, you should use the **Print** button to print a list of the codes for your records. The printout lists all of the trouble/fail codes in the system. For each code, the printout lists the code, description, labor sale, labor units, and commission percentage.

Service Advisors/Writers

A service advisor/writer is the person who greets the customer as he or she enters the Service Department. Some dealerships have an actual drive-in lane. In this scenario, Advisor/Writer greets the customer when he or she pulls into the shop. The title Advisor is used more commonly than the title Writer. Writer is an older title that used to be used to describe the same person referred to today as the Advisor.

The advisor's job is to advise customers on maintenance and recalls on their vehicles. In the past, many customers would only schedule service with a dealership for warranty repairs. Car manufacturers now go to great lengths to ensure dealerships ask customers who purchase vehicles from the dealership to return to the dealership for routine maintenance services (including tires) as well. With all of the computerized vehicle components today, dealerships push for all of the customers' business.

Use this button to open the Advisor/Writer Information screen to enter the service advisors and service writers. Since you assign each service writer an advisor, you should enter your service advisors first, and then enter your service writers. Autosoft recommends that your service writer and service advisor be the same person. This ensures accurate reports.

Advisor/Writer Information (ABE Motors)

Advisor/Writer Information

Advisor/Writer Number:

Short Name:

Full Name:

Full Social:

Advisor/Writer (A/W):

Default Advisor For This Writer:

Employee ID

MFC	Emp ID	MFC	Emp ID
FO	<input type="text"/>	HI	<input type="text"/>
CH	<input type="text"/>		<input type="text"/>
GM	<input type="text"/>		<input type="text"/>
HO	<input type="text"/>		<input type="text"/>

01 PAUL
02 BILL
03 JOHN
04 ANDREW
05 RAY
06 ADAM
07 BRIAN
08 MIKE
09 RICH

Exit Print Delete Clear Save

Adding a New Advisor/Writer

1. Click **Service Advisors/Writer**. The Advisor/Writer Information screen appears.
2. In **Advisor/Writer Number**, type the two-digit ID number you want to assign the service advisor/writer. Each advisor/writer must be assigned an ID number ranging from 01 to 99. The advisor/writer will use this code as the user ID in the Autosoft system.
3. In **Short Name**, type the individual's first name or nickname.

DaimlerChrysler dealers must enter the initial of the advisor's first name followed by the advisor's last name without spaces in between the entries. For example, John Doe must be entered as JDOE. The system uses this information and the social security number to generate the Advisor ID code required to process Chrysler warranty claims.
4. In **Full Name**, type the individual's full name (first name, middle initial, and last name).
5. Use the **Full Social** field to record the individual's full social security number. You must enter the full social security number. If no manufacturer ID is entered for a manufacturer in the fields at the bottom of the screen, the system will transfer the social security number with the warranty claims when you download them to the manufacturer.
6. In **Writer/Advisor**, identify if this is an advisor or a writer. Type **A** for Advisor or **W** for Writer.
7. In **Default Advisor For This Writer**, assign an advisor to each writer. Type the advisor's ID number, and the advisor's name is automatically displayed. Remember, Autosoft recommends that your service writer and service advisor be the same person. This ensures accurate reports.
8. The **Employee ID** section allows you to enter manufacturer-specific employee ID that needs to be transferred with warranty claims.

The **MFC** fields display the manufacturer codes based on your warranty parameters. If you set the **Download Warranty Repairs** option on the Warranty Setup screen to **Y** for yes, the system pulls the manufacturer code to this screen. It will display CH for Chrysler, FO for Ford, GM for General Motors, HO for Honda/Acura, MA for Mazda, MI for Mitsubishi, or VW for Volkswagen of America/Audi.

In **Emp ID**, type the employee's manufacturer-specific ID number next to the appropriate manufacturer code.
9. Click **Save** to save the advisor/writer's record. The advisor/writer is displayed in the list on the right side of the screen.
10. Continue to enter records as needed.
11. When you are finished, click **Exit** to return to the System Setup menu.

Editing an Advisor's/Writer's Information

1. In **Advisor/Writer Number**, type the individual's ID number, or click the name in the list on the right side of the screen.
2. The advisor/writer's information fills in on the screen.
3. Click in a field, and edit the information as needed.
4. Click **Save** to save the changes.

Deleting an Advisor/Writer

1. Select the advisor/writer.
2. Click **Delete**.
3. Click **OK** when prompted to verify you want to delete the record.

Printing the Advisor/Writer List

The printout lists each advisor/writer in the system by the individual's short name. It includes the individual's ID number and indicates if the individual is an advisor or writer.

1. Select any advisor/writer.
2. Click **Print**.
3. When prompted, select your print criteria.

Service Technicians

Use this button to open the Technician Information screen to enter the service technicians. In addition to entering basic technician information (name and ID numbers), you use this screen to enter the pay rates for each type of repair (customer pay, warranty pay, or internal).

You can enter up to 10 labor rates (A through J) for each repair type. This allows you to have different labor rates for different types of work, different insurance companies, or different extended maintenance contracts. The rates could be higher or lower than the technician's regular hourly rate.

For example, a dealership has a normal labor rate of \$50.00 per hour. For ABC Extended Maintenance Contract, the dealership only pays \$45.00 per hour. The technician might get paid \$20.00 for the regular rate of \$50.00, but when working on a vehicle with the ABC Extended Maintenance Contract, the technician may only get paid \$48.00 per hour.

Technician Information (ABC Motors)

Technician Number: 09

Short Name: DARRELL

Full Name: DARRELL PORTER

Flat/Hourly (F/H): H

Full Social: 154731054

State ID Number: 3184214654

ERO Password: DAR09

Dedicated Service/Body/QuickLube: S (S/B/Q Or Blank For Non-Dedicated)

Cost Per Hour		
C/P	W/C	Int.
\$%	\$%	\$%
(A): 17.00	(A): 17.00	(A): 17.00
(B): 17.00	(B): 17.00	(B): 17.00
(C): 17.00	(C): 17.00	(C): 17.00
(D): 17.00	(D): 17.00	(D): 17.00
(E): 17.00	(E): 17.00	(E): 17.00
(F): 17.00	(F): 17.00	(F): 17.00
(G): 17.00	(G): 17.00	(G): 17.00
(H): 17.00	(H): 17.00	(H): 17.00
(I): 17.00	(I): 17.00	(I): 17.00
(J): 17.00	(J): 17.00	(J): 17.00

Employee ID	
MFC	Emp. ID
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Buttons: Exit, Print, Delete, Clear, Save

Adding a New Technician

1. Click **Service Technicians**. The Technician Information screen appears.
2. In **Technician Number**, type the two-digit ID number you want to assign the technician. Each technician must be assigned an ID number ranging from 01 to 99.
3. In **Short Name**, type the technician's first name or nickname.
4. In **Full Name**, type the technician's full name (first name, middle initial, and last name).
5. Use the **Flat/Hourly** field to identify how the technician is paid. Type **F** for flat rate or **H** for hourly rate.
6. Use the **Full Social** field to record the technician's full social security number. You must enter the full social security number.
7. In **State ID Number**, type the technician's state identification number (if required). When entering the Miscellaneous Parameters, you will select whether or not you want the technician's name and state ID number print on the repair order.

8. In **ERO Password**, type the technician's password for electronic repair orders. This is the password the technician will use to log when working with electronic repair orders.
9. The **Dedicated Service/Body/QuickLube** field to indicate if the technician is dedicated to a specific department. If you set a department here, the technician list is the Schedule Xpress scheduler will only display the dedicated technicians for each department when scheduling appointments. Type **S** for service, **B** for body shop, **Q** for quick lube, or leave the field blank if no single department applies. This is an optional field.
10. Under **Cost Per Hour**, type the technician's pay rate for customer pay, warranty, and internal repairs. You can enter up to 10 levels of pay. Click the **Fill Down** button to fill in the remaining fields in the columns with the rates entered in the first field.
11. For each pay line, use the **\$%** field to indicate if the rate is a percentage or flat dollar amount. Type **%** if the rate is a percentage or **\$** if the rate is a dollar amount. If you press TAB or ENTER to advance through this field, **\$** will automatically fill in as the default entry.
12. The **Employee ID** section allows you to enter manufacturer-specific employee ID that needs to be transferred with warranty claims.

The **MFC** fields display the manufacturer codes based on your warranty parameters. If you set the **Download Warranty Repairs** option on the Warranty Setup screen to **Y** for yes, the system pulls the manufacturer code to this screen. It will display CH for Chrysler, FO for Ford, GM for General Motors, HO for Honda/Acura, MA for Mazda, MI for Mitsubishi, or VW for Volkswagen of America/Audi.

In **Emp ID**, type the employee's manufacturer-specific ID number next to the appropriate manufacturer code.

13. Click **Save** to save the information. The technician is displayed in the list on the right side of the screen.
14. Continue to enter technicians as needed.
15. When you are finished, click **Exit** to return to the System Setup menu.

Editing a Technician's Information

1. In **Technician Number**, type the technician's ID number, or click the technician in the list on the right side of the screen. The technician's information is displayed on the screen.
2. Click in a field, and edit the information as needed.
3. Click **Save** to save the changes.

Deleting a Technician

1. Select the technician.
2. Click **Delete**.
3. Click **OK** when prompted to verify you want to delete the record.

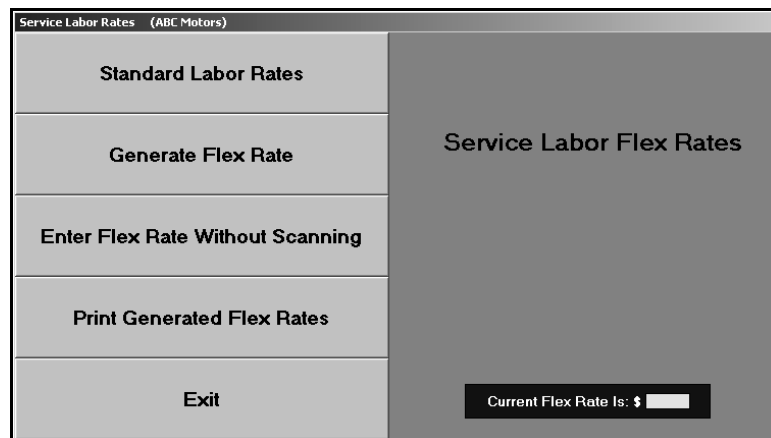
Printing the List of Technicians

Use the **Print** button to print a list of technicians. The printout lists each technician in the system by the technician's short name. It also lists the technician's ID number, the last four digits of the technician's social security number, and the technician's pay rate (flat rate or hourly).

Labor Rates

This button advances you to the Service Labor Flex Rates menu. This menu is used to view, generate, and print labor flex rates. The flex rate feature generates a flex rate schedule that provides competitive rates from the low-end average to the high-end average. This will help increase the effective rate of your service operations. The **Current Flex Rate** field displays the current flex rate.

Click the button that corresponds to the menu option you want to select. The appropriate screen or prompt appears. When you are finished, click **Exit** to return to the System Setup menu.



The screenshot shows a software interface titled "Service Labor Rates (ABC Motors)". On the left side, there is a vertical list of five menu options: "Standard Labor Rates", "Generate Flex Rate", "Enter Flex Rate Without Scanning", "Print Generated Flex Rates", and "Exit". On the right side, the text "Service Labor Flex Rates" is displayed. At the bottom right, there is a field labeled "Current Flex Rate Is:" followed by a small downward arrow and a text input box.

Standard Labor Rates

Use this button to open the Labor Rates screen to enter rates. You specify the rate for customer pay, warranty claim, and internal for both service and body shop. In addition, you set effective dates for the rates. The system will automatically pull the appropriate rate information based on the effective date you enter.

Labor Rates (ABC Motors)

Labor Rates

Labor Level: **A**

Description: **GENERAL**

Current Rate

Effective Date: **01/01/2008**

	Service	Body
Customer Pay:	55.00	36.00
Warranty Claim:	54.00	54.00
Internal:	40.00	40.00

New Rate

Effective Date: **01/01/2009**

	Service	Body
Customer Pay:	57.00	40.00
Warranty Claim:	57.00	55.00
Internal:	40.00	40.00

Duplicate This Setting For All Levels

Reset To Current

	C/P	W/C	Int.
A GENERAL			
Service 01/01/08	55.00	54.00	40.00
Body 01/01/08	36.00	54.00	40.00
Service 01/01/09	57.00	57.00	40.00
Body 01/01/09	40.00	55.00	40.00
B CUSTOMER 1			
Service 01/01/08	25.00	25.00	25.00
Body 01/01/08	35.00	35.00	35.00
Service 01/01/09	35.00	35.00	35.00
Body 01/01/09	35.00	35.00	35.00
C CUSTOMER 2			
Service 01/01/08	20.00	20.00	20.00
Body 01/01/08	30.00	30.00	30.00
Service 01/01/09	30.00	30.00	30.00
Body 01/01/09	30.00	30.00	30.00
D CUSTOMER 3			
Service 01/01/08	15.00	15.00	15.00
Body 01/01/08	25.00	25.00	25.00
Service 01/01/09	20.00	20.00	20.00
Body 01/01/09	25.00	25.00	25.00
E WARRANTY 1			
Service 01/01/08	15.00	15.00	15.00
Body 01/01/08	20.00	20.00	20.00
Service 01/01/09	20.00	20.00	20.00
Body 01/01/09	25.00	25.00	25.00
G WARRANTY 2			
Service 01/01/08	20.00	20.00	20.00

Exit Print Clear Save

Adding a New Labor Rate

1. Click **Standard Labor Rates**. The Labor Rates screen appears.
2. In **Labor Level**, type the labor level code (A through J). The code is the letter that will be used to identify the labor level. F is used for flat rate. You can also click a code in the list on the right side of the screen to select it.
3. Use the **Description** field to type a description for the rate.
4. The **Current Rate** and **New Rate** sections allow you to enter two sets of labor rates with different effective dates. The system will pull the rates based on the effective dates entered. For each effective date, enter the customer pay, warranty, and internal rate for service and body shop repairs.
5. Click **Save** to save the labor rate. The rate is displayed in the list on the right side of the screen.
6. Continue to enter rates as needed.
7. When you are finished, click **Exit** to return to the Service Labor Flex Rates menu.

Editing a Labor Rate

1. In **Labor Level**, type the code for the labor level rates you want to edit, or click the labor level in the list on the right side of the screen.
2. The information entered for that code is displayed on the screen.
3. Click in a field, and edit the information as needed.
4. Click **Save** to save the changes.

Tip: The green arrows make editing your labor rates easier. Click **Reset To Current** arrow to move the information in the New Rate section to the Current Rate section. The New Rate section will be cleared so you can enter the new rates as needed. Click the **Duplicate This Setting For All Levels** arrow to duplicate the settings in the New Rate *and* Current Rate areas for *all* settings (A-J).

Printing the Labor Levels

The printout displays the rates exactly as they appear in the list on the right side of the screen.

1. Click **Print**.
2. When prompted, select your print criteria.

Generate Flex Rate

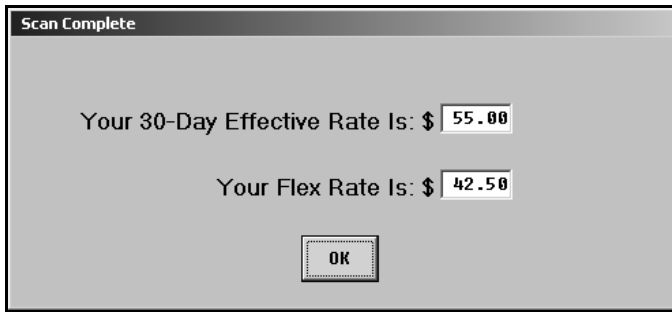
Some dealerships utilize the benefits of Flex Labor Rates. This rate is usually used for vehicles out of warranty for major repairs like transmission or motor work. The advisor works from a printed chart when selling a job.

It is important to sell the value of dollars to the customer rather than the amount of time the job takes. For example, a 1990 car needs transmission repair. This is a complicated repair, so the owner wants to take the vehicle to the dealership for the repair. The advisor quotes \$1,100.00 for the repair. At \$50.00 per hour, this is a 22-hour job. However, the job is actually a 15-hour job. The dealership benefits by selling its expertise for fixing the transmission. It is expensive to send technicians for manufacturer training. This is a way for the dealer to recover the investment in the personnel.

If you use flex rate, use this button to scan the customer repair orders from the last 30 days to determine your flex rate.

1. Click **Generate Flex Rate**.
2. Type the effective flex rate to be generated.
3. Click **OK** when prompted to verify you want to generate the rate.

- The 30-day effective rate and the flex rate display. Click **OK** to accept the values.



- The **Current Flex Rate** field displays the flex rate amount.



Enter Flex Rate Without Scanning

Use this button to manually enter a flex rate that will be used to generate the flex rate schedule.

- Click **Enter Flex Rate Without Scanning**.
- Type the desired flex rate. If you do not enter four digits including the decimal, press ENTER.
- The **Current Flex Rate** field on the menu will display the rate you entered.

Print Generated Flex Rates

Use this button to print the generated flex rate schedule. The schedule displays the flex rate for nine levels. When prompted to verify your printer is ready, select your print criteria.

ABC Motors										
Flex Rate Schedule										
Flat Hour Rate: \$42.50										
	0	1	2	3	4	5	6	7	8	9
0	.00	2.55	5.95	10.20	13.60	21.25	25.50	29.75	34.00	38.25
1	42.50	47.27	51.61	55.97	60.34	64.71	69.09	73.47	77.89	82.29
2	86.70	91.12	95.57	100.00	104.45	108.90	113.39	117.86	122.33	126.82
3	131.34	135.84	140.35	144.87	149.43	153.97	158.51	163.06	167.66	172.22
4	176.80	181.38	186.02	190.62	195.23	199.85	204.52	209.15	213.79	218.44
5	223.15	227.82	232.49	237.18	241.92	246.62	251.33	256.04	260.83	265.56
6	270.30	275.05	279.87	284.63	289.41	294.19	299.05	303.85	308.65	313.47
7	318.36	323.19	328.03	332.88	337.81	342.68	347.55	352.43	357.40	362.29
8	367.20	372.11	377.12	382.05	386.99	391.94	396.98	401.94	406.91	411.89
9	416.97	421.97	426.97	431.99	437.10	442.13	447.17	452.21	457.37	462.43
10	467.50	472.58	477.77	482.86	487.97	493.08	498.31	503.44	508.57	513.72

Miscellaneous Parameters

Use this button to open the Miscellaneous Parameters screen. The information entered on this screen determines how certain information is entered, stored, processed, or printed. You set the majority of the parameters on this screen by answering yes or no questions about the way you want the Service Writing module to run.

Miscellaneous Parameters (ABC Motors)

Setup "ERO" On This Client

Is Service Writing Interfaced With Accounting [Y/N]: Y

Shop Supplies

Service Based On Labor/Total/None: L 11.00 % Min: \$.00 Max: \$25.00 Shop Supplies

Body Based On Labor/Total/None: N .00 % Min: \$1.00 Max: \$1.00 Hazardous Material

Charge Applies To Internals [Y/N]: Y

R/O Print

1. 'Next Service' Message On Repair Orders [Y/N]: Y 10. Maximum Number Of Conditions On Hard Copy (1/6): 6

2. 'Service Come Back' Message On Repair Order [Y/N]: Y 11. Warranty Copy With Pre-Close Customer Copy [Y/N]: Y

3. 'Customer Labor Rate' On Repair Orders [Y/N]: N 12. Accounting Summary on Accounting Copy [Y/N]: Y

4. 'Customer Pay' Labor Time On Repair Orders [Y/N]: N 13. Mirror Hanger With Hard Copy [Y/N]: N

5. 'Warranty Sale' Figures On W-R/O's [Y/N]: N 14. Customer Copy With Hard Copy At Open [Y/N]: N

6. 'Internal Sale' Figures On Customer Pay R/O's [Y/N]: Y 15. Require Promise Time on R/O At Open [Y/N]: N

7. Separate Internal Copy With Customer Pay R/O's [Y/N]: Y 16. Print Labor Time Flags on R/O [Y/N]: N

8. Technician Name & State ID On Repair Orders [Y/N]: N 17. Restrict Adv/Tech ID Printing on RO (A/T/B/N): B

9. Labor/Parts/GOG/Sublet Totals Each Repair [Y/N]: Y 18. Allow Modification of Open/Close Dates on RO [Y/N]: N

Copy Counts

Customer Copy: 1

Accounting Copy: 1

Warranty Copy: 1

File Copy: 1

Internal Copy: 1

CSI Copy: 1

Miscellaneous

Restrict Charge Customers To 'Special Customer Parameters' [Y/N]: N

Allow An R/O To Be Started Without 'Miles In' [Y/N]: Y

Allow An R/O To Be Started Without e-Mail Address' [Y/N]: Y

Default Manufacturer Warranty Repairs Prompt: GH GM - General Motors

Include Costs When Viewing an R/O [Y/N]: Y

Require A Menu, Trouble Code, or LOP On All R/O's [Y/N]: Y

Require Confirmation When Closing Warranty And C/P Concurrently: Y

Default First Tech On Subsequent Repairs: Y

Default R/O's For This Client Are Service/Body/QuickLube (S/B/Q): S

Default Minimum Miles Between Maintenance Service: 5000

Cancel Save

1. Click **Miscellaneous Parameters**. The Miscellaneous Parameters screen appears.
2. Indicate if you use Autosoft Accounting. Type **Y** for yes or **N** for no.
3. Click to select **Shop Supplies** or **Hazardous Waste** to indicate which item you will be charging. The remaining fields in this section will determine how the shop supplies or hazardous waste will be calculated.
4. Indicate how shop supplies or hazardous waste should be calculated for service repairs and body shop repairs. You can set the charge as a percentage of the total labor or total repair or you can set a flat rate for the shop supplies/hazardous waste.

Use the first field to indicate if the shop supplies/hazardous waste should be calculated. Type **L** for labor, **T** for total, or **N** for none.

If you type **T** or **L**, specify the percentage you want to use for the charge. Use the **Max** field to enter the maximum charge for shop supplies/hazardous waste. The shop supplies/hazardous waste amount will be the specified percentage of the total labor or total charge. However, the charge will never be above the maximum charge set.

If you leave the first field blank, use the **Min** field to specify the flat charge for the repair.

5. Indicate if the shop supplies/hazardous waste should be applied to internal repairs and service contracts. Type **Y** for yes or **N** for no.

6. Use the **R/O Print** lines 1-9, 11-14, and 16-17 to specify how you want information to print in the system and on the repair orders. Type **Y** for yes or **N** for no accordingly.
7. Use the **Maximum Number Of Conditions To Print On Hard Copy** field (**R/O Print** line 10) to specify the maximum number of conditions (up to 4) you want to print on the hard copy.
8. Use the **Require Promise Time on R/O At Open** field to indicate if promised time is required. Type **Y** for yes or **N** for no. If this parameter is set to **Y** for yes, the system will prompt the user that promised time is required if the user attempts to advance past the Start R/O screen without adding promised time.
9. The **Allow Modification of Open/Close Dates on RO** parameter allows you to restrict users from editing the RO open and close dates. Type **Y** for yes to allow edits or **N** for no to restrict them.
10. Use the **Copy Counts** section to specify the number of copies you want to print for each copy type.
11. Use the **Miscellaneous** section to determine how various features in the system will work. Type **Y** for yes or **N** for no accordingly.
12. For **Default Manufacturer Warranty Repairs Prompt**, select the manufacturer you want to set as the default for warranty repairs. The list only displays the manufacturers that have a **Y** set in the Download field in the warranty parameters.
13. Use the **Default R/O's For This Client Are Service/Body/QuickLube** field to indicate the default R/O type for this workstation. Type **S** for service, **B** for body shop, or **Q** for quick lube. The R/O type specified will default as the R/O type of the Start Repair Order screen and can be edited when creating a repair order.
14. Use the **Default Minimum Miles Between Maintenance** field to specify the minimum number of days you want to go between oil changes. The system uses this mileage to calculate the next service mileage that will print on the oil change sticker. The default entry is 5000 miles
15. Click **Save** to save the information. The system returns you to the System Setup menu.

Setting Up ERO on the Workstation

Use the **Setup “ERO” On This Client** button to set up the ERO program on the workstation. The ERO allows you to electronically dispatch repairs to technicians. The technicians then use the ERO program to log repairs on and off as they work on the repairs. The system tracks the time and time units it takes to complete each repair. This setup needs to be run on all workstations that need access to the ERO.

1. Click **Setup “ERO” On This Client**.
2. Click **OK** when prompted to verify you want to set up the application.
3. An **ERO** icon will appear on the workstation’s desktop.

GOG/Sublet Pricing

Use this button to open the R/O Lubricant Description & Pricing Defaults screen to enter information pertaining to supply or disposal fees required for service. If the Parts Department restricts the Service Department from making changes on this screen, you can only edit the first line. The remaining four lines can only be accessed from the Parts Inventory module. The item on the first line will post to a separate inventory, cost, and sale account.

R/O Lubricant Description & Pricing Defaults (ABC Motors)

R/O Lubricant Description & Pricing Defaults

The First Item will Post to a Separate Inventory, Cost, and Sale Account.

Item	Inventory	Cost Each	Sale Each	Sale Total
Waste Disposal	99	1.95		3.00
ENGINE OIL UP TO 6QT	101	.97	1.75	
TRANSMISSION FLUID	320	1.10	2.95	.00
GEAR LUBE	121	.75	1.12	.00
	0	.00	.00	.00

Markup For Sublet Sale Customer Pay: 25.00%
 Warranty: 10.00%
 Internal: .00%

Cancel Save

1. Click **GOG/Sublet Pricing**. The R/O Lubricant Description & Pricing Defaults screen appears.
2. In **Item**, type the item name.
3. In **Inventory**, type the quantity in stock. The quantities entered represent how an item is dispensed or sold, and it may not match how the item is purchased. For example, bulk motor oil is purchased by the gallon but dispensed and billed to the customer by the quart.
4. In **Cost Each**, type the cost per unit for the item.
5. Type the sale amount in the field that corresponds with how you want to charge for the item.
 - If you want to *charge per unit*, type the selling price per unit in the **Sale Each** field. If you are entering a value in this field, the **Sale Total** field *must* be blank.
 - If you want to *charge a flat rate* regardless of the quantity sold, type the flat rate in the **Sale Total** field. If you are entering a value in this field, the **Sale Each** field *must* be blank.
6. If the **Markup For Sublet Sale** fields are available for editing, type the default markup percentage for customer pay, warranty, and internal.
7. Click **Save** to save the information entered. The system will return you to the System Setup menu.

Tax Rates/Cost Codes

Use this button to open the Tax Rate/Cost Code screen to set default sales tax rates, labor defaults, and cost codes. The system uses the information on this screen to automatically calculate sales tax and other tax as repair orders are generated.

Tax Rates/Cost Codes (ABC Motors)

Customer Pay Taxes		Warranty Taxes		Internal Taxes	
Sales	Other	Sales	Other	Sales	Other
Labor: 7.000	6.000	Labor: 7.000	6.000	Labor: 7.000	6.000
Parts: 7.000	6.000	Parts: 7.000	6.000	Parts: 7.000	6.000
Lubricants: 7.000	6.000	Lubricants: 7.000	6.000	Lubricants: 7.000	6.000
Sublet: 7.000	6.000	Sublet: 7.000	6.000	Sublet: 7.000	6.000
Deductible: 7.000	6.000				

Tax Parameters

Service Shop Supplies/Waste Disposal Taxed: Y

Body Shop Supplies/Waste Disposal Taxed: Y

Customer Discounts Taxed: Y

Cost Codes

1: B
2: L
3: A
4: C
5: K
6: H
7: 0
8: R
9: S
0: E

Cost Codes are Alpha Characters that print on documents in place of the actual cost numbers.

Labor Defaults

Labor Units Per Hour: 10

Minimum Dispatch Time Per Unit (Minutes): 3

Default Customer Pay Labor Tier To Use: A

Cancel Save

1. Click **Tax Rates/Cost Codes**. The Tax Rates/Cost Codes screen appears.
2. Under **Customer Pay Taxes**, **Warranty Taxes**, and **Internal Taxes**, type the sales tax rates for labor, parts, lubricants, sublet, and warranty deductible. Use the **Other** field to specify an additional tax that may apply to each item. When generating the repair order, you can specify which tax should be applied to the service.
3. Use the **Tax Parameters** section to indicate if tax should be applied to service supplies/waste disposal, body shop supplies/waste disposal, and customer discounts. Type **Y** for yes or **N** for no. If you type **Y** for customer discounts, the system applies the sales tax amount even if the customer owes nothing for the repair.
4. Under **Cost Codes**, type up to ten different letters to correspond with the numbers. Cost numerical data will print as alpha codes on documents instead of the actual amount. Be sure not to repeat letters.
5. In **Labor Units Per Hour**, type the number of units charged per hour. This is usually 10 (6 minutes per unit), but it may also be 6 (10 minutes per unit).
6. In **Minimum Dispatch Time**, type the minimum minutes that must be logged in the dispatcher in order for the log on to count. The minimum can be from 1 to 9 minutes. The default value is 3. If the technician logs off the repair before the minimum time is reached, the system will cancel the log on. This option will apply to whichever dispatcher you decide to use (the traditional dispatcher or the ERO dispatcher).
7. In **Default Customer Pay Labor Tier To Use**, type the letter for the labor rate that should be used for customer pay (A through J). Labor rates are defined in System Setup under Labor Rates. (See page 1:10 for information about labor rates.)
8. Click **Save** to save the information. The system returns you to the System Setup menu.

Warranty Parameters

This button advances you to the Warranty Parameters menu. You use this menu to set warranty parameters for various manufacturer interfaces. The warranty parameters must be set before using each interface.

Warranty Parameters (ABC Motors)	
Warranty Parameters	
Chrysler Warranty Parameters	KIA Warranty Parameters
Ford Warranty Parameters	Mazda Warranty Parameters
GM Warranty Parameters	Mitsubishi Warranty Parameters
Honda Warranty Parameters	Subaru Warranty Parameters
Hyundai Warranty Parameters	VW/Audi Warranty Parameters
Exit	

Chrysler Warranty Parameters

Use this button to set warranty parameters for Chrysler. For instructions on setting the warranty parameters, refer to the Autosoft *DaimlerChrysler Warranty Repairs* manual. You can download a copy of the manual at <http://download.Autosoft-asi.com/instructions/Chr/ChryslerWarranty.pdf>.

Ford Warranty Parameters

Use this button to set warranty parameters for Ford. For instructions on setting the warranty parameters, refer to the Autosoft *Ford Warranty* manual. You can download a copy of the manual at <http://download.Autosoft-asi.com/instructions/For/FordWarranty.pdf>.

GM Warranty Parameters

Use this button to set warranty parameters for General Motors. For instructions on setting the warranty parameters, refer to the Autosoft *GM Global Warranty Management* manual. You can download a copy of the manual at <http://download.Autosoft-asi.com/Instructions/GM/GMGWM.pdf>.

Honda Warranty Parameters

Use this button to set warranty parameters for Honda. For instructions on setting the warranty parameters, refer to the Autosoft *Honda Warranty* manual. You can download a copy of the manual at <http://download.Autosoft-asi.com/instructions/hon/HondaWarranty.pdf>.

Hyundai Warranty Parameters

Use this button to set warranty parameters for Hyundai. For instructions on setting the Hyundai warranty parameters, refer to the Autosoft *Hyundai Warranty* manual. You can download a copy of the manual at <http://download.Autosoft-asi.com/Instructions/Hyu/HyuWarranty.pdf>.

Kia Warranty Parameters

Use this button to set warranty parameters for Kia. For instructions on setting the Kia warranty parameters, refer to the Autosoft *Kia Warranty* manual. You can download a copy of the manual at <http://download.Autosoft-asi.com/Instructions/Kia/KiaWarranty.pdf>.

Mazda Warranty Parameters

Use this button to set warranty parameters for Mazda. For instructions on setting the Mazda warranty parameters, refer to the Autosoft *Mazda Warranty Repairs* manual. You can download a copy of the manual at <http://download.Autosoft-asi.com/Instructions/Maz/MazdaWarranty.pdf>.

Mitsubishi Warranty Parameters

Use this button to set warranty parameters for Mitsubishi. For instructions on setting the Mitsubishi warranty parameters, refer to the Autosoft *Mitsubishi Warranty Repairs* manual. You can download a copy of the manual at <http://download.Autosoft-asi.com/Instructions/Mit/MITWarranty.pdf>.

Subaru Warranty Parameters

Use this button to set warranty parameters for Subaru. For instructions on setting the Subaru warranty parameters, refer to the Autosoft *Subaru Warranty* manual. You can download a copy of the manual at <http://download.Autosoft-asi.com/Instructions/Sub/SubaruWarranty.pdf>.

VW/Audi Warranty Parameters

Use this button to set warranty parameters for Volkswagen/Audi. For instructions on setting the warranty parameters, refer to the Autosoft *Volkswagen/Audi Warranty Repairs* manual. You can download a copy of the manual at <http://download.Autosoft-asi.com/instructions/Vok/VokWarranty.pdf>.

Special Customer Parameters

Use this button to open the Special Customer Parameters screen to set parameters for customers eligible for special discounts and pricing. The customer's vehicle and account receivable control must be in the system before you can enter special customer parameters. If Accounting restricts Service from defining charge customers, you will not be able to access this screen. The system will display a message indicating Accounting has restricted access.

Special Customer Parameters (ABC Motors)

39126476 STEVE SHITH

Last Eight: 39126476

Name: STEVE SHITH

Acct. A/R Control: SMIT55

Counter Parts Credit Limit:

Taxable (Y/N):

Service Credit Limit: 1000.00

Taxable (Y/N):

Eligible For Parts WINS/Comp (Fleet-Gov-Etc)(F/G/?): (N)

WINS/Comp Code:

Price Level Matrix Code for Parts (A0 thru Z4): (A1)

Print Special Customer Parameters List

Special Discounts

Parts: 5.00%

Labor: 5.00%

Default Discount Code:

Exit Service Customers A/R List Delete Save

1. Click **Special Customer Parameters**. The Special Customer Parameters screen appears.
2. Type the last eight digits of the vehicle's VIN. You can search for a customer by clicking **Service Customers**. Type the first three letters of the customer's last name, the last four digits of the customer's phone number, or the customer's license plate number. A list of the customers who meet the criteria you entered appears. Click the customer you want to select.

Tip: You can build a list of customers to work with on this screen, and they will display in the list window on the right side of the screen. When you click **Service Customers** to search for customers, you will see check boxes at the beginning of each line. You use these boxes to select the customers you want to add to your "working" list. When you select these boxes, the **Close** button becomes a **Done** button. When you click **Done**, all the selected customers are listed in the window on the right side of the screen. You can then select the customers from this list and edit their settings as needed. This prevents you from having to continually use the Service Customers button to search for customers.

3. The customer's name and account number automatically fill in. If you need to select a different account number for the customer, click **A/R List**. Press the letter on the keyboard that corresponds to the first letter of the customer's last name. Click the account you want to assign this customer. The accounting AR control must be set up in the Accounting module before you can apply it to a customer record on this screen.
4. The **Counter Parts Credit Limit** field displays the customer's credit limit for counter parts. This information is for reference and cannot be edited on this screen.

5. In **Service Credit Limit**, type the customer's credit limit for service work, and indicate if the amount is taxable by typing **Y** for yes or **N** for no in the **Taxable** field.
6. If the customer is eligible for WINS or compensation, indicate if the customer is eligible for the discount. Type **Y** for yes or **N** for no. Use the **WINS/Comp Code** field to enter the Fleet or customer comp code used to report the wholesale transactions for compensation from the manufacturer.
7. Type the letter and number that correspond to the Price Level Matrix that will be used for this customer. These levels are created in the Parts Inventory System Setup.
8. Under **Special Discounts**, type the discount percentage for parts and labor and the discount code for this customer.

Tip: If you apply a discount to a customer's file, the system will display a reminder about the discount on the Review & Print screen when generating a repair order. The system will automatically apply the discount when you open the Discounts screen. (See Chapter 5 Repair Orders for complete information about generating repair orders and applying discounts.)

9. Click **Save** to save the information.
10. Click **Exit** to return to the System Setup menu.

Quick Complaints

Use this button to open the Quick Complaints screen. The Quick Complaints screen is used to enter up to 20 common customer complaints. These complaints are available in a list on the Enter Conditions screen when creating repair order. Instead of having to type the complaint, you can select the complaint from the list, and it appears on the repair order. This helps speed up the process of creating repair orders because you do not have to repeatedly type the same information.

The screenshot shows a window titled "Quick Complaints (ABC Motors)" with a sub-header "Quick Complaints". Inside the window, there are 20 numbered input fields arranged in two columns. The first seven fields contain pre-filled text: 1: CUSTOMER REQUESTS LUBE OIL FILTER, 2: BRAKES PULSATE, 3: CUSTOMER REQUESTS ALIGNMENT, 4: CUSTOMER REQUESTS TUNE UP, 5: CUSTOMER STATE CHECK ENGINE LIGHT ON, 6: UPSALE DECLINED, and 7: SERVICE REMINDER. Fields 8 through 10 are empty. Fields 11 through 20 are also empty. At the bottom of the window, there are two buttons: "Cancel" and "Save".

Adding a Quick Complaint

1. Click **Quick Complaint**. The Quick Complaint screen appears.
2. In each field, type the description of the customer complaint you want to add. Each line holds up to 40 characters including spaces.
3. Press TAB or ENTER to advance to the next field.
4. Click **Save** to save the information. The system returns you to the System Setup menu.

Editing a Quick Complaint

1. Click **Quick Complaint**.
2. Click in a field, and edit the description as needed. If you need to delete a complaint, simply delete the text in the field.
3. Click **Save** to save the changes. The system returns you to the System Setup menu.

Default Cities

Use this button to open the Default Cities screen to enter cities, states, ZIP Codes, and area codes that will automatically fill in when starting a repair order for a new customer on the Start Repair Order screen. The user will be able to select the city from a list, and the state, ZIP Code, and area codes will automatically fill in for the selected city. This helps speed up the process of entering a new customer's information.

The screenshot shows a window titled "Default Cities (ABC Motors)" with a sub-header "Default Cities". Below the header is a question: "Should The First City On This List Always Default For New Customers (Y/N):" with a dropdown menu set to "N". Below this is a table with two columns of city data. Each row contains a number, a city name, a state abbreviation, a ZIP code, and an area code. At the bottom of the window are "Cancel" and "Save" buttons.

	City	ST	ZIP	A/C		City	ST	ZIP	A/C
1:	WEST MIDDLESEX	PA	16159	724	11:	SHARON	PA	16146	724
2:	BROOKFIELD	OH	44403	330	12:	SHARPSVILLE	PA	15211	724
3:	FARRELL	PA	16121	724	13:	WHEATLAND	PA	16161	724
4:	GREENVILLE	PA	16125	724	14:	YOUNGSTOWN	OH	44505	330
5:	GROVE CITY	PA	16127	724	15:	YOUNGSTOWN	OH	44504	330
6:	HERITAGE	PA	16148	724	16:				
7:	HUBBARD	OH	44425	330	17:				
8:	LATROBE	PA	15139	724	18:				
9:	MASURY	OH	44438	330	19:				
10:	NILES	OH	44446	330	20:				

Adding Cities

1. Click **Default Cities**. The Default Cities screen appears.
2. Use the **Should The First City on This List Always Default for New Customers** field to determine if the information on the first line will automatically fill in on the repair order for all new customers. Type **Y** for yes or **N** for no.
3. In **City**, type the city name.
4. In **St**, type the official two-character abbreviation for the state where the city is located.
5. In **Zip**, type the city's ZIP Code/Postal Code.
6. In **A/C**, type the area code for the city.
7. Click **Save** to save the information. The system returns you to the System Setup menu.

Editing Cities

1. Click **Default Cities**.
2. Click in a field, and edit the information as needed. If you need to delete an entry, simply delete the text in the fields.
3. Click **Save** to save the changes. The system returns you to the System Setup menu.

Default Makes/Models

Use this button to open the Default Makes & Models screen to enter the makes and models that will appear in the Default Makes search list on the Start Repair Order screen when starting a repair order for a new customer. The user can click a make and model in the list, and the information will automatically fill in the appropriate field.

The screenshot shows a window titled "Default Makes & Models (ABC Motors)". It contains a grid of 7 columns and 18 rows. Each column has a "Make" header and a "Model" header. The "Make" columns contain: CHEVROLET, CHEVROLET, BUICK, CADILLAC, PONTIAC, GMC, and OLDSMOBILE. The "Model" columns contain: AVALANCHE, ASTRO VAN, CENTURY, CTS, AZTEK, CANYON, ACHIEVA; AVEO, EXPRESS, LACROSSE, DEVILLE, BONNEVILLE, ENVOY, ALERO; BLAZER, VENTURE, LESABRE, ESCALADE, GRAND AM, SAFARI, BRAVADA; CAVALIER, PARK AVE, EXT, GRAND PRIX, SAVANA, SILHOUETTE; COLORADO, RAINIER, GTO, SIERRA; CORVETTE, REGAL, SEVILLE, MONTANA, SONOMA; EQUINOX, RENDEZVOUS, SRX, SUNFIRE, YUKON; IMPALA, SKYLARK, XLR, VIBE; MONTECARLO, TERRAZA; S-10; SILVERADO; SUBURBAN; TAHO; TRACKER; TRAILBLAZE. At the bottom of the window are "Cancel" and "Save" buttons.

Adding Makes and Models

1. Click **Default Makes/ Models**. The Default Makes & Models screen appears.
2. Use the **Make** fields to enter up to seven vehicle makes
3. Use the **Model** fields to enter up to 17 models for each make.
4. Click **Save** to save the information entered. The system returns you to the System Setup menu.

Editing Entries

1. Click **Default Makes/Models**.
2. Click in a field, and edit the information as needed.
3. Click **Save** to save the changes. The system returns you to the System Setup menu.

Default Sublet

Use this button to open the Default Sublet Entries screen to enter sublet codes. These entries are available in a list on the Lubricant/Sublet screen when creating the repair order.

Adding a New Code

1. Click **Default Sublet**. The Default Sublet Entries screen appears.
2. In **Sublet Code**, type the sublet code. The code can be up to four characters long. The code should be unique to the service or the vendor name.
3. In **Vendor**, type the vendor name. The vendor name can be up to 20 characters long.
4. The **Labor Operation** field applies to DaimlerChrysler and Ford dealers only. Type the labor operation number in this field.
5. Use the **Normally Taxable** field to indicate if the service is taxable. Type **Y** for yes or **N** for no.
6. In **Tax Rate**, type the tax rate for the sublet as a percentage. You only need to enter a tax rate in this field if the tax rate for the sublet is different from the sublet tax entered as the default rate on the Tax Rates/Cost Codes screen. If the tax rate is not always a set amount, you can leave this field blank and enter the tax rate when generating the repair order.
7. In **Sublet Cost**, type the cost amount of service.
8. In **Sublet Sale**, type the sale amount of service.
9. If you want the sale amount to post to an account *other than the sublet account*, type the account number in **Account for Sale**. If you want the sale amount to post to the Sublet account, leave this field blank.
10. If you want the cost to post to an account *other than the sublet account*, type the account number in **Account for Cost**. If you want the cost to post to the Sublet account, leave this field blank.

11. If you want the inventory to post to an account *other than the Sublet* account, type the account number in **Account for Inventory**. If you want the inventory to post to the Sublet account, leave this field blank.
12. Click **Save** to save the information. The code you entered appears in the list on the right side of the screen.
13. Continue to enter sublet codes as needed.
14. Click **Exit** to return to the System Setup menu.

Editing an Existing Code

1. In **Sublet Code**, type the code you want to edit, or click the code in the list on the right side of the screen.
2. The information entered for this code is displayed in each field.
3. Click in a field, and edit the information as needed.
4. Click **Save** to save the changes.

Deleting a Code

1. Select the code.
2. Click **Delete**.
3. Click **OK** when prompted to verify you want to delete the record.

Printing the Sublet List

The printout lists all the sublet codes. For each code, the printout lists the labor operation, cost and sale amounts, and the Sale, Cost, and Inventory accounts assigned to each code.

1. Click **Print**.
2. When prompted, select your print criteria.

Define Discounts

Use this button to open the Define Discount Codes screen to enter discount codes. The discounts are available in a list on the Close Parts screen when creating a repair order. You can create two types of discounts. You can create a discount to apply to the entire repair order or to a specific repair on a repair order.

The screenshot shows the 'Define Discount Codes' window for 'ABC Motors'. The main form contains the following fields and sections:

- Discount Code:** TIRE
- Description:** FREE TIRE ROTATION
- Discount Total R/O Customer Pay:**
 - Labor Discounts:** Rate: 0.00%, Amount: .00
 - Parts Discounts:** Rate: 0.00%, Amount: .00
- Discount Repair:**
 - Discounted Repair To A Flat Charge Of: .01
 - Discount Repair By: [empty]
 - Labor Discount Ratio: 100.00%
 - Parts Discount Ratio: .00%
 - Dealer Pays Customer Taxes (Y/N): [empty]
- Include Sublet And Shop Supplies With Labor Discount (Y/N):** N
- Include GOG With Parts Discount (Y/N):** N
- Discount G/L For Labor: [empty]
- Discount G/L For Parts: [empty]
- Dealer Paid Tax G/L For Expense: [empty]

On the right side, there are two lists:

- Total R/O:**
 - BPOL BODY SHOP POLICY
 - NCPO NEW CAR POLICY
 - UCPO USED CAR POLICY
- By Repair:**
 - COUP COUPON
 - NEW NEW CAR ADV LETTER
 - SLOF SENIOR CITIZEN LOF

At the bottom, there are buttons for Exit, Print, Delete, Clear, and Save.

Adding a Discount Code that Discounts the Entire Repair Order

1. In **Discount Code**, type the discount code. The code can be up to four alphanumeric characters long.
2. Use the **Description** field to type the description of the discount code. The description can be up to 35 characters long.
3. Use the **Discount Total R/O Customer Pay** section to specify if the labor and parts discount is a percentage or flat amount.
 - If the discount is a percentage of the labor or parts amount, type the discount percentage in **Labor Discount Rate** and/or **Parts Discount Rate**.
 - If the labor or parts discount is a flat discount, type the discount amount in **Labor Discount Amount** and/or **Parts Discount Amount**. If you enter .01 as the labor or parts discount amount in the **Labor Discount Amount** or **Parts Discount Amount** field, you can manually edit the discount amount when applying the discount.
4. Use the **Include Sublet And Shop Supplies With Labor Discount** field to indicate if sublet and shop supplies should be discounted as part of the labor discount. Type **Y** for yes or **N** for no.
5. Use the **Include GOG With Parts Discount** field to indicate if gas, oil, and grease should be discounted as part of the parts discount. Type **Y** for yes or **N** for no.

6. In **Discount G/L for Labor** and **Discount G/L for Parts**, type the general ledger account used to post labor discounts and parts discounts.
7. Click **Save** to save the information. The code is added to the **Total R/O** list on the right.

Adding a Discount Code that Discounts a Single Repair

1. In **Discount Code**, type the discount code.
2. Use the **Description** field to type the description of the discount code.
3. Use the **Discount Repair** section to specify the repair charge and the distribution of the discount.
 - You have four options for the **Discounted Repair To A Flat Charge Of** field:
 - a. Type the maximum charge for a specific repair.
 - b. Type **.01** to discount the selected repair 100% (free).
 - c. Type **.00** if you want to be able to specify the discount percentage for labor and parts when applying the discount to a repair.
 - d. Type **.05** if you want to be able to specify a specific dollar amount when applying the discount to a repair.
 - If you want to discount a repair by a set dollar amount, type the dollar amount in **Discount Repair By**. This is for discounts such as coupons that require a specific dollar amount off the repair. If you enter a value in the **Discounted Repair To A Flat Charge Of** field, this field must be blank.
 - Use the **Labor Discount Ratio** field to specify the percentage of the discounted repair total that the labor discount makes up. This percentage plus the percentage for parts must equal 100%. For example, if the discount will be \$10 and the labor ratio is 50%, \$5 will be applied to the labor discount.
 - Use **Parts Discount Ratio** field to specify the percentage of the discounted repair total that the parts discount makes up. This percentage plus the percentage for labor must equal 100%. For example, if the discount will be \$10 and the parts ratio is 50%, \$5 will be applied to the parts discount.
 - Use the **Dealer Pays Customer Taxes** field to indicate if the dealer will pay the sales tax for this discount. Type **Y** for yes or **N** for no. Shop Supplies will not be charged to customer pay repairs with discounts flagged for the dealer to pay sales tax. If you type **Y**, use the **Dealer Paid Tax G/L For Expense** field to specify the general ledger account number for this tax.
4. Use the **Include Sublet And Shop Supplies With Labor Discount** field to indicate if the sublet and shop supplies should be discounted as part of the labor discount. Type **Y** for yes or **N** for no.
5. Use the **Include GOG With Parts Discount** field to indicate if gas, oil, and grease should be discounted as part of the parts discount. Type **Y** for yes or **N** for no.

6. In **Discount G/L for Labor** and **Discount G/L for Parts**, type the general ledger account used to post labor discounts and parts discounts.
7. Click **Save** to save the information. The code is added to the **By Repair** list on the right.
8. When you are finished entering codes, click **Exit** to return to the System Setup menu.

Editing an Existing Code

1. In **Discount Code**, type the code you want to edit, or click on the code in the list on the right side of the screen.
2. The information entered for this code fills in each field. Edit the information as needed.
3. Click **Save** to save the changes.

Deleting a Code

1. Select the code.
2. Click **Delete**.
3. Click **OK** when prompted to verify you want to delete the record.

Printing the Discount List

To print a list of the discount codes, click **Print**, and select your print criteria. For each code, the printout lists the discount code, description, and general ledger accounts for code.

Passwords

You can set passwords for the Service Writing module as needed. The password utility is available on the Data Utilities menu. Passwords help regulate who can enter certain areas of the program. If an area has been assigned a password, users will be prompted to enter the password when they choose to enter the area from the Service Writing menu. The password *must* be entered to open that area of the program.

Passwords are required for deleting customer history and deleting repair orders from history. This security feature ensures only authorized personnel can delete these files. Therefore, even if you do not want to set passwords for the system, you must set passwords for these features.

Important: For security purposes, this feature requires assistance from Autosoft. Call support at (800) 473-4630.

Enter Service Menu Operations

This option allows you to create menu codes. Menu codes save time by allowing you to enter all information for more popular service conditions. For example, you could create a menu code for a lube, oil, and filter, and call it LOF. When you are quoting or scheduling the service, all you have to do is select the menu code LOF, and all of the information for this service is automatically pulled.

The menu items are created by entering information on three screens. The first screen is used to enter service information. The second screen is used to enter part information, and the third screen is used to enter comments that you want to print on the hard copy of the repair order. The following sections walk you through entering information on each of the three screens.

Code	Description
2WA	2 WHEEL ALIGNMENT
4WA	4 WHEEL ALIGNMENT
BATT	CHECK BATTERY
BI	BRAKE INSPECTION
BULB	REPLACE BULB
CABIN	REPLACE CABIN AIR FILTER
CEL	CHECK ENGINE LIGHT
CF	COOLANT FLUSH
EM	EMISSIONS TEST
FB	FRONT BRAKE INSPECTION / R...
FSF	FUEL SYSTEM FLUSH
FUEL	REPLACE FUEL FILTER
INSPE	INSPECT BELTS & HOSES
LOF	CONVENTIONAL LUBE, OIL & FIL...
LOFD	DIESEL LUBE, OIL & FILTER
LOFS	SYNTHETIC LUBE, OIL & FILTER
MPI	MULTI POINT INSPECTION
PDI	PRE DELIVERY INSPECTION
PSF	POWER STEERING FLUSH
RB	REAR BRAKE INSPECTION / RE...
ROT	ROTATE TIRES
SC	SUSPENSION CONCERN
SI	STATE INSPECTION
TC	TRANSMISSION CONCERN
TF	TRANSMISSION FLUSH
TUNE	TUNE UP
WRKS	THE WORKS-OIL CHANGE,TIRE ...

Creating a New Menu Code

The first screen you will use to enter menu codes is the Enter Service Menu Op's screen. This is where you enter service information. The information entered on this screen determines the labor rates and labor information pulled to quotes or repair orders.

1. Click **Enter Service Menu Operations**. The Enter Service Menu Op's screen appears.
2. In **Menu**, type a code for the service condition. This field holds up to five alphanumeric characters. Assign each menu item a word or abbreviation that easily associates the menu with the service. For example, Lube, Oil, and Filter can be coded as LOF.
3. Use the **Complaint Lines** to type the complaint that would normally accompany the service. You can also use these fields to enter a description of the service. Each line holds up to 52 alphanumeric characters. The text prints exactly as it appears on each line, so you may need to press ENTER to force line breaks to ensure your text prints properly.
4. In **Labor Units**, type the labor units required for the repair. Do not enter decimal points. For example, 1.0 should be entered as 10.
5. In **Labor Rate**, type the code (A through J) that corresponds to the labor rate you want to use for the menu item for service contract, body shop, and quick lube repairs. The labor rates were entered under **Labor Rates** in the Service System Setup.

6. Use the **Cust/Warr/Int/QkLube** field to indicate the repair type for the service. Type **C** for customer pay, **W** for warranty, **I** for internal, **N** for new car road ready, or **Q** for quick lube. You can leave this field blank and fill it in when adding the repair to the repair order.
7. Use the **Update List Price on Parts** field to indicate if you want to automatically update the service price based on the price tape price. Type **Y** for yes or **N** for no. If you type **Y**, the system will automatically change the service price for parts to match the price tape price when the Update Parts Pricing report finds discrepancies in pricing.
8. The **Exclude Shop Supplies** box allows you to exclude shop supplies for this code. Click to select the box. A check mark will appear in the box. Click again to clear the box. When adding repairs to an R/O, shop supplies will not be added to repairs that use this code if this box is selected.
9. Use the **Calculate S/S With Quote** field to indicate if you want the shop supplies to be included on a customer quote for this menu code. Type **Y** for yes or **N** for no. This *does not* keep shop supplies from pulling to a repair order when the menu code is used.
10. If the service requires special pricing, type the price in **Special Price**.
11. If a specific discount code applies to the service, type the code in **Discount Code**. You can search for a discount code by clicking **Discount Codes**. A list of all the discount codes entered in the system appears. Click the discount you want to select.
12. Use the **Repair Is NON-Taxable** field to indicate if the repair is non-taxable. Type **Y** for yes or **N** for no.
13. Use the **Repair Net G/L Account** field to specify the general ledger account number for the repair. The charges for repairs using this code will update to this general ledger account.
14. In **Commission**, type the advisor's commission percentage or dollar amount. Type the percentage in the **.00%** field or the dollar amount in the **\$** field.
15. In **Technician**, type the ID number for the technician who will perform the service. This is an optional entry. Technicians can be added or edited when the repair order is being generated.
16. In **Labor Operation**, type the labor operation code if one is needed for the repair. Your manufacturer supplies the applicable Labor Operation codes.
17. In **Customer Complaint Code**, type the default complaint code for the service if one is needed. The Customer Complaint Code must match the entry in the Menu field. This ensures third-party vendors can identify the code. If you do not fill in the Customer Complaint Code, the code will not transfer to third-party vendors.
18. In **Trouble Code**, type the default trouble/fail code for the service if one is needed.
19. In **Default Next Service**, type a description of the next service that may be needed.
20. In **Parts Source**, type the parts inventory source number for the inventory that will be used for the menu item.

21. Use the **Print Menu Customer Presentation** parameter to indicate if you want to print the customer presentation for the menu code on the RO. Type **Y** for yes or **N** for no. If you type **Y** for yes, the customer presentation for the menu code will print on the RO along with the Service Writer's story when you add the menu code to an RO. You will not see this information on any of the screens. It will only display on the RO. If you type **N** for no, only the Service Writer's story will print on the RO for the repair, but the customer presentation will print when you use the menu code to add an upsale to the RO
22. Click **Next** to advance to the Service Menu Parts screen or **Save** to save the menu code without adding any additional information.

Entering Service Menu Parts

The Service Menu Parts screen is used to enter any parts needed for a service repair entered as a menu item. You can enter up to 18 parts and specify special parts pricing as needed.

LN	Part	Qty	Desc.	Cost	Price	Service	Intern	Warr
01								
02								
03								
04								
05								
06								
07								
08								
09								
10								
11								
12								
13								
14								
15								
16								
17								
18								

"Click" Line From List To Add/Edit

LN	Part	Qty	Desc.	Cost	Price	Service	Internal	Warranty
01								

Back Remove Line Save Next

1. In **LN**, type the line number you are adding, or click the line number.
2. Type the part number, and press ENTER. The part description automatically fills in the **Desc** field.

LN	Part	Qty	Desc.
01	12339994	1	OIL FLTR

3. Use the **Qty** field to indicate the quantity of the part needed for the repair. This field defaults to 1 but may be edited as needed.
4. The blue **Cost** and **Price** fields are only used if there is a special price for the parts used in this service. Otherwise, the normal cost for customer, internal, and warranty repairs (displayed in the tan fields to the right) will apply.

Cost	Price	Service	Internal	Warranty
3.42		6.84	.00	3.42

5. Press ENTER to advance through the fields and to file the part. It is added to the list.
6. Continue to enter parts as needed. When you are finished adding parts, click **Next** to advance to the Customer Presentation screen **Save** to save the menu code without adding any additional information.

Editing a Part Line

If you notice an error in a part line, you can edit it as needed.

1. Type the line number for the part, or click the part in the list you want to select. The part information is displayed in the fields at the bottom of the screen.

LN	Part	Qty	Desc.	Cost	Price	Service	Internal	Warranty
01	12339994	1	OIL FLTR	3.42		6.84	.00	3.42

2. Click in a field, and edit the information as needed.
3. Press ENTER to advance through the fields and to file the part line.
4. The part line will reflect the changes you made.

Removing a Part Line

You can delete part lines as needed. This removes the part from the menu item.

1. Type the line number for the part, or click the part in the list. The information for the part is displayed in the fields at the bottom of the screen.
2. Click **Remove Line**.
3. Click **OK** when prompted to verify you want to delete the record.

Entering Customer Presentation

The Customer Presentation screen allows you to enter suggestions or recommendations for service. This assists you with your upsales since it can be used to encourage customers to sign off on additional repairs that need to be completed while the vehicle is in for service. You can select to print any of the customer presentation text entered for any menu item on the hard copy of the repair order that you print from the Enter Conditions screen. (See Chapter 5 for more information.)

The screenshot shows a software window titled "Customer Presentation (ABC Motors)". At the top, a message box contains the text: "The 'Customer Presentation' will print on the R/O Hard Copy if a Menu of suggested repairs is entered on the Service History window." Below the message box is a text entry area with a label "Customer Presentation" and ten horizontal lines for input. At the bottom of the window are two buttons: "Back" and "Save".

1. Type information for the recommended service in the spaces provided. Each line holds up to 60 alphanumeric characters.
2. The text prints exactly as it appears on each line, so you may need to press ENTER to force line breaks to ensure your text prints properly.
3. When you are finished, click **Save**. The system takes you back to the first entry screen so you can add more menu items.
4. The menu item you entered will be added to the list on the right side of the screen.
5. Continue to enter menu items as needed by entering the information on each of the three screens. As you enter menu items, they are added to the list on the right side of the screen.

Editing Menu Items

Menu items can be edited as needed. This allows you to change information, add parts, or edit customer presentation text.

1. Type the menu code, or click the item in the list on the right side of the screen. The column headers in the list (**Code** and **Description**) allow you to sort the list. When you click one of the headers, the system sorts the list in descending order (numerically from 0 up and then alphabetically from A to Z). If you click the header again, the system sorts the list in ascending order (Alphabetically from Z to A and then numerically from the largest number down).
2. The service information is displayed on the screen.
3. Click in a field, and edit the information as needed.
4. Click **Next**.
5. On the Service Menu Parts screen, edit or add part information.
6. Click **Next**.
7. On the Customer Presentation screen, click in the line, and edit the text as needed.
8. Click **Save** to save the changes. The system returns you to the Enter Service Menu Op's screen.

Deleting Menu Items

1. Type the menu code, or click the item in the list on the right side of the screen.
2. Click **Delete**.
3. Click **OK** when prompted to verify you want to delete the record.
4. The menu item is removed from the list.

Printing the Menu Code List

You can print a list of menu codes for your reference. The printout lists all the menu codes, their descriptions, and the labor, parts, and totals for each code.

1. Click **Print Reference List**.
2. When prompted to verify your printer is ready, click to select **To Printer** to print the information or **To Screen** to view the information on your screen.
3. Once you select your print type, click **Print**.

Updating Parts Pricing

The Update Parts Pricing button allows you to update part pricing based on the current price tape. As part of the update, the system prints a list of changes for your reference. When prompted to verify your printer is ready, select your print criteria.

Finishing Up

Once you are finished entering the parameters, you are ready to begin using the Service Writing program. Remember, you can return to the setup menu and edit information as needed. Changes you make to the information in the setup only affect the repair orders that are created after you make the changes. Any repair orders created before you edit the setup information will still use the old setup information.

