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# **Table of Contents**

Introduction Autosoft FLEX DMS Service Writing	I:1
Understanding Menus	l:2
Understanding Entry Screens	l:2
Understanding Prompts	I:3
Using the Keyboard and Mouse	l:4
F1 Help and What's New?	I:5
Date and Time Prompt	I:5
Getting Ready	l:6
Chapter 1 System Setup	1:1
Trouble/Condition Codes	
Adding a New Code	1:2
Editing an Existing Code	1:3
Deleting a Code	1:4
Printing the List of Codes	1:4
Service Advisors/Writers	1:4
Adding a New Advisor/Writer	
Editing an Advisor's/Writer's Information	
Deleting an Advisor/Writer	1:6
Printing the Advisor/Writer List	1:6
Service Technicians	1:7
Adding a New Technician	1:7
Editing a Technician's Information	
Deleting a Technician	1:9
Printing the List of Technicians	1:9
Labor Rates	
Standard Labor Rates	1:10
Generate Flex Rate	1:11
Enter Flex Rate Without Scanning	
Print Generated Flex Rates	1:12
Miscellaneous Parameters	
Setting Up ERO on the Workstation	1:14
GOG/Sublet Pricing	
Tax Rates/Cost Codes	1:16
Warranty Parameters	1:17
Chrysler Warranty Parameters	1:17
Ford Warranty Parameters	
GM Warranty Parameters	
Honda Warranty Parameters	1:17
Hyundai Warranty Parameters	
Kia Warranty Parameters	
Mazda Warranty Parameters	
Mitsubishi Warranty Parameters	
Subaru Warranty Parameters	1:18

VW/Audi Warranty Parameters	1:18
Special Customer Parameters	1:19
Quick Complaints	1:21
Adding a Quick Complaint	1:21
Editing a Quick Complaint	1:21
Default Cities	1:22
Adding Cities	1:22
Editing Cities	1:22
Default Makes/Models	1:23
Adding Makes and Models	1:23
Editing Entries	1:23
Default Sublet	1:24
Adding a New Code	1:24
Editing an Existing Code	1:25
Deleting a Code	1:25
Printing the Sublet List	1:25
Define Discounts	1:26
Adding a Discount Code that Discounts the Entire Repair Order	1:26
Adding a Discount Code that Discounts a Single Repair	1:27
Editing an Existing Code	1:28
Deleting a Code	
Printing the Discount List	1:28
Passwords	
Enter Service Menu Operations	1:29
Creating a New Menu Code	1:29
Entering Service Menu Parts	1:31
Entering Customer Presentation	
Editing Menu Items	
Deleting Menu Items	1:34
Printing the Menu Code List	
Updating Parts Pricing	1:35
Finishing Up	1:35
Chapter 2 Customer Information	
Adding a New Customer	
Recalling a Customer's Information	
Editing a Customer's Information	
Deleting a Customer's Information	
Printing a Customer's Information	
Viewing a Customer's Service History	
Chapter 3 Service Quoting	
Setting up Service Quoting	
Creating a Quote	
Starting a Quote for an Existing Customer	
Starting a Quote for a New Customer	3:3

Adding Labor	3:5
Editing a Repair	3:7
Removing a Repair	3:7
Adding Parts	3:8
Removing Parts	3:9
Adding Sublet	3:10
Adding Shop Supplies/Hazardous Material	3:10
Removing a Shop Supplies/Hazardous Material	3:11
Adding Sublet	3:11
Removing a Sublet	3:12
Printing the Quote	3:13
Recalling a Quote	3:14
Deleting a Quote	3:14
Dumping the Quote to a Repair Order	3:15
Chapter 4 Schedule Xpress Scheduler	4:1
Accessing the Schedule Xpress Scheduler	4:1
Entering Setup Information	4:2
Scheduling Appointments	4:5
Selecting the Customer First	4:5
Selecting the Day First	4:8
Tagging Extra Time	4:10
Clearing Tagged Slots	4:10
Viewing the Schedule	4:11
Editing an Appointment	4:11
Viewing Appointment Details	4:12
Moving an Appointment	4:12
Removing an Appointment	4:12
Viewing Technician Availability	4:13
Viewing Daily Schedule Details	4:13
Moving Carry Over Appointments	4:15
Pulling the Prewrite to a Repair Order	4:16
Purging Prewrites	4:16
Chapter 5 Repair Orders	5:1
Understanding the Workflow	5:1
Generating Repair Orders	5:2
Viewing a Summary of the Repair Order	5:2
Start Repair Order	5:3
Starting a Repair Order for a New Customer	5:3
Starting a Repair Order for an Existing Customer	5:7
Using the Names Button	5:8
Starting a Repair Order for an Internal	5:9
Starting a Repair Order for a Customer with Prewrite Information	
Recalling a Repair Order	5:10
Voiding a Repair Order	5:11

Start Conditions	5:12
Adding Repairs	5:12
Editing a Repair	5:14
Removing a Repair	5:14
Adding Customer Presentation to a Repair Order	5:15
Printing the Hard Copy	5:15
Close Lubricants—Sublet	5:16
Adding Lubricants	5:16
Removing a Lubricant	5:17
Adding Sublet	5:17
Removing a Sublet	5:18
Close Service	5:19
Parts	5:22
Close Parts	5:23
Closing Parts	5:23
Adding Quick Lube Parts	5:24
Adding Body Shop Parts	5:25
Verifying Dirty Cores	5:26
Review & Print	5:27
Applying Discounts to Repair Orders	5:30
Utilities	5:32
Change R/O To Active	5:33
Enter R/O Status Code	5:33
Correct Data on Closed R/O's	5:34
Service Ordered Parts	5:35
Purge Stale Prewrites	5:36
Continuations	5:36
Customer History	5:37
Prewrites	5:37
Printing the Prewrite List	
Chapter 6 Electronic Repair Order Dispatching	6:1
Entering Setup Information	6:1
Technician Setup	6:1
ERO Setup	6:2
Minimum Dispatch Time	6:2
Dispatching Repair Orders	6:2
Dispatching from the Schedule Xpress Detail Screen	6:3
Dispatching from the Schedule Xpress Main Screen (R/O List)	6:4
ERO Dispatching from the Enter Conditions Screen	6:4
Removing Repairs	
Viewing all Dispatched Repairs	6:5
Using the ERO Program	6:6
Logging on to the ERO Program	6:7
Setting Up QwikLines	6:8

Logging on Repairs	6:9
Logging off Repairs	
Sending Parts Requests	
Viewing History	
Viewing Stats	
Minimizing the ERO	6:12
Switching Users	
Closing the ERO Program	6:13
Printing the Dispatcher Time Flags	6:13
Purging Stale Records	6:14
Chapter 7 Active R/O List	
Using the List Screen	7:1
Understanding the Status	7:2
Viewing the Repair Order	7:2
Printing the Repair order List	7:3
Chapter 8 Daily R/O Update	8:1
Selecting Print Criteria	8:1
List Closed R/O's	8:1
Daily Summary	8:2
Service Writer Summary	8:2
Daily Reports/Pre-writes	8:2
List Active R/O's	8:3
List Active W-R/O's	8:3
List All Open Repair Orders	8:3
List R/O's At 5 Days Or Older	8:3
Print Work In Process	8:3
Previous Daily Summaries	8:3
Print Pre-Writes	8:4
View Closed R/O List	8:4
Dispatcher Time Flags	8:4
Update Closed R/O's	8:4
Chapter 9 Repair Order History	9:1
Pulling the History Based on the Repair Order Number	9:1
Pulling the History Based on a Customer Search	9:2
Viewing the Time Flags	9:3
Viewing the Service History	9:3
Viewing the Complete Repair Order	9:3
Printing Copies of the Repair Order	9:4
Deleting a Repair Order	9:4
Viewing Recent Repair Orders	9:4
Chapter 10 Reports & Updates	10:1
Selecting Print Criteria	10:2
Service Time Summary Reports	10:2
Print Effective Rate Summary	10:3

Writer Time Summary	
Technician Time Summary	
Technician Time Report	
Writer Sales Report	
Writer 'Specials' Usage	
Writer Analysis	
Work In Process Worksheet	
Flagged Time	
Writer/Technician Statistics	
Technician Labor Stats	
Tech/Advisor Stats	
View Advisor/Writer Stats	
View Technician Stats	
Miscellaneous Service Reports	
Trouble/Condition Code & Menu Usage	
Warranty Labor Op Usage	
Print 'Come Back' Report	
Service Discounts	
GM Input Sheet	
Op Code Detail	
Payroll Time Flags	
Enter Pre-Flag Times	
Compile Flag Data	
Edit Compiled Data	
Print Flag Data	
Monthly Summary Update	
R/O Archives	
Archive Repair Orders	
View Archived Repair Orders	
Burn Archives To CD	
Remove An Archive File	
Daily Service DOC	
Report Generator	
Chapter 11 Followup & Marketing	
Setup	
Using Trouble Codes or Service Menu Codes	
Adding Setup Information	
Daily Followup	
CSI Questions	
Print Followup Short List	
Print Followup Sheets	
View/Edit Working Data	
Pull Marketing List	
Edit Marketing List	

Viewing a Customer's Repair History	11:10
Removing Customers from the List	11:10
Print Mailers	
Printing Mailers for Selected Customers	11:12
Printing Mailers for all of the Customers from a Certain Point on	11:13
Print Labels	11:13
Effectiveness Report	11:13
Miscellaneous Lists	11:14
Safety Inspection	11:14
Last Service Date	11:15
Next Service Date	11:15
Declined Service	11:15
Edit Compiled List	11:16
Print List	11:18
Print Labels	
Chapter 12 Data Utilities	12:1
Accessing the Data Utilities Menu	12:1
Purge Customer Files	12:2
Undoing the Last Purge	12:3
Selective Purge	12:3
Repair Customer Data Files	12:4
Verify R/O History Data	12:4
Merge Service Data Files	12:4
'Pickle' Copy of File	12:5
Merge With 'Pickled' File	12:5
Edit Service History	12:5
Editing a Record	12:6
Deleting a Service Record	12:6
Change Area Codes	12:6
Conclusion	13:1
Appendix A Full Service Scheduler	A:1
Entering Technicians' Schedules	A:2
Creating Dummy Technicians	A:3
Making a Technician Inactive	A:3
Removing a Technician from the Schedule	A:3
Schedule Service	
Scheduling an Appointment by Selecting the Day First	A:4
Scheduling an Appointment by Selecting the Customer First	A:9
Today's Schedule	A:11
Viewing Schedules for Other Days	A:11
Viewing a Technician's Schedule	A:12
Finding a Customer's Appointment	A:13
Schedule Prewrite	A:13
Adding a Prewrite for a New Customer	A:14

Adding a Prewrite for an Existing Customer	A:15
Editing a Customer's Prewrite Information	A:16
Viewing a Customer's Service History	A:16
Deleting a Prewrite	A:16
Reschedule	A:17
Rescheduling an Appointment	A:17
Deleting an Appointment	A:18
Print Schedules	A:19
Printing a Selected Day's Schedule	A:19
Printing a Selected Technician's Schedule	A:19
Printing the Schedule for All Technicians	A:20
Printing the No-Show List	A:20
Loaner/Rental	A:20
Setup & Maintenance	A:21
Purge Schedules	A:21
Purge Prewrites	A:21
Refresh Schedules	A:22
Remove A Schedule	A:22
Change Technician	A:22
Minimize	A:24
Appendix B Full Dispatching	B:1
Date and Time Prompt	B:1
Setup	B:2
Logging a Repair on	B:3
Logging a Repair off	B:4
Using the Jobs List	B:6
All Jobs	B:6
Open Jobs	B:6
Finished Jobs	B:6
Customer Waiting	B:7
Refreshing the R/O List	B:7
Opening the Tech List	B:7
Making Corrections	B:7
Editing Time Flag Information	B:8
Deleting Time Flag Information	B:9





# Introduction Autosoft FLEX DMS Service Writing

Welcome to Autosoft Dealer Management Systems Service Writing. This module provides all the tools you need to keep your Service Department running smoothly and efficiently. It automates everything from scheduling and creating repair orders to generating productivity reports and conducting marketing followup.



The system uses preset parameters to alleviate redundant data entry. In addition to saving you time when you are working in the Service Writing module, these parameters help reduce operator entry errors. The parameters serve as default entries that are automatically pulled when opening a variety of entry screens throughout the module. In most cases, the default entries can be edited as needed.

The system tracks customers from the time they schedule their appointments to the time they need to be contacted for follow-up marketing. Customer files are automatically created as customers come in for service and a repair order is generated. The system continuously updates the customers' files and tracks their service history, which can be viewed from most screens in the Service Writing module with one mouse click.

When generating repair orders, you can pull customer information, and it is automatically added to the repair order. Similarly, the default information set in the parameters is added to pre-built lists that you can use to select technicians, service writers, menu options, fail codes, and customer complaints when creating a repair order. Simply select information from the lists to cut back on repetitive typing, and create the repair orders quickly and easily. Combine the ease of data entry with the speed of laser-printed repair orders, and the result is accurate, professional-looking R/O's.

At the end of the day, you update the service information to Accounting to be posted to the books. The repair orders are added to the customer history, and the statistical data is stored so you can generate reports and conduct followup surveys. The system offers numerous predefined reports to help you evaluate your Service Department. Many of the reports allow you to specify criteria you want to use to "fine tune" the report to meet your needs. All of the reports can be viewed on screen or printed to paper. This provides quick access to the information you need when you need it.

# **Understanding Menus**

The Autosoft DMS program is made up of menus and input screens. Menus are screens that display all of the options for a particular area of the program. With the mouse, click the button that corresponds to the option you want to select. When you select an option from a menu, you will open the corresponding submenu, input screen, or prompt. The following is an example of a menu.

Repair Orders (ABC Motors) Repair Orders	
Start Repair Order	Utilities
Start Conditions	Warranty Interface
Close Lubricants-Sublet	Warranty Interface
Close Service	Active R/O List
Close Parts	Continuations
Review & Print	Customer History
Back	Prewrites

# **Understanding Entry Screens**

Input screens consist of data fields that accept input or display previously entered data. Each field is labeled to indicate the data required for that field. The following is an example of an input screen.

Start Repair Order (ABC Motors)	
R/O: 40373 Schedule Xpress	
Customer Number: SMI126476 Memo	VIN: 2G1WH52K739126476
Write:         [01] PAUL         Date:         [05] 15] [08]           Advisor:         [01] PAUL	Year: 2007 Make: CHEUROLET Model: BLAZER N/U/O: M License: QRX246 First Use: 11 07 07 Delivered: 11 07 07 Inspection: 05 Color: BLACK Cust Code:
On Do Not Call List: N Send Marketing Followup Letter (Y/N): N	Car Line: 1
Warranty Parts (A/B/C/L/N): B	
Odometer In:         7132         When Finished (C/W/E/D/P): C         Warranty Manufacturers           Last 8dom         3123         GM-General Motors         EM	
Time In: 11:21 Cash/Recv.: C	
Promised: 00:00 Job Number: 40373 Taxable: Y	
Service/Body/Contract/QuickLube (S/B/C/Q): S Term: 36 Expires: 11/08 Contract Mileage:	
Exit R/O List Search Names Void	Clear History Customer Next

It is important to note that some fields only accept specific information. For example, you cannot enter alpha characters in a strictly numeric field, such as a date field or dollar amount field. It is a common error when entering dollar values to forget to include the decimal point. The system automatically adds .00 after whole dollar amounts. For example, if you type 5, the system will make the entry 5.00. If you type 500, the system makes the entry 500.00. If you type 5.00, the system leaves the value as it was entered. Always double-check the dollar values entered to ensure the amount is going to post correctly.

## **Understanding Prompts**

The program also contains prompts to assist you as you work. Prompts appear when you select to generate reports or update information to master files. The prompts indicate the information that needs to be specified or the action that needs to be taken. For example, when you generate a report, you may be prompted to enter criteria you want to use for the report, and you are prompted to indicate if you want to view the report on your screen or if you want to print the report to paper. Similarly, when you select to update information, you are prompted to verify you want to complete the task. This ensures you have the opportunity to cancel an action if necessary.



Prompts also serve as a way for the system to communicate with you. In certain areas of the program, you will be prompted when a task has been completed. This is the system's way of informing you that an action was successfully carried out. For these prompts, click **OK** to acknowledge the message and to continue working. The system will also prompt you to indicate errors in entries or selections you are trying to make. Read the prompt to ensure you understand the problem, and click **OK** to continue working.

DONE!	ERROR!
Schedules Have Been Purged.	Invalid Current R/O Number!
Ok	Ok

The important thing to remember about prompts is that you should always read the prompts that appear on the screen to ensure you understand exactly what will happen before you continue.

# Using the Keyboard and Mouse

You can use the mouse or keyboard throughout the program to maneuver through the input screens and to carry out common functions on entry screens. The ability to use the keyboard to maneuver through the screens as you enter information allows you to work quickly since you do not have to take your hands off the keyboard to use the mouse while you are working. The following table identifies the keystrokes you can use to maneuver through the entry screens.

Кеу	Use it to
ENTER	Move to the next field
Up Arrow	Move to the previous field
Down Arrow	Move to the next field
Shift + Tab	Move to the previous field

Similarly, each button in the program has been assigned a corresponding function key. You can click the button or press the corresponding function key. (When using the keyboard to select an option, it is not necessary to press ENTER.) The following table lists common buttons and function keys you should learn. These are the most frequently available commands in the program.

Button	Function Key	Use it to
Back	ESC	Close a list or close the current screen
Exit	ES	Close the current screen
Help	F1	Display the Help page
<<	F2	Display the previous record
List	F3	Display a search list to select an existing entry
>>	F4	Display the next record
Print	F6	Print a copy of the information on the screen
Delete	F8	Delete a record
Clear	F9	Clear a record from the screen

# F1 Help and What's New?

Because the Autosoft DMS program is continuously changing to meet the needs of our customers, new features are added to the software. These changes will include the addition of fields, buttons, or screens. This manual represents the program as it is now.

Click the **What's New?** icon on the Service Writing menu to read about enhancements that have been added to the Service Writing module. This helps you quickly identify the enhancements that have been made to the system since your last web update.

To keep our documentation updated, and our users informed, we have added individual help pages to each screen in the program. Press F1 to display the help page for the current screen or menu.

Each page provides the following pieces of information:

- A description of the screen,
- Basic instructions for using the screen,
- A list of the fields on the screen and an explanation of the information required in each field,
- A list of the buttons on the screen and instructions for using each button, and
- A list of the function keys that can be used to carry out commands on the screen.

These help pages are updated as changes are made to the program and added to your system when you run an update from the Internet; thus, the help pages are always current. You should become familiar with the help page feature and use it to learn about the new information added to the program and to quickly access information while you are on a screen.

## **Date and Time Prompt**

The first time you enter the Service Writing module each day, you are prompted to verify that the system date and time are correct on your computer. If the date and time are not correct, you will need to correct the date and time on your computer clock. It is important that the system date and time are correct. In addition, the user ID that will be used to log the information entered in the system is displayed. If a different ID is needed, type the ID. Always verify the date, time, and ID before you click **OK** to accept the information.

Is Your Com	nputer Date & Time Correct?
0	02/16/2010 10:58
	User ID: 01
Cancel	ок

# **Getting Ready**

You are now ready to learn how to use Autosoft DMS Service Writing. Each chapter in the manual covers a specific area of the Service Writing module. Review each chapter before attempting to use each feature.



# 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.

Trouble/Fail Codes (AE	3C Motors)					
	Sort For Trouble On R/O Screens					
Code: Desc.: Special La Default La Customer Compla	bor Units:	Exclude	Shop Supplies			
Labor Rate (AThru & Repair Is Usually (C/G Most Qualified Te	J) Svc: Con J/W/N/I): echnician: C	tract: Body:	Q7L:			
Commi	ssionable:00 ssionable: pecial Labor Posti	ng Accounts				
	Labor Sale Labor Cost Labor Inventory	Account:				
Statistical Fron: // To Current Volume MTD: Units: YTD: Units:						
Exit	Print	Delete	Save			

- 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.
- 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 Inf	ormation (ABC Mol	ors)						
	Adviso	r/Writer In	formation		01 02 03 04	PAUL BILL JOHN ANDRE₩		
Defa	Advisor/Writer Number: 77 Short Name: 10HV Full Name: 10HV KIRK Full Sociat: 754125649 Advisor/Writer (A/W): U Default Advisor For This Write: 77 TOHY							
	Enployee ID           WFC         Emp ID           F0         HI           CH         CH           GH         CH           H0         CH							
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 Numbo Short Nam Full Nam Flat/Hourly (F/ Full Soci	e: [09] e: [DARRELL] e: [DARRELL]	)PORTER		01 02 03 04 05 06 07 08	TOM Stephen Dauid Francis Fred John Steve Ralph		
	ER0 Password: DAR 09 Dedicated Service/Body/QuickLube: S [S/8/Q Or Blank For Non-Dedicated]						
(A): 17.00 \$       (A): 17.         (B): 17.00 \$       (B): 17.         (C): 17.00 \$       (C): 17.	10       \$       (B):       17         10       \$       (C):       17         10       \$       (D):       17         10       \$       (D):       17         10       \$       (E):       17         10       \$       (F):       17         10       \$       (F):       17         10       \$       (G):       17         10       \$       (G):       17         10       \$       (H):       17         10       \$       (I):       17	300         52           000         52	nployee ID Emp ID 				
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.

Service Labor Rates (ABC Motors)	
Standard Labor Rates	
Generate Flex Rate	Service Labor Flex Rates
Enter Flex Rate Without Scanning	
Print Generated Flex Rates	
Exit	Current Flex Rate Is: <b>\$</b>

### **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.



#### 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.

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



5. 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.

- 1. Click Enter Flex Rate Without Scanning.
- 2. Type the desired flex rate. If you do not enter four digits including the decimal, press ENTER.
- 3. 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 Sched	dule								
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.

tiscellaneous Parameters (ABC Motors) Setup "ERO" On This Client	Is Service Wi	iting Interfaced With Accounting
Shop Supplies Service Based On Labor/Total/None: Body Based On Labor/Total/None: Charge Applies To Internals (Y/N):	N .00 % Min:\$ 1.00	Max:\$25.00 C Shop Supplies Max:\$1.00 C Hazardous Material
R/O Print     'Next Service' Message On R     'Service Come Back' Message On I     'Customer Labor Rate' On R     'Customer Labor Rate' On R     'Sustomer Pay' Labor Time On R     'Sustaint' Sale' Figures     'Internal Sale' Figures On Custome     'Separate Internal Copy With Custome     S. Tochnician Name & State ID On R	Repair Order         (Y/N):         Y         11.           epair Orders         (Y/N):         N         12.           epair Orders         (Y/N):         N         13.           on W-R/O's         (Y/N):         N         14.           er Pay R/O's         (Y/N):         Y         15.           r Pay R/O's         (Y/N):         Y         16.	Maximum Number Of Conditions On Hard Copy (1/6) 6 Warranty Copy With Pre-Close Customer Copy (Y/N); V Accounting Summary on Accounting Copy (Y/N); N Mirror Hanger With Hard Copy (Y/N); N Customer Copy With Hard Copy At Open (Y/N); N Require Promise Time on R/O At Open (Y/N); N Print Labor Time Flags on R/O (Y/N); N Restrict Adv/Tech ID Printing on R/O (A/T/6/N); B
Customer Copy: 1 Accounting Copy: 1 Warranty Copy: 1 File Copy: 1 Internal Copy: 1 CSI Copy: 1 Rec	ellaneous triet Charge Customers To 'Spec Allow An R/O To Be Started Default Manufa Include Cost Require A Menu, Trouble Co quire Confirmation When Closing Default Fir Default Fir ault R/O's For This Client Are Se	Allow Modification of Open/Close Dates on RO (Y/N); N ial Customer Parameters' (Y/N); N Started Without 'Miles In' (Y/N); V Uthout e-Mail Address' (Y/N); V cturer Waranty Repairs Prompt: [CH] GM - General Motors • Is When Viewing an R/O (Y/N); V de, or LOP On All R/O's (Y/N); V Waranty And C/P Concurrently; V st Tech On Subsequent Repairs; V vice/Body/QuickLube (S/B/Q); S Between Maintenance Servic; 5000

- 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.
- 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 Lubricar	R/O Lubricant Description & Pricing Defaults (ABC Motors)								
	<b>R/O Lubricant Description &amp; Pricing Defaults</b>								
	The First Item will Post to a Separate Inventory, Cost, and Sale Account.								
	Item		Inventory	Cost Each	Sale Each	Sale Total			
	Waste Disposa	L	99	1.95		3.00			
	ENGINE OIL UP	TO 6QT	101	.97	1.75				
	TRANSMISSION	LUID	320	1.10	2.95	.00			
	GEAR LUBE		121	.75	1.12	.00			
			0	. 00	. 00	.00			
			Markup For Subl	et Sale					
	Warranty: <mark>10.00</mark> % Internal: <b></b>								
						•			
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)	
Tairraces/cose codes (noc riocos)	
Customer Pay Taxes           Sales         Other           Labor:         7.000         6.000           Parts:         7.000         6.000           Lubricants         7.000         6.000           Sublet:         7.000         6.000	Warranty Taxes         Internal Taxes           Sales         Other           Labor:         7.000           Parts:         7.000           Lubricants:         7.000           Sublet:         7.000           Sublet:         7.000           Sublet:         7.000           Sublet:         7.000           Sublet:         7.000
Tax Parameters Service Shop Supplies/Waste Disposal Taxed: [Y] Body Shop Supplies/Waste Disposal Taxed: [Y] Customer Discounts Taxed: [Y]	Cost Codes       1: 8         2: L       2: L         2: Alpha       3: A         Characters       4: C         that pirt on       5: K         documents in       6: H         actual cost       7: 0         numbers.       8: R         9: S       9: S         0: E       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.
- 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 dispatch).
- 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 <u>http://download.Autosoft-asi.com/instructions/Chr/ChryslerWarranty.pdf</u>.

### 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 <a href="http://download.Autosoft-asi.com/instructions/For/FordWarranty.pdf">http://download.Autosoft-asi.com/instructions/For/FordWarranty.pdf</a>.

### **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 <u>http://download.Autosoft-asi.com/Instructions/GM/GMGWM.pdf</u>.

### 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 <u>http://download.Autosoft-asi.com/instructions/hon/HondaWarranty.pdf</u>.

### 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 <u>http://download.Autosoft-asi.com/Instructions/Hyu/HyuWarranty.pdf</u>.

### **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 <a href="http://download.Autosoft-asi.com/Instructions/Kia/KiaWarranty.pdf">http://download.Autosoft-asi.com/Instructions/Kia/KiaWarranty.pdf</a>.

#### **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 <u>http://download.Autosoft-asi.com/Instructions/Maz/MazdaWarranty.pdf</u>.

#### **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 <u>http://download.Autosoft-asi.com/Instructions/Mit/MITWarranty.pdf</u>.

### **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 <a href="http://download.Autosoft-asi.com/Instructions/Sub/SubaruWarranty.pdf">http://download.Autosoft-asi.com/Instructions/Sub/SubaruWarranty.pdf</a>.

### **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 <a href="http://download.Autosoft-asi.com/instructions/Vok/VokWarranty.pdf">http://download.Autosoft-asi.com/instructions/Vok/VokWarranty.pdf</a>.

## **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	SMITH
Last Eight: 39120 Name: STEU				
Acct. A/R Control: SMIT!	55			
Counter Parts Credit Limit: Taxable (Y/N); Service Credit Limit: 1000.00 Taxable (Y/N); [V]				
Eligible For Parts WINS/Comp (Fleet-Gov-Etc)(F/G/?): [H] WINS/Comp Code: Price Level Matrix Code for Parts (A0 thru Z4): [A]1				
Print Special Discounts Customer Parameters List Special Discount Code:				
Exit Service /	A/R List Delete	Save		

- 1. Click **Special Customer Parameters**. The Special Customer Parameters screen appears.
- 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.

Quick	Complaints
1: CUSTOMER REQUESTS LUBE OIL FILTER	7 11:
2: BRAKES PULSATE	12:
3: CUSTOMER REQUESTS ALIGNMENT	13:
4: CUSTOMER REQUESTS TUNE UP	14:
5: CUSTOMER STATE CHECK ENGINE LIGHT ON	15:
6: UPSALE DECLINED	16:
7: SERVICE REMINDER	17:
8:	18:
9:	19:
18:	20:
Cancel 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.

	Default Cities								
1: 2: 3: 4: 5: 6: 7: 8: 9:	City City On City UEST HIDDLESEX BROOKFIELD FARBELL GREENVILLE GROUE CITY HERHITAGE HUBBARD LATROBE HASURY HILES	ST ZIP A/C	r New Customers (Y/N): N City 11: SHARON 12: SHARPSUILLE 13: WHEATLAND 14: YOUNGSTOWN 15: YOUNGSTOWN 16: 17: 18: 19: 20:	ST     ZIP     A/C       PA     f6146     724       PA     15211     724       PA     16161     724       OH     14550     330       OH     145504     330       Image: State S					
Cancel	Save								

### **Adding Cities**

- 1. Click **Default Cities**. The Default Cities screen appears.
- 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.

Make	Make	Make	Make	Make	Make	Make
CHEVROLET	CHEVROLET	BUICK	CADILLAC	PONTIAC	GMC	OLDSMOBILE
Model	Model	Model	Model	Model	Model	Model
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	ESV	GRAND PRIX	SAVANA	SILHOUETTE
COLORODO		RAINIER	EXT	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						

### 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.

Default Sub	let Entries (ABC M	otors)				
Default Sub	Default Sublet Code	Sublet E	DNTP DNTS GLAS GRAN GRAP SHCH TOWA TOWU	THE DENT PROS STEUE'S BODY SHOP THE GLASS GALLERY HEWHAH'S GRAPHICS PIONEER GRAPHICS Special Handling Ch Arnold's Towing United Towing		
	Vendor Labor Operation Normally Taxable Tax Rate	::Y	TOWW UPOA UPOR	WESTERN TOWING Auto Upholstery plus Renfield Upholstery		
	General Ledger	Sub Sub Account f Account For In				
Exit	Print	Delete	Clear	Save		

### 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.



### 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.
- 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 option 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.
- 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.

Enter Service Menu Op's (ABC Motors)		
Complaint Lines	Code	Description
	2WA	2 WHEEL ALIGNMENT
Menu:LOF CONVENTIONAL LUBE, OIL & FILTER	4WA	4 WHEEL ALIGNMENT
	BATT	CHECK BATTERY
	BI	BRAKE INSPECTION
	BULE	
Labor Units: 3	CABI	
Labor Rate (AThru J) Svc: [A] Contract: [A] Body: [A] Q/I		CHECK ENGINE LIGHT
Cust/Warr/Int/QkLube: [0] Normal Labor Sale \$ 25.50	CF	COOLANT FLUSH
Update List Price on Parts: Y Exclude Shop Supplies	EM	EMISSIONS TEST
	FB	FRONT BRAKE INSPECTION / R
Calculate S/S with Quote:	FSF	FUEL SYSTEM FLUSH
Special Price: 19.99	FUEL	
Discount Code:	INSP	
Repair Is NON-Taxable (Y/N): N	LOF	CONVENTIONAL LUBE, OIL & FIL
Repair Net G/L Account:		▶ 1⁄3 DIESEL LUBE, OIL & FILTER
	LOFS	
Commission: 00% or \$00	MPI	MULTI POINT INSPECTION
Technician:	PDI	PRE DELIVERY INSPECTION
Labor Operation: LOF		POWER STEERING FLUSH
Customer Complaint Code:	RB BOT	REAR BRAKE INSPECTION / RE Rotate tires
	SC	SUSPENSION CONCERN
	SI	STATE INSPECTION
Default Next Service:		TBANSMISSION CONCERN
Parts Source: 1	TF	TRANSMISSION CONCERN TRANSMISSION FLUSH
Print Menu Customer Presentation (Y/N):(Y)	TUN	
	WBK	
		o The notice of Ande, The
Exit Discount Codes Delete Clear Save Ne	xt Prin	nt Reference List Update Parts Pricing

### 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.
- 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.

	ice Menu Parts	(ABC Motors)							
_N	Part		Qty	Desc.	Cost	Price	Service	Intern	Warr
01 00									
02 03									
03 04									
95									
96									
97									
98									
89 10									
10 11									
12									
13									
14									
15									
16									
17 18									
10									
''Clic	k'' Line From List T	o Add/Edit							
	N Part		Qty	Desc.	Cost	Price	Service I	nternal War	ranty
	31								
_									
_	Back			Remove Line	1			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.
<b>Ø1</b>	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.)

Customer Presentation (ABC Motors)
The "Customer Presentation" will print on the R/O Hard Copy if a Menu
of suggested repairs is entered on the Service History window.
_ Customer Presentation
Back 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.

- 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.



# **Chapter 2 Customer Information**

The **Customer Information** button on the Service Writing menu is used to enter, view, and edit customer and vehicle information. When you create a repair order for a new customer, the system automatically creates a customer file. You only need to create a file on this screen if you want the customer's information in the system before the customer comes in for service. The Customer Information screen can also be accessed on the Repair Orders menu by clicking **Customer History**.

🖅 Customer Information (ABC Motors) 08/02	/2013 14:28:39
Customer Number: SMI 126476 Last 8: 39126476	/IN: 39126476 🕋 Active/Inactive (A/I); A
City/State: WEST MIDDLESEX PA 16159 e-Mail: Primary Contact Method (H/W/M/E/A): M	Home:         724)         555         1234         Work:         724)         555         9876
Stock No:     36123     Year:     [2913]       Car Line:     1     Make:     [CHEUROLET]       New/Used/Other:     6     Model:     [HALTBU]       Varranty MFC     *     Body:     4 DR       Lease/Purch/Finance:     F     Color:     BLACK	Keys: 16K875 License/St: (0RX246 [PA] Delivered: 111/07]/12 Odomete: In Service: 111/07]/12
Last Service:     02//08//13     3123       Next Service:     05//dd/     13       Total Service Visit:     1       Inspection Month:     03       Service Contract:     -       Term:     Expires:       Y     Contract Distance:       Special Order Parts (Y/I)	Memo         Special Order Parts           Image: Special Order Parts         Image: Special Order Parts           Image: Special Order Parts         Image: Special Order Parts
Close < Search Customers > Print	Delete Clear Repair History Save

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

# Adding a New Customer

Some of the fields will be updated automatically by the system as the vehicle is brought in for service. The information entered on this screen can be pulled to a repair order. If information is edited when the repair order is being generated, the information on this screen is automatically updated to reflect the changes. Similarly, new customers who are entered when a repair order is being generated will automatically have a customer information file created. You should always search for the customer in the system before entering a customer file to ensure there will not be duplicate entries. Please refer to "Recalling a Customer's Information" on page 2:2 to learn how to search for a customer.

- 1. Type the appropriate information in each field. (Press F1 to view the Help page for this screen and to read about the information required in each field.)
- 2. Press ENTER to advance to the next field.
- 3. Click **Save** to save the information entered.

# **Recalling a Customer's Information**

There are four ways to recall a customer's information:

- Type the customer number in the **Customer Number** field. The customer number is the first three letters of the customer's last name and last six digits of the vehicle's VIN. The customer's information fills in on the screen.
- Type the first three letters of the customer's last name in the **Customer Number** field, and click **Search Customers** (or press F3). The system displays a list of customer's whose last name begins with the letters. Click the customer in the list you want to select, and the customer's information fills in on the screen.
- Type the last eight characters of the VIN in the Last 8 field. The system will display the
  record for the first customer/vehicle with a matching VIN. Click the arrow buttons on the side
  of the Search Customers button to scroll through the records. Click < to displays the
  previous customer's information. Click > to display the next customer's information. The
  customer's information is displayed on the screen. (You can also scroll by pressing F2 to
  view the previous record and F4 to view the next record.)
- Click **Search Customers** (or press F3). On the Customer Search Criteria screen, type the first three letters of the customer's last name, the customer's full or partial 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. The customer's information fills in on the screen.

# **Editing a Customer's Information**

- 1. Select the customer.
- 2. Click in a field, and edit the information as needed.
- 3. Click **Save** to save the changes.

## **Deleting a Customer's Information**

A password is **required** to delete customer information. This security feature ensures only authorized personnel can delete files.

- 1. Select the customer.
- 2. Click Delete.
- 3. Click **OK** when prompted to verify you want to delete the record.
- 4. Type the password.

# **Printing a Customer's Information**

- 1. Select the customer.
- 2. Click Print.
- 3. When prompted to verify your printer is ready, select your print criteria.

## Viewing a Customer's Service History

- 1. Select the customer.
- 2. Click Repair History.
- 3. A list of repair orders for the customer is displayed.

Service H	listory						
R/0	Date	Odom	TN		Repair	Labor	Parts
	02/08/08		09	W	RECALL 1245780	37.80	39.60
40348A	02/08/08	3123	02	Q	LUBE-OIL-FILTER	16.50	4.75
Back				'C	lick' Line To View R/O Detail		

4. Click a repair order to view the finished R/O. A summary of the repair order opens on your screen.

	dlesex, P	otors						
40348	2 G 1	WH52K7	39126476	STEVE SMITH			02/08/08	11
2007 CH	007 CHEVROLET BLAZER BLACK			555 MAIN STREE			10:31	11
3123	3123	11/07/05	QRX246	- West Middlesi	CAPA 10155		02/08/08	1
80.				(724) 555-1234	(724) 555-98	376	PAUL	1
	-OIL-FILTE 2020 STEPH	EN-020202020	25	Total Lubrica	To égt nts	[02] 3 1	1.75	
	L 1245780	L-318421465	15	Total Parts .	(SENSOR A)	[09] 7 1	39.60	
		Labor Time Total Labor Total Parts	C/P 3 16.50 .00	W/CINT 7 0 37.80 .00 39.60 .00	-Total - 10 54.30 39.60	0( <b>/A</b> )		
Back								

- 5. If you select to view a repair order in the list that is too old, you will receive a message indicating that there is no data available for the selected R/O. Click **OK** to acknowledge the message.
- 6. Click **Back** to return to the Service History list.
- 7. Click **Back** to close the customer's history.





# **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.

Start Quote (ABC Motors)	
Quote:	]
Customer Number:	VIN:
Writer: 1811 PAUL Date: 1811 [26] 11 Advisor: 1811	Year: Make: Model:
Name:	
Address:	
City:	
E-Mail:	
Memo:	
Phone: Work: Cell:	Warranty Parts Pricing:
	Warranty Manufacturers Varranty Repair
Quote Type (S/B/C/Q): S Service	
	Contract:
Exit Quote List Search Delete	Clear Next

- 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.

Add Labor (ABC Motors)					
Quote:00001	STEVE SMITH 2003 CHEVROLET BLAZ 261WH52K739126476			- List	
Repairs	Complaint/C	ause/Cure			
Repair: 1 🔲 Exclude S/S					
Menu: Labor Op: C/W/I/N/Q: Labor Level: Labor Time: Told					
Sale:					
C/P Repair Is NON-Taxable	Remove Repair	Save Repai	r	"Click" Line fro	m List to Process
Exit Quote List		View Quote	Clear	Back	Next

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

READY?		×
0	This Will Star	t Another Condition?
	Cancel	ОК

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

4. 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 CHEUROLET BLAZE 261WH52K739126476		Press END Save Repair	15K 15,00 1TIRE REPLO 2TIRE REPLO 30K 30,00	ICE 2 TIRES 30 SERVICE NE 3 MILE SERVIC
Repair: Repair: 1 Exclude S/S Menu: Labor Op: C/W/I/N/Q: C Labor Level: A Labor Time: Toral Labor Time: Toral C/T Sale: Toral	Complaint/C	ause/Cure		ALIGN ALIG BRAKB REPLA BRAKF REPAL BRAKF REPAL C.U.S SALE CHAIR CHAR DECLI CUST DTAIL DETAI INSPE INSPI LOF LURE ROTAT RO.AI SI STATI TUNE TUNE	E AC DMER DECLINED IL VEHICLE CTION OIL-FILTER E TIRES INSPECTION
Exit Quote List		View Quote	Clear	Back	Next

- 5. 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.
- 7. 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.
- 8. In **Labor Time**, type the number of units required for the repair.
- 9. The **Sale** field identifies the total labor sale for the repair. This is based on the labor level and the labor time.
- 10. 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.
- 11. 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.
- 12. 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.

Add Parts (ABC Motors) OEM Source: 1 OEM SC Quote: 00001	DURCE 1 STEVE SMITH	1-(Q) LUBE-0	IL-FILTER
	03 CHEVR BLAZE 2G1WH52K739126476 Odom In	κ.	
IN     Part Number     Qiyl     Fill       01     Image: Constraint of the second			r
Exit Quote List	Vi	ïew Quote Clear	Back Next

- 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.
- 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.

Add GOG/Sublet (ABC Motors)				
Quote: 00001 STEVE SMITH 2003 CHEUROLET B 261WH52K73912647				
Shop Supplies       Waranty     Internal       Lubricants     Dty, R   T   Cost       Waste Disposal     Image: Cost of the second		"Clied	K <sup>**</sup> Condition From List	
Code Vendor/Description  Options > B1  Tire Balance	R     T     P.O.     Tx     Tax %       1     C     060601     V     1       1     C     000601     1     1		DRD         Cost	Sale
Exit Quote List	View Quote	e Clear	Back	Next

- 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).
- 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).
- 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.

- 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.

Waste DI ENGINE O TRANSNIS A1 GEAR LUB B1 B2 B1 B2 B1 B1 B2 C1 C2 C2 C2 C2 C2 C2 C2 C2 C2 C2 C2 C2 C2	<pre><cancel> <clear line=""> Alignment ACCESSOBIES Tire Balance Body Work/Repair BATTERY TAX Customer Reinburseme USC Deductible(Goodw DFALER MATER. FREIGHT CHARGES</clear></cancel></pre>	Y N Y Y N Y Y Y Y	0 - 00 0 - 00		- 00 - 00 - 00 - 00 2 - 00 - 00 - 00 - 0	▲ .00 .00 .00 2.00 .00 .00 .00 .00 .00 .0
Close N Options > Options > Options > Options >						

- 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 SHITH 2003 CHEVROLET BLAZER 261WH52K739126476	W/C Int. C/P .00 .00 Labor 16.50
Overall Taxoble       No Tax         No Tax       No Tax         Full Tax       Tax 1 Only         Tax 1 Only       Tax 1 Only         Tax 2 Only       Tax 2 Only         Warranty Deductible:       _00	00         .00         Parts         10.00           .00         .00         Sublet         .00           .00         .00         S/Sup         4.82           .00         .00         6-0-6         3.00           .00         .00         W/Ded         .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
Exit Quote List Vi	iew 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 Quo	tes											
Ope	n	Closed	[	All	]							
Quote	R/0	Date	s/w			lame		Pho			Vehicle	
00001		01/19/2011	01	STEVE SI	MITH			(724) 5	55-1234	2003 CHE	ROLET	
00008		01/20/2011	01	ELIZABE						2003 HON		
00009		01/20/2011	01	ROGER C	HRISTO	PHER				1992 CHV	EROLET	
Bac	<u>د</u>	Search Pho	ne Nu	mber:		Erom: 1	1/20/20	10 <b>v</b> To	1 /26	/2011 -	l Clea	r Search

- 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: SMI126476 Memo	VIN: 2G1WH52K739126476
Writer: 01 PAUL Date: 01 26 11	Year: 2003
Advisor: 01 JIM	Make: CHEVROLET Model: BLAZER
Name: STEVE SMITH	N/U/O:
Address: 555 MAIN STREET	License:
City: WEST MIDDLESEX PA 16159	First Use: 00 00 00
E-Mail:	Delivered: 00 00
Memo:	
Phone: 724 555 1234 Work: 724 555 9876	Color:
Cell: 724 555 0001	Cust Code:
On Do Not Call List: N	Car Line:
Send Marketing Followup Letter (Y/N):	Warranty Parts (A/B/C/L/N): B
	Warranty Manufacturers
Odometer In: When Finished Last Odom 7132 (C/W/E/D/P):	Warranty Repair
Cash/Danus	
Time In: 16: 07 Cash/necv.	
Taxable:	Contract:
	Term: 36 Expires: 11/08 Contract Mileage:
Service/Body/Contract/QuickLube (S/B/C/Q): Q	
Exit R/D List Search Names Void	Clear History Customer Next

7. 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.

Open         Closed         All           Quote         R/O         Date         S/W         Name         Phone         Vehicle           Quote         R/O         Date         S/W         Name         Phone         Vehicle           Quote         R/O         Date         S/W         Name         Phone         Vehicle           Quote         R/O         Date         S/W         Name         (724) 555-1234         2003 CHEVROLET           Quoto         40433         01/19/2011         O1         ADAM WALKERS         2010 CHEVROLET           Quoto         40433         01/20/2011         O1         PAUL HARTLEY         (724) 555-4123         2008 CHEVROLET           Quoto         40433         01/20/2011         O1         TESS WILLIAMS         724) 555-4123         2008 CHEVROLET	Active Quo	tes							
OD001         40438         01/19/2011         01         STEPE SMITH         (724) 555-1234         2003 CHEVROLET           00003         40431         01/19/2011         01         ADAM WALKERS         2010 CHEVROLET           00005         40432         01/20/2011         01         ADAM WALKERS         2010 CHEVROLET           00005         40433         01/20/2011         01         TESS WILLIAMS         (724) 555-4123         2000 CHEVROLET	Open		Closed		All				
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         (724) 555-4123         2008 CHEVROLET	Quote					Name			
00005 40432 01/20/2011 01 PAUL HARTLEY (724) 555-4123 2008 CHEVROLET 00006 40433 01/20/2011 01 TESS WILLIAMS							(724) 555-1234		
00006 40433 01/20/2011 01 TESS WILLIAMS									
							(724) 555-4123	2008 CHEVROL	.ET
	00006	40433	01/20/2011	01	TESS WILLIAM	15			
Back Search Phone Number: From: 10/28/2010 To: 1/26/2011 Clear Search	Bac	<	Search Pho	ne Nu	mber:	From: 10/28/201	0 • To: 1 /26	j/2011 🔹	Clear Search

8. 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.

QT1		×
0	This quote has already been closed.	
	Ok	


Chapter 4

# **Chapter 4 Schedule Xpress Scheduler**

The Schedule Xpress scheduler is a quick scheduler that allows you to schedule appointments from the Repair Order screens. At the time of scheduling, you create a prewrite that can be pulled to a repair order when the customer arrives for service. If you prefer to use the Autosoft full Service Scheduler, please refer to Appendix A for information regarding the full scheduler.

# Accessing the Schedule Xpress Scheduler

Initially, you can access the Schedule Xpress Scheduler from any repair order screen.

- 1. Click **Service Writing** on the ASI DMS main menu.
- 2. Click **Repair Orders** on the Service Writing menu.
- 3. Click **Start RO** (or any other button on the left side of the Repair Orders menu).
- 4. Click **Schedule Xpress**. The Schedule Xpress scheduler opens.

S Schedule Xpress									. 🗆 🗙
06:00						4	February	2011	Þ
						iun Mon 30 31	Tue Wed 1 2		Fri Sat 4 5
06:30						67	8 9	10	11 12
07:00						13 🚛 20 21	15 16 22 23		18 19 25 26
						27 28 6 7	1 2 8 9	3	4 5 11 12
07:30									11 12
08:00					- 1	Monda	y, Februa	ry 14 2	D11
						100	.0% A	vaila	ble
08:30					- 11	0 Req	uires Rid	е	
09:00					10		uires Loa	ner	
09.00						0 Pick 0 Wai			
09:30									
10:00					-	O Serv O Bod			
10.00							k Lube		
10:30						0 Tota	al Appoint	ments	
11.00									-
11:00		L			- 1				
11:30									
12:00					Ţ	Service	Body	Y Qw	ikLube
Minimize	Close	Customers	Details	R/O List		Tech Lis	t	Setu	ıp

**Tip:** When scheduling appointments, you have the option of working on three separate schedules: Service, Body Shop, and Quick Lube. Use the tabs on the bottom right side of the Schedule Xpress screen to move among the schedules. You will set the default schedule for the workstation in the Schedule Xpress Setup. If you prefer not to use the separate schedules and want to see all appointments on one schedule, Autosoft recommends that you use the columns to categorize your appointments. For example, use the first column to schedule lube-oil-filter appointments, the second column to schedule transmission work, etc.

# **Entering Setup Information**

Before you can use the scheduler, you must complete the setup. The setup information determines how the scheduler works. In addition, you have the option to set it as you default scheduler. If you set it as the default scheduler, you can access it from all the Repair Order screens, and the Schedule Xpress scheduler will open when you click **Scheduling** on the Service Writing main menu.

1. Click **Setup** on the bottom of the Schedule Xpress Scheduler. The Setup screen appears.

Setup	E4				
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Start         Quit           06:00         13:00           07:30         14:00           07:30         14:30           07:30         16:30           09:30         16:30           09:30         16:30           10:30         17:30           11:30         18:30           19:30         19:30           19:32         19:32           Hours/Day;         32	Start         Quit           06:00         13:00           07:30         14:00           07:30         16:30           07:30         16:30           09:30         16:30           10:30         17:30           10:30         17:30           10:30         17:30           11:00         18:30           19:30         18:30           19:30         19:30           Hours/Day:         20           Hours/Day:         48	Start         Quit           06:00         13:00           07:00         14:00           07:30         14:30           07:30         16:30           08:30         15:30           09:30         16:30           09:30         16:30           10:30         17:30           11:00         18:30           19:30         19:30           Appt's/Bay;         20           Hours/Day;         48	Start         Quit           06:00         13:00           06:30         13:30           07:00         14:30           08:30         15:30           08:30         15:30           08:30         15:30           08:30         15:30           08:30         16:30           08:30         16:30           10:00         17:30           11:00         8:30           19:30         19:30           Appt's/Bay:         20           Hours/Day:         48	Start         Quit           0:6:00         13:00           0:7:00         14:00           0:8:30         15:00           0:8:30         15:00           0:8:30         15:00           0:8:30         15:00           0:8:30         15:30           0:8:00         16:30           0:8:30         16:30           10:00         17:30           11:00         18:30           19:30         19:30           Appt*s/Day:         21           Hours/Day:         48	Start         Quit           0 600         Y 13:00           0 7:700         14:00           0 7:30         14:30           Y 70:00         14:50           0 8:30         15:30           9 9:00         15:30           0 9:00         15:30           0 9:00         15:30           1 0:30         17:30           1 1:00         18:30           1 19:30         19:30           Appt*s/Day;         10           Hours/Day;         24
Don't Prompt To     Don't Prompt To     Run In 1024 x 768     Your Resolution     Default Schedule Th	3 Window Is 1920 x 1080	Schedule 32 1     Schedule Availat     O By Appointme	'ime Slots/Hour 'ime Slots/Hour ility	Schedule History O Keep Schedule Hist O Keep Schedule Hist	ory For 120 Days Manual Purge
Close		By Hours	Purge Prewrites	Show D Unlock Time Slots	Ocops

- 2. For each day of the week, click to select the **Start** and **Quit** time. A check mark will appear in the box for the time you select. Click a check mark to clear the time slot.
- **Tip:** You can move carry over appointments from one day to another. When these appointments are moved, they will populate the first available slots on the schedule. Therefore, you may want to leave the top slots open or set the schedule to start 30 minutes earlier so carry over appointments will always be at the top of the schedule. Otherwise, the carry over appointments may end up being mixed in throughout the schedule wherever there is an open slot.
  - 3. In **Appt's/Day**, indicate the number of appointments you want to schedule per day. The default entry is 20.
  - 4. In **Hours/Day**, indicate the number of hours you want available on the schedule each day. The default entry is 48.

5. The Make Xpress My Default Scheduler box determines where you can access the Schedule Xpress scheduler. If you leave this box empty, you will only be able to access the Schedule Xpress scheduler on the Repair Order screens. The Scheduling button on the Service Writing main menu will open the full Autosoft Service Writing Scheduler. If you do not plan to use the Schedule Xpress Scheduler, leave this field blank, and refer to Appendix A for information on the full Autosoft Service Writing Scheduler.

If you select this box, the Schedule Xpress scheduler will be your default scheduler. In addition to accessing it from all the Repair Order screens, you can open the Schedule Xpress scheduler using the **Scheduling** button on the Service Writing main menu.

- 6. If you do not want to print prewrites, click to select **Don't Prompt To Print Prewrites**. The system will automatically skip the printing prompt. If you leave this field blank, the system will prompt you to print a prewrite when you save it. You can print it or skip printing at that time.
- 7. The **Run In 1024 x 768 Window** field affects how the scheduler displays on the screen. If you want it to run in a full window, click to select this box. This will change the resolution of your screen. Your current resolution is displayed under this field for your reference.
- 8. Use the **Default Schedule This Station** section to select the schedule you want to set as the default schedule for this workstation: Service, Body Shop, or Quick Lube. Click to select the circle next to the default you want to set. This schedule will automatically display when the Schedule Xpress scheduler opens. You can still view the other schedules using the Service, Body, and QwikLube tabs on the bottom of the schedule Xpress screen.
- 9. Use the **Schedule Layout** section to determine the number of slots that appear on the schedule each hour. Click to select 12, 16, or 32 slots per hour. The default is 32.
- 10. Use the Schedule Availability section to indicate if you want availability calculated based on the number of appointments or the number of hours scheduled each day. If you select By Appointments, the system uses the figure you specified in the Appt's/Day field to calculate the availability. If you select By Hours, the system uses the figure you specified in the Hours/Day field to calculate the availability. The schedule availability is displayed on the schedule.

- 11. Under **Schedule History**, determine if you want to keep the schedule history for 10 or 30 days. Click the circle in front of the option you want to select. The default is 10.
- 12. Use the **Show Detail** slider to determine how much detail shows when you view the schedule details (using the Details button on the main schedule Xpress screen). If you move the slider to the left, the detail screen will display only the first complaint added to the prewrite for the appointment. If you move the slider to the right, the detail screen will display all complaints added to the prewrite for the appointment.
- 13. Click **Close** to save the settings and close the screen.

**Tip:** You can preset the minimum minutes that must be logged in order for the log on to count using the **Minimum Dispatch Time Per Unit (Minutes)** field on the Tax Rates/Cost Codes screen, accessible through the Service Writing module's System Setup menu. The minimum can be from 1 to 9 minutes. The default value is 3. When a technician logs on to a repair, the clock starts timing. If the technician logs off the repair before the minimum time is reached, the system will cancel the log on.

**Important:** The **Ooops** button on the bottom of the Setup screen runs a utility that recovers the schedule data in the event that the date on a computer is off. The utility must be run on the computer that is experiencing the problem. Do not use this utility without assistance from the Autosoft support desk. Call (800) 473-4630 for support.

# **Scheduling Appointments**

You have the option of selecting the day as the first step to scheduling an appointment or selecting the customer information as the first step to scheduling an appointment. You decide which method you want to use. It is most likely that you will use a combination of both methods based on the type of customer you are scheduling (new versus existing) and the flexibility of the customer's schedule.

**Tip:** The lines on Scheduler Xpress are in 30 minute increments, but you can use the columns to indicate any times within the 30 minutes you prefer. For example, the first for the 8:00 slot can be for 8:00, the second column at the 8:00 slot could be for 8:10, the third column at 8:00 could be for 8:20, etc. You can customize how you use the columns based on your dealership's need.

### Selecting the Customer First

When scheduling an appointment, you have the option of selecting the customer information first before selecting the day. You would use this method for existing customers. This allows you to view their service history and check Chrysler VIP, Ford OASIS, or General Motors VIS to identify any additional repairs they may need for their appointment.

- 1. Click **Customers** on the Schedule Xpress main screen.
- 2. Use the Customer Search Criteria screen to search for the customer in the system. The screen will display a list of customers who meet the criteria you specify for the search. Hold the right mouse button down on a line in the list to view a summary of the customer's information and the customer's repair history. Click the customer you want to select.
- 3. The customer's information fills in on the screen.

Schedule Service					
			Clic	k Line To View R/O	
Customer: SMI 126476 Then Press	Name or Phone Number InterTo Search	40348			
Writer: [81] Assigned Tech:			09 W RECALL 12		77.40
writer: gr Assigned Tech:	Tech List		02 Q LUBE-OIL-	FILTER	21.25
Name: STEVE SMITH					
Addrs: 555 MAIN STREET					
City: WEST MIDDLESEX P	A 16159				
Memo:					
E-Mail:					
Home: 724 555 1234 •					
	C Requires Ride				
Work: 724 555 9876 🔿	C Requires Loaner				
Cell: 724 555 0001 O	Orop Off				
	C Pick-Up	Compl	aint		
	Service				
	C Body				
	C Quick Lube				
VIN: 2G1WH52K739126476	S QUICK LUDE	Quick Co			
Year: 2007	When Finished	JULICK CO	mpiaints		·
Make: CHEVROLET	C Call			∗ Total Esti	mated Time (Units) 🚺 🛨
Model: BLAZER	C E-Mail				
N/U/O: N	C Deliver		vice: 05/15/08	7132	
Inspect: 05	O Will Pickup	Deliv	ered: 11/07/07	Salesman: ST	EPHEN WILLIAMS
Color: BLACK	<ul> <li>Waiting</li> </ul>		Memo		Special Order Parts
Contract:					
Term: 36 Expires: 11/12 Contrac	st Mileage:				
L remit do Explies. 117 12 contrac	A Innougo.				
Cancel Schedule Ne	xt Customer Lis	t			

- 4. The Writer field automatically defaults to the writer ID selected for the workstation.
- 5. You can use the **Assigned Tech** field to assign a technician for the appointment. When the prewrite is pulled to the repair order, the technician will automatically fill in for all repairs added for the appointment. *This is an optional field.* You can enter or edit the technician on the Enter Conditions screen once the prewrite is pulled to the repair order.

Click **Tech List** to view a list of the technicians and a bar graph for the time that has been assigned to each technician so far for the day. The graph display is rounded to 15-minute increments and is intended only to show the estimated time. If you right-click on a technician, you can view a list of appointments assigned to the technician. This same list displays when you click **Tech List** on the main Schedule Xpress screen and on the Details screen. You can click on a technician on this screen to select the technician for the appointment.

- 6. Click the circle to the right of the phone number field that contains the phone number that should be used for this appointment. This is the number where the customer can be reached if questions arise during service.
- 7. Indicate if the customer requires a ride, requires a loaner, will be dropping off the vehicle, or if dealership needs to pick up the vehicle. Click to select the option. The system keeps a running total of this information and displays it on the scheduler for each day.
- 8. Click the circle next to the appointment type: service, body shop, or quick lube. This becomes the repair order type when the prewrite is pulled to the R/O. The system remembers the last appointment type selected and uses it as the default for the next appointment schedule. When viewing the schedule, you can quickly identify appointments based on the background color. Quick lube appointments will be blue, and body shop appointments will be orange. Service appointments will not have a background color.
- 9. Under **When Finished**, click to select the option that indicates how the customer will be notified when the service is done: call, e-mail, deliver, will pickup, or waiting. This information prints on all copies of the repair order.
- 10. Click Next to open the Enter Complaints screen to enter up to six complaints that will be addressed during the service. When the prewrite is pulled to the repair order, the complaints will automatically pull to the Enter Conditions screen. When you are finished entering the information, click OK. When prompted to verify your printer is ready, you have two options. Click Print to save and print the information, or click Skip to save the information without printing it. If you specified that you do not print prewrites in the scheduler setup, the system will automatically skip printing. You will be back at the Schedule Service screen.

Tip: You can print all the prewrites for a specific day from the Daily R/O Update menu. Click **Daily Reports/Prewrites**, and click **Print Prewrites**. Type the date for the day you want to print, and select your print criteria.

Enter Complaints					
Menu Service: Tech: Quoted Time: 9	U	sage	Code	Ť	Name
	LOF	LUBE-OIL	-FILTER		<u>م</u>
	SI		SPECTION		
	ROT	ROTATE	TIRES		
	BYLAB	BODY LAP	BOR		
Menu Service: Tech: Quoted Time:	PTLAB	PAINT LA			
	ROTAT	ROTATE			
	SERVI	30,000 SE			
	USD	UPSALE E			
	C.U.S	SALE DEC			
Menu Service: Tech: Quoted Time:	SSR		SALES REMINDE		
	DECLI		R DECLINED RE	PAIRS	
	P&M	PAINT & M	ATERIAL		
	PDI	PRE DELI	VERY INSPECTIO	IN	
Menu Service: Tech: Quoted Time:	1TIRE	REPLACE			
Menu Service.	BRAKF	REPALCE	FRONT BRAKES		
	CHAIR	CHARGE			
	INSPE	INSPECTI			•
		1	Click Line To Vie	ω B/0	_
Menu Service: Tech: Quoted Time:	40348	02/08/08	3123		
			LL 1245780		77.40
		02 Q LUBE	-OIL-FILTER		21.25
Menu Service: Tech: Quoted Time:					
Cancel					

- 11. Use the **Total Estimated Time** field to indicate how many time units are required for the appointment. This is used to determine schedule availability as well.
- 12. Click Schedule.
- 13. Use the calendar on the right side of the screen to select the day for the appointment.
- 14. If you are using the three separate schedules, **make sure you are on the correct schedule for the appointment: Service Body Shop, or Quick Lube**. Click the tab on the bottom right side of the screen as needed to select the schedule.
- 15. Click the time slot for the appointment. The customer's name appears in the selected slot.

### Selecting the Day First

You also have the option of scheduling an appointment by selecting the day first. You would use this method when scheduling an appointment for a new customer or when you need to negotiate the day first due to the customer's schedule.

- 1. Use the calendar on the right side of the screen to select the day for the appointment.
- 2. If you are using the three separate schedules, **make sure you are on the correct schedule for the appointment: Service Body Shop, or Quick Lube**. Click the tab on the bottom right side of the screen as needed to select the schedule.
- 3. The left side of the screen displays the times available to schedule for that day. Click the time slot you want to select. The Schedule Service screen appears.
- 4. If this is an existing customer, type the customer's customer number. You can also click **Customer List** to search for the customer. Use the Customer Search Criteria screen to search for the customer in the system. The screen will display a list of customers who meet the criteria you specify for the search. Hold the right mouse button down on a line in the list to view a summary of the customer's information and the customer's repair history. Click the customer in the list you want to select.

If this is a new customer, type the customer's name, address, telephone numbers, and vehicle information. A minimum of the customer's name and phone number is required for new customers. This saves the customer's information to the prewrite only. The customer information will not be added to the Service customer database until the prewrite is pulled to a repair order.

- 5. The Writer field automatically defaults to the writer ID selected for the workstation.
- 6. You can use the assigned Tech field to assign a technician for the appointment. When the prewrite is pulled to the repair order, the technician will automatically fill in for all repairs added for the appointment. *This is an optional field.* You can enter or edit the technician on the Enter Conditions screen once the prewrite is pulled to the repair order.

Click **Tech List** to view a list of the technicians and a bar graph for the time that has been assigned to each technician so far for the day. The graph display is rounded to 15-minute increments and is intended only to show the estimated time. If you right-click on a technician, you can view a list of appointments assigned to the technician. This same list displays when you click **Tech List** on the main Schedule Xpress screen and on the Details screen. You can click on a technician on this screen to select the technician for the appointment.

7. Click the circle to the right of the phone number field that contains the phone number that should be used for this appointment. This is the number where the customer can be reached if questions arise during service.

- 8. Indicate if the customer requires a ride, requires a loaner, will be dropping off the vehicle, or if dealership needs to pick up the vehicle. Click to select the option. The system keeps a running total of this information and displays it on the scheduler for each day.
- 9. Click the circle next to the appointment type: service, body shop, or quick lube. This becomes the repair order type when the prewrite is pulled to the R/O. The system remembers the last appointment type selected and uses it as the default for the next appointment schedule. When viewing the schedule, you can quickly identify appointments based on the background color. Quick lube appointments will be blue, and body shop appointments will be orange. Service appointments will not have a background color.
- 10. Under **When Finished**, click to select the option that indicates how the customer will be notified when the service is done: call, e-mail, deliver, will pickup, or waiting. This information prints on all copies of the repair order.
- 11. Click Next to open the Enter Complaints screen to enter up to six complaints that will be addressed during the service. When the prewrite is pulled to the repair order, the complaints will automatically pull to the Enter Conditions screen. When you are finished entering the information, click OK. When prompted to verify your printer is ready, you have two options. Click Print to save and print the information, or click Skip to save the information without printing it. If you specified that you do not print prewrites in the scheduler setup, the system will automatically skip printing. You will be back at the Schedule Service screen.
- Tip: You can print all the prewrites for a specific day from the Daily R/O Update menu. Click **Daily Reports/Prewrites**, and click **Print Prewrites**. Type the date for the day you want to print, and select your print criteria.
  - 12. Use the **Total Estimated Time** field to indicate how many time units are required for the appointment. This is used to determine schedule availability as well.
  - 13. Click **Schedule**. The customer's name will appear in the time slot you selected.

### **Tagging Extra Time**

You can tag extra time slots for an appointment or tag slots that you want to block off on the schedule. This provides more flexibility when working with your schedule to ensure you have enough time blocked for an appointment or to ensure that certain time slots are not scheduled.

- 1. On the schedule, right-click the blank slot you want to tag.
- 2. Click Tag on the pop up menu that appears.



3. The slot turns yellow and reads, "(Tagged)#" (where # is the writer ID who tagged the slot).

Charles Farmer	
(Tagged) 01	

#### **Clearing Tagged Slots**

Tagging a slot hold it but does not lock it. You can clear the tag or schedule an appointment in a tagged slot as needed.

- 1. Right-click the tagged slot.
- 2. Click **Clear Tag** on the pop up menu that appears.



3. The slot is cleared.

# **Viewing the Schedule**

When viewing the schedule, you can quickly identify appointments based on the background color. Quick lube appointments will be blue, and body shop appointments will be orange. Service appointments will not have a background color. Once a prewrite is pulled to a repair order, it is flagged as processed and will have a gray background. When the repair order for an appointment is closed, the background turns dark gray. The appointment will also display (O) when the repair order is open and (C) when the repair order is closed.

09:30		(C) Buford V Hardin	
		(O) Sarah Cassell	
10:00	(O) Steve Smith	Benjamin B Davidson	
	Donnie L Adams		Charles Farmer
10:30	Angela S Bonewitz		(Tagged) 01
	Patrick E Craig		
11:00		Jeff Derhammer	
	Donna G Evans		
11:30			Bonnie J Parks
			(Tagged) 01
12:00	Johnny C Christian	Rick A Lewis	(Tagged) 01

# **Editing an Appointment**

You can edit appointment information as needed. If you edit customer information in the Schedule Xpress scheduler, the changes will be saved to the customer's master file.

- 1. Click the appointment on the schedule. The Schedule Service screen appears.
- 2. Edit the information as needed.
- 3. Click **Schedule** to save the information.

**Tip:** You can also edit an appointment by clicking **Edit** on the Schedule Info screen that appears when you right-click on an appointment.

# **Viewing Appointment Details**

- 1. Hold the right mouse button down on the appointment on the schedule.
- 2. The Schedule Info window opens and displays a summary of the information entered for the appointment.

	- Schedule In	fo						
	Phone: (	724) 555-1	234 PreWrit	e: 000277				
	Name: S	TEVE SMITH						
	Address: 5	55 MAIN ST	REET					
	City/State: WEST MIDDLESEX PA 16159							
	Last Svc: 🛛	2/08/08 2	G1WH52K739	126476 🚗				
		1 Waiting (	<u> </u>					
	LOF - LUB	E-OIL-FILT	ER					
	[-							
	-							
	-							
		1	1					
Steve Smit	Hide	Move	Edit	Remove				
Donnie L A								

3. Click **Hide** to close the summary.

### **Moving an Appointment**

You can move an appointment as needed for rescheduling. If you attempt to schedule or move an appointment to a filled slot, you will be prompted that the space is filled. You will have to click **Replace** on the prompt to fill the space if you want to override the existing appointment. However, you will not be prompted if you attempt to schedule a tagged spot since tagged spots are spots being held and are not spots that are actually scheduled.

- 1. Right-click the appointment on the schedule.
- 2. Click Move.
- 3. Click the time slot on the schedule where you want to move the appointment.

## **Removing an Appointment**

Removing an appointment deletes it completely from the schedule. Once you remove an appointment, the only way to get it back on the schedule is to manually reschedule the appointment.

- 1. Right-click the appointment on the schedule.
- 2. Click Remove.
- 3. Click **Gone** when prompted to verify you want to remove the appointment. The appointment is deleted from the schedule.

# Viewing Technician Availability

Click **Tech List** to check technician availability. The Appointments By Tech screen displays a list of the technicians and a bar graph for the time that has been assigned to each technician so far for the day. The graph display is rounded to 15-minute increments and is intended only to show the estimated time. If you right-click on a technician, you can view a list of appointments assigned to the technician. This same list displays when you click **Tech List** on the Schedule Service screen and on the Details screen.

# **Viewing Daily Schedule Details**

Use the **Details** button on the bottom of the Schedule Xpress main screen to view the schedule details for the day currently displayed on the screen. The list will identify which prewrites have been pulled to repair orders, and you can view a summary of the repair order right from the screen.

- **Tip:** You can dispatch electronic repair orders from this screen and the main schedule screen. Please refer to the Electronic Repair Order instructions available on the Autosoft documentation Web page for instructions on using the ERO.
  - 1. Use the calendar to select the day.
  - 2. Click **Details**. The Schedule Details screen appears and displays the day's schedule.

Sched	Schedule Details								
_				Schedu	le F	or O	2/14/		
[	All R/O's		Service			1		Quick L	
Clic	Click "Customer" Column To Dispatch Click "Stat" Column To View R/O Click "Action" Column To Change								
Time	Customer	Phone	Req.	P/W	s₩	ΤN	Stat	Action	Complaint
09:30	Buford V Hardin	(724) 555-6642	Pick	000253	01	02	Cls	Waiting	ROT-ROTATE TIRES
	Sarah Cassell	(724) 555-3662	Loner	000263	01	03	Opn	Call	SES LIGHT ON
10:00	Steve Smith	(724) 555-0001	Ride	000259	01	01	Opn	₩aiting	LOF-LUBE OIL FILTER
	Benjamin B Davidson	(724) 555-5656	Drop	000264	01	03		Call	DRIVER SIDE WINSHEILD WIPER ARE DOESN
10:00	Donnie L Adams	(724) 555-4444	Pick	000255	01	01		Waiting	LOF-LUBE OIL FILTER
	Charles Farmer	(724) 555-1000	Drop	000256	01	04		Call	DENT REPAIR BUMPER
10:30	Angela S Bonewitz	(724) 555-0710	Ride	000261	01	01		₩aiting	LOF-LUBE OIL FILTER
	Patrick E Craig	(724) 555-7777	Drop	000262	01	01		₩aiting	LOF-LUBE OIL FILTER
11:00	Jeff Derhammer	(724) 555-1863	Pick	000257	01	02		Waiting	ROT-ROTATE TIRES
	Donna G Evans	(724) 555-8888	Drop	000266	01	01		Waiting	LOF-LUBE OIL FILTER
11:30	Bonnie J Parks	(724) 555-9422	Loner	000265	01	04		Call	DRIVER DOOR DENT REPAIR
12:00	Johnny C Christian	(724) 555-6666	Drop	000260	01	01		₩aiting	LOF-LUBE OIL FILTER
	Rick A Lewis	(724) 555-5555	Ride	000258	01	03		Deliver	CUSTOMER REQUIRES A TUNE UP
•	۰ ۲								
	Close Tech List	Dispatched .	lobs Li:	st Prir	nt Sc	hedu	le/No	Shows	Move Carry Over 🔲 Remove "Notified"

- 3. By default, all appointments are displayed. Use the tabs at the top of the screen to view just the service, quick lane, or body shop appointments. The system saves the last tab you selected and automatically displays that tab the next time you open the screen. This is saved by station.
- 4. The **Req** column displays the drop off information (ride, loaner, drop off, or pick up). Vehicles the dealership needs to pick up are shaded red so they are easily identified.

- 5. The **Stat** column indicates the status of the appointment/repair order. It displays "Cls" for closed, "Opn" for open, of remains blank if the R/O hasn't been created. Click the status in the **Stat** column to view a summary of the repair order.
- 6. The **Action** column displays the action that needs to be taken when the appointment is completed. You can click this column edit the action or mark that the customer has been notified.



- 7. You can click to select the **Remove "Notified"** box to remove the customers who have been flagged as "Customer Notified" from the list.
- 8. The number of complaint displayed for each appointment is determined by the **Show Detail** slider in the scheduler setup. If the slider was set to the left, the detail screen will display only the first complaint added to the prewrite for the appointment. If the slider was set to the right, the detail screen will display all complaints added to the prewrite for the appointment.
- 9. Click **Tech List** to check technician availability. The Appointments By Tech screen displays a list of the technicians and a bar graph identifying the time for the day. The red bar graph identifies the time that has been assigned to each technician so far for the day while the green bar graph identifies how much time the technician has actually logged for the day in the ERO program. The graph display is rounded to 15-minute increments and is intended only to show the estimated time. If you right-click on a technician, you can view a list of appointments assigned to the technician. This same list displays when you click **Tech List** on the main Schedule Xpress screen and the Schedule Service screen.
- 10. The Dispatched Jobs List button will display a summary of the technicians' times.
- 11. Click **Print Schedule/No Shows** on the Schedule Details screen to print the schedule as needed. You are prompted to indicate if you want to print the full schedule or just the no-show appointments. Click the button that corresponds to the list you want to print.
- 12. Click **Close** to close the Schedule Details screen.

# Moving Carry Over Appointments

From the Schedule Details screen, you can move any appointments that have an open repair order to another day on the schedule. When appointments are moved as "carry over" appointments, they will show in the schedule list with a red background to indicate they were carried over. The appointments are added to the available appointment slots on the new day in the order the slots appear. Therefore, you may want to leave the top slots open or set the schedule to start 30 minutes earlier in the schedule setup so carry over appointments will always be at the top of the schedule. Otherwise, the carry over appointments may end up being mixed in throughout the schedule wherever there is an open slot. In this case, you may need to manually move the appointments to different slots.

- 1. Click **Details** on the Schedule Xpress main screen.
- 2. Click Move Carry Over.
- 3. The system displays a list of appointments with open repair orders. A check mark in the box in front of the name in the list indicates the appointment will be moved. Click to clear the check mark from the box for any appointments you do not want to move.

Move Carry Over Appoint	ments
	William Lovern
	⊉∕Frank A. Salerno
Move From	
2 /14/2011 💌	
N	
MoveTo	
2 /15/2011 💌	
Move Now	
Close	Un-Check Line To Cancel "Move" For An Appointment

- 4. The **Move From** date automatically defaults to today's date.
- 5. Use the **Move To** date automatically defaults to tomorrow's date. If you want to move the appointments to another date, use the drop-down calendar to select the date.
- 6. Click Move Now.
- 7. The system prompts you to verify you want to move the appointments to the selected date. Click **OK** to acknowledge the message.
- 8. When the appointments have been moved, the system displays a "Did That" message. Click **OK** to acknowledge the message.
- 9. The appointments will appear on the selected day's schedule in red.

**Tip:** You can also move carry over appointments by moving the appointment as explained under "Moving an Appointment" on page 4:12. If you move an appointment in this manner, it will not be red.

### Pulling the Prewrite to a Repair Order

- 1. Click **Prewrite** on the Start Repair Order screen.
- 2. A list of all of the prewrite entries appears.
- 3. Click the customer you want to select. The prewrite summary appears.
- 4. Click **Pull To R/O** to pull the information to the Start Repair Order screen.

### **Purging Prewrites**

The Schedule Xpress Setup screen contains a **Purge Prewrites** button. You can use this button to remove prewrites from the system. You specify the date you want to use for the purge. The system will delete all prewrites through the specified date. You should run this utility periodically to keep the service schedule files clean. This will save space and improve the service scheduler's performance.

- 1. Click Setup on the bottom of the Schedule Xpress Scheduler. The Setup screen appears.
- 2. Click **Purge Prewrites**.
- 3. In **Purge Through**, type the date you want to use as the cutoff date for the purge, and press ENTER. The system will delete all prewrites through this date.



- 4. Click **OK** when prompted to verify you want to purge the prewrites.
- 5. The system displays a Did That message when the purge is complete. Click **OK** to acknowledge the message.



# **Chapter 5 Repair Orders**

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

Repair Orders (ABC Motors) Repair Orders					
Start Repair Order	Utilities				
Start Conditions	Warranty Interface				
Close Lubricants-Sublet	Warranty Interface				
Close Service	Active R/O List				
Close Parts	Continuations				
Review & Print	Customer History				
Back	Prewrites				

## **Understanding the Workflow**

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

- 1. The service advisor creates the repair order.
- 2. The repair order is issued to a technician.
- 3. The technician diagnosis the problem and writes comments on the back of the repair order.
- 4. The technician returns the repair order to the service advisor, and the advisor advises the customer of the work that needs to be performed.
- 5. When the customer approves the work, the advisor returns the repair order to the technician.
- 6. The technician takes the repair order to the Parts Department so the Parts Department can add parts to the repair order.
- 7. When the job is complete, the technician returns the repair order to the advisor, and the advisor closes the repair order.

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

### **Generating Repair Orders**

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

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

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

## Viewing a Summary of the Repair Order

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

## **Start Repair Order**

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

Start Repair Order (ABC Motors)	
R/O: 40373 Schedule Xpress	
Customer Number: SMI126476 Memo	VIN: 2G1WH52K739126476
Writer:         01         PAUL         Date:         05         15         08           Adviso:         01         PAUL         Date:         05         15         08           Adviso:         01         PAUL         Date:         05         15         08           Name:         STEUE         SHITH         SHITH <t< th=""><th>Year: [2007] Make: [CHEUROLET] Model: [BLAZER] N/U/O: [4] License: [08/3246] First Use: [11] [47] [07] Delivered: [11] [47] [07] Inspection: [65] Color: [BLACK]</th></t<>	Year: [2007] Make: [CHEUROLET] Model: [BLAZER] N/U/O: [4] License: [08/3246] First Use: [11] [47] [07] Delivered: [11] [47] [07] Inspection: [65] Color: [BLACK]
Cell: 724) 555 [0001] On Do Not Call List: N Send Marketing Followup Letter (Y/N): N	Cust Code: Car Line: 1 Warranty Parts (A/B/C/L/N): B
Odometer In: 7132 When Finished Last Odom 3123 (C/W/E/D/P):C	Warranty Manufacturers GM - General Motors
Time In: [11]:[21] Cath/Recv.: [2] Promised: [80]: [60] Job Number: [43373] Taxable: [7] Service/Body/Contract/QuickLube (S/B/C/Q): [5]	Contract:EXTENDED SERVICE CONTRACT Term: 36 Expires: 11/68 Contract Mileage:
Exit R/O List Search Names Void	Clear History Customer Next

### Starting a Repair Order for a New Customer

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

- 1. The system automatically generates the repair order number once the Start Repair Order screen is complete, and you advance to the Enter Conditions screen.
- 2. In **Customer Number**, type the first three letters of the customer's last name only. Proceed to enter the customer information. Be sure to enter the full VIN number in the **VIN** field. The customer number will be assigned when the repair order is created. The customer number consists of the first three letters of the customer's last name and the last six digits of the VIN.
- 3. Both the **Writer** and **Advisor** fields default to the operator ID entered on the start-up screen. You can change the writer or advisor ID by typing over the existing ID numbers.
- 4. The **Date** field defaults to the system date. Edit the date as needed. This should be the actual service date. If the date is earlier or later than the current date, the system will display a warning informing you of the situation. Click **OK** to continue or **Cancel** to edit the date.

- 5. In **Name**, Type the customer's name. If a new customer is created on this screen, the system will separate the customer's name and fill in the first name, middle initial, and last name fields on the Customer Information screen and Customer History screen. In order for the system to break up the customer's name, the name must be entered in one of the following formats:
  - [First Name] [Last Name] = Steve Smith
  - [First Name] [Middle Initial] [Last Name] = Steve S Smith
- 6. The **Individual** field is required for Canadian GM dealers. Use this field to identify the customer as an individual or a company. By default for new customers, a check mark appears in this field to flag the customer as an individual. If the customer is an individual, leave the field selected. Use the three fields to the right to re-enter the customers first name, middle initial, and last name. This ensures you have entered the customer's name correctly.

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

- 7. In **Address**, type the customer's street address (house number and street name).
- 8. In **City**, type the customer's city, state, and ZIP Code/Postal Code.

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

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

- 9. Use the **E-Mail** field to record the customer's e-mail address.
- 10. In **Phone**, **Work**, and **Cell**, type the customer's home, work, and cellular phone numbers. If a default area code was set in the setup, it is automatically fills in the first box for the home and work phone numbers.
- Indicate if this customer is on the Do Not Call list. Type Y for yes or N for no. N is the default. This determines if the customer is pulled to the phone survey list in CSI/SSI. However, this does not prevent the customer from being pulled to the Daily Followup lists in Service Writing for closed repair orders.
- 12. Use the **Send Marketing Follow-up Letter** field to indicate if you want a follow-up letter sent to the customer. Type **Y** for yes or **N** for no. **N** is the default. This field does not determine if the system will pull the customer to the follow-up list in the CSI/SSI module, to the marketing list in the Marketing module, or to the Daily Follow-Up List in the Service Writing module. The field is available, however, when creating a service report in the Report Generator.

- 13. In Odometer In, type the vehicle's odometer reading. For reference, the odometer reading from the last service will be displayed. If the Allow an R/O to be Started Without Odometer In field on the Miscellaneous Parameters screen is set to N for no, you must enter the odometer reading before advancing to the Enter Conditions screen. If you click Next to advance to the Enter Conditions screen without entering the starting mileage when required, a red X will appear next to this field indicating you cannot continue until you enter the mileage.
- 14. The **Time In** automatically fills in from the computer clock.
- 15. In **Promised**, type the promised completion time. This is an optional entry. If there is no promised time, leave the default zeros to indicate there is no promised time. If the **Require Promise Time on R/O At Open** field on the Miscellaneous Parameters screen is set to **Y** for yes, you must enter the promised time before advancing to the Enter Conditions screen.
- 16. Use the When Finished (C/W/E/D/P) field to indicate how the customer will be notified when the service is done. Type C for call customer. Type W if the customer is waiting at the dealership. You can view the repair orders flagged W for waiting on the Waiting tab on the repair order list. Type E for send customer an e-mail message. Type D for deliver vehicle. Type P for customer will pick up. Type N if none of these options/another scenario exists. This is the default entry.
- 17. Use the **Cash/Recv** field to indicate the type of payment. Type **C** for cash payment or **R** for receivable. Accounting may control receivables. **C** is the default.
- 18. In **Job Number**, type the job number, if needed. The job number will default to the repair order number. If you use "lot hats" or other devices, use the number from that device.
- 19. Use the **Taxable** field to indicate if the service is taxable. You have four options.
  - Type **Y** for yes. This applies all of the applicable sales tax (both Sales Tax and the Other Tax as set under Tax Rates/Cost Codes in the Service parameters).
  - Type **N** for no. No tax is applied to the service.
  - Type **1** if you want to apply only the Sales Tax (as set under Tax Rates/Cost Codes in the Service parameters). The tax amount appears in the **Tax 1** field on the Review & Print screen.
  - Type **2** if you want to apply only the Other Tax (as set under Tax Rates/Cost Codes in the Service parameters). The tax amount appears in the **Tax 2** field on the Review & Print screen.
- Use the Service/Body/Contract/Quick Lube field to indicate the repair order type. Type S for service, B for body shop, C for contract (outside service contract), or Q for quick lube. The default entry for this field can be set on the Miscellaneous Parameters screen in the Service Setup.
- 21. In **VIN**, type the vehicle identification number. Seventeen-character VINs are checked for accuracy. You can click the car icon next to the field or press F10 to view the VIN decoding data. This provides detailed information about the vehicle based on the VIN.
- 22. In **Year**, type the vehicle's model year. This field automatically fills in based on the VIN in the previous field.

- 23. The **Make** field should fill in based on the VIN. Otherwise, type the vehicle's make. If you leave this field blank and press ENTER, a list of vehicle makes and models appears. This list pulls from the Default Makes/Models parameters in the System Setup. Click the make/model you want to select.
- 24. The **Model** field should also fill in based on the VIN. Otherwise, type the vehicle's model. If you selected a make/model from the default list in the previous field, this field automatically fills in with the selected model.
- 25. Use the N/U/O field to indicate the type of vehicle. Type N if the vehicle was sold as new at this dealership. Type U if the vehicle was sold as used at this dealership. Type O if the vehicle was not sold by this dealership. O is the default.
- 26. In **License**, type the vehicle's license plate number. Use the second field to the right to record the licensing state.
- 27. In **First Use**, type the date the vehicle was placed into active service for warranty purposes. This is a very important date for the Service Department. This date identifies when the warranty terms (months/mileage) began and helps identify when the extended warranty goes into effect. *This date may be different from the delivery date*.
- 28. In **Delivered**, type the date the vehicle was purchased by the current customer.
- 29. In Inspection, type the month the vehicle state safety inspection is due, if required.
- 30. In **Color**, type the color of the vehicle.
- 31. The **Cust Code** field is for Ford customers enrolled for special Ford incentive programs. Type the customer code in this field.
- 32. In **Car Line**, type the line number for the integrated service posting parameters line Accounting will use to post this service sale. For example, if this is a body shop repair and this field contains a 2, the sale will go to Accounting with the posting parameters set in the integrated service sales parameters for B2. If the customer purchased the vehicle from your dealership, this field defaults to the car line the vehicle was originally assigned.
- 33. The Warranty Parts field defaults to the pricing level set in the Miscellaneous Parts Parameters in the Part Inventory Setup for the vehicle's model year. You should leave the default entry for warranty purposes. However, you must manually type L if you will be using the list price for parts, such as for warranty contracts, or N if you will be using the net price/cost. You can leave this field alone for customer pay repair orders because the parts will be priced according to the parameters set in parts.
- 34. Use the **Warranty Manufacturers** list to select the manufacturer for warranty repairs. If you set the default manufacturer in the Miscellaneous Parameters, this field automatically displays the manufacturer.
- 35. In **Contract**, type the name of the extended contract provider. This is an optional entry.
- 36. If you entered a contract, type the term of the contract in months in **Term**, the month and year the contract expires in **Expires**, and the covered mileage in **Contract Mileage**.
- 37. Click Next. This saves the information and generates the repair order number.

### Starting a Repair Order for an Existing Customer

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

- 1. Click **Search**. There are four ways to pull an existing customer.
  - a. Type the first one to three letters of the customer's last name in the **Name** field. The system actually searches the first thee characters in the **Customer Number** field in the customer's file for the letters specified, so the accuracy of the search results with this search option depend on you properly entering customer numbers in the system. The customer number should consist of the first three letters of the customer's last name followed by the last six digits of the VIN.
  - b. Type the last four digits of the customer's home phone number in **Phone**.
  - c. Type the customer's full or partial license plate number in **License**.
  - d. Type the customer's full or partial first name in **First Name**, and press ENTER.
  - e. Type the customer's full or partial last name in Last Name, and press ENTER.
  - f. Type the customer's full or partial full name in **Full Name**, and press ENTER.
- 2. A list of the customers who meet the criteria you entered appears. If you hold the right mouse button down on a customer in the list, you can view the following customer information: name, full address, last service date, VIN, VIN decoding, and the repair history. In order to keep the customer information on the screen, you must hold down the right mouse button and slide the pointer on to the customer information displayed. Then, the information will stay on the screen so you can view the repair history or VIN decoding data. You can view an R/O by clicking an entry in the repair history.
- 3. Click the customer you want to select. The customer's information automatically fills in on the screen.
- 4. For existing customers, the **Individual** field automatically populates based on the information entered for the customer when creating the customer's file or when creating the first repair order for the customer. If necessary, you can use the three **Individual** fields to edit the customer's name if it does not appear correctly. This will edit the name in the customer's file.
- 5. Enter any additional information as needed.
- **Tip:** If you selected the wrong customer for the R/O, when you click **Search** to bring up the Customer Search Criteria screen again, there will be a **Prev List** button. Click this button to bring up the previous list of customers. The system will remember the criteria entered on the Customer Search Criteria screen until you leave the Start Repair Order screen.
  - 6. If there is memo data in the customer's file, the Memo button will display a green check mark. If the customer's file contains no memo data, this button displays a red minus sign. To view available memo data, click the Memo button. Click Close to close Customer Memo screen. To add memo data, click the Memo button, type the information, and click Save. The memo block holds up to 512 characters. The memo data will also be available in the Parts Inventory module on the Service R/O Parts screen.

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

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

#### Using the Names Button

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

Search Cus	tomers							
GENERAL	CAR RENTAL	COMPANY		1234 North Main	Street	West Middlesex	(724) 555-99	99
			4					
	Search Phone:			Vehicle Inventory	Name: Addrs: City:			
	Search Name Abort	ок 			Memo:			

- 1. Click Names.
- 2. Type the last four digits of the customer's phone number or first three characters of the customer's last name.
- 3. The screen will display all the entries in the service history that match your search criteria. Click an entry to select the customer.
- 4. Click **OK** to pull the name to the repair order. *Only* the customer's name, address, and phone number will pull to the current repair order.
- 5. Enter the remaining information on the Start Repair order screen as needed.
- 6. When all information is complete, click **Next** to continue to the next entry screen.

### Starting a Repair Order for an Internal

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

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

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

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

2. The Estimated Internal Repairs screen appears.

Estimated Internal Repairs
Current Estimated Repair Cost: \$
Add To Above: \$
Abort

- 3. The **Current Estimated Repair Cost** field displays the amount of any repairs currently pending for the vehicle.
- 4. In **Add To Above**, type the amount you anticipate spending on the repairs, and press ENTER. You must enter a value, even if it is .01. This becomes the "pending" repair amount.
- 5. The **Name** field identifies the repair order as an internal.
- 6. Type any additional information on the screen as needed.
- A "Certified/Pre-Owned" flag will appears next to the N/U/O field to indicate this is a certified used vehicle if the Certified field on the Vehicle Information screen in the Accounting module contains a Y for yes.
- 8. Click **Next** when you are finished.

### Starting a Repair Order for a Customer with Prewrite Information

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

- 1. Click **Prewrite**. A list of all of the prewrite entries appears. Click the tabs at the top of the list screen to filter the prewrite list, or filter the list by typing the last four digits of the customer's phone number in the **Filter by Phone Number** field.
- 2. Click the car icon next to each prewrite line to view the VIN decoding data. This provides detailed information about the vehicle based on the VIN.
- 3. Click the magnifying glass icon to the left of the prewrite number to view a summary of prewrite information. Click **Hide Details** to close the summary.
- Click the customer you want to select, and click OK to pull the information to the Start Repair Order screen. The information entered for the prewrite fills in on the screen. Type any additional information as needed.
- 5. Click **Next** when you are finished.

#### **Recalling a Repair Order**

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

- Type the letter of the customer's last name. The list will display the customers whose last name begins with that letter.
- By default, all repair orders display in the list. Use the **Service**, **Body Shop**, **Service Contract**, and **Quicklane** tabs to view just the selected repair orders. Click the **All R/O's** tab to view all repair order again.
- The My R/O's tab displays just the repair orders for the current user ID/writer number.
- The **Waiting** tab displays just the repair orders flagged **W** for waiting in the **When Finished** field on the Start Repair Order screen.
- By default, all repair types are displayed in the list. Use the last five tabs on the top of the screen to filter the list based on the repair type: customer pay (C/P), warranty (W/C), internal (I/R), or quick lane (Q/L). If there are multiple repairs on the repair order with multiple repair types, the system uses the repair type for the first repair added to the repair order to determine the sort.
- By default, the list is sorted by R/O number. Click any column header on the screen to sort the list by the R/O number, job number, customer's name, etc.
- Click Print on the bottom of the Active R/O's screen to print the list.
- When viewing the R/O list, you can view the detail for a repair order by holding down the right mouse button on the repair order in the list.

### Voiding a Repair Order

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

- **Tip:** If a password is set in Accounting for deleting service documents, you will be required to enter the password in order to void the repair order.
  - Select the repair order you want to void by typing the repair order number in the R/O field or by clicking R/O List and selecting the repair order from the list. The information for the repair order fills in on the screen.
  - 2. Click Void.
  - 3. Click **OK** when prompted to verify you want to void the repair order. The system prints a copy of the voided repair order and marks the repair order "Voided R/O" in the R/O list.

#### Voiding a Repair Order with Sublet

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

ATTENTION!		×
	There Is Sublet 0	)n This R/O.
	Ok	Cancel

#### Voiding a Repair Order with Restricted Access to Parts

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



# **Start Conditions**

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

Enter Conditions (ABC Motors)		D 10 D 1			
R/O:       40373       STEVE SHITH         2897       CHEUROLET BLAZER         261WH52K739126476       2         Get VIS       Trouble/F         Get VIS       Customer Pay Re         Print L       Print L         ROTATE TIRES       1         Labor Levet A       Complaint Complaint Code         C / W / I / Q : C       Labor Sale         C / W / I / Q : C       Complaint Code	spair Is NDN-Taxable JF Window Sticker	Year:	CHEUROLET BLAZER N 11/07/07 11/07/07 05 7132	39126476	
Remove Repair ERO Dispatch Sav	e Repair	Tech's Writer	s Menus	Fail Codes	Q Comp's
Exit R/O List Print	History View R/O	Clear	Back	,	Next

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

### **Adding Repairs**

- If you advanced to this screen by clicking Next on the Start Repair Order screen, the R/O field automatically fills in with the repair order number. Otherwise, type the repair order number you want to retrieve for editing, or click R/O List to select the repair order.
- 2. In **Repair**, type the number for the repair you are entering. Number each repair (condition) separately. You can add up to 12 repairs per repair order. Enter the repairs as a number from 1-9 and as the letters X, Y, or Z (for repairs 10, 11, and 12).

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

- 3. The **Menu** field is an optional entry. If you entered menu items using the **Enter Service Menu Operations** option in the Service Writing System Setup, you can pull the information to the repair order. Type the menu code, or click **Menus** to choose from the available menu items. Use menu codes for common maintenance repairs. You can view the detail for any code in the menu item list by holding down the right mouse button on the menu item
- 4. In Trouble/Fail Code, type the trouble code or fail code. These codes can be established by the manufacturer or service manager. If you entered trouble/fail codes in the Service Writing System Setup, click Fail Codes to select the codes from a list. These are not required entries, but if you do not use the codes and use a third-party marketing vendor, the vendor will not be able to determine the type of customer pay work performed on the vehicle.
- Tip: Use the tabs at the top of the lists to sort the menu items and fail codes. The default sort for these items is based on the sorting parameter set in the System Setup using the using the **Trouble/Condition Codes** menu option. The usage sort will sort the list by the frequency that the codes are used. The code sort will sort the list by the code (numerically and then alphabetically). The name sort will sort the list by the description (numerically and then alphabetically).
  - 5. Click to select the **Customer Pay Repair Is NON-Taxable** box if the repair is non-taxable.
  - 6. Use the **Complaint** lines to type a description of the complaint or the repair to be done. If you entered quick complaints in the Service Writing System Setup, click **Q Comp's** to select the complaint from a list. Drag a complaint from the list to the description line.
  - 7. In **Technician**, type the technician's ID number. You can select the technician from a list by clicking **Tech's**. Click a technician in the list, and the field automatically fills in with the technician's ID number. This is an optional entry on this screen.
  - 8. The **Writer** defaults to the service writer entered on the Start Repair Order screen. You can change the writer by entering a different writer's ID number. You can also select the writer from a list by clicking **Writers**. Click the writer in the list, and the field automatically fills in with the writer's ID number.
  - 9. Use the **C/W/I** field to indicate the type of sale. Type **C** for customer pay, **W** for warranty, **I** for internal, **N** for new car road ready (PDI), or **Q** for quick lube.
  - Type the labor level code (A-J). The labor level codes represent labor rates, which are defined using the Labor Rates option on the Service System Setup menu. The actual labor rate will differ based on the type of repair (customer pay, warranty, internal). Level F is used for flex rate.
  - 11. In **Estimated Labor Time**, type the labor units required for the repair. Do not enter decimal points. For example, 1.0 should be entered as 10.
  - 12. The **Labor Sale** is calculated based on the labor level and labor time entered unless you selected a menu item. For menu items, the labor sale defaults to the labor sale entered when creating the menu item using the **Enter Service Menu Operations** option in the Service Writing System Setup.
  - 13. In **LOP**, type the labor operation code set by the manufacturer. This is an optional entry on this screen.

- 14. In **Complaint Code**, type the customer complaint code, if required. This is an optional entry on this screen.
- 15. Click **Save Repair** to add the repair to the repair order. The repair is displayed in the list on the right side of the screen.
- 16. Add additional repairs as needed.
- 17. If necessary, use the **Print LOF Window Sticker** button to print a static windshield label to remind the customer of the next service date. This option requires a thermal transfer printer and preprinted labels available from Autosoft's Forms division. You set the default thermal printer by clicking Utilities on the DMS main menu and clicking Service. Use the Static Label list to select the printer. You can also print the LOF window sticker when closing the repair order on the Close Service screen
- 18. Click **Next** when you are finished adding all of the repairs to the repair order to advance to the next screen.
- **Tip:** The time for each repair will not pull to the payroll time flags until the repair is saved on the Close Service screen.

#### **Editing a Repair**

- 1. Type the repair order number you want to retrieve for editing, or click **R/O List** to select the repair order.
- 2. Type the repair number, or click the repair in the list on the right side of the screen. The information for the repair is displayed.
- 3. Click in a field, and edit the information as needed.
- 4. Click **Save Repair** to save the changes.

#### Removing a Repair

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

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

### Adding Customer Presentation to a Repair Order

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

- 1. Click **History**. The history screen displays all of the repair orders in the customer's service history. Click a repair order to view the repair order. This allows you to research the customer's history to see what services might be due.
- 2. The right side of the Service History screen displays all of the menu items entered in the Service Writing System Setup. Click the menu item in the list you want to add to the repair order.
- 3. The R/O Data list on the right side of the Enter Conditions screen displays "Upsale Menu" followed by the code for the menu item you selected.

### Printing the Hard Copy

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

- 1. Click Print.
- 2. Click to select what you want to print. The **Print** button prints the hard copy of the repair order. The **Add-ons Only** button is only available if you have already printed the original repairs added to the repair order.
- **Tip:** If you use mirror hangers and set the **Print Mirror Hanger with Hard Copy** setting on the Miscellaneous Parameters screen to **Y** for yes, the mirror hanger prints when you print the hard copy. If there is prewrite information for the customer/vehicle, the prewrite information prints on the mirror hanger.

### **Close Lubricants—Sublet**

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

International Symbolic     (ABC Motors)       R/O     Steve SHITH       2867     CHEURDLET       2617     C6140H52K739126476						
Shop Suppl Warrenty Internal Lubricants Waste Disposai ENGINE OIL UP TRANSMISSION GEAR LUBE	Customer           Qty. R T Cost           1         1           0         1           1         0           1         0	95 1.95	ale Ext []	I (Q) LUBE-	K" Condition From L OIL-FILTER E TIRES	ist
Sublet         Code           Options >	Vendor/Description					
Exit R/O	List		View R/O	Clear	Back	Next

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

### **Adding Lubricants**

- 1. If you advanced to this screen by clicking **Next** on the Enter Conditions screen, the **R/O** field automatically fills in with the repair order number. Otherwise, type the repair order number you want to retrieve for editing, or click **R/O** List to select the repair order.
- 2. The Shop Supplies/ Hazardous Waste label is based on the option selected on the Miscellaneous Parameters screen in the Service Writing System Setup. The system calculates the shop supplies/ hazardous waste based on the parameters set on the Miscellaneous Parameters screen. If you want to override these calculations for a repair, type the shop supplies/hazardous waste charge in the corresponding field (warranty, internal, or customer). The amount will be added to the first Lubricants line if it corresponds to the repair type (W, I, or C).

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

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

- 4. In **Qty**, type the quantity needed for the repair.
- 5. In **R**, type the repair number that corresponds with the repair that needs this item, or click the repair in the repair list to the right. This is the number assigned to each repair on the Enter Conditions screen (1 -9 and X, Y, or Z).
- The T field fills in with C for customer pay, W for warranty, I for Internal, N for new car road ready (PDI), or Q for quick lube. This field defaults to the repair type entered for the repair number entered in the previous field.
- 7. The individual cost and sale price and the total cost and sale price automatically fill in the **Cost/Ext** and **Sale/Ext** fields. These values pull from the R/O Lubricant Pricing set in the Parts Inventory System Setup.
- 8. Click **Next** when you are finished entering information to advance to the next screen.

#### **Removing a Lubricant**

- 1. Click in the **Qty** field.
- 2. Delete the quantity, and press ENTER.
- 3. The lubricant line is removed.

### Adding Sublet

- 1. Type the sublet code, or click **Options** to select the code from the sublet list.
- 2. The remaining fields for the line fill in based on the information entered for the sublet in the setup. Enter additional information as needed.
- 3. In **Vendor/Description**, type the vendor for the service or a description of the service if a default description does not fill in for the sublet.
- 4. In **R**, type the repair number that corresponds with the repair that needs this item, or click the repair in the repair list above. This is the number assigned to each repair on the Enter Conditions screen (1 through 9 and X, Y, or Z).
- 5. The **T** field fills in with **C** for customer pay, **W** for warranty, **I** for Internal, **N** for new car road ready (PDI), or **Q** for quick lube. This field defaults to the repair type entered for the repair number entered in the previous field.

- 6. In **P.O.**, type the purchase order number. Otherwise, this field automatically fills in with the repair order number.
- 7. Use the **TX** field to specify if the sublet is taxable. If you specified the default taxing when creating the sublet in the Service System Setup, the default tax parameter automatically fills in this field. The entry in this field determines both if the sublet is taxable and which tax will be applied.
  - Type **Y** for yes. This applies all of the applicable sales tax (both Sales Tax and the Other Tax as set under Tax Rates/Cost Codes in the Service parameters).
  - Type **N** for no. No tax is applied to the service.
  - Type **1** if you want to apply only the Sales Tax (as set under Tax Rates/Cost Codes in the Service parameters). The tax amount appears in the **Tax 1** field on the Review & Print screen.
  - Type **2** if you want to apply only the Other Tax (as set under Tax Rates/Cost Codes in the Service parameters). The tax amount appears in the **Tax 2** field on the Review & Print screen.
- 8. Type the tax rate for the service in **Tax %**. If you entered a tax rate in the sublet setup, this field automatically defaults to that rate. If the tax needs to be different from the tax rate set in the parameters, type the rate you want to use.
- 9. In **LOP**, type the labor operation code for the sublet. If you entered a default code in the sublet setup, this field automatically defaults to that labor operation code.
- 10. In **Fail**, type the fail code. This is the code set by either the manufacturer or the dealer.
- 11. In **DRD**, type the daily rental days for a loaner car. This is required for Chrysler and Ford. This field should not be used to record rental days for general car rental use.
- 12. In **Cost**, type the cost of the sublet. If you entered a default cost in the sublet setup, this field automatically defaults to that cost.
- 13. The **Sale** amount is automatically calculated based on the cost. If you entered a default sale amount in the sublet setup, this field automatically defaults to that sale amount. If you did not enter a default markup in the parameters, you can manually enter the sale amount.
- 14. Click **Next** when you are finished entering the information to advance to the next screen.

#### **Removing a Sublet**

- 1. Click the **Options** button next to the line you want to remove.
- 2. Click Clear Line.

### **Close Service**

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

Close Service (ABC Motors)					
R/O:         40373           Odom In:         7132           Last         3123           Odom Out:         7132           VIN:         261UHH52K739126476	STEVE SMITH 2007 Chevrolet I 2G1WH52K7391264		Schedule Xpress	-List 1-(Q) LUBE- \$9017 2-(C) Rotat	342 FILTER
Inspection Month: [85] Sched Maint (Y/N):[V] Next Service:[Lube-011-Filte Next Svc Date:[81] /dd/ [88]	r Print LO Vindov Line: 1 Sticker				
Repair: 1     Exclude S/S       Fail Code:     LUBE       Comp Code:     LOF       Labor Op:     C/A///N/Q:       Labor Level:     A       Technicat:     81       Other Time:     3       Other Time:     1       Sale:     16.59	Complaint/Cause/C	re Additi	anal Tech's		
Total Sale: 16.58 Comeback: M Declined				"Ulick" Line fro	m List to Process
Exit R/O List Time Guide	es Parts	History View R/0	) Clear	Back	Next

- If you advanced to this screen by clicking Next on the Lubricants/Sublet screen, the R/O field automatically fills in with the repair order number. Otherwise, type the repair order number you want to retrieve for editing, or click R/O List to select the repair order.
- 2. The **Odom In** field automatically fills in with the odometer reading as the vehicle is brought in for service. The odometer reading for the last service is displayed to the right of this field.
- 3. In Odom Out, type the odometer reading at the end of service. If the Odometer Out field is less than or equal to the Odometer In field, the system will prompt you to indicate what you want to do about this situation. If you click Fine, the system ignores the odometer readings. If you click Add 2, the system automatically adds two miles to the Odometer Out field. You can manually edit the odometer out as needed. If you bring the repair order up second time and the mileage is the same, the system will prompt you again, but this time, your option will be to add one mile.
- 4. The **VIN** field automatically fills in with the vehicle identification number. This pulls from the information entered on previous screens.
- 5. The **Inspection Month** also fills in if an inspection month was entered on the Start Repair Order screen.
- 6. Use the Scheduled Maintenance field to indicate if you want to print a reminder on the repair order for the customer to schedule maintenance in the future. This determines if the customer will be included when you compile the marketing list to send reminder postcards. Type Y for yes or N for no. The default entry is N. You must change the default N to Y as needed to ensure an accurate marketing list. If one of the words "lube," "oil," or "filter" appear in the service description, this field will automatically default to Y. The miles driven per month will be calculated and displayed to the right of this field.
- 7. If you type **Y** in the **Scheduled Maintenance** field, the **Next Service** field defaults to a description of "Lube-Oil-Filter." Leave this entry, or type the description for the next service.

- 8. In **Next Svc Date**, type the date (month and year) for the next service. If you entered **Y** in the **Scheduled Maintenance** field, this field defaults to a suggested return service date. Edit the date as needed.
- 9. If you use static windshield labels, click **Print LOF Window Sticker** to print a label to remind the customer of the next service date. This option requires a thermal transfer printer and preprinted labels available from Autosoft's Forms Division. (You set the default thermal printer by clicking **Utilities** on the DMS main menu and clicking **Service**. Use the **Static Label** list to select the printer.)
- 10. The **Line** field defaults to the line entered on the Start Repair Order screen. The car line determines which General Ledger accounts the information will post to in Accounting. If you edit the line on this screen, the line will be saved to the customer's file.
- 11. In **Repair**, type the repair number, or click the repair in the list on the right side of the screen. Typing a new repair number will start a new repair. The system warns you that selecting a new repair number will starts a new repair. Click **OK** to acknowledge the message.
- 12. Click to select the **Exclude S/S** box if you want to exclude shop supplies for this repair. A check mark will appear in the box to indicate it has been selected. Click the box again to clear it.
- 13. In **Fail Code**, type the fail code, or click **Fail Codes** to display a list the codes. Click the code you want to select. If you entered a code on the Enter Conditions screen, the code automatically fills in this field. Use the tabs at the top of the list to sort the list by usage, code, or name.
- 14. In **Complaint Code**, type the complaint code (if needed). If you entered a code on the Enter Conditions screen, the code automatically fills in this field.
- 15. In **Labor Op**, type the labor operation code set by the manufacturer. If you entered a code on the Enter Conditions screen, the code automatically fills in this field.
- The repair type should automatically fill in the C/W/I/N field. It displays C for customer pay, W for warranty, I for internal, N for new car road ready, or Q for quick lube.
- 17. The **Labor Level** should automatically fill in with the labor level entered on the Enter Conditions screen, but you can edit it as needed.
- 18. In **Technician**, type the technician ID number for the technician who completed the repair, or click **Techs** to display a list of technicians. Click the technician you want to select. If you selected a technician on the Enter Conditions screen, the technician's ID number automatically fills in this field.

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

The field to the right displays the technician's name. It will display the name entered in the **Short Name** field on the Technician Information screen in the Service Writing setup. If there are multiple labor lines for the repair, this is the technician assigned to the first labor line.
19. In **Labor Time**, type the labor time in time units. Do not use decimal points. If you entered labor time on the on the Enter Conditions screen, the time automatically fills in this field.

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

- 20. In Other Time, type the labor units for any other time you want to record for the repair.
- 21. The **Actual Time** field defaults to the value entered in the **Labor Time** field. The labor values are used to generate technician time reports.

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

- 22. The **Sale** field displays the sale amount. The system automatically calculates the sale amount based on the labor units in the **Labor Time** field and the labor level selected for the repair.
- 23. The **Total Sale** field displays the total sale amount. The system automatically calculates the total sale amount based on the labor units in the **Total Labor Time** field and the labor level selected for the repair.
- 24. Use the **Comeback** field to indicate if this is a repeat repair. Type **Y** for yes or **N** for no. If this is a repeat repair, you will be prompted to enter the original repair order number, repair date, repair number, and technician number. Click **History** to view past repair orders. (You must flag a repair in order for it to appear on the Comeback report.)
- 25. The **Declined** box lets you track declined repairs. You can track declined repairs for future up sales using the **Declined Service** report available on the Miscellaneous Lists menu in the Service Followup & Marketing section. Click the box to select it. A check mark will appear in the box to indicate it has been selected. Click the box again to clear it.
- 26. The **Complaint/Cause/Cure** Section displays the customer complaint entered on the Enter Conditions screen. Type additional information as needed.
- 27. When all of the information for the repair is entered, press the END key on your keyboard, or click the "**Press END Save Repair**" message.

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

- If Autosoft provides a warranty interface for your manufacturer, the corresponding warranty screen appears. Add information as needed. Click **Save** to save the warranty information. (Please refer to your manufacturer warranty manual for complete instructions on completing the additional warranty screens.)
- 29. Repeat steps 11-26 for each repair on the repair order you need to close. Click **Next** when you are finished closing all of the repairs to advance to the next screen.
- **Tip:** The **Time Guides** button allows General Motors dealers to access labor time guide information. For other manufacturers, you can access the labor time guide information on the warranty screen. Refer to your manufacturer-specific warranty manual provided by Autosoft for information about using the labor time guides for your manufacturer.

#### Parts

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

- 1. The top of the screen lists all of the parts that have been added to the repair order. A list of the conditions is displayed on the bottom-right side of the screen.
- 2. Click a part in the list. The part number is displayed in the first field on the bottom of the screen, and the **Condition** field indicates the corresponding repair number (condition). Edit this field if the part needs to be assigned to a different repair. You can select a repair by clicking the repair in the list on the bottom-right side of the screen. The repair number will fill in **Condition** field.
- Use the buttons next to the Failed Part field to indicate if the selected part is the failed part. Click Yes to mark the failed part, and click No to mark the remaining parts. You can only mark one part as the failed part.
- 4. Click **Back** to return to the Close Service screen.
- **Tip:** If you switch parts between repairs (conditions) that have different repair types, you are prompted that some of your parts are flagged improperly. You must re-close parts to ensure the pricing information is correct. For example, if you switch a part from a customer pay repair to a warranty repair, you are prompted the parts are flagged improperly. Click **OK** to acknowledge the message, and re-close the parts section of the repair order to ensure that the parts for the warranty repair are charged with the warranty price and that the parts for the customer pay are charged with the customer pay price. If the Parts Department has restricted automatic re-pricing of parts switched between repairs, you cannot switch the parts between conditions. You will have to inform the Parts Department about the corrections that need to be made to the repair order.

# **Close Parts**

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

Close Parts (ABC Motor R/O: 40373	s) <u>Steve Smith</u> <u>2007 Chevroli</u> 2G1WH52K73912		Schedule Xpress		<b>'arranty Parts M</b> a Part Line from List t	
LN Part No		Qty Cost			kt. Desc	
01 89017342			11.17 LUBE-OIL-FILT ROTATE TIRES		.17 FILTER	(1)
	ondition: 1 led Part: <u>Yes</u> <u>No</u>	"Click" Condition From List				
Exit R/O	List	Quick Lane Parts	View R/O	Clear	Back	Next

## **Closing Parts**

- 1. The screen displays a list of parts on the repair order.
- 2. To edit a part, click a part in the list. This opens the Edit Parts screen. You use this screen the same way you use the Edit Parts screen that opens when you click **Parts** on the Close Service screen.
- 3. Click **Next** when you are finished reviewing all of the parts to advance to the next screen.
- **Tip:** If Parts has restricted automatic re-pricing of parts switched between repairs, you cannot switch the parts between conditions. If you attempt to switch the parts, the system will prompt you that some parts are improperly flagged for condition and that the Parts Department must make the necessary changes. Click **OK** to acknowledge the information, and inform the Parts Department about the changes that need to be made to the parts.

### **Adding Quick Lube Parts**

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

QuickLube Parts R/O: <b>4037</b> 1-(Q) LUBE-01 2-(C) ROTATE	20 20 L-FILTER	IITH UROLET BL 739126476		25 81 8792 25 81 152 8 25 81 23 85 25 81 23 85 25 16 28 16 25 17 13 77 25 32 4 85 2 41 85 4 89	6.50 6.50 6.50 6.50 6.50	OIL FILTI OIL FILTI OIL FILTI OIL FILTI OIL FILTI
LN Part N 02 01 89 017342	lumber		FILTER			
Exit	Save					

#### Adding a Quick Lube Part

- 1. Click **Quick Lane Parts**. The Quick Lube Parts screen appears.
- 2. Type the part number, or click the part in the list on the right side of the screen. The description and pricing for the part fill in on the line.
- 3. Type the quantity.
- 4. Click **OK** to file the line.
- 5. Continue to add parts.
- 6. Click **Save** when you are finished.

#### **Removing a Quick Lube Part**

- 1. Click the part to bring the information to the "working line."
- 2. Delete the quantity.
- 3. Click **OK**. The part line is removed.
- 4. Click Save.

# Adding Body Shop Parts

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

Body Shop Parts R/O: 4034	200	LIAM IVANY 5 Pontiac Aztec 7171717171717171 Molding Str			
LN Pa 01 12569875	rt Number	Dty         F         Cost           1         1         123.18	Price Extent 175.00 175	ded Descri .00 RT SIDE	
Exit	Save				

#### Adding a Body Shop Part

- 1. Click Body Shop Parts. The Body Shop Parts screen appears.
- 2. Type the part number, quantity, repair number, cost, and price. The extended amount automatically fills in based on the price.
- 3. Type a description of the part. This field holds 15 characters.
- 4. Click **OK** to file the line.
- 5. Continue to add parts.
- 6. Click **Save** when you are finished.

#### Removing a Body Shop Part

- 1. Click the part to bring the information to the "working line."
- 2. Delete the quantity.
- 3. Click **OK**. The part line is removed.
- 4. Click Save.

# **Verifying Dirty Cores**

If cores have been flagged as outstanding by the Parts Department, the system will display a message that there are outstanding cores when you bring up the R/O on the Close Parts screen in the Service Writing module. You must click **OK** to acknowledge the message.



In addition, a **Cores** section will appear on the Edit Parts screen for parts with cores. Use the three options in this section to indicate if a dirty core has been returned. The default entry is based on the entry in the **C** field on the Service R/O Parts screen in the Parts Inventory module. You can check the dirty core inventory for a part on the Master Inventory screen.

Edit Parts		
000979113		1 (C) LUBE OIL FILTER
Cores		
C Returned		
Outstanding     Charge Customer		
Condition: 1		
Condition.		
Eailed Part C Yes		
Failed Part: F		
	"Click" Condition	
Close	From List	

- **Returned:** Click to select this field if a dirty core was returned. A dirty core will bed added to the inventory. If the entry in the **CR** field was initially **R** for returned when the part was added to the R/O and the R/O is edited and the entry changed to **O** for outstanding (either here or on the Service R/O Parts screen), a dirty core will be subtracted from inventory.
- **Outstanding:** Click to select this field if the dirty core is still outstanding. This entry does not affect the dirty core inventory. The system will display a message that there are outstanding cores if you select this option. Click **OK** to acknowledge the message.
- **Charge Customer:** Click to select this field if the customer needs to be charged for the dirty core.

# **Review & Print**

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



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

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

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

- 2. The fields on the right side of the screen display the total warranty cost, internal amount, and customer pay amount. You cannot edit these fields on this screen. If there is an error, click **Back** to return to the appropriate screen, and edit the information as needed.
- 3. The **See Also** field displays any additional repair order numbers associated with this repair if they exist. This field is for reference only. No information can be entered in this field.
- 4. Use the **Overall Taxable** and **Warranty Taxable** fields to indicate if the service is taxable. You have four options for each. Click to select the tax option.
  - **No Tax:** No tax will be applied to the repair order.
  - **Full Tax:** This applies all of the applicable sales tax (both the Sales Tax and the Other Tax as set under Tax Rates/Cost Codes in the Service System Setup).
  - **Tax 1 Only:** This applies only the Sales Tax (as set under Tax Rates/Cost Codes in the Service System Setup).
  - **Tax 2 Only:** This applies only the Other Tax (as set under Tax Rates/Cost Codes in the Service System Setup).

- 5. Use the **Charge Shop Supplies** box to indicate if you want to charge shop supplies to the repair order. By default, the box is selected. Click to clear the box as needed. The shop supplies will be charge according to the parameters set on the Miscellaneous Parameters screen in the Service Writing System Setup.
- 6. The **Warranty Manufacturer** field indicates the manufacturer responsible for any warranty repairs.
- 7. The Date Closed automatically fills in using the current system date. This will be the closing date for the R/O. The system uses this date to run most of the service reports, so if this date is not correct edit it. The system holds the closing date as soon as you print the R/O, even if you don't close the R/O at the time of printing. If you recall the R/O on a different day, this field will still display the closing date as the date when you printed the R/O. In this situation, you must edit the closing date to the current date if this date needs to be the closing date. When you print the R/O, the system compares the close date to the system date. If the dates differ by more than seven days, the system prompts you to confirm the close date. The system checks to ensure the closing date is not earlier than the open date. The system will warn you if this situation occurs. If you indicate you want to change the date, the system defaults the date to the current system date. You can also manually edit the date as needed.
- 8. Use the **Warranty Deductible** field to specify the deductible amount that applies to the repair order. There must be a warranty claim (W) on the repair order to use this field.
- 9. The **Additional Customer Pay Non-Taxable** field allows the writer to reduce the amount of tax a customer is charged. This applies to special circumstances that you cannot adjust through normal R/O settings. The system uses the dollar amount entered here to reduce the amount used to calculate the tax.

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

- 10. If applicable, use the **Special Customer Pay Tax Rate** field to specify the special tax rate that applies to the repair order.
- 11. The Cash/Receivables field indicates the payment type for the service. The payment type was initially entered on the Start Repair Order screen. It displays C for cash or R for receivable. You can edit the payment type as long as Accounting hasn't restricted the Service Department from changing payment types.

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

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

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

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

- 14. You are prompted to indicate what you want to do with the repair order. Click the button that corresponds with the option you want to select.
  - (Y) Print & Close R/O: Print and close the repair order. This closes all repairs.
  - (P) Print & Close C/P: Print and close the customer pay. This closes the customer pay and internal repairs and leaves the warranty repairs open. You can select to print the warranty copy at this time by selecting the Print Warranty Copy Now box.
  - (C) Customer Copy: Print a customer copy of the repair order. All repairs remain open.
  - Invoice R/O: Invoice the repair order to the Cashier. This closes all repairs and sends the repair order to the Cashier. The repair order is not updated to Accounting until the Cashier prints the repair order and the Service Department performs the Daily R/O Update. You can select to print the customer copy at this time by selecting the **Print Customer Copy Now** box. If you do not print the customer copy at this time, all copies of the repair order print when the cashier prints the repair order.
  - (W) Invoice C/P: Invoice the customer pay repairs to the Cashier. The customer pay and internal repairs are closed and sent to the Cashier, while the warranty repairs remain open. You can select to print the customer copy at this time by selecting the Print Customer Copy Now box. If you do not print the customer copy at this time, all copies of the repair order print when the cashier prints the repair order. The customer pay and internal repairs are updated to Accounting when the Cashier prints the repair order and the Service Department performs the Daily R/O Update. When the warranty repairs for the corresponding repair order are ready, they should be closed with an I. If the corresponding customer pay and internal repairs have already been closed and updated to Accounting, the warranty repairs will be closed and updated during the next daily update. If the corresponding customer pay and internal repairs have not been closed and updated to Accounting, the warranty repairs will be closed and updated at the same time as the Customer Pay and Internal repairs.
  - **(M) Print Memo:** Print a memo copy of the repair order. All repairs remain open. The memo copy prints everything for the repair order, including the cost. Therefore, the memo copy is usually printed as an internal copy that can be referenced while the technician completes the work.
  - (N) No Action: Take no action at this time. This cancels the print and returns you to the Review & Print screen.
  - **Ooops:** This button appears on the right-hand side of the **No Action** button. Use this button to reactivate the warranty repairs or an entire R/O.
- 15. The system prints the appropriate copy and closes the repairs accordingly.

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

# **Applying Discounts to Repair Orders**

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

40373 STEVE SMITH 2007 CHEVROLET BLAZER [Labor: 5%]         (Hold Right Mouse Button Down For Discount Code Profile)         "Click* Line to Select Repair         Remove Current Discount Code         ?-       BPOL BODY SHOP POLICY         NCPO NEW CAR POLICY       UCPO         UCDU USED CAR POLICY       Code         Code       Discount Buy Repair         Remove Current Discount Code       Parti IS Not Discount Bub         COUP COUPON       NEW CAR ADU LETTER         SLOF SENIOR CITIZEN LOF       Total Discount         Total R/O Customer Pay       CP-         Manual Discount       Discount         Manual Discount       Discount         Parts:       .00         Parts:       .00         Parts:       .00         About       Remove All         Save       .00	Discount	5					
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Remove Current Discount Code         ?-         BPOL BODY SHOP POLICY         NCPO NEW CAR POLICY         UCPO USED CAR POLICY         UCPO USED CAR POLICY         Code         Discount By Repair         Remove Current Discount Code         NOME Repair IS Not Discountable         COUP COUPON         NEW New CAR ADU LETTER         SLOF SENIOR CITIZEN LOF         TIRE FREE TIRE ROTATION         USED CAD ADU LETTER         SLOF SENIOR CITIZEN LOF         TOTA POL Contomer Pay         Code:         Manual Discount         Dot ADU LETTER         Labor:       .00         DO 000       Sublet 00         000       .00         Data Procenter       .00         Labor:       .00         Parts:       .00         Do 00       .00         Discult       .00         Out Benove All       Save		(Hold Right Mouse Button Down For Discou	nt Code Profile)		"CI	ick" Line To Selec	t Repair
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Parts:         .00         11.17         .00         .00         0.00         Disc         .00           About         Remove All         Save         .00         .00         .00         Labor         .00	Laboi00			0		W/I	Ded .00
Parts:         .00         11.17         .09         Total:         .00         .00         Subtotal         43.42           About         Remove All         Save         .00         .00         .00         Labor         .00	La	bor: .00 27.50 .00	Parts: 0	0	0.0	0.0	ec 00
About         Remove All         Save         .00         .00         Labor         .00	Pa	rts: . 00 11.17 .00	Total:	0			.00
				-	.00	.00 300	10(a) <u>43.42</u>
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**Tip:** If discounts have been assigned to fail codes applied to the repair order or to customer's record, a message will appear in the bottom-left side of the Review & Print screen indicating discounts apply. The system automatically calculates and applies these discounts when you open the Discounts screen.

#### Applying a Discount to a Selected Repair

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

- 1. Click the repair you want to select in the list on the right side of the screen.
- 2. Type the repair discount code, or click the repair discount code in the **Discount By Repair** list (the blue section). You must click the code in the **Code** column to select the code. If you click and hold down the mouse button on the discount description, you can review the details for each discount.
- 3. The system uses the discount information entered for the repair discount in the Service Writing System Setup to determine how much labor and parts need to be discounted to reach the discounted repair total specified for the discount code. The **Total Discounts** fields display the discount amounts, and the **Customer** fields reflect the new discounted charge. If you selected a discount that has a flat rate of .01, the system discounts the repair 100%, making the repair free.
- 4. Click **Save Changes** to save the discount. (If you try to exit the screen without saving changes, the system prompts you to indicate if you want to save the changes.)

#### Applying a Discount to the Entire Repair Order

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

- Type the R/O discount code, or click the R/O discount code in the Discount Total R/O list (the green section). Be sure you select a discount that applies to the entire repair order. You must click the code in the Code column to select the code. If you click and hold down the mouse button on the discount description, you can review the details for each discount.
- 2. The **Total R/O Customer Pay** fields calculate and display the discount amount, and the **Customer** fields adjust to reflect the new discounted charge. If you select a discount with the labor and parts discount amounts set for .01, you can manually edit the labor and parts discounts to the desired amount.
- 3. Click **Save Changes** to save the discount. (If you try to exit the screen without saving changes, the system prompts you to indicate if you want to save the changes.)
- **Tip:** If you apply a discount but the parts total does not reflect the discount, have the Parts Department check the R/O Lubricants Pricing parameters to verify if you are permitted to apply discounts to parts on an R/O.

#### Manually Applying Discounts

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

- 1. Click the discount code for the discount to be applied.
- 2. Use the Labor Discount and Parts Discount fields to type the discount.
- 3. Click Save Changes.

#### Using the "NONE" Discount

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

#### **Removing the Current Discount Code**

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

- 1. If you are removing a repair discount, select the repair.
- In the discount list, click the blank code field next to the "Remove Current Discount Code" discount.
- 3. The discount is removed.

#### **Removing All Discounts**

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

- 1. Click Remove All Discounts.
- 2. Click **OK** when prompted to verify you want to remove the discounts.
- 3. Click Save Changes to save the edit.

# Utilities

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

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

### Change R/O To Active

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

- 1. Click Change R/O To Active.
- 2. Type the repair order number, or search for the repair order by clicking the "Click For List" message. Click the repair order you want to select.

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

- 3. Press ENTER if necessary.
- 4. Click **OK** when prompted to verify you want to make the change.

#### Enter R/O Status Code

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

- 1. Click Enter R/O Status Code.
- 2. Type the repair order number, or search for the repair order by clicking the "Click For List" message. Click the repair order you want to select.
- 3. Type the status code for the repair order. A list of codes is provided for your reference.



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

# Correct Data on Closed R/O's

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

Correct R/O Data (ABC Motors)	Correct R/O Data (ABC Motors)					
Correct Customer/Veh	icle Data - Closed R/O's					
R/O No.: 40373 Writer: 01 PAUL Advisor: 01 PAUL Name: STEUE SMITH Addrs 555 MAIN STREET City: WEST MIDDLESEX PA 16159 Home: 724, 555 1234 Work: 724, 555 0876 Cell: 724, 555 0801	Year: 2007 Hake: CHEUROLET Hodel: BLAZER New/Used/Other: [6] License: (QRS246 Inspection Month: (05) UIN: 2614H52K739126476) Odometer In: 7132 Odometer Out: 7132					
Contract: EXTENDED SERVICE Term: 36 Expires: 11/08						
Exit	Save					

- 1. Click Correct Data On Closed R/O's. The Correct R/O Data screen appears.
- 2. Type the repair order number, or click **List** to displays a list of repair orders. Click the repair order you want to edit.
- 3. The information is displayed in the appropriate fields.
- 4. Press ENTER to advance through the fields, and edit the information as needed.
- 5. Click **Save** to save the information.
- 6. Click **Exit** to return to the Utilities menu.

### Service Ordered Parts

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

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

Part Number	Desc		Date	Name	Phone	Status	Writer
10280480	ANTENNA			MARK DAVIS	724-555-9898		
10305686	REGULATO	081205	08/08/06	DELLIA CHRISTOPHE			
			: (no gro	ouping) 🔹			

- 1. Click Service Ordered Parts.
- 2. The screen displays the list of ordered parts.
- 3. Use the list at the bottom of the screen to specify the grouping order you want to use for the list: part number, description, order que document, order date, customer name, customer phone number, order status, or service writer. You can also select to sort the list by clicking on the column header you want to use for the sort.
- 4. If an R/O was started and the R/O number was included on the order, you can click the customer in the list to view the repair order. If no R/O exists, the system prompts you that it cannot find the R/O.
- 5. Use the **Print** button to print the list as needed.
- 6. Click **Back** to close the screen.

### **Purge Stale Prewrites**

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

- 1. Click **Purge Stale Prewrites**.
- 2. Use the drop-down calendar to select the date you want to use as the cutoff point for the purge. All of the prewrites before this date will be removed.
- 3. Click Go.
- 4. Click **OK** when prompted to verify you want to purge the old prewrites.

# Continuations

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

- 1. Click **Continuations**.
- 2. Type the repair order number, and press ENTER.
- 3. Click **OK** when prompted to verify you want to generate the continuation.
- 4. The continuation R/O number will display. Click **OK** to continue.

Continuation R/O
The Continuation R/O Number Is 40352
Choose OK to continue
Cancel Current R/0: 40351

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

# **Customer History**

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

📧 Customer Information						
Customer Number: SHI126476 Last 8: 39126476	VIN: 2G1WH5	2K739126476	Active/Inact	ive (A/I):A		
Name: STEVE SMITH		4 555 1234	Work: 724 559			
Name: STEVE SMITH		4 555 0001 Bir	thdate: 05 19 (	50		
Address: 555 MAIN STREET	Salutation: St	eve				
City/State: WEST_MIDDLESEX_PA_16159	Memo:					
e-Mail:	s alesman: 02 s Purch Here: 1	STEPHEN WILL	IAMS			
On Do Not Call List: N Car			lei Type Code.			
Stock No: GM Year: [2007]		s: 1GK875 1GK	275			
Car Line: 1 Make: CHEVROLET	-	s. TGK875   TGK8 e: QRX246	375			
New/Used/Other: N Model: BLAZE		d: 11/07/07				
GM - General Motors V GM Body:	Odomete					
Lease/Purch/Finance: P Color: BLACK	In Servic	e: 11/07/07				
			×			
Last Service: 02/08/08 3123	_   _	Memo		ecial Order Parts		
Next Service: 05 /dd/ 08 Lube-0i1-Filter Total Service Visits: 1						
Inspection Month: 05						
Service Contract: EXTENDED SERVICE CONTRACT						
Term: 36 Expires: 11/12 Contract Distance:	100000					
Special Order Parts	(YZN): N					
Close < Search Customers > Print	Delete	Clear	Repair History	Save		

# **Prewrites**

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

# **Printing the Prewrite List**

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

- 1. Click **Prewrites**. The Service Prewrite screen appears.
- 2. Click **Prewrite List**. The Prewrite List opens.
- 3. Click the tabs at the top of the list screen to select the prewrite list you want to print.
- 4. Click **Print**.
- 5. When prompted to verify your printer is ready, select your print criteria.



Chapter 6

# **Chapter 6 Electronic Repair Order Dispatching**

The Electronic Repair Orders (ERO) program is a complete R/O dispatching system. From the Service Writing module in the Autosoft DMS system, writers dispatch repairs to specific technicians. When the technicians log on to the ERO program, their work list automatically displays on the screen. The ERO refreshes every 45 seconds to ensure the list is current as repairs are assigned throughout the day.

Technicians log repairs on and off as they work on them. The system tracks the time and time units it takes to complete each repair. The Service Writers or Service Manager can view the assigned list and check the status of each repair at any time.

**Tip:** If you prefer to use the Autosoft full dispatcher, please refer to Appendix B for information regarding the full dispatcher.

# **Entering Setup Information**

First, you must enter setup information for the ERO dispatching. This includes entering passwords for technicians and creating shortcuts for the ERO program on each workstation. In addition, you will set the minimum dispatch time the ERO program will use.

## Technician Setup

You must first enter the ERO password for each technician that will use the ERO feature. Technicians use the password to log on to the ERO program. Based on the ID and passwords used to log on, the ERO will automatically display the technician's repair orders.

- 1. Open ASI DMS.
- 2. Click Service on the ASI DMS main menu.
- 3. Click System Setup on the Service Writing main menu.
- 4. Click **Service Technicians**. The Technician Information screen appears.
- 5. Select a technician from the list on the right side of the screen.
- 6. In **ERO Password**, type the password the technician will use to log on to the ERO program. Passwords can be up to five alphanumeric characters.
- 7. Click Save.
- 8. Continue to add passwords using steps 4-5 for each technician as needed.
- 9. Click **Exit** to close the screen when you are finished.

### **ERO Setup**

The Electronic Repair Orders program must be installed on each workstation separately. This allows you to control which workstations have access to the program.

- 1. Click Miscellaneous Parameters. The Miscellaneous Parameters screen appears.
- 2. Click Setup ERO On This Client.
- 3. Click **OK** when prompted to verify you want to set up the program.
- 4. An **ERO** icon will appear on the workstation's desktop.
- 5. Click Close.
- 6. Return to the Service Writing menu.

#### **Minimum Dispatch Time**

You need to set the minimum dispatch time. When a technician logs a repair on, the clock starts timing. If the technician logs off the repair before the minimum time elapses, the system will cancel the log on, and the *time will not be added to the repair*. The default minimum dispatch time is 3 minutes. You only need to edit the parameter if you want the minimum dispatch time to be other than 3 minutes.

- 1. Click **Repair Orders** on the Service Writing main menu.
- 2. Open any repair order screen.
- 3. Click **Schedule Xpress**. The Schedule Xpress screen appears.
- 4. Click **Setup**. The Schedule Xpress Setup screen appears.
- 5. In **Minimum Dispatch Time (Minutes)**, indicate the minimum minutes that must be logged in order for the log on to count. The minimum can be from 1 to 9 minutes.
- 6. Click **Close** to close the screen and save the setting.

# **Dispatching Repair Orders**

Service Advisors can dispatch repair orders to technicians from the Schedule Xpress Scheduler or the Enter Conditions screen. The repair order will appear in the technician's repair list.

### Dispatching from the Schedule Xpress Detail Screen

- 1. Click **Repair Orders** on the Service Writing main menu.
- 2. Open any repair order screen
- 3. Click **Schedule Xpress** to open the scheduler.
- 4. Click Details. The Detail screen appears.
- 5. Click the customer name for the R/O you want to dispatch. A repair order must exist in the Service Writing module before you can dispatch it to a technician. Open repair orders will have a status "Opn."
- 6. The ERO Dispatch screen appears.

ERO	Dispatch						
T/N	Name	Que	Est.	Actual	Open	R/0	Dispatched Jobs (TOM)
01	TOM	1	:18				
02	STEPHEN						
03	DAVID						
	FRANCIS						
	FRED						
	JOHN						
	STEVE						
	RALPH						
89	DARRELL						
				<u> </u>			
				<u> </u>			
_							
				air From List			"Click" On B/O Number To Edit Dispatch List All Techs
	LUBE-OIL-FI Rotate tire						"Click" On R/O Number To Edit Dispatch List All Techs
	All Current		airs				B/0: 40373 STEVE SMITH
							Repair: A 2007 CHEUROLET BLAZER
							Repair: A 2G1WH52K739126476
							All Current Repairs
							Technician: Assign Remove No Priority
-	1						Technician: Assign Remove Priority 1
	Close						□ Priority 2

- 7. Click the technician in the list on the left side of the screen you want to assign the repair/repair order.
- 8. The window on the bottom left side of the screen displays the repairs on the selected R/O. The repair number automatically defaults to "A" for **All Current Repairs**. If you want to assign all repairs on the repair order to the technician, leave the default entry. If you only want to assign a specific repair, click the repair in the repair list. The repair number will fill in the **Repair** field.
- 9. If necessary, click to select the priority level for the repair. Repairs flagged "Priority 1" will display red in the technician's ERO list. The technician should complete these repairs first. Repairs flagged "Priority 2" will display pink in the technician's ERO list. The technician should complete these repairs second. Repairs flagged "No Priority" will appear in the technician's ERO list without special formatting.
- 10. Click Assign. The repairs will appear in the technician's work list in the ERO program.
- 11. Click **Close** to close the screen.

### Dispatching from the Schedule Xpress Main Screen (R/O List)

- 1. Click **Repair Orders** on the Service Writing main menu.
- 2. Open any repair order screen.
- 3. Click **Schedule Xpress** to open the scheduler.
- 4. Click R/O List. An Active R/O List screen appears.
- 5. Click the repair order you want to dispatch. The ERO Dispatch screen appears.
- 6. The ERO Dispatch screen appears.
- 7. Dispatch the repairs using steps 7-10 under "Dispatching from the Schedule Xpress Detail Screen."

#### ERO Dispatching from the Enter Conditions Screen

- 1. On the Enter Conditions screen (**Start Conditions** menu option), make sure the repair order you want to dispatch is displayed on the screen.
- 2. Click **ERO Dispatch**.
- 3. Click the technician in the list on the left side of the screen you want to assign the repair/repair order.
- 4. The window on the bottom left side of the screen displays the repairs on the selected R/O. The repair number automatically defaults to "A" for All Current Repairs. If you want to assign all repairs on the repair order to the technician, leave the default entry. If you only want to assign a specific repair, click the repair in the list. The repair number will fill in the Repair field.
- 5. If necessary, click to select the priority level for the repair. Repairs flagged "Priority 1" will display red in the technician's list. The technician should complete these repairs first. Repairs flagged "Priority 2" will display pink in the technician's list. The technician should complete these repairs second. Repairs flagged "No Priority" will appear in the technician's list without special formatting.
- 6. Click Assign. The repairs will appear in the technician's work list in the ERO Program.

### **Removing Repairs**

- 1. Advance to the ERO Dispatch screen through the Schedule Xpress scheduler or the Enter Conditions screen.
- 2. Verify the correct repair order is displayed on the ERO Dispatch screen. The repair order number should display in the **R/O** field on the bottom of the screen.
- 3. Click the repair in the repair list you want to remove.
- 4. Click Remove.
- 5. The repair is removed from the technician's list.

#### Viewing all Dispatched Repairs

While on the ERO Dispatch screen, you can use the **List All Techs** button to view all dispatched repairs. The first number in parenthesis is the technician ID assigned the repair. Next, you will see the R/O number and repair number. To the right of the repair number, you will see a code in parenthesis that identifies the status of the repair. The repair description/complaint is the last item displayed.

There are six possible status codes. The status changes as the technician works on the repair and finalizes it. Below is a list of the status codes and what each code means.

- (Que): The repair has not yet been started. This status will appear only for repairs flagged "No Priority."
- (P-1): This status only appears for repairs that have been flagged "Priority 1." This status means that the repair has not yet been started or that it has been saved but not finalized.
- (P-2): This status only appears for repairs that have been flagged "Priority 2." This status means that the repair has not yet been started or that it has been saved but not finalized.
- (Wrk): The repair is being worked on. The technician has this repair logged on in the ERO program.
- (T/A): Time has been assigned to the repair. The technician has logged the repair on and off but has not finalized the repair. Instead, the technician saved the information using the **Save Story** button in the ERO program. The repair will remain in the technician's list until it is finalized.
- (Fin): The repair has been finalized. A repair is finalized when the technician clicks the Finalize Repair button in the ERO program.

Below is an example of the Dispatched Jobs list. A breakdown has been provided for each technician in the list to help illustrate how the information is displayed.

		Dispat	tched Jobs - All Techs
(01)	40373		LUBE-OIL-FILTER
(01)	40383		RECALL 1245780 Heater Runs Cold.
		1(T/A)	
(02)	40388	1(Que)	CUSTOMER REQUESTS TUNE UP
(04)	40377	1(Wrk)	LUBE OIL FILTER

Tech	R/O	Repair	Status	Description
01	40373	1	(Fin)	The repair has been finalized.
01	40373	2	(P-1)	The repair was flagged "Priority 1." The technician has not started this repair.
01	40383	1	(P-2)	The repair was flagged "Priority 2." The technician has not started this repair.
01	40386	1	(T/A)	The repair has had time applied to it, but the technician has not finalized the repair.
02	40388	1	(Que)	The repair was flagged "No Priority." The technician has not started this repair.
04	40377	1	(Wrk)	The technician is currently working on the repair.

# Using the ERO Program

The ERO program runs outside of the Autosoft DMS Service Writing module. Each technician will log on to the program. The technician's work list will automatically display the assigned repairs, and the ERO will track the total time and time units for each repair. Technicians log repairs on and off and document repair information on one screen, simplifying the process.

General Motors VIS and Chrysler VIP are in the ERO program. This allows the technician to check for any additional repairs that may be needed. The VIP and VIS interface works the same way it does on the Repair Order screens in the Service Writing module.

# Logging on to the ERO Program

- 1. Double-click the **ERO** icon on the desktop.
- 2. Type your technician ID (user ID) and password on the prompt. (You can also click a technician in the list on the right side of the screen to have the ID automatically fill in on the prompt.)

Technician Log On	
	TOM
	STEPHEN
	DAVID
	FRANCIS
	FRED
- · · · -	JOHN
Tech Number:	STEVE
	RALPH
Password:	DARRELL
Close ER0	

3. The ERO opens and displays your repair orders.

	nic Repair Orders (ABE Motors)	1100					_101 ×
and the second second	ian 01 TOM	Tine			0		
	Description						
40373-1	LUBE-OIL-FILTER						
40373-2	ROTATE TIRES					ාස	
40383-1	HEATER RUNS COLD.			$\square$			
40386-1	LOF		j.	=			Print LOF Window Sticker
		R/O:		tual Minutes:			
		Log On	Log Off				
					1		
	Right Click" On Line To View R/0	Finalize Repair	Print Time Flag	Save Story	Repairs	QwikLines	Parts Request
Hir	vimize New User	Close	History	Clear	Stats	Setup	

# Setting Up QwikLines

Each technician can save unique QwikLines. This is information that the technician may type frequently. Instead of having to repeatedly type the same information, the technician can select the text from his/her QwikLines list. QwikLines are not shared in a common list. *Each technician must enter his/her own QwikLines*.

- 1. Click Setup.
- 2. Type the information you want to save as your QwikLines. Each line holds up to 45 characters. If you require more than 45 characters, you must use multiple lines to add your text.

Setup
QwikLines
FULL SERVICE OIL CHANGE
OIL FILTER #
ENGINE OIL ADDED

3. Click **Close**. The information is automatically saved when you close the screen.

# Logging on Repairs

Only one repair can be logged on per technician at a time.

1. Click a repair in the window on the top left side of the screen.

	nic Repair Orders (ABC Motors) an 01 TOM ———————————————————————————————————
Repair	Description
40373-1	LUBE-OIL-FILTER
40373-2	ROTATE TIRES
	L.S.
40383-1	HEATER RUNS COLD.
40386-1	LOF

2. The repair order number and repair number fill in on the screen for reference. The window on the bottom right side of the screen lists all the repairs on the repair order with descriptions for your reference.

Time	
05/15/2008 09:58:20	
	Total Actual Minutes: 0
R/O: 40373 2	
	Total Actual Units:
	View R/O
Log On 📐 🛛 Log C	Dff
└Ź┛	
ROTATE TIRES	

3. Click **Log On**. The ERO program begins timing the repair. A yellow block appears in the center of the top window. It displays the time elapsed for the repair.

**Tip:** Once the repair is logged on, the **Log On** button becomes a **Cancel Log On** button. Click this button to cancel the log on. The repair is cleared from the screen, and no time is saved.

# Logging off Repairs

- 1. Click Log Off.
- 2. The Total Actual Minutes and Total Actual Units fill in based on the time for the repair.

**Tip:** Remember, the minimum dispatch time can be set in the Schedule Xpress setup. If the technician logs off before the minimum time elapses, the time will not be added to the R/O.

3. Use the lines at the bottom of the screen to enter information for the repair.

You can pull your QwikLines to the repair by clicking **QwikLines** and clicking the line in your list. The mouse pointer becomes a piece of paper with a paper clip. Click on the line where you want to drop the QwikLine, and it will fill in the line for you. Remember, if you created a QwikLine that used two rows, you must select both rows of text to add to the story.

- 4. You have three options at this point:
  - If you added a story to the repair, click **Save Story** to save the changes. This leaves the repair in your list so you can log it on again or add additional information as needed. You will need to finalize the repair later to ensure it is flagged as finalized and to remove it from your list.
  - If this is the final repair on a repair order, click **Print Time Flags** to print the thermal sticker with the time for *all the repairs on the R/O*. You will need to print the time flags before you finalize the last repair on an R/O.
  - If you are finished with the repair, click **Finalize Repair** to finalize the repair and remove it from your list.

**Important:** In order to close a repair, you must click **Finalize Repair**. Logging off does not close a repair. The repair will remain in your ERO list until it is finalized.

**Tip:** Use the **Print LOF Window Sticker** button to print a static windshield label to remind the customer of the next service date. This option requires a thermal transfer printer and preprinted labels available from Autosoft Forms division.

### **Sending Parts Requests**

The Autosoft ERO Parts Request provides a communication tool for the Service Technicians and Parts Department. From the ERO screen, the Service Technician prepares a list of parts required for each repair order and sends the list to the Parts Department. A notification will appear on the Parts Department workstations that a parts request has been received. Once the Parts Department has fulfilled the request, the Parts Department sends message back to the technician that his/her parts are ready. The technician can pick up the parts without having to wait in the Parts Department for the order to be fulfilled.

- 1. Select a repair order from the work list on the left side of the screen.
- 2. Click **Parts Request** on the bottom right side of the Electronic Repair Order screen. The Parts Request screen appears.

Parts Re						
	OEM Source: 1	Ch	rysler		83954 11/14/07 31456	08 W CHECK FOR POWER STEER
Γ	Part Number	Աեթ	Description	07H		08 V CHECK FOR OIL LEAK RIG 08 V CHECK FOR ROUGH OVER B 08 V WHEN FIRST STARTING OU
					53034030AC	GASKET 1 W
					53834829AD	GASKET 1 W
		כו			6508219AA	W 8 UT2
					6587746AA	BOLT 8 W
		iH			4874469 431886686B	LUBRICANT 2 V LUBRICANT 1 V
		iH			431806088 5014730AM	ABSBR PKC 2 V
		18			520882210K	ABSORBER 2 W
		ļ			4874477	SEAL 1 V
					518328288	RESERVOIR 1 V
		JLJ			4883077	FLUID 1 V
					82395 09/12/07 30123	08 W CHECK FOR GAS LEAK
		íĦ			52100196AD	TUBE 1 W
		iĦ			79794 86/27/87 29912	03 C 2688 LUBE OIL FILTER
		íH		-	5281090RA	FILTER 1 C
		÷			6882668488	01L 5 C
	<u></u>	12				
					76375 84/85/87 29648	08 C STATE INSPECTION AFTER
						08 C VEHICLE EMISSION TEST
		Ш		Ы	75871 02/16/07 28123	08 V CUST STATES CLUNKING N
L	L				71127 89/86/86 18866	03 V PERFORM FRONT DRAKE IN 03 V RECALL F17 HEATED SEAT
Г		Text	Message		CBHKF170	KIT 1 V
í					5093183AB	SHOE KIT 1 W
					V5018672	ROTOR 2 W
					67671 05/12/06 18065	33 C VEHICLE EMISSION TEST 84 C STATE INSPECTION AFTER
						04 C STRIE INSPECTION RETER
					64906 02/15/06 11123	04 V CHECK FOR WIND NOISE A
	1				55135958AJ	SEAL 1 W
Clos	re Send				57787 05/27/05 5225	33 I VEHICLE ENISSION TEST
						33 I STATE INSPECTION STICK .
		-				

3. Type the part number for the parts you want to request in the **Part Number** field and the quantity you are requesting in **Qty**.

You can also select a part number from the customer's repair history listed on the right side of the screen to add to the request. Click the part number in the customer's history, and the mouse cursor becomes a yellow piece of paper. Click the **Parts Number** field where you want to add the part number. When selecting a part from the repair history, the quantity defaults to the quantity for that service date. Edit the quantity as needed.

If you need to remove a part, simply change the quantity to 0 (zero). The part will be removed when the request is sent to the Parts Department.

- 4. The **Description** and **O/H** fields fill in with the part name and on-hand quantity from the Master Inventory record.
- 5. Use the **Text Message** box to type any information that you want to send with the request. The counter workers can reply to this text when fulfilling the order.
- 6. Click **Send** when you are finished adding parts to this request. You will be back at the Electronic Repair Order screen.

7. You will receive a message on the Electronic Repair Orders screen when the parts are ready. If a counter worker sent you a text message, it will appear in the yellow Answer Back window. Otherwise, the window will read, "Your Parts Are Ready."

– Parts	Request				
Answe	r Back				
Your	Parts	Are	Ready		
L					
			OK	1	

8. Click **OK** to acknowledge the message.

#### **Viewing History**

Use the **History** button on the bottom of the ERO screen to view the customer's service history. A list of the service dates appears. Click a date to view the repair order.

#### **Viewing Stats**

The **Stats** button on the bottom of the ERO screen allows you to view your time. The list identifies the time for individual repairs and your total time for all the repairs in the list. The statistics for all *closed* repair orders are cleared during the daily R/O update.

#### **Minimizing the ERO**

Once the ERO program is open, you can minimize it. This allows you to keep the program open while you work on other things. Click **Minimize** on the Electronic Repair Order screen, and the ERO program is minimized to your task bar. When you need to work in the ERO program, click the ERO item on your task bar at the bottom of your screen. This gives you instant access to the program whenever you need it.

# Switching Users

A new technician can log on to the ERO program while it is already open on the workstation. This allows multiple technicians to use the same workstation without having to close and reopen the program.

- 1. Click New User.
- 2. Type your user ID and password on the prompt. (You can also click a technician in the list on the right side of the screen to have the ID automatically fill in on the prompt.)
- 3. The ERO opens and displays your repair orders.

## Closing the ERO Program

At the end of the day, the ERO program should be closed.

- 1. Click Close.
- 2. Click **OK** when prompted to verify you want to close the program.

# **Printing the Dispatcher Time Flags**

You can print the dispatcher time flags from the Daily R/O Update menu. *This is a summary of the time for each technician for the day.* The time flags must be printed before the daily R/O update since the update clears the dispatcher information for all closed repair orders.

- 1. Click **Daily R/O Update** on the Service Writing Main menu.
- 2. Click Dispatcher Time Flags.
- 3. When prompted to verify your printer is ready, select your print criteria.

Important: In order to ensure accurate time flags, you can only use one dispatch in the ASI DMS system. You must choose to use the traditional dispatcher (available using the **Dispatcher** button on the Service Writing menu) or the ERO dispatcher (available from the Enter Conditions screen or Xpress Scheduler). You cannot use both.

# **Purging Stale Records**

If a Service Writer attempts to close a repair that a technician has logged on, the system will display a warning that a technician is logged on to the repair. Make sure the technician is finished with the repair, and have the technician finalize it before you continue. In the event a repair order is updated before the technician has finished or finalized a repair, the repair will stay in the technician's list indefinitely. In this event, you will have to purge the stale records.

- 1. Click **Service** on the ASI DMS main menu.
- 2. Click **Dispatching** on the Service main menu.
- 3. Accept the date and time if prompted.
- 4. Click Setup.
- 5. Click Purge Stale Data.
- 6. Click **OK** when prompted you want to purge the data.
- 7. The system displays a "Did That" message when the purge is complete. Click **OK** to acknowledge the message.



# Chapter 7 Active R/O List

The Active R/O List screen is used to view and search a list of active repair orders. This screen is for reference. No data can be entered here. If you need to make a correction to a repair order, you must use the Repair Orders menu.

R/0 40409 40408	JOB		D	CWI	WN	Body Shop	Contracts Quicklane	Waiting		TN	All YEAB	C/P W/C	STATUS
40408		C S	-	C wi	01		GERALD P BARBAS		555-4673	IN		BUIC	Open
		5		C	01		RAYMOND MANNING	• •	555-1233	84			Open
40407		5	- 1	U	61 61		HAUS CAR RENTAL		555-4566	01		CHEVROLET	Open
40407		5		C	01		JIM HANSEN AUTOBODY	• •	555-7899	85			Open
48483		5		U	61 61		VALLEY RENTAL		555-9877	0,0		CHFUROL FT	Open
	000252	5	· I	_	01		DOROTHY M. HARMON	• •	555-7580		2002		Open
	000267	5	- 1	C	R1		FRANK A. SALERNO		555-6878	62			Open
	000263	5		C	01		SARAH CASSELL	• •	555-3662	02		BUICK	Open
	666246	5			R1		LARRY BABCON		555-8522			CHEVROLET	Open
40386 0	000235	5	:	C	01		TIMOTHY B TERRY	• •	555-7411	01	2004		Open
40385 6	000229	5	- 1	C	01		BUFORD V HARDIN		123-6642		2001	BUIC	Open
40380		5	;	W	01	05/15/08	CHRIS E BROWN		555-7444	01	2004	CHEV	Open
40377		5	5	Q	01	05/15/08	STACIE TENNYSON	(330)	555-3232	01	2005	PONTIAC	Open
40376		5	;		01	05/15/08	ROBERT WILDER	(724)	555-9633	01	2004	CHEV	Open
40373		5	\$	C Q	01	05/15/08	STEVE SMITH	(724)	555-1234	01	2007	CHEVROLET	ReClose
40372		5	5	C	01	05/15/08	DAVID J MADSEN	(724)	555-2588	02	2004	CHEV	Open
40370 8	888888	5	\$	C	01	05/15/08	JAMES M WALTON	(740)	555-9511	01	2002	CHEVROLET	Open
40369		5	5	C	01	05/15/08	LILLY JONES	(724)	555-0002	11	2001	MAZDA	Open
40368		0	Į I	Q	01	05/15/08	WILMA SMITH	(740)	555-7533	01	2006	PONTIAC	ReClose

# Using the List Screen

There are several ways to work with the list.

- Type the letter of the customer's last name. The list will display the customers whose last name begins with that letter.
- Type the last four digits of the customer's phone number, and press ENTER. The list will display the customers whose phone number matches the entry.
- By default, all repair orders display in the list. Use the **Service**, **Body Shop**, **Service Contract**, and **Quicklane** tabs to view just the selected repair orders. Click the **All R/O's** tab to view all repair order again.
- The My R/O's tab displays just the repair orders for the current user ID/writer number.
- The Waiting tab displays just the repair orders flagged W for waiting in the When Ready Call/Waiting field on the Start Repair Order screen.
- The **Closed** tab displays the repair orders that have been printed and closed.

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

# **Understanding the Status**

The **Status** column identifies the R/O status. The status changes as repairs are closed. There are three codes:

- **Open:** The repair order is open. No repairs have been closed.
- WC Open: The warranty claims are open. All customer pay and internal repairs have been closed.
- **Reclose:** The customer copy was printed, but the R/O was not closed. The R/O still needs to be closed.

# Viewing the Repair Order

- 1. Click the repair order in the list.
- 2. A summary of the R/O appears.
- 3. To print the summary, click the printer icon, and click **Print**.
- 4. Click **Back** to close the summary.

**Tip:** When viewing the R/O list from any repair order screen, you can view the detail for a repair order by holding down the right mouse button on the repair order in the list.

# Printing the Repair order List

You can print the selected repair order list as needed.

- 1. Click Print.
- 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**.

**Tip:** Click **Refresh** to refresh the R/O list to ensure the list is current and includes any repair orders that may have been created while you were viewing the list.




# Chapter 8 Daily R/O Update

The Daily R/O Update menu provides a list of options for printing summaries of the repair orders and updating the repair orders on a daily basis. The menu displays the date of the last R/O update for your reference. Click the button that corresponds to the menu option you want to select. The appropriate prompt, submenu, or screen appears. When you are finished, click **Back** to return to the Service Writing menu.

Daily R/O Update (ABC Motors)	
List Closed R/O's	•
Daily Summary	Daily R/O Update
Service Writer Summary	
Daily Reports / Pre-Writes	
View Closed R/O List	
Dispatcher Time Flags	
Update Closed R/O's	
Back	

# **Selecting Print Criteria**

You have the option of viewing the generated reports on your screen or printing them to paper. When you select a report to print (and after you enter any criteria the system prompts you to specify), select **To Printer** to print the information or **To Screen** to view the information on your screen.

If you select to view the report, you can print the report from the viewing screen by clicking **File** and selecting **Print**. To exit the viewing screen, click **File**, and click **Exit**.

# List Closed R/O's

Use this button to print a comprehensive list of the closed repair orders. For every closed repair order, the report lists the repair order number, customer number, customer's name, and R/O open date. It also lists the totals for warranty, customer pay, internal, and cost for labor, parts, and shop supplies. In addition, it lists the total time charged on the repair order and the profit margin.

# **Daily Summary**

The Daily Summary is an excellent report to print before performing the daily update. It prints a summary of the closed repair orders. You can use this summary to verify there are no errors on the repair orders.

In addition to listing the parts sales, labor cost, labor sale, and profit margin for each repair order, the report displays the overall totals for all of the closed repair orders, including the total number of closed repair orders and the total number of active repair orders in the system. The printout also provides a technician summary that lists the customer pay, warranty, internal, and daily totals for each technician.

# **Service Writer Summary**

The Service Writer Summary is another good report to run before performing the daily update. It provides a breakdown of the business handled by each service writer and identifies all the repair orders that were closed for the day and that will update to Accounting during the daily update.

The report is grouped by service writer. For each writer, the report lists the closed repair order summary and open repair order summary. The bottom section of each writer's summary lists the totals for labor, parts, gas/oil/grease, shop supplies, and sublet for warranty, customer pay, and internals. The total cost and total profit margin are also listed. This report will list repair orders that have the warranty repairs still open on them, but these repair orders will not update until the warranty repairs are closed.

### **Daily Reports/Pre-writes**

This button advances you to the Miscellaneous Daily Reports menu. This menu is used to print various reports about the open repair orders in the system. You can also use this menu to print the pre-write information for all of the pre-writes entered for a specific day.

Miscellaneous Daily Reports (ABC Motors)	
List Active R/O's	
List Active W-R/O's	Miscellaneous Daily Reports
List All Open Repair Orders	
List R/O's At 5 Days & Older	
Print Work In Process	
Previous Daily Summaries	
Print Pre-Writes	
Exit	

#### List Active R/O's

Use this button to print a list of all the open, active customer and internal repair orders. The report lists the repair order number, customer's name, service date, and the cost and sale totals for parts and labor for each repair order. The bottom of the report lists the total cost and sale for parts and labor for all repair orders on the report and the number of open customer and internal repair orders in the system.

#### List Active W-R/O's

Use this button to print a list of the open, active warranty repair orders. The report lists the repair order number, customer's name, service date, and the cost and sale totals for parts and labor for each repair order. The bottom of the report lists the total cost and sale for parts and labor for all repair orders on the report and the number of open warranty repair orders in the system.

#### List All Open Repair Orders

Use this button to print a list of all the open repair orders—warranty, customer, and internal. The report lists the repair order number, customer's name, service date, and the cost and sale totals for parts and labor for each repair order. The bottom of the report lists the total cost and sale for parts and labor for all the repair orders on the report, the totals for the primary customer repair orders, and the number of open repair orders in the system.

#### List R/O's At 5 Days Or Older

Use this button to print a list of the repair orders that have been open for five days or longer. This is based on the open date for the repair order. For each repair order, the printout lists the R/O number, customer name, repair type/pay type, open date, parts cost and sale total, and labor cost and sale total.

#### **Print Work In Process**

Use this button to print a list of repair orders with work in progress for the Service Department and Body Shop. The report lists the service repair orders and body shop repair orders separately. For each repair order on the report, it lists the repair order number, repair date, customer's name, labor cost, any pre-flag time paid on the repair order, parts cost, gas/oil/grease cost, and sublet cost. The end of the report lists the total labor, total pre-flag labor paid, net labor (total labor minus any pre-paid labor), net parts, net parts per source, net gas/oil/grease, and net sublet for all of the service repair orders and body shop repair orders. The end of each section lists the total service repair orders and total body shop repair orders listed on the report.

#### **Previous Daily Summaries**

Use this button to view previous daily summaries. The list will hold 23 updates. The list will show each update available if you updated more than once a day. Click the update in the list you want to view. The update displays on your screen. Print the information from the viewing screen as needed.

#### **Print Pre-Writes**

Use this button to print a summary for each pre-write due to come in for service on a specific day. Type the date you want to print. You must type the date in an eight-character format with or without slashes (mmddyyyy or mm/dd/yyyy). If you do not enter slashes, press ENTER to continue. Click **OK** when prompted to verify your printer is ready. A separate page prints for each pre-write scheduled on the date you specify. The printout lists all of the information entered for the pre-write (customer's information, vehicle information, and repair information.)

### View Closed R/O List

Use this button to display a list of the closed repair orders. The screen displays the repair order number, customer name, customer pay amount, warranty amount, internal amount, and total amount posted to the repair order. When you are finished viewing the list, click **Back** to return to the Daily R/O Update menu.

### **Dispatcher Time Flags**

Use this button to print a breakdown of the time each technician spent on repairs. In order to print this report, you must use the Dispatcher feature. You must print the dispatcher time flags before performing the daily R/O update since the update clears the time flags.

The report is grouped by technician. The report lists every repair order the technician was assigned. For each repair order, the report lists the repair order number, repair number, service date, log on time, log off time, and the total number of minutes the technician spent working on that repair order. The end of each technician's section lists the total minutes the technician spent working on repairs for all of the repair orders.

# Update Closed R/O's

Use this button to update the closed repair orders. This updates the Customer Information, Vehicle History, and Repair Order History files. The update also sends the repair orders to the Accounting module so the information can be posted to the books.

- Important: All other workstations must exit the Service Writing module during the update. If you receive an error during the update, verify that all users are out of the Service Writing module. If all users are out of the module and you still receive an error, use the File Rebuild Utility on the Utilities & Settings menu to verify ASROJ.DAT, ASROD.DAT, ASROM.DAT, and ASROCRC.DAT. If you still receive an error, call Autosoft for assistance.
  - 1. Click Update Closed R/O's.
  - 2. Click **OK** when prompted to verify you want to update the repair orders.
  - 3. If there are open repair orders more than 30 days old, the system displays a warning. Click **OK** to acknowledge the message and to view a list of the open repair orders. You should research the repair orders to ensure each needs to remain open. Click **Cancel Update** to cancel the update or **Continue Update** to continue with the update.



# **Chapter 9 Repair Order History**

The Repair Order History screen is used to view and print repair orders that have been closed. You can also use this screen to delete a repair order from a customer's history. This information is for reference only. No data can be entered or edited on this screen. If you need to edit information on a repair order, use the Edit Service History feature on the Data Utilities menu in the Service System Setup. When you are finished viewing information, click **Exit** to return to the Service Writing menu.

If you use the Dispatcher feature, a **Re-Print Dispatcher Time Flag** button appears on the top right side of the screen. You can use this button to reprint the dispatcher time flags for the selected repair order. This prints the same time flags were printed in the Dispatcher. Therefore, just like printing the time flags in the Dispatcher, you must have a thermal transfer printer in order to print the time flags from this screen.

Repair Order History (A	BC Motors)									
	Repair Order History									
R/O No.: 40346 Year: (2007) Make: (CHEUR Model: (BLAZE VIN: (20144)	OLET				Date: <u>02/08/2</u> dvisor: <u>01</u> Writer: <del>01</del> S/8: <u>S</u> ar Line: <u>1</u> Miles: <u>3123</u>	008				
T/C Op.	TRTNU/ QA02 3 WA09 7	3 18.25 LUBE	aint -OIL-FILTER LL 1245780			82/08/08 82/08/08				
Exit Sea	rch R	ecent Print	History	Time Flags	View R/O	Delete				

### Pulling the History Based on the Repair Order Number

If you know the repair order number you want to view, type the number in the **R/O No.** field, and press ENTER. The repair order information fills in on the screen.

**Tip:** Once the vehicle information fills in on the screen, you can click the car icon next to the **VIN** field or press F10 to view the VIN decoding data. This provides detailed information about the vehicle based on the VIN.

### Pulling the History Based on a Customer Search

If you know the customer the repair order is for, you can search the customer's history to select the appropriate repair order.

- 1. Click Search.
- 2. On the Customer Search Criteria screen, 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.
- 3. A list of the customers who meet the criteria you entered appears. Click the customer you want to select. A list of the repair orders for that customer appears in the list on the bottom part of the screen.

Customer	Customer Search Criteria (ABC Motors)								
		3912647	6 STEV	E SMITH	ć	06 CHEVROLE	BLAZER	BLACK	724-555-1234
				,	0				
Name	:==								
Phone	:								
License	·								
	"Click" Line To View								
	10 41644								
R/0	Date	Miles	TN T	Complaint			Labor	Part	
40348B 40348A	02/08/2008 02/08/2008		09 W 02 Q	RECALL 124 LUBE-OIL-F			37.80 16.50	39.60 4.75	
4004011	027 007 2000	0120	02 Q	LODE OIL I			10.50	4.1.2	
Cancel	1				'Click'' Line To V	ïew			

4. Click the repair order you want to view. The information for the repair order fills in on the Repair Order History screen.

Repair Order His	Repair Order History (ABC Motors)									
	Repair Order History									
Yea Maki Mode	1: <b> 40348   STE</b> 1: 2007 e: Chevrolet 1: Blazer 4: 261WH52K739					Date: 02/08/2 kdvisor: 01 Writer: 01 S/B: S ar Line: 1 Miles: 3123	8008			
T/C Op.	T R T Q A Q			nt L-FILTER			02/08/08			
	ŴĄ		40 RECALL	1245780			02/08/08			
l Exit	Search	Recent	Print	History	Time Flags	View R/O	Delete			

### **Viewing the Time Flags**

Click **Time Flags** to view the time flags for the repair order. The Flagged Time screen will open and displays the time for the selected repair order. Click **Close** to close the screen.

# **Viewing the Service History**

Click **History** to display the vehicle's repair history. Click a repair order in the list to view it. The information fills in on the Repair Order History screen.

Repair His R/O	Date	Miles	TN T	Complaint	Labor	Parts
40348B 40348A	02/08/2008 02/08/2008	3123	09 W	RECALL 1245780	37.80 16.50	39.60 4.75
Close				"Click" Line To View		

# Viewing the Complete Repair Order

Click **View R/O** to view a summary of the repair order. The screen displays all of the repairs for the selected repair order. This is the same information that is displayed when you click **View R/O** on any of the six entry screens when generating repair orders.

ABC Motors		
West Middlesex, PA 16159 (800) 473–4630		
40348 2 G 1 W H 5 2 K 7 3 9 1 2 6 4 7	7 6 STEVE SMITH	02/08/08
	555 MAIN STREET WEST MIDDLESEX PA 16159	10:31
11/07/05 ORX246	WEST MIDDLESEX PA 16159	02/08/08
2 3123 1101/03 QIA240	(724) 555-1234 (724) 555-9876	PAUL
(1) LUBE-OIL-FILTER	(124) 555-1254 (124) 555-9610	PAOL
	Labor [02] 3 Engine Oil Vo To 6gt 1	16.50 1
	Total Labor	16.50
(02-2020 STEPHEN-0202020202)	Total Lubricants Total Repair (QuickLane)	
	Iotal Repair (Quickase)	
(2) RECALL 1245780	Labor [09] 7	37.80
	(F)10069218 (SENSOR A) 1	39.60
	Total Labor	
(09-1054 DARRELL-3184214654)	Total Parts Total Repair (Warranty )	
(07 105% BRANDE S10%21%63%)	iotai separi (Waffallty )	
C/P	W/CINTTotal-	
Labor Time 3	7 0 10	
Total Labor 16.50 Total Parts .00	37.80 .00 54.30 39.60 .00 39.60 (N/R)	
	39.60 .00 39.60 (N/A)	

# **Printing Copies of the Repair Order**

You can print the repair order from this screen. The printout is an exact reprint of the original repair order. You have the option of printing specific copies of the repair order as needed.

- 1. Click Print.
- On the Print Options dialog, click to select the copies you want to print: customer copy, Accounting copy, warranty copy, or file copy. A check mark will appear in the box in front of the copy. This indicates a copy will print. Click a box to clear it.
- 3. Click **Print** to print the selected copies.

### **Deleting a Repair Order**

You can delete a repair order from history. This removes the repair order from the history, so ensure you want to delete it before you proceed. You cannot recall a repair order once it has been deleted. If you attempt to recall a deleted repair order, you will receive a message indicating that you have entered an invalid repair order number. *A password is required to delete a repair order from history.* This security feature ensures only authorized personnel can delete files.

- 1. Select the repair order.
- 2. Click Delete.
- 3. Click **OK** when prompted to verify you want to delete the record.
- 4. Type the password.

### **Viewing Recent Repair Orders**

The **Recent** button allows you to view a list of recent repair orders. You can choose to view 5, 10, 15, or 30 days back.

- 1. Click Recent.
- 2. Move the slider to select the number of days back you want to view (or click the days on the slide bar to move the slider).
- 3. From the list, click the repair order you want to view (or slide the bar to **Close** to close the list.)



Chapter 10

# **Chapter 10 Reports & Updates**

The Service Reports/Updates menu is used to run service reports and to perform a monthly update of your service data. Almost all of the reports use the repair order closing date to generate the report information. The exceptions are the Writer and Technician Statistic reports, which use the repair order update date (the date the repair order was updated to Accounting using the Daily R/O Update). You can view the closing date that will be used for the repair order on the Review & Print screen when you are printing and closing the repair order.

The menu displays two dates. The "Last Monthly Update Was" date identifies the month and year used for the last monthly update run. The "Completed On" date identifies the date on which the last update was run.

To use the menu, click the button that corresponds to the menu option you want to select. The appropriate submenu or prompt appears. When you are finished on the Service Reports/Updates menu, click **Exit** to return to the Service Writing menu.

Service Reports/Updates (ABC Motors)	
Service Time Summary Reports	Service Reports/Updates
Writer/Technician Statistics	
Miscellaneous Service Reports	
Payroll Time Flags	
Monthly Summary Update	
R/O Archives	
Daily Service DOC	Report Generator
Exit	Last Monthly Update Was May, 2008 Completed On 05/31/2008

**Important:** Different reports are designed to pull different information. Therefore, *the reports will not match.* For example, one writer report includes discounts while another writer report doesn't, so the reports will not be the same. Another reason reports will not match is because some reports use the date when the repair order was updated to Accounting and other reports use the close date for the repair order.

# **Selecting Print Criteria**

You have the option of viewing the generated reports on your screen or printing them to paper. When you select a report to print (and after you enter any criteria the system prompts you to specify), select **To Printer** to print the information or **To Screen** to view the information on your screen.

IS YOUR PRINTER READY?					
O To Printer - OKIPAGE 14i					
To Screen					
	Print L				
	Cancel				

If you select to view the report, you can print the report from the viewing screen by clicking **File** and selecting **Print**. To exit the viewing screen, click **File**, and click **Exit**.

### **Service Time Summary Reports**

This button advances you to the Service Time Summary menu. This menu is used to print servicetiming reports. These reports can help you determine your effective labor rate and can be used to determine the time and labor sold by advisors and technicians. Click the button that corresponds to the report you want to print. Follow the prompts on your screen. When you are finished, click **Exit** to return to the Service Reports/Updates menu.



### Print Effective Rate Summary

Use this button to print your effective rates. When prompted to verify your printer is ready, select the period you want to use to print the summary: Previous Month, Current Month, or Last 30 Days.

The report prints a page for combined rates, customer pay, internal, and warranty. Each page lists the daily and month-to-date flat hours, sales, and effective rate for each date listed.

Effective Rate Summary - Combined								
		Daily			MTD			
Date	Flat Hrs.	Sales	Eff. Rate	Flat Hrs.	Sales	Eff. Rate		
06/01	77.6	3490.14	44.98	77.6	3490.14	44.98		
06/02	49.7	1859.74	37.42	127.3	5349.88	42.03		

### Writer Time Summary

Use this button to print a time summary for each service writer. The report uses the repair order closing date. This report may take a long time to generate, so be patient while the system gathers the information.

The report prints one page for each writer in the system. The report displays the total repair orders, total time, labor, sales, time per repair order, average sale, and effective rate for each writer. The information is broken down per month. The information for the month is updated during the monthly summary update. Therefore, from January to the current month displays the time summary for the current year, and the next month to December displays the information from last year. The printout also displays the yearly totals. The figures on the report could be off due to the month-end update.

Write	r Time S	ummary: PAUL				
Mo.	Total R/O's	Total Time	Labor Sales	Time Per R/O	Avg. Sale	Eff. Rate
JAN:	163	285.4	9278.38	1.8	56.92	32.51
FEB:	172	336.8	10990.83	2.0	63.90	32.63

### **Technician Time Summary**

Use this button to print a time summary for each service technician. Like the Writer Summary, this report also uses the repair order close date.

The report prints one page for each technician in the system. The report displays the total repair orders, total time, labor, sales, time per repair order, average sale, and effective rate for each technician. The information is broken down per month. The information for the month is updated during the monthly summary update. Therefore, from January to the current month displays the time summary for the current year, and from next month to December displays the information from last year. The printout also displays the yearly totals. The figures on the report could be off due to the month-end update.

Techn	ician Time	Summary:	(01) TOM			
Mo.	Total R/O's	Total Time	Labor Sales	Time Per R/O	Avg. Sale	Eff. Rate
JAN:	178	119.1	4196.50	.7	23.58	35.24
FEB:	185	128.3	4735.09	.7	25.60	36.91

#### **Technician Time Report**

Use this button to print a time report for all of the technicians based on a specific date range. The report uses the repair order close date. This is a good report to run to check your labor sales. When prompted, specify the beginning and ending dates you want to use for the report. Select to generate a simple or detailed report, and select your print criteria.

The simple report prints one page for each technician. Each page lists the repair orders the technician worked on and displays the time units and labor amount for each repair order. The information is broken down into three columns: customer pay, internal, and warranty. A plus sign (+) after a labor amount indicates the amount was adjusted to more than the regular labor rate per unit, and a minus sign (-) after a labor amount indicates the amount was adjusted to less than the regular labor rate per unit (for services such as a lube-oil-filter). The bottom of each technician's section displays the totals for the date range.

Techni	cian Time	e Report						
Technic	ian: (01)	TOM	From	n: 06/01/20	08 To:	06/30/20	08	
			 Uni	- C/P t Labor	Ir Unit	nt Labor	V Unit	V/C Labor
	/ /							
47486 47498	06/09/08 06/09/08	INTERNAL - INTERNAL -	•	00.00 00.00	8	18.00+ 18.00+	9 9	47.79 47.79

The end of the report provides a time summary for all of the technicians. It displays the total labor units and cost for customer pay, internal, and warranty. Next, It lists the total time units, sales, number of repair orders, and average total per repair order. Finally, it lists the number of technicians reporting for the period and lists the average labor units, sales, and repair orders per technician.

Technician Time Report						
Summary All Technicians	From:	06/01/2008	To:	06/30/2008		
	 Unit	C/P Labor		Int Labor		W/C Labor
Total All Techs	4430	18546.82	1499	4174.90	788	3993.80
Total Units		6717				
Sales	\$	26715.52				
Repair Orders		415				
Per Repair Order	\$	64.37				
Total Technicians Reporting		10				
Average Units Per Tech	\$	671.7				
Average Sales Per Tech		2671.55				
Average R/O's Per Tech	\$	41.5				

The detailed report lists the same information as the simple report, but it lists the individual repairs for each repair order separately and identifies the pay type, labor level, charged units, actual units, and cost for each repair.

Techr	nician T	'ime Report											
Technic	zian: (01)	TCM	From:	06/01/2	800	<b>T</b> o: 06/	30/200	08					
				C/P	I	nt	W	/c					
			Unit	Labor	Unit	Labor	Unit	Labor		T/L	C/U #	√U	Cost
47298	06/03/08	KATHERINE WILLS	5	3.35-	0	.00	0	.00	Rep:1 2688 LUBE OIL FILTER	C/A	5	4	6.80
47311	06/04/08	INTERNAL - 8039	( 0	.00	8	18.00+	10	53.10	Rep:1 9099 STATE INSPECTIO	I/A	8	2	3.40
									Rep:2 NEW VEHICLE MAKE REA	N/A	10	8	13.60
47315	06/04/08	INTERNAL - 8105	( 0	.00	8	18.00+	11	58.41	Rep:1 9099 STATE INSPECTIO	I/A	8	3	5.10

### Writer Sales Report

Use this button to print a sales report for all of the service writers based on a specific date range. The information on this report reflects discounts applied to the service.

The report lists the repair orders for each writer and displays the time units and labor amount for each repair order. The information is broken down into three columns: customer pay, internal, and warranty. The total value of the parts sold on each repair order is also displayed. The end of each technician's section displays the totals for the date range.

Write	rs Sales	Report								
Writer	: (02) BI	LL	From	: 06/01	L/2008	To:	06/30/20	08		
				Unt			Int Labor		-W/C Labor	Parts
47402 47415		INTERNAL INTERNAL			.00	8 8	18.00 18.00	-	47.79 53.10	4.90 4.90

The end of the report lists the totals for the entire Service Department. It also breaks the totals down according to customer pay, internal, and warranty sales.

Writers Sales Report					121 - 121
Total Department From: 06/01	/2008 To	o: 06/30/2	008		
C/P Unit Labor				C Labor	Parts
4430 18312.66	1499 	4174.90	788	3993.80	22815.57
Total Units Repair Orders	6717 442	Total	Labor Sales Parts Sales		
Labor Units Per R/O	15	Labor	Sales Per F	a/o	59.91

### Writer 'Specials' Usage

Use this button to print a trouble code/fail code usage report for a specified date range. It can help with your dealership's upsales. The report is based on the service menu codes added to repair orders. In order for the report to work, the menu/trouble code needs to have commission amounts set.

The report lists every repair order with a menu code on it. In addition, the report lists the service writer for the repair order, the service date, customer's name, number of labor units sold, sale amount, rate, and the advisor's commission percentage or flat commission for the repair order. The end of the report lists the totals repair orders on the report and the totals for all of the repair orders.

Writer Special Usage										
Advisor: (02) BILL From:06/01/2008 To:06/30/2008										
R/O	Date	Cust.		T/C	Unt	Sale	Rate	& Comm.	\$ Flat	
47117 47117		INTERNAL - INTERNAL -			5 8	4.50 18.00	8 8	.00 .00	2.00 1.00	

#### Writer Analysis

Use this button to print an analysis for each service writer for a specified date range. This report does not include voided repair orders. Type the beginning and ending dates you want to use for the report.

The report provides two summaries for each writer. First, the report lists the total number of repair orders, the total time units, and labor for customer pay, internal pay, and warranty pay, and the total parts and sublet for each date the writer was active. The customer pay gross profit per hour is calculated by dividing the number of customer pay repair orders by the customer pay gross profit. The customer pay gross profit percentage is calculated by dividing the customer pay labor by the customer pay gross profit.

Writer .	Analy	ysis							
Advisor:	(02)	BILL		From	: 06/01/20	08 To	: 06/30/20	08	
Date	RO's		-C/P Labor	] Unt	Int Labor	V Unt	I/C Labor	Parts	Sublet
06/01/08 06/02/08		194 97	951.75 300.00	11 8	38.50 18.00	41 26	217.71 138.06	830.78 1114.87	.00

The next part of each writer's analysis provides a comprehensive analysis of the writer's customer, internal, and warranty totals, as well as the overall totals. The end of the report provides the totals for the whole Service Department.

Advisor Sales Analysis: (02) BILL     From: 06/01/2008 To: 06/30/2008       (Report Excludes Body Shop)       Customer Pay Repair Orders     119       Customer Pay Repair Orders     193.1       Average Customer Pay Hours Per R/O     1.6       Customer Pay Labor Gross Profit     65.01       Customer Pay Labor Gross Profit     63.55%       Customer Pay Labor Gross Profit     63.55%       Customer Pay Labor Gross Profit     744.32       Customer Pay Labor Gross Profit     744.32       Customer Pay Sublet     300.99       Internal Repair Orders     31       Internal Rours     26.0       Average Internal Hours Per R/O     63.55%       Internal Labor Gross Profit     4916.97       Internal Labor Gross Profit     92.42.34       Average Internal Labor Per R/O     53.48       Internal Labor Gross Profit     49.39%       Internal Labor Gross Profit     95.04       Average Warranty Claim Repairs Orders     25       Warranty Labor Gross Profit     586.04       Warranty Labor Gross Profit     586.04       Warranty Labor Gross Profit     586.04       Warranty Labor Gross Profit Per R/O     586.04	Writer Analysis		
(Report Excludes Body Shop)       Customer Pay Repair Orders     119       Customer Pay Hours     193.1       Average Customer Pay Hours Per R/0     1.6       Customer Pay Labor Gross Profit     \$ 4316.97       Customer Pay Labor Gross Profit     \$ 4416.97       Customer Pay Labor Gross Profit *     63.55%       Customer Pay Labor Gross Profit *     \$ 7442.34       Customer Pay Sublet     \$ 300.99       Internal Repair Orders     31       Internal Hours     \$ 60.0       Average Internal Hours Per R/0     \$ 23.48       Internal Labor Gross Profit *     \$ 9727.90       Average Internal Labor Per R/0     \$ 23.48       Internal Labor Gross Profit *     \$ 49.39%       Internal Labor Gross Profit *     \$ 19.9       Average Internal Labor Gross Profit *     \$ 19.9       Average Marranty Claim Hours     \$ 128.00       Warranty Claim Repairs Orders     \$ 25       Warranty Claim Boor Gross Profit *     \$ 995.04       Average Warranty Claim Labor Gross Profit *     \$ 58.90%       Warranty Labor Gross Profit Per R/0     \$ 23.44       Warranty Labor Gross Profit *     \$ 58.90%       Warranty Labor Gross Profit Per R/0			
Customer Pay Repair Orders     119       Customer Pay Hours     193.1       Average Customer Pay Hours Per R/0     16       Customer Pay Labor Gross Profit     \$436.97       Customer Pay Labor Gross Profit     \$436.97       Customer Pay Labor Gross Profit     \$65.01       Customer Pay Labor Gross Profit     \$41.32       Customer Pay Labor Gross Profit Per R/0     \$41.32       Customer Pay Labor Gross Profit Per R/0     \$41.32       Customer Pay Sublet     \$300.99       Internal Repair Orders     \$1       Internal Hours     \$26.0       Average Internal Hours Per R/0     \$8       Internal Labor     \$77.90       Average Internal Labor Per R/0     \$23.48       Internal Labor Gross Profit *     \$49.39\$       Internal Labor Gross Profit *     \$49.39\$       Internal Labor Gross Profit *     \$128.00       Warranty Claim Repairs Orders     \$25       Warranty Claim Hours     \$19.9       Average Warranty Claim Hours Per R/0     \$39.80       Warranty Labor Gross Profit Per R/0     \$8       Warranty Labor Gross Profit *     \$56.04       Warranty Labor Gross Profit *     \$23.44	Advisor Sales Analysis: (02) BILL	From: 06/01/2008	To: 06/30/2008
Customer Pay Hours     193.1       Average Customer Pay Hours Per R/0     1.6       Customer Pay Labor     \$ 7736.57       Average Customer Pay Labor Gross Profit     \$ 4916.97       Customer Pay Labor Gross Profit *     63.55%       Customer Pay Sublet     \$ 7442.34       Customer Pay Sublet     \$ 300.99       Internal Hours     26.0       Average Internal Hours Per R/0     \$ 23.40       Internal Labor Gross Profit *     9 39%       Internal Labor Gross Profit *     9 49.39%       Internal Labor Gross Profit Per R/0     \$ 128.00       Warranty Claim Repairs Orders     25       Warranty Claim Hours     \$ 19.9       Average Warranty Claim Hours Per R/0     \$ 38.0       Warranty Claim Hours     \$ 58.06       Warranty Labor Gross Profit *     \$ 58.06       Warranty Claim Hours     \$ 58.06       Warranty Claim Hours     \$ 25.04       Warranty Claim Hours     \$ 58.06       Warranty Labor Gross Profit *     \$ 58.06       <	(Report Excludes Body Shop)		
Average Customer Pay Hours Per R/0     1.6       Customer Pay Labor Gross Profit     \$7736.57       Average Customer Pay Labor Gross Profit *     65.01       Customer Pay Labor Gross Profit *     63.55*       Customer Pay Sublet     \$300.99       Internal Repair Orders     31       Internal Hours     26.0       Average Internal Hours Per R/0     8       Internal Labor     \$727.90       Average Internal Labor Gross Profit *     49.39*       Internal Labor Gross Profit *     49.39*       Internal Labor Gross Profit *     11.60       Internal Parts     \$57.31       Internal Sublet     \$128.00       Warranty Claim Repairs Orders     25       Warranty Claim Repairs Orders     95.04       Average Warranty Claim Labor Per R/0     \$8       Warranty Labor Gross Profit *     58.90*       Warranty Labor Gross Profit *     \$8.00*       Warranty Labor Gross Profit *     \$8.00*       Warranty Labor Gross Profit *     \$8.00*	Customer Pay Repair Orders	119	
Customer Pay Labor	Customer Pay Hours	193.1	
Average Customer Pay Labor Per R/0     \$ 65.01       Customer Pay Labor Gross Profit     \$ 4916.97       Customer Pay Labor Gross Profit Per R/0     \$ 41.32       Customer Pay Parts     \$ 7442.34       Customer Pay Sublet     \$ 300.99       Internal Repair Orders     31       Internal Hours     26.0       Average Internal Hours Per R/0     \$ 23.48       Internal Labor Gross Profit *     \$ 49.39%       Internal Labor Gross Profit *     \$ 49.39%       Internal Labor Gross Profit *     \$ 49.39%       Internal Labor Gross Profit Per R/0     \$ 11.60       Internal Labor Gross Profit Per R/0     \$ 128.00       Warranty Claim Repairs Orders     25       Warranty Claim Hours     19.9       Average Warranty Claim Hours Per R/0     \$ 39.80       Warranty Labor Gross Profit *     \$ 58.90%       Warranty Labor Gross Profit *     \$ 58.90%       Warranty Labor Gross Profit Per R/0     \$ 2123.10       Warranty Claim Sublet     \$ 00       Parts Sales </td <td>Average Customer Pay Hours Per R/O</td> <td>1.6</td> <td></td>	Average Customer Pay Hours Per R/O	1.6	
Average Customer Pay Labor Per R/0     \$ 65.01       Customer Pay Labor Gross Profit     \$ 4916.97       Customer Pay Labor Gross Profit Per R/0     \$ 41.32       Customer Pay Parts     \$ 7442.34       Customer Pay Sublet     \$ 300.99       Internal Repair Orders     31       Internal Hours     26.0       Average Internal Hours Per R/0     \$ 23.48       Internal Labor Gross Profit *     \$ 49.39%       Internal Labor Gross Profit *     \$ 49.39%       Internal Labor Gross Profit *     \$ 49.39%       Internal Labor Gross Profit Per R/0     \$ 11.60       Internal Labor Gross Profit Per R/0     \$ 128.00       Warranty Claim Repairs Orders     25       Warranty Claim Hours     19.9       Average Warranty Claim Hours Per R/0     \$ 39.80       Warranty Labor Gross Profit *     \$ 58.90%       Warranty Labor Gross Profit *     \$ 58.90%       Warranty Labor Gross Profit Per R/0     \$ 2123.10       Warranty Claim Sublet     \$ 00       Parts Sales </td <td>Customer Pay Labor\$</td> <td>7736.57</td> <td></td>	Customer Pay Labor\$	7736.57	
Customer Pay Labor Gross Profit %		65.01	
Customer Pay Labor Gross Profit Per R/O     \$ 41.32       Customer Pay Sublet     \$ 7442.34       Customer Pay Sublet     \$ 300.99       Internal Repair Orders     31       Internal Hours     26.0       Average Internal Hours Per R/O     8       Internal Labor     727.90       Average Internal Labor Gross Profit     \$ 23.48       Internal Labor Gross Profit *     49.39*       Internal Labor Gross Profit *     49.39*       Internal Labor Gross Profit *     \$ 49.39*       Internal Labor Gross Profit Per R/O     \$ 11.60       Internal Sublet     \$ 128.00       Warranty Claim Repairs Orders     25       Warranty Claim Hours Per R/O     \$ 39.80       Warranty Claim Hours Per R/O     \$ 39.80       Warranty Labor Gross Profit *     \$ 586.04       Warranty Labor Gross Profit *     \$ 58.90*       Warranty Labor Gross Profit Per R/O     \$ 23.44       Warranty Labor Gross Profit *     \$ 58.90*       Warranty Labor Gross Profit *     \$ 58.90*       Warranty Claim Sublet     \$ 00       Parts Sales     \$ 9622.75       Sublet Sales     \$ 239.0       Total Hours     \$	Customer Pay Labor Gross Profit\$	4916.97	
Customer Pay Parts     \$ 7442.34       Customer Pay Sublet     \$ 300.99       Internal Repair Orders     31       Internal Hours     26.0       Average Internal Labor     8       Internal Labor     8       Internal Labor Gross Profit     8       Internal Labor Gross Profit     359.50       Internal Labor Gross Profit Per R/O     \$ 11.60       Internal Labor Gross Profit Per R/O     \$ 11.60       Internal Parts     \$ 57.31       Internal Sublet     19.9       Average Warranty Claim Repairs Orders     25       Warranty Claim Repairs Orders     19.9       Average Warranty Claim Hours Per R/O     \$ 39.0       Warranty Labor Gross Profit     \$ 995.04       Average Warranty Claim Labor     \$ 995.04       Average Warranty Claim Labor Per R/O     \$ 8       Warranty Labor Gross Profit *     58.04       Warranty Labor Gross Profit *     58.90%       Warranty Claim Sublet     \$ 00       Parts Sales     \$ 9622.75       Sublet Sales     \$ 9459.51       Total Hours     \$ 239.0       Total Hours Ser R/O     1.5       Total Hours Per R/O <td>Customer Pay Labor Gross Profit &amp;</td> <td>63.55%</td> <td></td>	Customer Pay Labor Gross Profit &	63.55%	
Customer Pay Sublet     \$ 300.99       Internal Repair Orders     31       Internal Hours     26.0       Average Internal Hours Per R/O     8       Internal Labor     727.90       Average Internal Labor Per R/O     \$ 359.50       Internal Labor Gross Profit     349.39%       Internal Labor Gross Profit Per R/O     \$ 11.60       Internal Parts     \$ 57.31       Internal Sublet     \$ 128.00       Warranty Claim Repairs Orders     25       Warranty Claim Hours     \$ 995.04       Average Warranty Claim Labor Gross Profit *     \$ 99.04       Average Warranty Claim Labor Per R/O     \$ 39.80       Warranty Labor Gross Profit *     \$ 99.04       Average Warranty Claim Labor     \$ 995.04       Average Warranty Claim Bours Per R/O     \$ 39.80       Warranty Labor Gross Profit *     \$ 586.04       Warranty Labor Gross Profit *     \$ 586.04       Warranty Labor Gross Profit *     \$ 00       Warranty Labor Gross Profit Per R/O     \$ 23.44       Warranty Claim Sublet     \$ 00       Parts Sales     \$ 9622.75       Sublet Sales     \$ 428.99       Total Hours Sales <td< td=""><td>Customer Pay Labor Gross Profit Per R/O\$</td><td>41.32</td><td></td></td<>	Customer Pay Labor Gross Profit Per R/O\$	41.32	
Customer Pay Sublet     \$ 300.99       Internal Repair Orders     31       Internal Hours     26.0       Average Internal Hours Per R/O     8       Internal Labor     727.90       Average Internal Labor Per R/O     \$ 359.50       Internal Labor Gross Profit     349.39%       Internal Labor Gross Profit Per R/O     \$ 11.60       Internal Parts     \$ 57.31       Internal Sublet     \$ 128.00       Warranty Claim Repairs Orders     25       Warranty Claim Hours     19.9       Average Warranty Claim Labor Gross Profit     \$ 995.04       Average Warranty Claim Labor Gross Profit     \$ 586.04       Warranty Labor Gross Profit *     \$ 586.04       Warranty Labor Gross Profit *     \$ 586.04       Warranty Labor Gross Profit Per R/O     \$ 23.44       Warranty Labor Gross Profit *     \$ 586.04       Warranty Labor Gross Profit *     \$ 00       Parts Sales     \$ 9622.75       Sublet Sales     \$ 239.0       Total Hours     \$ 239.0       Total Hours Per R/O     \$ 1.5       Total Hours Per R/O     \$ 1.5       Total Labor Sales     \$ 9459.51	Customer Pay Parts\$	7442.34	
Internal Hours     26.0       Average Internal Labor     .8       Internal Labor     .727.90       Average Internal Labor Per R/0     \$23.48       Internal Labor Gross Profit     \$359.50       Internal Labor Gross Profit Per R/0     \$11.60       Internal Labor Gross Profit Per R/0     \$11.60       Internal Sublet     \$57.31       Internal Sublet     \$128.00       Warranty Claim Repairs Orders     25       Warranty Claim Rours     \$19.9       Average Warranty Claim Hours Per R/0     \$8       Warranty Claim Labor Gross Profit *     \$985.04       Average Warranty Claim Labor Per R/0     \$8.980       Warranty Labor Gross Profit *     \$98.00       Warranty Labor Gross Profit *     \$86.04       Warranty Labor Gross Profit *     \$23.44       Warranty Labor Gross Profit Per R/0     \$23.44       Warranty Claim Sublet     \$00       Parts Sales     \$9622.75       Sublet Sales     \$428.99       Total Hours     \$23.0       Total Hours     \$1.5       Total Labor Sales     \$9459.51       Total Labor Sales     \$9459.51       Total Labor Gro		300.99	
Internal Hours     26.0       Average Internal Labor     .8       Internal Labor     .727.90       Average Internal Labor Per R/0     \$23.48       Internal Labor Gross Profit     \$359.50       Internal Labor Gross Profit Per R/0     \$11.60       Internal Labor Gross Profit Per R/0     \$11.60       Internal Sublet     \$57.31       Internal Sublet     \$128.00       Warranty Claim Repairs Orders     25       Warranty Claim Rours     \$19.9       Average Warranty Claim Hours Per R/0     \$8       Warranty Claim Labor Gross Profit *     \$985.04       Average Warranty Claim Labor Per R/0     \$8.980       Warranty Labor Gross Profit *     \$98.00       Warranty Labor Gross Profit *     \$86.04       Warranty Labor Gross Profit *     \$23.44       Warranty Labor Gross Profit Per R/0     \$23.44       Warranty Claim Sublet     \$00       Parts Sales     \$9622.75       Sublet Sales     \$428.99       Total Hours     \$23.0       Total Hours     \$1.5       Total Labor Sales     \$9459.51       Total Labor Sales     \$9459.51       Total Labor Gro			
Internal Hours     26.0       Average Internal Labor     .8       Internal Labor     .727.90       Average Internal Labor Per R/0     \$23.48       Internal Labor Gross Profit     \$359.50       Internal Labor Gross Profit Per R/0     \$11.60       Internal Labor Gross Profit Per R/0     \$11.60       Internal Sublet     \$57.31       Internal Sublet     \$128.00       Warranty Claim Repairs Orders     25       Warranty Claim Rours     \$19.9       Average Warranty Claim Hours Per R/0     \$8       Warranty Claim Labor Gross Profit *     \$985.04       Average Warranty Claim Labor Per R/0     \$8.980       Warranty Labor Gross Profit *     \$98.00       Warranty Labor Gross Profit *     \$86.04       Warranty Labor Gross Profit *     \$23.44       Warranty Labor Gross Profit Per R/0     \$23.44       Warranty Claim Sublet     \$00       Parts Sales     \$9622.75       Sublet Sales     \$428.99       Total Hours     \$23.0       Total Hours     \$1.5       Total Labor Sales     \$9459.51       Total Labor Sales     \$9459.51       Total Labor Gro	Internal Repair Orders	31	
Average Internal Hours Per R/0     .8       Internal Labor		26.0	
Internal Labor     \$ 727.90       Average Internal Labor Per R/0     \$ 23.48       Internal Labor Gross Profit     \$ 359.50       Internal Labor Gross Profit Per R/0     \$ 11.60       Internal Sublet     \$ 57.31       Internal Sublet     \$ 128.00       Warranty Claim Repairs Orders     \$ 25       Warranty Claim Hours     \$ 19.9       Average Warranty Claim Hours Per R/0     \$ 8       Warranty Labor Gross Profit *     \$ 995.04       Average Warranty Claim Labor Per R/0     \$ 8       Warranty Labor Gross Profit *     \$ 58.00       Warranty Labor Gross Profit *     \$ 58.90       Warranty Labor Gross Profit Per R/0     \$ 2123.10       Warranty Labor Gross Profit Per R/0     \$ 2123.10       Warranty Claim Sublet     \$ 00       Parts Sales     \$ 9622.75       Sublet Sales     \$ 428.99       Total Hours     \$ 9459.51       Total Labor Gross Profit     \$ 5862.51       Labor Hours Per R/0     \$ 1.5       Total Labor Gross Profit     \$ 5862.51       Labor Gross Profit *     \$ 61.97%       Labor Gross Profit *     \$ 57.5       Labor Gross Profit Per R/0     \$ 57.	Children and Chi	.8	
Average Internal Labor Per R/0     \$ 23.48       Internal Labor Gross Profit     \$ 359.50       Internal Labor Gross Profit \$     49.39%       Internal Labor Gross Profit Per R/0     \$ 11.60       Internal Parts     \$ 57.31       Internal Sublet     \$ 128.00       Warranty Claim Repairs Orders     25       Warranty Claim Hours     19.9       Average Warranty Claim Hours Per R/0     8       Warranty Labor Gross Profit *     995.04       Average Warranty Claim Labor Per R/0     \$ 39.80       Warranty Labor Gross Profit     \$ 586.04       Warranty Labor Gross Profit Per R/0     \$ 23.44       Warranty Labor Gross Profit Per R/0     \$ 23.44       Warranty Claim Sublet     \$ 00       Parts Sales     \$ 9622.75       Sublet Sales     \$ 428.99       Total Hours     \$ 239.0       Total Hours Ser R/0     1.5       Total Hours Ser R/0     1.5       Total Labor Gross Profit     \$ 862.51       Labor Gross Profit     \$ 862.51       Labor Gross Profit     \$ 862.51       Labor Gross Profit %     \$ 61.97%       Labor Gross Profit Per R/0     \$ 57.56 <td></td> <td></td> <td></td>			
Internal Labor Gross Profit     359.50       Internal Labor Gross Profit %     49.39%       Internal Parts     \$57.31       Internal Sublet     \$128.00       Warranty Claim Repairs Orders     25       Warranty Claim Hours     19.9       Average Warranty Claim Hours Per R/O     8       Warranty Claim Labor Per R/O     8       Warranty Labor Gross Profit     \$995.04       Average Warranty Claim Labor Per R/O     \$39.80       Warranty Labor Gross Profit     \$586.04       Warranty Labor Gross Profit *     586.04       Warranty Labor Gross Profit Per R/O     \$2.3.44       Warranty Labor Gross Profit Per R/O     \$2.3.44       Warranty Claim Sublet     \$2123.10       Warranty Claim Sublet     \$00       Parts Sales     \$9622.75       Sublet Sales     \$428.99       Total Hours     \$239.0       Total Labor Sales     \$428.99       Total Labor Gross Profit     \$5862.51       Labor Hours Per R/O     \$1.5       Total Labor Gross Profit     \$5862.51       Labor Gross Profit %     \$61.97%       Labor Gross Profit %     \$57.68			
Internal Labor Gross Profit %			
Internal Labor Gross Profit Per R/O     \$ 11.60       Internal Parts     \$ 57.31       Internal Sublet     \$ 128.00       Warranty Claim Repairs Orders     25       Warranty Claim Hours     19.9       Average Warranty Claim Hours Per R/O     .8       Warranty Labor Gross Profit     .995.04       Average Warranty Claim Labor Per R/O     .8       Warranty Labor Gross Profit     \$ 586.04       Warranty Labor Gross Profit Per R/O     \$ 23.44       Warranty Labor Gross Profit Per R/O     \$ 2123.10       Warranty Claim Sublet     \$ 00       Parts Sales     \$ 9459.51       Total Hours     1.5       Total Labor Gross Profit     5862.51       Labor Gross Profit %     61.97%       Labor Gross Profit %     61.97%       Labor Gross Profit %     53.75       Labor Gross Profit %     57.68			
Internal Parts     \$ 57.31       Internal Sublet     \$ 128.00       Warranty Claim Repairs Orders     25       Warranty Claim Hours     19.9       Average Warranty Claim Hours Per R/O     .8       Warranty Claim Labor     \$ 995.04       Average Warranty Claim Labor Per R/O     .8       Warranty Labor Gross Profit     \$ 39.80       Warranty Labor Gross Profit *     58.90%       Warranty Labor Gross Profit *     58.90%       Warranty Claim Parts     \$ 2123.10       Warranty Claim Sublet     \$ 00       Parts Sales     \$ 9622.75       Sublet Sales     \$ 9459.51       Total Hours     \$ 239.0       Total Labor Sales     \$ 9459.51       Total Labor Gross Profit *     1.5       Total Labor Gross Profit *     \$ 5862.51       Labor Gross Profit *     \$ 61.97%       Labor Gross Profit *     \$ 61.97%       Labor Gross Profit *     \$ 61.975       Labor Gross Profit *     \$ 61.975       Labor Sales Per R/O     \$ 57.68	terrestriction resolution to the state of th		
Internal Sublet     \$ 128.00       Warranty Claim Repairs Orders     25       Warranty Claim Hours     19.9       Average Warranty Claim Hours Per R/0     8       Warranty Claim Labor     \$ 995.04       Average Warranty Claim Labor Per R/0     \$ 39.80       Warranty Labor Gross Profit     \$ 586.04       Warranty Labor Gross Profit %     58.90%       Warranty Labor Gross Profit Per R/0     \$ 23.44       Warranty Claim Sublet     \$ 2123.10       Warranty Claim Sublet     \$ 00       Parts Sales     \$ 9622.75       Sublet Sales     \$ 9459.51       Total Hours     \$ 239.0       Total Labor Sales     \$ 9459.51       Total Labor Gross Profit \$     \$ 1.5       Total Labor Gross Profit \$     \$ 61.97%       Labor Gross Profit \$     \$ 61.97%       Labor Sales Per R/0     \$ 35.76			
Warranty Claim Repairs Orders     25       Warranty Claim Hours     19.9       Average Warranty Claim Hours Per R/0     .8       Warranty Claim Labor     995.04       Average Warranty Claim Labor Per R/0     .995.04       Average Warranty Claim Labor Per R/0     .39.80       Warranty Labor Gross Profit			
Warranty Claim Hours     19.9       Average Warranty Claim Hours Per R/0     .8       Warranty Claim Labor     995.04       Average Warranty Claim Labor Per R/0     \$39.80       Warranty Labor Gross Profit     \$586.04       Warranty Labor Gross Profit %     58.90%       Warranty Labor Gross Profit Per R/0     \$23.44       Warranty Claim Parts     \$2123.10       Warranty Claim Sublet     \$00       Parts Sales     \$9622.75       Sublet Sales     \$9459.51       Total Hours     \$239.0       Total Labor Sales     \$9459.51       Total Repair Orders     164       Labor Gross Profit %     \$862.51       Labor Gross Profit %     \$1.97%       Labor Gross Profit %     \$39.0       Total Labor Sales Per R/0     \$357.5       Labor Gross Profit %     \$39.0       Total Labor Gross Profit     \$586.251       Labor Gross Profit %     \$35.75       Labor Sales Per R/0     \$35.75       Labor Sales Per R/0     \$57.68		128.00	
Warranty Claim Hours     19.9       Average Warranty Claim Hours Per R/0     .8       Warranty Claim Labor     995.04       Average Warranty Claim Labor Per R/0     \$39.80       Warranty Labor Gross Profit     \$586.04       Warranty Labor Gross Profit %     58.90%       Warranty Labor Gross Profit Per R/0     \$23.44       Warranty Claim Parts     \$2123.10       Warranty Claim Sublet     \$00       Parts Sales     \$9622.75       Sublet Sales     \$9459.51       Total Hours     \$239.0       Total Labor Sales     \$9459.51       Total Repair Orders     164       Labor Gross Profit %     \$862.51       Labor Gross Profit %     \$1.97%       Labor Gross Profit %     \$39.0       Total Labor Sales Per R/0     \$357.5       Labor Gross Profit %     \$39.0       Total Labor Gross Profit     \$586.251       Labor Gross Profit %     \$35.75       Labor Sales Per R/0     \$35.75       Labor Sales Per R/0     \$57.68	Warranty Claim Repairs Orders	25	
Average Warranty Claim Hours Per R/0     .8       Warranty Claim Labor     \$ 995.04       Average Warranty Claim Labor Per R/0     \$ 39.80       Warranty Labor Gross Profit     \$ 586.04       Warranty Labor Gross Profit Per R/0     \$ 23.44       Warranty Claim Parts     \$ 2123.10       Warranty Claim Sublet     \$ 00       Parts Sales     \$ 9622.75       Sublet Sales     \$ 9459.51       Total Hours     \$ 239.0       Total Labor Sales     \$ 9459.51       Total Labor Gross Profit     \$ 1.5       Total Labor Soles     \$ 61.97%       Labor Gross Profit     \$ 5862.51       Labor Gross Profit     \$ 57.68			
Warranty Claim Labor     \$ 995.04       Average Warranty Claim Labor Per R/0     \$ 39.80       Warranty Labor Gross Profit     \$ 586.04       Warranty Labor Gross Profit *     58.90%       Warranty Labor Gross Profit Per R/0     \$ 23.44       Warranty Claim Parts     \$ 2123.10       Warranty Claim Sublet     \$ 00       Parts Sales     \$ 9622.75       Sublet Sales     \$ 9459.51       Total Hours     \$ 239.0       Total Repair Orders     1.64       Labor Gross Profit *     1.5       Total Labor Gross Profit *     \$ 5862.51       Labor Gross Profit *     \$ 5862.51       Labor Gross Profit *     \$ 57.68	the second secon		
Average Warranty Claim Labor Per R/O     \$ 39.80       Warranty Labor Gross Profit     \$ 586.04       Warranty Labor Gross Profit %     \$ 58.90%       Warranty Labor Gross Profit Per R/O     \$ 23.44       Warranty Claim Parts     \$ 2123.10       Warranty Claim Sublet     \$ 00       Parts Sales     \$ 00       Parts Sales     \$ 9622.75       Sublet Sales     \$ 428.99       Total Hours     \$ 239.0       Total Labor Sales     \$ 9459.51       Total Repair Orders     \$ 164       Labor Gross Profit %     \$ 586.251       Labor Gross Profit %     \$ 586.04       Labor Gross Profit %     \$ 57.68			
Warranty Labor Gross Profit     \$ 586.04       Warranty Labor Gross Profit %     \$ 58.90%       Warranty Labor Gross Profit Per R/O     \$ 23.44       Warranty Claim Parts     \$ 2123.10       Warranty Claim Sublet     \$ 00       Parts Sales     \$ 00       Parts Sales     \$ 9622.75       Sublet Sales     \$ 428.99       Total Hours     \$ 239.0       Total Labor Sales     \$ 9459.51       Total Repair Orders     \$ 164       Labor Hours Per R/O     \$ 5862.51       Labor Gross Profit %     \$ 586.04       Labor Gross Profit %     \$ 58.90%       Labor Gross Profit %     \$ 57.68			
Warranty Labor Gross Profit %     58.90%       Warranty Labor Gross Profit Per R/O     \$23.44       Warranty Claim Parts     \$2123.10       Warranty Claim Sublet     \$00       Parts Sales     \$00       Parts Sales     \$9622.75       Sublet Sales     \$428.99       Total Hours     \$239.0       Total Labor Sales     \$164       Labor Hours Per R/O     \$1.5       Total Labor Gross Profit     \$5862.51       Labor Gross Profit %     \$1.97%       Labor Sales Per R/O     \$57.68			
Warranty Labor Gross Profit Per R/O     \$ 23.44       Warranty Claim Parts     \$ 2123.10       Warranty Claim Sublet     \$ 00       Parts Sales     \$ 00       Parts Sales     \$ 9622.75       Sublet Sales     \$ 428.99       Total Hours     \$ 239.0       Total Labor Sales     \$ 9459.51       Total Repair Orders     \$ 164       Labor Hours Per R/O     \$ 1.5       Total Labor Gross Profit     \$ 5862.51       Labor Gross Profit %     \$ 35.75       Labor Sales Per R/O     \$ 57.68			
Warranty Claim Parts     \$ 2123.10       Warranty Claim Sublet     \$ 00       Parts Sales     \$ 9622.75       Sublet Sales     \$ 428.99       Total Hours     239.0       Total Labor Sales     \$ 9459.51       Total Repair Orders     164       Labor Hours Per R/0     1.5       Total Labor Gross Profit     \$ 5862.51       Labor Gross Profit %     \$ 61.97%       Labor Sales Per R/0     \$ 57.68			
Warranty Claim Sublet     \$ 00       Parts Sales     \$ 9622.75       Sublet Sales     \$ 428.99       Total Hours     239.0       Total Labor Sales     \$ 9459.51       Total Repair Orders     164       Labor Hours Per R/0     1.5       Total Labor Gross Profit     5862.51       Labor Gross Profit %     61.97%       Labor Sales Per R/0     35.75       Labor Sales Per R/0     \$ 57.68	statistic provide the statistic of the statistical statistical and the statistical statistical statistics and the statistical statistical statistics and the statistical statistical statistics and the statistical sta		
Parts Sales     \$ 9622.75       Sublet Sales     \$ 428.99       Total Hours     239.0       Total Labor Sales     \$ 9459.51       Total Repair Orders     164       Labor Hours Per R/0     1.5       Total Labor Gross Profit     5862.51       Labor Gross Profit %     61.97%       Labor Sales Per R/0     35.75       Labor Sales Per R/0     \$ 57.68			
Sublet Sales     239.0       Total Hours     239.0       Total Labor Sales     9459.51       Total Repair Orders     164       Labor Hours Per R/0     1.5       Total Labor Gross Profit     5862.51       Labor Gross Profit %     61.97%       Labor Gross Profit Per R/0     35.75       Labor Sales Per R/0     \$77.68	warrancy craim subjet	.00	
Total Hours     239.0       Total Labor Sales     9459.51       Total Repair Orders     164       Labor Hours Per R/0     1.5       Total Labor Gross Profit     5862.51       Labor Gross Profit %     61.97%       Labor Sales Per R/0     35.75       Labor Sales Per R/0     57.68	Parts Sales\$	9622.75	
Total Labor Sales     \$ 9459.51       Total Repair Orders     164       Labor Hours Per R/O     1.5       Total Labor Gross Profit     5862.51       Labor Gross Profit %     61.97%       Labor Gross Profit Per R/O     35.75       Labor Sales Per R/O     \$ 57.68	Sublet Sales\$	428.99	
Total Labor Sales     \$ 9459.51       Total Repair Orders     164       Labor Hours Per R/O     1.5       Total Labor Gross Profit     5862.51       Labor Gross Profit %     61.97%       Labor Gross Profit Per R/O     35.75       Labor Sales Per R/O     \$ 57.68			
Total Labor Sales     \$ 9459.51       Total Repair Orders     164       Labor Hours Per R/O     1.5       Total Labor Gross Profit     5862.51       Labor Gross Profit %     61.97%       Labor Gross Profit Per R/O     35.75       Labor Sales Per R/O     \$ 57.68			
Total Repair Orders     164       Labor Hours Per R/0     1.5       Total Labor Gross Profit     5862.51       Labor Gross Profit %     61.97%       Labor Gross Profit Per R/0     35.75       Labor Sales Per R/0     57.68	to be a second of the dualities when a to bound is to be at the below is bound is to be at the		
Labor Hours Per R/0     1.5       Total Labor Gross Profit     5862.51       Labor Gross Profit %     61.97%       Labor Gross Profit Per R/0     35.75       Labor Sales Per R/0     57.68			
Total Labor Gross Profit     5862.51       Labor Gross Profit %     61.97%       Labor Gross Profit Per R/O     35.75       Labor Sales Per R/O     57.68			
Labor Gross Profit %       61.97%         Labor Gross Profit Per R/O       35.75         Labor Sales Per R/O\$       57.68			
Labor Gross Profit Per R/0       35.75         Labor Sales Per R/0       57.68			
Labor Sales Per R/0\$ 57.68			
	teresteres transformers to be and the term of the second sec		
Average R/O's Per Day 15			
	Average R/O's Per Day 15		

#### Work In Process Worksheet

Use this button to print a worksheet that lists all of the open repair orders. You use the printout to "pencil in" the technician costs so the amount can be added to the Service Time Flags and posted to payroll. The report groups the information by technician. For each open repair order, the printout lists the repair order number, service date, each repair on the repair order, and the repair type and labor level assigned to each repair.

WIP W	lork Shee	t For Tech:01					191 - 191
ADA		Through 06/30/2008					
47611		LILLY WILLIAMS CUSTOMER STATES PASS. REA	C/A	10	10	17.00	۲ I
47664	06/21/08 Repair 1	FRED SMITH SERVICE ENGINE SOON LIGHT	C/A	10	10	10.00	[]

#### **Flagged Time**

Use this button to print a flag-time report for a specific date range. This report prints a real-time flagtime report. Every time you add time flag data to a repair order on the Close Service screen, whether you add to or subtract from the time, the system stores the information in the report database. The system calculates the technicians' actual time units every time you print the report. You can use this report to identify technicians' time units and use the information to post payroll.

This report does not pull information from the Payroll Time Pre-flag report. The Payroll Pre-flag report is a completely unrelated report.

This report includes all open repair orders and closed repair orders that have been updated to Accounting during the date range you specify. The report prints the information by technician. The top part of the report lists all of the repair orders for the technician for the date range you selected. It lists the repair order number, customer's name, each repair on the repair order, the repair type, labor level, customer complaint for the repair, charge time units, actual time units, and the status of the repair order. The bottom of the report lists the total repairs the technician worked on, the total charged time units, and the total actual time units.

Flagged Time 06/2	1/2008 To	06/22/2008							
Tech 03							C/T	A/T	Status
47667 ROBERT JONES		Repair 1	(C)	A	HEATER/AIR BLOWE	R DOESN'T	12	10	Open
Total Repairs	1								
Total Charge Units	12								
Total Actual Units	10								

### Writer/Technician Statistics

This button advances you to the Advisor/Writer/Technician Stats menu. This menu is used to view and print statistics for service writers and technicians. Click the button that corresponds to the menu option you want to select. The appropriate prompt or screen appears. When you are finished, click **Exit** to return to the Service Reports/Updates menu.

Advisor/Writer/Technician Stats (ABC Motors)	
Technician Labor Stats	Advisor/Writer/Technician Stats
Tech/Advisor Stats	
View Advisor/Writer Stats	
View Technician Stats	
Exit	

#### **Technician Labor Stats**

Use this button to print technician labor statistics for a specific month. Type the two-digit month (01 for January, 02 for February, etc.). When prompted to verify your printer is ready, select your print criteria.

For each technician, the report displays the hourly cost, actual time, cost, chargeable time, labor sale, and time ratio percentage for the selected month and year-to-date.

Tec	hnician	Labor	Stats For	Month:	06			141-151 (111-151)
No.	Name		Hr.	Ad	ctual	Cha	rgeable	Time
			Cost	Time	Cost	Time	Sales	Ratio
01	TOM		17.00 (H)	68.9	1171.30	90.5	3125.8	131.3%
02	STEPHEN		17.00 (H)	81.8	1390.60	107.8	4965.29	131.8%
03	DAVID		17.00 (H)	68.2	688.30	68.6	2333.95	100.6%
04	FRANCIS		17.00 (H)	63.2	1074.40	64.9	2891.7	102.78
05	FRED		17.00 (H)	62.8	1067.60	65.1	3058.85	103.7%
06	JOHN		17.00 (H)	58.4	992.80	62.7	2370.78	107.48
07	STEVE		17.00 (H)	79.4	1349.80	73.7	3471.58	92.8%
08	RALPH		17.50 (H)	71.8	1256.50	73.9	3143.79	102.9%
09	DARRELL		17.50 (H)	62.3	1090.25	88.6	2596.48	142.28
Pro	fitability	Y	63.9%	616.8	10081.55	695.8	27958.22	112.8%

### Tech/Advisor Stats

Use this button to print the statistics for the current period or pay period. This report uses the date when the repair order was updated to Accounting and not the close date for the repair order. Use the drop-down calendar to select the date range you want to use for the report, and click Go. When prompted to verify your printer is ready, select your print criteria.

The report is broken down into two parts. The first part of the report is the technician time report. For each technician, the report displays the actual time and cost, chargeable time and cost, time ratio percentage, and effective rate for the current period or pay. The bottom of this section displays the totals for all of the technicians.

Tec	hnician	Time	From:06/01	To:06/30			13 1945 M	10 10 10 10 10 10 10 10 10 10 10 10 10 1
No.	Name		Ac	tual	Cha	rgeable	Time	Eff.
			Time	Cost	Time	Sales	Ratio	Rate
01	TOM		70.9	1205.30	90.8	3121.95	128.1%	34.38
02	STEPHEN		81.7	1388.90	107.0	4860.31	131.0%	45.42
03	DAVID		75.8	823.40	80.0	2893.79	105.5%	36.17
04	FRANCIS		66.1	1123.70	67.6	2984.36	102.3%	44.15
05	FRED		58.6	996.20	63.7	2991.95	108.7%	46.97
06	JOHN		53.8	914.60	59.1	2187.78	109.98	37.02
07	STEVE		72.5	1232.50	74.7	3533.81	103.0%	47.31
08	RALPH		70.0	1225.00	74.1	3154.41	105.9%	42.57
09	DARRELL		61.9	1083.25	89.0	2618.05	143.8%	29.42
			63.4	634.60	66.6	2230.55	105.0%	33.49
Pro	£. 64	.75%	611.3	9992.85	706.0	28346.41	115.5%	40.15

The second part of the report is the advisor time report. For each advisor, the report displays the total repair orders, total time, total labor sales, average time per repair order, average sales, and effective rate broken down by customer pay, internal, and warranty, as well as displaying the overall totals.

Advis	or Time	From:06/01	To:06/30			171 (71
	Total Repairs	Total Time	Labor Sales	Time Per Repair	Avg. Sale	Eff. Rate
01-TOM	1					
C/P:	248	196.6	7859.57	.8	31.69	39.98
WAR:	37	31.6	1553.49	. 9	41.99	49.16
INT:	56	26.2	727.90	.5	13.00	27.78
TOT:	341	254.4	10140.96	.7	29.74	39.86

#### **View Advisor/Writer Stats**

Use this button to open the Advisor/Writer Information screen. This screen is used to view and edit service advisor and service writer statistics. The screen will display the statistics for each month. The information for the month is updated during the monthly summary update. Therefore, from January to the current month displays the statistics for the current year, and from next month to December displays the information from last year. The repair order units displayed are per condition. When you are finished, click **Exit** to return to the Advisor/Writer/Technician Stats menu.

	1	Adviso	- 1	01 02 03 04	PAUL BILL John Andrew	R	W W					
	Advisor/Writer Number:[03] Name: <mark>JOHN</mark> Advisor/Writer:[V]							05 06 07 08 09 10	RAY Adam Brian Mike Rich Tony			
Mo	R/0's	Hours	Sales	Mo	R/0's	Hours	Sales	1				
JAN	163	285.4			181	292.3	9308.25					
FEB	172	336.8		AUG	2 09	372.8	12233.03					
MAR	181	344.2	12435.89	SEP	175	305.4	10660.40					
APR	121	262.8	9401.41	OCT	2 0 2	349.5	12406.01					
MAY	143	278.1	10118.28	NOV	127	256.3	8613.64					
	84	163.7	5724.14	DEC	117	199.6	6958.15					

#### **Viewing Statistics**

First, you must click **Refresh Data** to recompile the statistics to ensure they are up to date. Click **OK** when prompted to verify you want to refresh the data. Since the system scans the repair order history file, the process may take several minutes. The system will display a "Did That " message when it is finished refreshing the data. Click **OK** to acknowledge the message.

Once you refresh the data, type the advisor's or writer's code, or click the individual in the list displayed on the right side of the screen. The statistics fill in on the left side of the screen.

Click **Print** to print the selected advisor's or writer's statistics. When prompted, select your print criteria. The report lists the number of repair orders the individual worked on each month.

If you need to edit statistics, click in a field, and edit the information as needed. Click **Save** to save the changes. The information will be updated.

**Tip:** Because the statistics displayed on this screen are generated during the monthly update, the information may not be accurate depending on the day of the month you performed your monthly update (for example, the 5<sup>th</sup> day of the month rather than the 1<sup>st</sup> day of the month). Therefore, Autosoft recommends that you use the Writer Analysis or Writer Sales report when you want a comprehensive summary of a writer's activity for the month. Both of these reports use the repair order close date.

### **View Technician Stats**

Use this button to open the Technician Information screen. This screen is used to view and edit technician statistics. The screen will display the technician statistics for each month. The information for the month is updated during the monthly summary update. Therefore, from January to the current month displays the statistics for the current year, and from next month to December displays the information from last year. The repair order units displayed are per condition. When you are finished, click **Exit** to return to the Advisor/Writer/Technician Stats menu.

echniciar	n Inforn	_	ABC Motors	) cian In	forma	tion			01 62	TOM Stephen
	Technician Number:08 Name: <mark>64LPH</mark>								03 04 05 06 07 58	DAUID FRANCIS FRED JOHN STEUE RALPH
	Mo.	R/0's	Charge Hours	Actual Hours	Labor Sales		Time Ratio		09	DARRELL
	JAN	88	113.7	129.8	5500.78	1.3	87.6			
	FEB	79	125.3	124.2	5548.81	1.6	100.9			
	MAR	100	130.7	130.7	5854.85	1.3	100.0			
	APR	80	147.9	134.1	6770.61	1.8	110.3			
	MAY	118	148.7	138.4	6761.89	1.3	107.4			
	JUN	55	63.0	58.1	2955.95	1.1	108.4			
	JUL	86	93.4	89.6	4095.10	1.1	104.2			
	AUG	106	127.3	126.7	5967.82	1.2	100.5			
	SEP	109	123.2	132.0	5351.35	1.1	93.3			
	OCT	99	146.2	154.5	6829.01	1.5	94.6			
	NOV	117	134.7	115.6	6121.24	1.2	116.5			
	DEC	91	117.6	117.1	5901.04	1.3	100.4			
Exil	t	P	rint	Refresh Da	ita Clea	r Screen	1	Save		

#### **Viewing Statistics**

First, you must click **Refresh Data** to recompile the statistics to ensure they are up to date. Click **OK** when prompted to verify you want to refresh the data. Since the system scans the repair order history file, the process may take several minutes. The system will display a "Did That " message when it is finished refreshing the data. Click **OK** to acknowledge the message.

Once you refresh the data, type the technician's code, or click the technician in the list displayed on the right side of the screen. The statistics fill in on the left side of the screen.

Click **Print** to print the selected technician's statistics. When prompted, select your print criteria. The report lists the number of repair orders the individual worked on each month.

If you need to edit statistics, click in a field, and edit the information as needed. Click **Save** to save the changes you made. The information will be updated.

**Tip:** Because the statistics displayed on this screen are generated during the monthly update, the information may not be accurate depending on the day of the month you performed your monthly update (for example, the 5<sup>th</sup> day of the month rather than the 1<sup>st</sup> day of the month). Therefore, Autosoft recommends that you use the Technician Time report when you want a comprehensive summary of a technician's activity for the month. The Technician Time report uses the repair order close date.

### **Miscellaneous Service Reports**

This button advances you to the Miscellaneous Service Reports menu. This menu is used to print trouble code and menu usage reports, warranty labor operation reports, and "come back" reports.

To generate a report, click the button that corresponds to the report you want to print. Follow the prompts that appear on your screen. When you are finished, click **Exit** to return to the Service Reports/Updates menu.

It is important to note that you cannot directly compare reports on this menu. The OP Code Detail report considers all types of repair orders and reports by Menu code, Trouble/Fail code, and Labor Op Code (respectively). As a result, you cannot generate the Trouble/Condition Code & Menu Usage or the Warranty Labor Op Usage report and directly compare the data to the OP Code Detail report. For example, if a Menu item has been set up to perform a warranty operation, and the warranty manufacturer's Labor Op Code is part of the Menu item, the Warranty Labor Op Usage report would provide data based on the labor op, but the OP Code Detail report would provide data based on the Menu code.

Miscellaneous Service Reports (ABC Motors)	
(ABL MULUES)	
Trouble Code & Menu Usage	Miscellaneous Service Reports
	-
Warranty Labor Op Usage	
	-
Print 'Come Back' Report	
	-
Service Discounts	
	-
GM Input Sheet	
	-
Op Code Detail	
Exit	

### Trouble/Condition Code & Menu Usage

Use this button to print a usage report for all of the trouble/condition codes and menu codes in the system. The information for this report is updated each month during the monthly update.

The first part of the report displays trouble code statistics. The report lists the total charge time/units and the total sale amount for the code this month and past 12 months.

Trou	ole Code Stats				(0) (0)
For P	eriod From 06/04 To 06/30				
		Мо	nth	Үе	ar
No. D	esc.	Units	Volume	Units	Volume
1C	COMPRESSION	.0	.00	.0	.00
1D	BROKEN	. 6	33.00	. 6	33.00
1E	BURNED	.0	.00	.0	.00
1F	CARBON DEPOSIT	.0	.00	.0	.00
1G	CHIPPED	.0	.00	.0	.00
1H	CLOGGED/RESTRICTED/BLOCKE	.0	.00	.0	.00
LOF	LUBE-OIL-FILTER	2.8	101.25	2.8	101.25
REC	RECALL	.7	37.80	.7	37.80
		4.1	172.05	4.1	172.05

The next part of the report displays menu code usage. The report lists the total charge time/units, the number of times the code was used, and the sale amount for each code for this month and past 12 months.

Servi	Service FasQuote Usage							
Code	Desc.							
LOF	2688 LUBE OIL FILTER Current Month Units: Year-To-Date Units:	2030 7347	Freq. : Freq. :	410 1473	Volume \$: Volume \$:	1638.14 6214.75		
ROT	2299 ROTATE TIRES & CHECK Current Month Units: Year-To-Date Units:	AIR PRES 547 1845	SURE. Freq.: Freq.:	143 487	Volume \$: Volume \$:	1758.65 5947.25		

### Warranty Labor Op Usage

Use this button to print a usage report for the warranty labor operation codes for a specific date range. When prompted, type the beginning and ending dates you want to use for the report. The report lists each labor operation used during the specific date range. The Total columns display the total number of times the code was used, the number of units sold, and the total sale amount for each code. The Average columns display the average number of units sold and the average sale amount for each code.

Warranty Labor Op Usage								
For Period From 06/01/2008 To 06/30/2008								
OP Code Usage Units Sales Units Sale								
26860303 85410000 85333333	9 5 2	48 40 6	64.40 212.40 31.86	5 8 3	7.16 42.48 15.93			

#### Print 'Come Back' Report

Use this button to print a list of customers who returned for a duplicate repair for a specific date range. This report is generated based on the **Comeback** field on the Close Service screen when the repair order is being generated. When prompted, type the beginning and ending dates you want to use for the report.

The report lists the original repair order number and the comeback repair order number. For each repair order, the printout lists the customer's name, service performed, writer, technician, and sale amount.

Service Come-Back's								
For Period From: (	06/01/2008	To:06/30/2008						
			SR	TN	Sale			
Original: 20001 (	06/01/2008	SIENNA METZ BRAKE PEDAL VIBRATES	02	05	27.50			
Comeback: 20020 (	06/22/2008	SIENNA METZ BRAKE PEDAL VIBRATES	01	05	27.50			

### Service Discounts

Use this button to print a report of the discounts applied repair orders for a specified period. The printout separates discounts for customer pay, internal, and warranty. For each repair order, the printout lists the R/O number, service date, service writer, customer name, sale amount and discount amount for service and parts, tax discount, and total discount.

ABC Motors										
Servi	ce Disc	ounts -	Customer Pay							
For Pe	riod From	06/01/200	8 To:06/30/2008							
				Lab	or	Par	s	Tax	Total	
R/O	Date	Writer	Name	Sale	Disc	Sale	Disc	Disc	Disc.	
41318	06/09/08	01-Bill	LARRY MILLER	75.00	7.50	.00	.00	.00	7.50	10.
41331	06/14/08	06-Adam	MICHELE KATT	65.00	.00	6.80	. 48	.00	.48	
				140.00	7.50	6.80	. 48	.00	7.98	5.
Writer	01 7	75.00	7.50 10.0%							
Writer	06 7	1.80	.48 .7%							

### **GM Input Sheet**

GM dealers use this button to generate a report that identifies the Service and Body Shop units that were sold for the month and year to date. The printout lists the units for customer pay, service contract, and quick service, warranty, internal, and new vehicle inspection. Dealers use the printout to assist them as they prepare their financial statement for the month. When prompted, type the month for the report, and select your print criteria.

GM Input Sheet					
For Month: 06					
		SERV MONTH	ICE Y-T-D	BODY MONTH	SHOP Y-T-D
CUSTOMER + SERV CONTRACT +	QUICK SERV:	443.0	3949.2	0.0	3.9
	WARRANTY :	48.7	1067.3	0.0	66.8
	INTERNAL:	149.9	1666.4	0.0	18.9
NEW VEHICLE	INSPECTION:	30.1	191.2		

### **Op Code Detail**

This button advances you to the Op Code Detail menu. Use this menu to generate an operation code detail report. This helps you identify the Op code used for each repair order. This list provides important information about the Op code usage for your analysis. You use the first menu option to generate the detail for a specific date range. You can then view all the detail or use the remaining menu options to view the information using a specific filter.

Op Code Detail (ABC Motors)	
Generate Op Code Detail	Op Code Detail
Op Codes by Code	
Op Codes by Advisor/Writer	
Op Codes by Tech	
Exit	

#### Generate Op Code Detail

First, use this button to generate the operation code detail for a specific date range. The generated detail you can view using this option includes information for all repair orders in the selected date range.

- 1. Click Generate Op Code Detail.
- 2. Type the date range you want to use to compile the data.
- 3. When prompted to verify your printer is ready, select your print criteria.
- 4. The system prompts you to indicate if you want to include repairs that do use labor op codes. Click **Yes** or **No**.
- 5. The system prompts you that the information on the printed report is a partial representation of the compiled data. It also includes the location where the **OPDETAIL.TXT** file is located. Click **OK** to continue.
- 6. The system prompts you with the location where the **OPDETAIL.XLS** file is located. Click **OK** to continue.

The program generates three files when you select to generate the report:

- **REPORT.PDF:** This file displays on the screen when you select **To Screen** as your print option. The same information print when you select **To Printer** as you print option. Please note that size limitations allow this file to display only a partial representation of the generated data. The printout lists the following information: advisor/writer ID, RO number, repair number, Op code, pay type, closed date, vehicle's VIN, make, and model, technician ID, and the customer's name.
- C:\ASIXL\OPDETAIL.XLS: This is a Microsoft Excel file. You can only view and edit the file in Microsoft Excel. Once you edit the data, you can save it as an Excel file or comma delimited file (CSV) so you can attach the file to an e-mail message to send to third-party vendors as needed. The file includes the following information: advisor/writer ID, RO number, repair number, Op code ID, Op code description, repair labor amount, sold labor units, actual labor units, repair cost, total RO parts price, total RO parts cost, Vehicle model year, odometer, labor type, ZIP code, RO closed date, VIN, make, model, technician ID, and the customer's name, address, city, state, home phone number, work phone number, and e-mail address.
- C:\ASITEXT\OPDETAIL.TXT: This is a comma delimited text file. You can view and edit the file in any text editing program (WordPad, NotePad, Microsoft Word, etc.). This file can also be attached to an e-mail message to send to third-party vendors as needed. This file includes the same information included in the XLS file.

#### **Op Codes By Code**

Use this button to view or print just the information from the generated data for a specific Op code.

- 1. Click **Op Codes By Code**.
- 2. The system identifies the dates for the generated data. Click **OK** to continue.
- 3. Type the Op code you want to use for the report.
- 4. When prompted to verify your printer is ready, select your print criteria.

#### **Op Codes By Advisor/Writer**

Use this button to view or print just the information from the generated data for a specific advisor/writer.

- 1. Click Op Codes By Advisor/Writer.
- 2. The system identifies the dates for the generated data. Click **OK** to continue.
- 3. Type the advisor/writer ID you want to use for the report.
- 4. When prompted to verify your printer is ready, select your print criteria.

#### **Op Codes By Tech**

Use this button to view or print just the information from the generated data for a specific technician.

- 1. Click **Op Codes By Tech**.
- 2. The system identifies the dates for the generated data. Click **OK** to continue.
- 3. Type the technician ID you want to use for the report.
- 4. When prompted to verify your printer is ready, select your print criteria.

### **Payroll Time Flags**

Service Managers use the Service Time Flags menu to pre-edit the payroll time flags. This allows a technician's pay to include times from open and closed repair orders. The information automatically updates to the Payroll Service Time Flags so Accounting can post the information to the current payroll.

Technician Time Flags (ABC Motors)	
Enter Pre-Flag Times	Service Time Flags
Compile Flag Data	
Edit Compiled Data	
Print Flag Data	
Exit	

- 1. Use the Enter Pre-Flag Times button to add time for open repair orders.
- 2. Compile the flag data. This will compile the data for closed repair orders and any information added for open repair orders.
- 3. Use the Edit Compiled Data button to edit the compiled data.
- 4. Print the flag data for your records.

#### **Enter Pre-Flag Times**

The Service Manager uses this feature to pre-edit the payroll time for <u>open</u> repair orders. This allows a technician's pay to include times from open repair orders. When the payroll clerk compiles the Service Time flags, the system will pull the open repair orders the Service Manager edited. The edited data will display when the repair order is selected on the Edit Compiled Data Screen on the Service Time Flags menu in Payroll and will update when the Payroll Clerk selects to update the flag times to the current pay.

- 1. Click Enter Pre-Flag Times. The Payroll Time Pre-Flags screen appears.
- 2. The right side of the screen displays the open repair orders. Click a repair order. The repair order number, customer's name, and vehicle make and model fill in the fields at the top of the screen.
- 3. Click the repair you want to select. Any previously paid flags on the repair fill in the **PPFU** field (Prior Pre-Flag Units).



- 4. The **CT** field displays the charged time units for the repair, and the **AT** field displays the actual time units for the repair.
- 5. Type the total units for the repair in **PFU**. If the repair order is open and flagged over more than one payroll, the payroll program will do the calculation. This is only when a repair order is open and flagged over more than one payroll.

For example, the first week the technician puts 2 hours on a job. The Service Manager enters 20 units as the pre-flag time, and the technician's pay includes the 20 units. By the end of the second week, the job is still not finished, and now the technician has a total of 5 hours on the job. The Service Manager will now enter 50 units, the total time on the job. When the payroll program compiles the flags, the technician will be paid for 30 units for this pay because he was paid for 20 of the 50 units last pay.

6. Click **Save**. Continue to work your way through the list of repair orders.

### **Compile Flag Data**

Use this button to compile flag time data. This compiles information for closed repair orders and any information added for open repair orders.

- 1. Click Compile Flag Data.
- 2. Use the drop-down calendars to select the date range for the compiled data.
- 3. Click Go.
- 4. Click **OK** when prompted to verify you want to compile the data.

**Tip:** Click **Refresh Flag Data** on the Compile prompt to refresh the time flag data to ensure it is accurate. Click **Refresh** again when prompted to verify you want to refresh the data.

#### **Edit Compiled Data**

Use this button to open the Edit Technician Time Flags screen to edit the compiled time flag data.

Edit Technician Time	Flags					
01 TOM			ate Uni			
02 STEPHEN			pen)		.50 .00	
03 DAVID	Technician: 08	06971 (0	pen)	2 3.	.00 .00	CHARLES WILSON
04 FRANCIS 05 FRED	Customer 15.00			5 7.	.50 .00	
06 JOHN	Warranty 15.00			· · ·	.50 .00	
07 STEVE	Internal 15.00					
08 RALPH	WIP 340A					
89 DARRELL	WIF 340H					
		1				
	Repair Order:					
	Labor Units:					
	Labor Cost:					
	Save					
	Remove					
	Tielliove					
		·				
Exit	View R/O	View Previous I	Paid Flags	01	pen R/O's	Remove Compiled List

#### Editing the Cost on a Repair Order

- 1. Click Edit Compiled Data.
- 2. Click the technician you want to select in the list window on the left side of the screen.
- 3. The window on the right side of the screen displays a list of repair orders pulled for the technician. Click a repair order to select it. (You can view a summary of the repair order by clicking **View R/O**.)
- 4. If the repair order has been updated to the schedule, the labor cost appears under the Labor Cost field. This allows you to see the amount that was entered into the schedule so you can correct the information if necessary.
- 5. The **Labor Units** field displays the time units for the repair, and the **Labor Cost** field displays the cost for this repair order. Edit these amounts as needed.
- 6. Click **Save** to save the information.

#### Removing a Repair Order

Use the following instructions to remove a selected repair order from a technician's list.

- 1. Select the technician and repair order.
- 2. Click Remove.
- 3. Click **Gone** when prompted to verify you want to delete the record.

#### Adding a New File

You should use the Work In Process Worksheets to add new files on this screen.

- 1. Select the technician.
- 2. Type the repair order number, or click **Open R/O's** to select the R/O from a list of the open repair orders for the selected technician.
- 3. Click **OK** when prompted that the system will create a new record.
- 4. Type the labor cost.
- 5. Click **Save**. The repair order is added to the list on the right side of the screen.

#### **Removing the Compiled Data**

Use the **Remove Compiled List** button to remove all of the compiled information. If you decide you want to use the Service Time Flag data, you will have to recompile the information.

- 1. Click Remove Compiled List.
- 2. Click **Gone** when prompted to verify you want to delete the information.

#### **Viewing Previously Paid Time Flags**

Use the View Previously Paid Flags button to view all of the previously compiled time flags that have been updated to payroll.

- 1. Click View Previous Paid Flags.
- 2. Click an R/O in the list to view the R/O on your screen.
- 3. Click **Back** to close the R/O or the View Previous Paid Flags screen.

#### Print Flag Data

Use this button to print the compiled data. This lists all of the repair orders for each technician and the total labor cost. When prompted to verify your printer is ready, select your print criteria.

### **Monthly Summary Update**

Use this button to perform a monthly update of your service data. This compiles all the service data and makes it available for the reports that depend on the monthly update to bring the service information up to date. The accuracy of the reports that are updated during the monthly update depends on the day of the month you perform the update. For example, if you do not run your monthly update until the 5<sup>th</sup> day of the following month, your service data will be off by five days. If you run the monthly update at the end of business on the last day of the month, your service data will be up to date.

**Important:** All workstations must exit the Service Writing Module during the update. Similarly, no one can be in the Service R/O section or have a repair order open in the Parts Inventory module.

#### 1. Click Monthly Summary Update.

- 2. Type the month and year you are updating. This is the *previous* month. For example, you update June's data in July. Never update the current month.
- 3. Click **OK** when prompted to verify you want to run the update.
- 4. The "Last Monthly Update Was" date on the menu changes to the month and year used for the update. The "Completed On" date displays the current date.

# **R/O Archives**

This button advances you to the R/O Archives menu. The R/O Archives menu is used to archive repair orders. When you archive a repair order, it is turned into a PDF file and stored on the local hard drive. Several years of records can be maintained on the local drive.

This menu also provides a method for viewing your archived repair orders and burning them to a CD for backup. Because the system backup does not include making a backup of the local drive, the records may be lost due to hardware failure or other unforeseen accidents. By "burning" the files to a CD, you ensure the records are safely backed up. Several copies should be made so a copy can be stored off-site in a safety deposit box (or other safe location).

R/O ARchives (ABC Motors)	
View Archived Repair Orders	R/O Archives
Archive Repair Orders	
Burn Archives To CD	
Remove An Archive File	
Exit	

#### Archive Repair Orders

The first step is to archive the repair orders. This converts the files to a PDF document.

- 1. Click Archive Repair Orders.
- 2. In the **From** and **To** fields, type the start and end repair orders. All of the repair orders within the range will be archived. To archive a single repair order, type the repair order number in both the **From** and **To** fields.

Archive Repair Orders						
From	R/0:20000					
То	R/0:29999					

- 3. Click **OK** when prompted to verify you want to archive the records.
- 4. If there are missing repair orders within the sequence you selected, the system will prompt you with a message indicating the number of repair orders that are missing. Click **OK** to acknowledge the message.

#### **View Archived Repair Orders**

Click **View Archived Repair Orders** to view a list of the archived repair orders. The system displays a list of available PDF files. Each file will be named for the corresponding repair order or the first repair order entered in a sequence. For example, if you save repair orders from 10000 to 19999, the file will be named RO10000.

- 1. Click View Archived Repair Orders.
- 2. Click the file you want to view in the Archive List. The repair order will open for viewing and printing. If there is more than one repair order in the file, use the arrow keys on the toolbar or on your keyboard to scroll through the repair orders.
- 3. When you are finished viewing the repair order, click File, and click Exit.

#### **Burn Archives To CD**

Use this button to burn the repair orders stored on your local drive to a CD. The computer you are working on must have a CD burner installed. Store the backup CD in a safe place (fireproof safe, safety deposit box, etc) preferably offsite to ensure your records are protected.

1. Click Burn Archives To CD. The Burn Archive screen appears.



- 2. The left side of the screen lists all of the PDF files available for backup. Click the box to the left of the file to select it. A check mark appears in the box.
- 3. Once you have selected the files you want to burn, click **Burn Now**. The files are burned to the CD.
- 4. Click **Back** to Return to the R/O Archives menu.
- **Tip:** When you "burn" the repair orders to the CD, you will not be able to access any records previously burned to the CD. Therefore, Autosoft suggests you use a separate disk for each archive. When you use a new disk, you only need to select the PDF file for the repair orders you just archived. However, if you choose to use the same disk over again, you must select all of the archived records to ensure you will be able to access all of the files.

#### **Remove An Archive File**

Use this button to remove an archived repair order.

- 1. Click Remove An Archive File.
- 2. In the Archive List, click the PDF file you want to remove.
- 3. Click **OK** when prompted to verify you want to delete the file.
- 4. The file is removed from the archive list, and the system closes the list.

# **Daily Service DOC**

The Daily Operating Control screen allows the Service Manager to view the Service and Body Shop daily DOC. These DOC's are created in the Accounting module. The DOC will show the Service Manager where the Service Department stands with the respect to the general ledger figures on each day the DOC is compiled. The DOC must be compiled in the Accounting module before you can view the DOC in the Service module.

- 1. Click **Daily Service DOC**.
- 2. The screen automatically displays the Service DOC. Click **Body Shop** at the bottom of the screen to display the Body Shop DOC.
- 3. Click **DOC History** to view a list of DOC's that have been previously compiled.
- 4. Click **Comparison DOC's** to compare the current Daily DOC with a DOC from the DOC history.
- 5. Click **Print** to print the DOC. When prompted to verify your printer is ready, select your print criteria.
- Tip: Use the Allow Parts To View My DOC's box to determine if the Parts Department can view the Service DOC. If you select the box, the Service and Body buttons on the Parts Daily DOC screen will be available. If you leave the box empty, the Service and Body buttons on the Parts Daily DOC screen will be unavailable.

# **Report Generator**

The Report Generator is used to create user-defined reports. This allows you to pull the information you want from your Autosoft DMS system. Once you generate a report, you can save the settings and use the report to pull information in the future. Please refer to the *Autosoft Report Generator User Guide* that came with your Autosoft DMS software for complete instructions on how to use the Report Generator. You can access a PDF version of the manual from the help pages in the Report Generator.




# **Chapter 11 Followup & Marketing**

The Service Followup menu is used to assist you with activities that promote customer retention. The options allow you to create followup mailers and print followup lists. Click the button that corresponds to the menu option you want to select. The appropriate submenu or screen appears. When you are finished, click **Exit** to return to the Service Writing menu.

Service Followup (ABC Motors)	
Daily Followup	Service Followup
Pull Marketing List	
Edit Marketing List	
Print Mailers	
Print Labels	
Effectiveness Report	
Miscellaneous Lists	
Setup	
Exit	

## Setup

Before you can use the followup program, you must create your followup mailers. Use the **Setup** button to enter the parameters you want to use when generating the followup lists and to enter text for the mailers you want to send out. (The instructions on the following page explain the information required in each field and how to enter your mailer text.)

Setup (ABC Motors)	
Maintenance Service Codes	Generic         Flyer Text           VIN         Flag           Text 1
Maintenance Service Description Keywords	Text 2
Keywords are words or phrases that you have used in the	Text 4
complaint line of the repair to indicate that maintenance service was performed. Such as "LOP" or "LUBE". Minimum Miles To Pult: [Usually 2800] Minimum Days To Pult: [Usually 80]	Text 6
Maximum Days To Pull: [Usually 110] Back	VIN Flags - the 2nd letter of the VIN to customize text for your new car franchise.

**Important:** You must use pre-printed forms to use this feature. Autosoft can print the forms, or another vendor can print the forms based on a form from Autosoft. The forms must match the Autosoft form exactly in order to work with this module.

### Using Trouble Codes or Service Menu Codes

The Maintenance Service Code setup of postcard reminders is sensitive to the use of trouble/fail codes and service menu codes. Please review the following information before entering your setup information. It will help you decide whether you should use trouble/fail codes or service menu codes.

#### Trouble Fail Code Usage

A trouble code allows you to assign specific general ledger accounts to the item to specific where the labor for the repair will post. The postcard setup will find the occurrences of the trouble/fail code as created in the Trouble/Fail Code setup. A postcard scan for trouble/fail codes is not sensitive to whether or not the **Labor Operation** field is left blank in the Trouble/Fail Code setup. The trouble/fail code used for a repair order is recorded to the R/O history and is searchable in a postcard search.

#### Service Menu Code Usage

When creating menu codes, you can assign parts associated with repair and add customer presentation for up sales. The postcard setup will find the use of a service menu codes **IF** the **Labor Operation** field and **Code** field in the Enter Service Menu Operations setup match. For example, code SPE needs to be in the **Code** field and **Labor Operation** field. The codes must match in spelling for a valid search. If the **Labor Operation** field is left blank, then essentially the postcard search for the usage of that code will be null.

#### **Adding Setup Information**

- 1. In **Maintenance Service Codes**, enter up to ten codes that apply to follow up as they appear in either the menu codes or trouble codes, and the system will search for the codes when generating the marketing list. If the system finds one of the codes entered here in a customer's service history file, it will check to see how long ago the service was done. If the service falls within the minimum or maximum days specified on this screen, the system will pull that customer to the marketing list.
- 2. Under **Maintenance Service Description Keywords**, type up to five descriptions you want the system to search for when generating the marketing list. The system searches the Customer Complaint line in the repair order history for the descriptions.
- 3. In **Minimum Miles To Pull**, type the minimum miles a vehicle should have (based on the system's estimation of accumulated miles) before it is included on the marketing list.
- 4. In **Minimum Days To Pull**, type the minimum number of days since the last service that should elapse before the customer is added to the marketing list.
- 5. In **Maximum Days To Pull**, type the maximum number of days since the last service date that should elapse before the customer is added to the marketing list.

6. Click **Generic**, and use the Flyer Text area to type a general message that will print on all non-manufacturer-specific mailers. <u>You must press ENTER</u> to force line breaks as you type, or the text will not print properly.

	Flyer Text
Generic	Nobody knows your vehicle like ABC
	Motors. Our records indicate that your
Flag	vehicle is due for service.
Text1	
	Please call our Service Department
Text 2	between 8:00 and 5:00 to schedule your next
	appointment.

- Click the **Text** buttons, and use the Flyer Text area to type messages that will print on all manufacturer-specific mailers. <u>You must press ENTER</u> to force line breaks as you type, or the text will not print properly.
- 8. Use the **VIN Flag** field to indicate the manufacturer for the text you are adding. The second letter on the VIN indicates the manufacturer. Type that letter in the **VIN Flag** field. For example, all General Motors vehicles have G as the second letter of the VIN. To assign a GM-specific message, you would type G in this field.

1	Flyer Text
Generic	Nobody knows your GM vehicle like ABC
VIN	Motors. Our records indicate that your
Flag	vehicle is due for service.
Text 1 G	
	Please call our Service Department
Text 2 F	between 8:00 and 5:00 to schedule your next
	appointment.

9. Click **Back** when you are finished entering the setup information. The system automatically saves the information you enter.

## **Daily Followup**

This button advances you to the Service Followup Sheets menu. This menu is used to conduct daily service followup. You can print followup short lists or detailed followup sheets. Both options allow you to conduct surveys to rate customer satisfaction based on a scale from 1 to 5. The survey questions are tailored to fit the needs of your dealership.

When you first access this menu, you are prompted to select the date for the working data you want to use. The data is based on the repair order closing date. Each date listed contains the repair orders that were closed on that date. The data only includes information for the last six days. You cannot go back further than six days. The followup list is based strictly on the repair order list for the service date selected. The customer's status (A for active or I for inactive) and the customer's "On Do Not Call List" entry in the customer information file *do not* determine if a customer is pulled to this followup list.

Print Service Follup Sheets	(ABC Motors)			
Print Fo	llowup Short List	Sen	vice Followu	p Sheets
Print F  View/E	Select Working Data Available Data	Closed On Closed On Closed On Closed On Closed On	05/14/08 05/13/08	
Select Folk	Abort			
cs	I Questions			
	Exit			

The dates in the data list should appear in order from the most recent date to the oldest date. If the menu is missing a date, Service did not perform the Daily R/O Update on that date. Similarly, if Service performs multiple Daily R/O Updates, the menu will display the same date on multiple lines.

If one or more dates appear to be out of order in the Select Working Data list, check to see if there is a closed repair order for the day that has an old open date (days or weeks ago). This might be caused, for example, by a repair order that contained both customer pay and warranty work, where the warranty repair remained open for a period of time. When the repair is finally closed, the repair order is included in the Daily R/O Update. The Daily R/O Update displays the oldest open date for all of the repair orders updated as the date in the data list. The repair order with the oldest open date will be the first repair order in the closed repair order list for that day and will be the first repair order data in Adobe<sup>®</sup> Acrobat<sup>®</sup> Reader<sup>®</sup>.

To select the working data, click the date you want to select. (You must select working data to continue. If you click **Abort**, the system will return you to the Service Followup menu.) The data for the date you selected becomes the working list for all of the menu options. The selected date is displayed on the bottom of the menu for your reference. If you need to change the date, click **Select Followup List To Process** to display the list of available data again.

To begin working with the data and to print the followup sheets, click the button that corresponds to the menu option you want to select. The appropriate prompt or screen appears. When you are finished, click **Exit** to return to the Service Followup menu.

### **CSI** Questions

Before you can print the followup sheets, you must enter the text that you want to print on the sheets using the **CSI Questions** button. These are the same questions entered in the CSI/SSI module. You can enter up to four questions that allow the customers to rate their service on a scale from 1 to 5. Simply type up to four questions in the fields provided. When you are finished, click the **Back** to return to the Service Followup Sheets menu. The system automatically saves the information.

CSI Followup Questions (ABC Motors)
CSI Followup Questions
Question 1 Are you fully satisfied with the repairs
Question 2 Were you treated in a fair & courteous manner
Question 3 Were all of your service concerns corrected
Question 4 Were you completely satisfied with this visit
Back

**Tip:** These are the same questions found in the CSI/SSI module. If you edit the questions here, the changes pull to the CSI/SSI module. Similarly, changes made to the questions in the CSI/SSI module automatically pull to the Service Writing Daily Followup.

### Print Followup Short List

Click **Print Followup Short List** to print a followup short list for all of the closed repair orders. This list can be used to conduct phone surveys if your dealership does not want to mail out customer surveys. When prompted to verify your printer is ready, select your print criteria.

The list prints four closed repair orders per page. It displays the customer's name, address, and phone numbers, the repair order number and closing date, the vehicle's year, make, model, and mileage, the advisor and technician for the repair order, and the followup survey questions.

	ABC Motors								
Close	ed Repair Ord	ers For CSI Followup							
R/O 4	0373 05/15/08								
		STEVE SMITH	Home	(724)					
		555 MAIN STREET	Cell	(724)	555-	000	1		
		WEST MIDDLESEX PA 16159	Work	(724)	555-	987	6		
Year	07								
Make	CHEVROLET	LUBE-OIL-FILTER							
Model	BLAZER								
Odom	7132	Are you fully satisfied with	the repai	rs?	1	2	3	4	5
		Were you treated in a courted	ous manner	?	1	2	3	4	5
Tech	01	Were all of your service cond	cerns addr	essed?	1	2	3	4	5
Advs S/M	01 PAUL 02 STEPHEN WI	Were you completely satisfied				2		4	5

### **Print Followup Sheets**

Use this button to print followup sheets for customers. This printout can be used to conduct individual surveys through the mail.

#### 1. Click Print Followup Sheets.

In the list, click the box in front of the customer's name to select the customers for whom you
want to print the followup sheets. A check mark appears in the box to indicate the customer
has been selected. You can also use the Select All button to select all customers and the
Clear All button to clear the boxes for all customers.

#### 3. Click Print Selected.

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

Each customer's survey prints on a separate page. The printout lists the customer's information, service history, details for the most recent service, and the followup survey questions.

		ABC Motors				
Salesman: 02 - SI	PEPHEN W	ILLIAMS				
R/O 40373 05/15/08	3912647	76	Home ('	724) 555-123	4	
Year 07	STEVE S	SMITH		724) 555-000		
Make CHEVROLET	555 MA	IN STREET	Work (	724) 555-987	6	
Model BLAZER	WEST M	IDDLESEX PA 16159	^			
			Service	Visits: 2		
Odom 7132	Steve		Cars Pure	ch Here: 1		
			Birthday	May, 19		
Tech 01 PAUL						
Advs 01	On a scale	from 1 to 5 how would you	rate the following?			
						_
		1 fully satisfied		? 12	34 34	5
	Were yo	ou treated in a co	urteous manner?	1 2	3 4	5
	Were a.	ll of your service ou completely sati	concerns address	sed? 1 2	3 4	5
Delivered 11/07/07	were yo	ou completely sati	siled with the v.	1510: 1 2	5 4	5
Repair 1 LUBE-OIL			(Q)	31.57		
Repair 2 ROTATE T			(C)			
Repair 2 Romins 1			Total Repairs			
			ropulle			
Repair History						_
14.0		IN Repair			Tota	-
40373B 05/15/2008		01 ROTATE TIRES		(C)		-
40373A 05/15/2008		01 LUBE-OIL-FILT	ER	(Q)		_
40348 02/08/2008	0		•	()		-
40332B 09/05/2006		01 RECALL 124578	-	(W)		-
40332A 09/05/2006	0 0	01 LUBE OIL FILT	ER	(Q)	.0	0
Comments						

## **View/Edit Working Data**

Use this button to open the Edit Compiled List screen. This screen is used to view the list of closed repair orders in the current working list and to change the status of repair orders as needed.

Edit Con	npiled Li	ist			
40368	(C)	86	PONTIAC	WILMA SMITH	Active
40369	(C)	01	MAZDA	LILLY JONES	Active
40370	(C)	02	CHEVROLET	JAMES M WALTON	Active
40372	(0)	04	CHEV	DAVID J MADSEN	Active
40373	(0)	07	CHEVROLET	STEVE SMITH	Active
40376	(0)	64	CHEV	ROBERT WILDER	Active
40377	(Q)	85	PONTIAC	STACIE TENNYSON	Active
40380		84	CHEV	CHRIS E BROWN	Active
40385		01	BUIC	BUFORD V HARDIN	Active
40386	(C)	04	CHEV	TIMOTHY B TERRY	Active
40387		04	CHEVROLET	LARRY BABCON	Active
40395		03	BUICK	SARAH CASSELL	Active
40397		99	CHEV	FRANK A. SALERNO	Active
40401		02	BUIC	DOROTHY M. HARMON	Active
40403		88	CHEVROLET	VALLEY RENTAL	Active
40406		07	PONTIAC	JIM HANSEN AUTOBODY	Active
40407		08	CHEVROLET	HAUS CAR RENTAL	Active
40408		02	PONTIAC	RAYMOND MANNING	Active
40409	(C)	00	BUIC	GERALD P BARBAS	Active
	1				<b>2</b>
Close	e			"Click" Line To Char	nge Status

Click a repair order to change its status from "Active" to "Removed" or from "Removed" to "Active." You can only print followup sheets for active repair orders.

40385	(C) 01	BUIC	BUFORD V HARDIN	Active
40386	(C) 04	CHEV	TIMOTHY B TERRY	Removed
40387	(C) 04	CHEVROLET	LARRY BABCON	Removed
40395	(C) 03	BUICK	SARAH CASSELL 💦	Removed
40397	(C) 99	CHEV	FRANK A. SALERNO	Active
40401	(Q) 02	BUIC	DOROTHY M. HARMON	Active
40403	(Q) 08	CHEVROLET	VALLEY RENTAL	Active

## **Pull Marketing List**

Use this button to generate a list of customers due for followup mailings. The list is based on the mailing date you specify. The system will also use the information you entered in the Followup Setup to generate the list. The system displays your parameters as it scans the files.

- **Tip:** An inactive (I) status in the Customer Information file will prevent a customer from being pulled to this marketing list. If a customer has expressed he or she does not wish to be contacted by the dealership, you can use the customer's status to help prevent the customer from being pulled to this marketing list.
  - 1. Click Pull Marketing List. The Scan Records screen appears.
  - Type the mailing date you want to use for the list (the date you want to send the mailers out). You are already filtering the list based on the minimum miles to pull, minimum days to pull, and maximum days to pull you entered in the Setup.



- 3. Click **OK** when prompted to verify you want to pull the working list. (If you click **Cancel**, the system will clear the date field, and you can enter a new date.)
- 4. The system will ask you if you want to perform a pre-scan fix. Click **OK** or **No** to indicate the option you want. The pre-scan fix helps verify the integrity of the files to ensure the system can successfully generate your list.
- 5. The system will scan the records. This may take several minutes depending on the number of service records in your system. The system will display the progress as it scans.
- 6. If a list already exists, the system will prompt you to indicate if you want to override the existing list. Click **OK**. (If you select to cancel the override, the system will discontinue generating the new list.)
- 7. When the system is done generating the list, it will display a message indicating the number of records in the new list. Click **OK** to acknowledge the message.

## **Edit Marketing List**

Use this button to edit the marketing list as needed before printing the mailers. You can remove customers from the marketing list and view customers' repair history. If you edit a customer's information on this screen, the changes will update to the customer's master file. Ensure you have permission to edit customer files before making changes on this screen.

1. The screen displays the customers on the list.

Edit Marketing List (	Edit Marketing List (ABC Motors)							
Last 8 Mfg Name		Previous		Last		Days	Odometer Now	
01010101 G ALIC	E BALDWIN	05/22/2007	47568	09/18/2007	50353	257	56368	
02020202 G ROGE	R CRIM	09/07/2007	99661	11/06/2007	102316	208	111520	
11266580 G BERN	ICE M ADAMS		0	11/06/2007	34543	208	41407	
1B661200 L JESS	IE M GARNER		0	11/28/2007	41204	186	47342	
2S502340 G SAND	RA GAINS		0	12/03/2007	43535	181	49508	
30107300 G CARL	HARVILLE	10/03/2007	82765	01/03/2008	85577	150	90162	
32351480 G RONA		05/08/2007	83727	10/12/2007	86227	233	89937	
33333330 G ROGE	R CRIM	06/07/2006	59405	07/03/2007	65801	334	71265	
37147730 G JESS		07/31/2007	58322	12/05/2007	61995	179	67172	
37327270 G MARS		05/05/2006	38472	06/25/2007	44207	342	48922	
39126470 G STEV		09/14/2007	85685	01/03/2008	91136	150	98502	
39235200 G SHAR		07/31/2007	55778	11/20/2007	58201	194	62398	
39325200 G SHAR		05/16/2007	77751	08/06/2007	81314	300	94349	
3B293250 D LARR		09/07/2007		11/19/2007	111320	195	121914	
3E214230 G WILS			0	08/27/2007	78715	279	87922	
3E322810 G THOM			0	10/18/2007	76955	227	84446	
3E366430 G ELIS		07/26/2007	52122	01/14/2008	56315	139	59703	
3M703190 G GEOR		06/25/2007	62645	01/14/2008	67616	139	71020	
41100500 G KERR		10/10/2007	85331	11/20/2007	89407	194	108693	
41133620 G THOM	PSON		0	10/23/2007	56653	222	63979	
	Previous Page				Nexti	Page		
Las	Corrections Entered Here Are Updated To The Customer Master File. Last 8: Address: City: Salutation:Save							
Exit	Pre-Edit List	Repair Histor	P	Print List	Rem	ove	Clear	

- 2. Click **Previous Page** and **Next Page** to scroll through the pages of the list as needed.
- 3. Click the customer, and the customer's information appears in the fields at the bottom of the screen.
- 4. Edit the information as needed. Remember, the information you edit here will update the customer's record.
- 5. Verify a name appears in the **Salutation** field. Type a name if one does not fill in this field. If this field is blank, no name will print on the mailer.
- 6. Click **Save** to save the changes.
- 7. Continue to view and edit customer information as needed.
- 8. Click **Exit** to return to the Service Followup menu.

### Viewing a Customer's Repair History

You can view the repair history for any customer on the list using the **Repair History** button. The screen will display the repair history. This information is for viewing only. You cannot edit any information on the screen.

- 1. Click the customer you want to select. The customer's information is displayed in the fields on the bottom of the screen.
- 2. Click Repair History.
- 3. The customer's repair history is displayed. The top part of the screen displays the vehicle's model year, make, and model. If the vehicle was purchased from the dealership, the top part of the screen also displays the delivery date.

The bottom part of the screen displays the repair order history. It lists the repair order number, service date, mileage, technician ID, repair type (C for customer, W for warranty, I for internal, N for new car road ready, or Q for quick lube), a description of the service, and the totals for labor and parts for each service/condition.

4. Click **Back** to return to the List screen.

### **Removing Customers from the List**

You should always edit the list to remove any customer you do not want on the list. The system may include internals or dealer trades that have customer files in the system, so you should be sure to edit the list to remove these "customers." Editing the list only removes customers from the current compiled list; this does not remove their customer records from the system. There are two ways to remove customers from the list. You can use the **Pre-Edit List** button or the **Remove** button.

#### **Pre-Editing the List**

The **Pre-Edit List** button allows you to view a list of all the customers on the compiled list. This option allows you to remove customers from the list without viewing their information. This only removes the customers from the current compiled list. It does not remove the customers' records from the system.

You can remove customers from the list as needed by changing a customer's status in the pre-edit list. There are two statuses. An "Active" status means the customer is currently displayed on the list screen. (Initially, all customers will have an "Active" status until the list is edited.) A "Remove" status means the customer does not appear on the list screen. The customer will only appear in the pre-edit list. You can only print mailers for customers with an "Active" status.

- 1. Click Pre-Edit List. A list of the customers on the list appears.
- 2. The third column displays the customer's status. Click a customer to change the customer's status. The status will change from "Active" to "Removed" or from "Removed" to "Active."
- 3. Click **Previous** and **Next** to maneuver through the additional pages of the list, and continue to edit the list as needed.
- 4. Click **Back** to return to the List screen. The customers with a status of "Removed" will no longer appear on the list on this screen.

#### **Removing Customers on the Edit screen**

The **Remove** button allows you to remove customers from the list after viewing their information on the Edit Marketing List screen. This only removes the customers from the current compiled list. It does not remove the customers' records from the system.

- 1. Click **Previous Page** and **Next Page** to advance to the previous and next pages of the list.
- 2. Click the customer's name, and the customer's information fills in the fields on the bottom of the screen.
- 3. Click Remove.
- 4. Click **OK** when prompted to verify you want to delete the record. The system removes the customer from the list.

#### Adding a Customer Back to the List

- 1. Click Pre-Edit List.
- 2. Click the customer you want to add back to the list. The customer's status changes from "Removed" to "Active."
- 3. Click **Close**. The customer appears on the Edit Marketing List screen again.

## **Print Mailers**

Use this button to print mailers for all or selected customers on the marketing list. You entered the mailer information in the Setup. You must use pre-printed forms to use this feature. Autosoft can print the forms, or another vendor can print the forms based on a form from Autosoft. The forms must match the Autosoft form exactly in order to work with this module.

## **Printing Mailers for Selected Customers**

- 1. Click **Print Mailers**. The Print Mailers screen appears and displays the customers on the list.
- 2. Click the customers to highlight their names. Click **Previous Page** and **Next Page** to scroll through the pages of the list as needed.

Print Mailers	(ABC Motors)							
16148	91919191 SIENNA M	IETZ		6	11/27/2007	21215	0 187	27386
16150	41133628 THOMPSON		05/17/2007	47742	09/06/2007	54142	57 269	69513
16159	32351484 RONALD 0	ADAMS		8	01/17/2008	59481	0 136	63969
16159	33333333 ROGER CR	IM		8	10/19/2007	15389	0 226	22847
16159	39126476 STEVE SM	ITH	05/16/2005	18133	10/19/2007	51279	37 226	59734
16159	41414141 HAROLD M	UIR		9	11/16/2007	6589	0 198	13123
16159	61616161 ETHAN DU		04/11/2007	62680	07/02/2007	65246	31 335	75729
43722	4H103626 RACHEL E	LLIS		9	10/23/2007	46727	0 222	54053
43732	3E366438 ELISHA S				12/21/2007		0 163	71610
43762	AAAAAAAA WILMA SM				11/05/2007		0 209	37078
43773	48184858 MICHELE				01/08/2008		0 145	65422
43793	TZ169634 REVA THO			0	11/21/2007		0 193	25847
44438	5RT64320 STACIE T			8	10/22/2007		0 223	10447
445 05		ANKFORD		9	08/21/2007		0 285	17232
44512	44444444 EMILY CA		10/26/2007		12/21/2007		46 163	107713
45745	41100509 KERRY WI				12/17/2007		0 167	83402
45750		RRISON	06/25/2007				35 132	37138
55555	11266580 BERNICE				10/12/2007		0 233	68733
55555	2S502340 SANDRA G				10/12/2007		0 233	42437
55555	37147735 JESSICA	BROOKS 1/3		0	06/21/2007	19215	0 346	30633
	Previous Pag	ge			N	lext Page		
							Order Mailer Form	
	SANDRA GAINS Autor of the second seco							
		-						
Back		Print All Se	elected	Print All Start	ing With			
DaCK		- Thirdan at		- and a start				

- 3. When you are finished selecting the customers, click **Print All Selected**. The Print Setup appears.
- 4. If necessary, use the **Name** drop-down list to select the printer you want to use to print the mailers, and click **OK**.

Print Setup		<u>? x</u>
Printer		
Name:	OKIPAGE 14i	Properties
Status:	Ready	
Туре:	OKIPAGE 14i	
Where:	LPT1:	
Comment:		
- Paper		Orientation
Size:	Letter	Portrait
Source:	Automatically Select	A C Landscape
Network.		OK J Cancel

5. Click **Back** to return to the Service Followup menu.

### Printing Mailers for all of the Customers from a Certain Point on

- 1. Click **Print Mailers**. The Print Mailers screen appears and displays the customers on the list.
- 2. Click **Previous Page** and **Next Page** to scroll through the pages of the list as needed.
- 3. Click the customer you want to use as the starting point. (If you wanted to print mailers for the entire list, you would select the first customer on the list.)
- 4. The field at the bottom of the screen displays the name of the selected customer for your reference.
- 5. Click Print All Starting With. The Print Setup appears.
- 6. If necessary, use the **Name** drop-down list to select the printer you want to use to print the mailers, and click **OK** to print the mailers.
- 7. The system will display a "That's All" message when it is done processing the print job. Click **OK** to acknowledge the message.
- 8. Click **Back** to return to the Service Followup menu.

## **Print Labels**

Use this button to print mailing labels for the customers on the marketing list. This feature requires 1x4 inch labels printed on a laser printer. The labels print in ZIP Code order. When prompted to verify your printer is ready, select your print criteria.

**Tip:** You can print the labels to screen to preview them, but do not print the labels from the viewing screen because the information will not line up correctly with the 1x4 inch labels. When you are ready to print the labels, print them directly to the laser printer.

## **Effectiveness Report**

Use this button to print a report that identifies the effectiveness of your follow-up activities. The mailing list remains in the system for 60 days. Up to 30 days after a mailing, you can check the service records to see if a customer came in after receiving the mailer. If the customer returns within the 30-day period for any service, the system will count that visit as a hit.

- 1. Click Effectiveness Report.
- 2. Click the date for the mailing you want to view.
- 3. When prompted to verify your printer is ready, select your print criteria.

## **Miscellaneous Lists**

Use this button to advance to the Scan For Lists menu. Use the menu to generate a safety inspection list or a list based on the last service date or next service date. All of this information is based on the fields on the Customer Information screen. You can edit the lists and print mailing labels for the customers on the lists as needed.

Scan For Lists (ABC Motors)	
Safety Inspection	Miscellaneous Lists
Last Service	
Next Service	
Declined Service	
Edit Compiled List	
Print List	
Print Labels	
Exit	

- 1. Generate the list.
- 2. Edit the list.
- 3. Print the list and labels as needed.
- 4. Click **Exit** to return to the Service Followup menu.

#### **Safety Inspection**

Use this button to generate the safety inspection list.

- 1. Click Safety Inspection.
- 2. Type the month when the inspection is due.
- 3. Type the service date you want to use to limit the list.
- 4. Click **OK** when prompted to verify you want to generate the list.
- 5. The system displays a message indicating the list has been generated and identifying the number of customers on the list. Click **OK** to acknowledge the message.

### Last Service Date

Use this button to generate a list based on the last service date.

- 1. Click Last Service Date.
- 2. Type the date you want to use to generate the list. You must type the dates in an eightcharacter format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not use slashes, press ENTER after you enter the date.
- 3. Click **OK** when prompted to verify you want to scan for the list.
- 4. The system displays a message indicating the list has been generated and identifying the number of customers on the list. Click **OK** to acknowledge the message.

#### **Next Service Date**

Use this button to generate a list based on the last next date.

- 1. Click Next Service Date.
- 2. Type the date you want to use to generate the list. You must type the dates in an eightcharacter format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not use slashes, press ENTER after you enter the date.
- 3. Click **OK** when prompted to verify you want to scan for the list.
- 4. The system displays a message indicating the list has been generated and identifying the number of customers on the list. Click **OK** to acknowledge the message.

#### **Declined Service**

Use this button to generate a list of declined services. This is based on the **Declined** box on the Close Service screen. The report uses the R/O update date to generate the list.

- 1. Click **Declined Service**.
- 2. Type the R/O update date you want to use to generate the list. You must type the dates in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not use slashes, press ENTER after you enter the date.
- 3. Click **OK** when prompted to verify you want to scan for the list.
- 4. The system displays a message indicating the list has been generated and identifying the number of repairs on the list. Click **OK** to acknowledge the message.

### **Edit Compiled List**

Use this button to open the Edit List screen. This screen is used to edit the compiled safety inspection list. You can edit customer information or remove customers from the list. Labels will not print for customers you remove from the list. Any changes you make to the customer's information on this screen will not update to the customer's master file. The edits only affect how the information prints on the mailers. If you need to permanently edit the information, you must edit it in the customer's master file.

Edit List (A	BC Motors)					
01010101	ALICE BALDWIN	09/05/2006	Active	40342	LUBE OIL FILTER	<b>▲</b>
02 02 02 02 02	ROGER CRIM	01/03/2008	Active	40352		
1R137679	JOSEPH FRANCIS	01/03/2008	Active	40362	CHARGE AC	
20144966	JOHN D HENSON	01/03/2008	Active	40363	INSPECTION	
30107300	CARL HARVILLE	01/03/2008	Active	40360	LUBE OIL FILTER	
31313131	AMANDA HARTMAN	01/03/2008	Active	40343	DRIVER-SIDE FRON	TTIRE LE
33333333	ROGER CRIM	01/03/2008	Active	40335	LUBE OIL FILTER	
37327279	MARSHALL N FRANKLIN	01/03/2008	Active	40358	LUBE OIL FILTER	
39110840	ANN ANGELIS	01/03/2008	Active	40353	REPLACE 1 TIRE	
39126476	STEVE SMITH	01/03/2008	Active	40348	LUBE-OIL-FILTER	
3B137143	JEFFREY M DAWSON	01/03/2008	Active	40356	REPALCE FRONT BR	AKES
3E322812	THOMAS F NORRIS	01/03/2008	Active	40365	LUBE OIL FILTER	
3M703197	GEORGE E. GAGE	01/03/2008	Active	40359	LUBE OIL FILTER	
41218141	BARBARA J BOTSON	01/03/2008	Active	40354	LUBE OIL FILTER	
41319463	MICHAEL MARCUM	01/03/2008	Active	40364	ROTATE TIRES	
41414141	HAROLD MUIR	01/03/2008	Active	40344	LUBE OIL FILTER	
44444444	EMILY CASSIDY	01/03/2008	Active	40336	LUBE OIL FILTER	
4NA34346	MITCHELL L EVERAGE	01/03/2008	Active	40357	LUBE OIL FILTER	
51515151	LAURA FRANKFORD	01/03/2008	Active	40345	LUBE OIL FILTER	
55555555	DELLIA CHRISTOPHER	01/03/2008	Active	40337	LUBE OIL FILTER	-
5RT64320	STACIE TENNYSON	01/03/2008	Active	40334	LUBE OIL FILTER	-
ſ	Last 8: 01010101	Name: ALICE BALD	ITN			
					= 1	
	Active/Inactive (A/I): A	Address: 1010 GREEN				
		City: HERMITAGE	PA 1	16148		
	Sa	lutation: ALICE				
					······	
		Phone: 724 555 10	10		Save	
Exit	Pre Edit List	Previous	Next		Remove	Clear Screen

#### **Editing Customer Information**

- 1. Click Edit Compiled List.
- 2. The generated list is displayed in the top part of the screen, and the information for the first customer on the list is displayed in the fields at the bottom of the screen.
- 3. Verify the information, and edit it as needed. (If you make changes, click **Save** to save the information. The next customer's information is automatically displayed.)
- 4. Click Next and Previous to work your way through the list.
- 5. Click **Exit** to return to the Scan For Lists menu.

#### **Removing Customers from the List**

You should always edit the list to remove any customer you do not want on the list. The system may include internals or dealer trades that have customer files in the system, so you should be sure to edit the list to remove these "customers." Editing the list only removes customers from the current compiled list; this does not remove their customer records from the system. There are two ways to remove customers from the list. You can use the **Pre Edit List** button or the **Remove** button.

#### Pre-editing the List

The **Pre Edit List** button allows you to view a list of all the customers on the compiled list. This option allows you to remove customers from the list without viewing their information. This only removes the customers from the current compiled list. It does not remove the customers' records from the system.

You can remove customers from the list as needed by changing a customer's status in the pre-edit list. There are two statuses. An "Active" status means the customer is currently displayed on the list screen. (Initially, all customers will have an "Active" status until the list is edited.) A "Removed" status means the customer does not appear on the list screen. The customer will only appear in the pre-edit list. You can only print mailers for customers with an "Active" status.

- 1. Click **Pre Edit List**. A list of the customers on the list appears.
- 2. Click a customer to change the customer's status. The status will change from "Active" to "Removed" or from "Removed" to "Active."
- 3. Click **Previous** and **Next** to maneuver through the additional pages of the list, and continue to edit the list as needed.
- 4. Click **Back** to return to the Edit List screen. The list will reflect the customers' status based on your edits.

#### Removing Customers on the Edit screen

The **Remove** button allows you to remove customers from the list after viewing their information on the Edit List screen. This only removes the customers from the current compiled list. It does not remove the customers' records from the system.

- 1. Click **Previous** and **Next** to advance to the previous and next pages of the list.
- 2. Click the customer's name, and the customer's information fills in the fields on the bottom of the screen.
- 3. Click Remove. The customer's status changes from "Active" to "Removed."

#### Adding a Customer Back to the List

- 1. Click **Next** and **Previous** to scroll through the list as needed.
- 2. Click the customer you want to add back to the list.
- 3. Click Save. The customer's status changes from "Removed" to "Active."

#### **Print List**

Use this button to print the finished list. This list reflects any edits you made using the Edit Compiled List option.

- 1. Click Print List.
- 2. When prompted to verify your printer is ready, select your print criteria.

### **Print Labels**

Use this button to print labels for the customers on the list. This feature requires 1x4 inch labels printed on a laser printer. There should be two labels across the page and 10 labels down the page.

- 1. Click Print Labels.
- 2. When prompted to verify your printer is ready, select your print criteria.
- **Tip:** You can print the labels to screen to preview them, but do not print the labels from the viewing screen because the information will not line up correctly with the 1x4 inch labels. When you are ready to print the labels, print them directly to the laser printer.





# **Chapter 12 Data Utilities**

The Data Utilities button on the System Setup menu advances you to the Data Utilities menu. This menu is used to set up the passwords for the Service Writing module and to run maintenance on files. If you are unsure about the effects a utility will have on your system, please call the Autosoft support desk and speak with a support specialist.

Data Utilities (ABC Motors)	
Passwords	Data Utilities
Purge Customer Files	
Selective Purge	
Repair Customer Data Fields	
Verify R/O History Data	
Merge Service Data Files	
Edit Service History	
Change Area Codes	
Exit	

## Accessing the Data Utilities Menu

- 1. Click **System Setup** on the Service Writing main menu.
- 2. Click **Passwords & Data Utilities** on the System Setup menu. The Data Utilities menu appears.

**Tip:** Passwords were covered in Chapter 1 System Setup. Please refer to that chapter for information on using passwords.

## **Purge Customer Files**

Use this button to delete customers that have been inactive for a specified amount of time. This utility only affects customers who have no last service date or that have a last service date prior to the date you specify. If there is no last service date, the system uses the delivery date for the purge. This utility does not affect delivery customers who have a "D" in the **Active/Inactive** field on the Customer Information screen.

Autosoft recommends that you perform a daily backup immediately before using this utility. All users must be out of the Autosoft DMS program during the daily backup. If you are trying to remove customers with a certain word in their name, use the Delete Records with Word in Name utility in the Marketing module (from the Autosoft DMS main menu).

Dunna Day	mant Customers (ABC Motors)
Purge Du	Purge Dormant Customers
	The Customer Master File may become cluttered with customer records that are no longer needed. Usually these records may be identified by the length of time since the last activity or service to the vehicle. This program will remove those dormant records that have had no activity from the date entered.
	This procedure should only be done when there is NO OTHER ACTIVITY from other users on the system.
	This procedure may take up to an hour to complete.
	Purge All Records With No Activity After: 05/13/2006 F Retain ALL New
	It Is Recommended That All New Vehicles Sold At This Dealership Be Retained.
Exit	Undo Last Purge

- **Warning:** Autosoft recommends that you run this utility on the server. All users must be out of the Autosoft DMS system while the utility is running. This utility permanently deletes the dormant customer files. Make sure you want to complete this exact task before you continue. Keep a record of the date you perform the purge in case you need to run the "undo" utility.
  - 1. Click Purge Customer Files. The Purge Dormant Customers screen appears.
  - 2. By default, the **Retain ALL New** box is selected. This will ensure that all customer files for new vehicles sold at your dealership will be retained in the system regardless of inactivity. Autosoft recommends that you always leave this field selected.
  - 3. Type the date you want to use to purge records, and press ENTER if needed. This field defaults to two years prior to the current date. Customer records that have been inactive since before this date will be deleted from the system.
  - 4. Click **OK** when prompted to verify you want to purge the records.
  - 5. When the system is finished purging the files, it displays a "Did That" message indicating the number of records scanned, the number of records deleted, and the number of records skipped. Click **OK** to acknowledge the message.

### Undoing the Last Purge

If necessary, you can reverse the last customer purge that was performed. The system holds the files from the last purge, and when you run the "undo" utility, the system restores the purged files back into the system files.

- 1. Click Purge Customer Files. The Purge Dormant Customers screen appears.
- 2. Click Undo Last Purge.
- 3. The system displays a prompt indicating when the last purge was performed. Verify that this is the correct date, and click **OK**.
- 4. When the system is finished restoring the files, it displays a "Did That" message indicating the number of records that were restored. Click **OK** to acknowledge the message.

## **Selective Purge**

Use this button to remove customer records for dealer trades and wholesale customers that were processed incorrectly.

- 1. Click Selective Purge.
- 2. Type the criteria you want to use to find the files, and press ENTER.
- 3. Click **OK** when prompted to verify you want to execute the search.
- 4. The system will prompt you when the scan is complete and identify the total number of files found. Click **OK** to acknowledge the message.
- 5. The list of records is displayed on the screen. Use the check box next to each record to indicate if you want to include or exclude the record from the list to be deleted. A check mark will include the record. Click a checked box to clear the check mark. A blank box means the record will not be deleted.
- 6. Click **Remove Selected Record**.
- 7. Click **OK** when prompted to verify you want to delete the records.
- 8. The system prompts you that the selected records have been removed. Click **OK** to acknowledge the message.

## **Repair Customer Data Files**

The **Repair Customer Data Fields** button is used to correct "numeric only" fields that have alpha characters entered in them. Numeric fields are intended for information such as dates, odometer readings, quantities, dollar amounts, and so on. If you receive a "Bad Data In Field" error, one of your files may have been corrupted and now contains incompatible or unrecognizable data in fields that require only numeric entries. This utility can be used to attempt to correct the data files. For security reasons, this feature requires a password.

**Important:** Do not use this feature without assistance from an Autosoft Support Desk Representative. Call support at (800) 473-4630 for assistance.

## Verify R/O History Data

Use this utility to verify the R/O history data in your system. The system will scan the data and correct any corrupted history files.

- 1. Click Verify R/O History Data.
- 2. Click **OK** when prompted to begin the scan.
- 3. When the system is finished verifying the files, it displays a "Did That" message indicating the number of records it corrected. Click **OK** to acknowledge the message.

## **Merge Service Data Files**

This button advances you to the Merge Files menu. With the help of an Autosoft Support Desk Representative, you can use the Merge Files menu to merge two identical files to fix files that may be corrupt. This is a two-stage process. First, you will make a backup copy of the target file using the first menu option. Second, you will merge the backup copy and the working copy of the file into the working directory. When you are finished, click **Exit** to return to the Data Utilities menu.

**Important:** Do not use this feature without assistance from an Autosoft Support Desk Representative. Call support at (800) 473-4630 for assistance.

Merge Files

### 'Pickle' Copy of File

Use this button to make a backup copy of the target file. This is the first step in merging the files.

- 1. Click 'Pickle' Copy Of File.
- 2. Type the file name.
- 3. Click **OK** when prompted to verify you want to pickle the file.
- 4. The system will prompt you when it is finished pickling the file. Click **OK** to acknowledge the message.

#### Merge With 'Pickled' File

Use this button to merge the two files into the working directory.

- 1. Click Merge With 'Pickled' File.
- 2. Type the file name.
- 3. Click **OK** when prompted to verify you want to merge the files.
- 4. The system will prompt you when it is finished merging the files. Click **OK** to acknowledge the message.

## **Edit Service History**

Use this button to open the Enter/Edit Customer Service History screen to edit service files. You can also use this screen to delete a repair order from a customer's history. The information you edit on this screen changes the service history in the Customer Information file, but it does not affect the information in the Repair Order History. In addition, the repair order summary in the customer's history will not reflect the changes since this is a snapshot of the repair order at the time it was closed and updated.

Enter/Edit Custo	mer Service History (ABC M	lotors)		
Last 8: VIN: Year: Make:	Enter/Edit <u>16ND113W6Y2101873</u> 2003	R/0: 10012 Date: 05/03/2007 Odom: 63125 Tech: 01 Type: C Labo: 16.95 Parts: 5.00	ce History	
		Comp:		_
Exit	Search	List	Delete	Save

### **Editing a Record**

- 1. Click Edit Service History. The Enter/Edit Customer Service History screen appears.
- 2. Type the last eight digits of the vehicle's VIN.

You can also search for a customer by clicking **Search**. 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.

- 3. The VIN, Year, and Make fields automatically fill in.
- 4. Click **List** to display the service history for the selected vehicle. Click the service date you want to select. The repair order information fills in on the fields on the right part of the screen.
- 5. Enter or edit the information as needed.
- 6. Click **Save** to save the information.

### **Deleting a Service Record**

A password is required to delete a repair order from history. This security feature ensures only authorized personnel can delete files.

- 1. Select the customer.
- 2. Click List to select the service date.
- 3. Click Delete.
- 4. Click **OK** when prompted to verify you want to delete the record.
- 5. Type the password.

## **Change Area Codes**

Use this button to change an area code for selected exchanges. You can only select eight exchanges at a time, so if more exchanges need to be edited, you will have to repeat the process until all of the exchanges have been edited as needed.

- 1. Click Change Area Codes.
- 2. In From Area, type the original area code, and in To Area, type the new area code.
- 3. Next, type all of the exchanges that will use the new area code. If necessary, press ENTER to advance through any blank fields.
- 4. Click **OK** when prompted to verify you want to change the area code. All of the Service customer records with the selected exchanges will be edited to include the new area code.





# Conclusion

This completes the instructions for the Autosoft DMS Service Writing Module. Refer to these instructions each time you need to use this feature. As always, if you have any questions that this manual does not answer, or if you receive errors while using the program, you can call the Autosoft Support Desk at (800) 473-4630.



# **Appendix A Full Service Scheduler**

The Service Writing module has a full scheduler you can use to manage your service schedule. You can use it to schedule service appointments, print schedules, and view loaner or rental vehicle schedules. This is a separate scheduler from the Schedule Xpress Scheduler. You can only use one scheduler. The two schedulers do not interface with each other, so you cannot pull information from one scheduler to the other scheduler.

The full scheduler is only available from the Service Writing main menu, unlike the Schedule Xpress scheduler that is available from all the Repair Order screens. The full scheduler offers a few additional features not available in the Xpress Scheduler, such as multiple printing options for the schedule and access to your loaner information. You should use whichever scheduler fits your dealership's needs.

The availability of the full Service Scheduler depends on the **Make Xpress My Default Scheduler** box in the Schedule Xpress setup. This field determines if you can access the full scheduler or just the Schedule Xpress scheduler. If you leave this box empty, you will be able to access the full scheduler using the **Scheduling** button on the Service Writing main menu. If you select this box, the Schedule Xpress scheduler will be your default scheduler. In addition to being able to access the Schedule Xpress from all the Repair Order screens, the Schedule Xpress scheduler will open when you click **Scheduling** on the Service Writing main menu. If you have selected to use the Schedule Xpress Scheduler as your default scheduler, you cannot access the full scheduler. Refer to Chapter 4 for instructions on using the Schedule Xpress Scheduler.



## **Entering Technicians' Schedules**

Before you can use the scheduler, you must enter your technicians' schedules. The technicians must be set up in the Service Writing System Setup before you can add their schedules to the Service Scheduler.

- 1. Click **Setup/Utilities**.
- 2. Click Technicians Information. The Technician Information Screen appears.

Technici	ian Informatio	วท						
		Technicia	n Inforn	natio	n	01 02 03 04	TOM Stephen David Francis	(Inactive) (Inactive) (Inactive) (Inactive)
	Shoi Active/Inad We T	Number:	Quit	15+ 1:00 1:30 2:00 3:00 4:00 5:00	s 24-Hr Military Time) MINUTE INTERVALS DPM = 1300 Hours DPM = 1400 Hours DPM = 1400 Hours DPM = 1500 Hours DPM = 1700 Hours DPM = 1700 Hours DPM = 1700 Hours	04 05 07 08 09	FRED JOHN STEUE RALPH DARRELL	(Inactive) (Inactive) (Inactive) (Inactive) (Inactive)
	Exit	Save	Remov	re	Clear			

- 3. The window on the right side of the screen displays a list of the service technicians in the system. Type the technician's ID number, or click the technician in the list.
- The Short Name field automatically displays the technician's first name or nickname. This is the same name entered in the Short Name field on the Technician Information screen in the Service Writing System Setup.
- 5. Indicate if this is an active or inactive technician. Type **A** for active or **I** for inactive. **A** is the default entry. Only active technicians appear on the service schedule.
- 6. Type the technician's start and end times for each day. You must enter the time in military time and in 15-minute intervals. There is a conversion chart to the right of the fields to assist as you enter times.
- 7. Click **Save** to save the schedule.
- **Tip:** If you add a technician or edit a technician's schedule after opening a day on the service schedule, use the **Refresh Schedules** utility on the Service Scheduling Setup & Maintenance menu to refresh the schedule and to apply the new settings. See page A:22 for more information on this utility.

### **Creating Dummy Technicians**

If you do not schedule appointments with specific technicians, you can create dummy technicians here that will appear on the schedule. You will need to create enough dummy technicians to accommodate your schedule. For example, if you schedule three appointments per time slot, you may want to create three dummy technicians.

- 1. In Technician Number, type two letters as the technician's ID (AA, BB, CC, etc.).
- 2. Type a description for the technician, or leave the field blank if you prefer not to use a description.
- 3. Type **A** to make this an active technician.
- 4. Enter the schedule.
- 5. Click Save.

### Making a Technician Inactive

Once a technician is active, you can make the technician inactive by changing the technician's status to I for inactive. The technician will no longer appear on the schedule, but the system *retains the technician's hours* on this screen in case you want to make the technician active again later.

- 1. Select the technician.
- 2. Type I in the Active/Inactive field.
- 3. Click Save. The technician's status in the technician list will read, "Inactive."

#### Removing a Technician from the Schedule

The **Remove** button also makes a technician inactive, but this option *clears the technician's hours* on this screen. You would use this option if you do not want to retain the technician's hours. This option removes "dummy" technicians from the system.

- 1. Select the technician.
- 2. Click Remove.
- 3. Click **OK** when prompted to verify you want to remove the technician from the schedule.
- 4. The system informs you that the technician will be removed from the schedule but left in the list. Click **OK** to acknowledge the message.
- 5. The technician's status in the technician list will read, "Inactive."

## **Schedule Service**

You will use the **Schedule Service** button to schedule the service appointments. When scheduling an appointment, you will advance through several screens. This section provides an overview of the scheduling process.

🗐 Service	Schedul	ing									_ 🗆 🗙
JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	ОСТ	NOV	DEC
2006					'Click' To	Select					2006
SUN	N	MON		TUE	w	ED	THU		FRI		SAT
							1	2		3	
4		5	6		7		8	9		10	
11		12	13		14		15	16		17	
18		19	20		21		22	23		24	
25		26	27		28		29	30			
Back					Customer	Informatio	n				

### Scheduling an Appointment by Selecting the Day First

- 1. Click Schedule Service. The Service Scheduling screen appears.
- 2. As you begin to schedule appointments, each day will displays the percentage of the day available for scheduling. Blank buttons are days that have not been opened.
- 3. Click the calendar day you want to schedule the appointment. You will have to click the day twice if you are selecting/opening a new day.
- 4. The Daily Schedule screen appears and displays the times available to schedule for that day. The left side of the screen displays the morning hours, and the right side of the screen displays the afternoon and evening hours.

Daily Sch	hedu	le					
Thurse	day	. Jun 1, 2006 Mori	ning	Thurs	day.	, Jun 1, 2006 Afte	rnoon
Time	TN	Cust	Complaint	Time	TN	Cust	Complaint
				12:00	05	AMANDA HARTMAN	COOLANT LEAKS
09:00	02	ETHAN DURICK	LUBE-OIL-FILTER	:00	06	BRIAN MYERS	REPLACE FRONT BRAKES
:00	05	SIENNA METZ	BRAKE PEDAL VIBRATE				
:30		ROGER CRIM	LUBE-OIL-FILTER	01:00	07	JACK KELLER	FOUR WHEEEL ALIGNMEN
:30	03	LAURA FRANKFORD	LUBE-OIL-FILTER	:00	08	DENNIS JOHNSON	LUBE-OIL-FILTER
				:00	09	TRACEY WILLIAMS	LUBE-OIL-FILTER
10:00		ELIZABETH SCOTT	LUBE-OIL-FILTER				
:00	08	WILLIAM P IVANY	REPLACE MOLDING	02:00	01	DELLIA CHRISTOPHE	HEATER WON'T STAY WF
11:00		HAROLD E MUIR	LUBE-OIL-FILTER				
:30	06	ALICE BALDWIN	LUBE-OIL-FILTER				
					<u> </u>		
			[				
Back	k	"Click" On Customer Name To View Details		lext		"Click" On Customer Name To View Details	Customer Information

5. If this day is not acceptable to the customer, click **Back** to return to the Service Scheduling screen to select another day.

**Tip:** If you click and hold the left mouse button on a customer's name, you can view appointment detail for the repair.

6. Once you have verified the day is acceptable to the customer, click **Customer Information**. The Customer List screen appears.

Customer List	
Customer List Phone : [	
Name:[ Last 8:[ License:[ Stock:[	
Stock	
Back	New Customer

7. At this point, you have two options depending on whether the appointment is for an existing customer or new customer.

If the appointment is for an existing customer,

- a. Search for the customer by entering the last four digits of the customer's phone number, the first three digits of the customer's name, the last eight digits of the vehicle's VIN, or the vehicle's license plate number. If this is an appointment for an internal, you can search based on the vehicle's stock number.
- b. A list of customers who meet the criteria you entered is displayed in the list window on the right side of the screen. Click the customer you want to select.
- c. The system will advance you to the Repairs screen. The top of the screen displays the customer's service history. This information allows you to review the history and sell additional services the customer may need at this time.
- d. Enter up to six complaints in the bottom part of the screen.

You can manually enter the complaints by typing the complaint description or by entering a menu code. You entered the menu codes in the Service Menu setup. If you type a menu code in the **Menu** field, the description of the menu item will automatically fill in the **Comp** field.

You can search a list of menu items by clicking **Menu List**. A list of the menu items entered in the Service FasQuote setup is displayed. Click the menu item in the list you want to select. Click the **Menu** field where you want to add the menu item. The menu code and description will automatically fill in, along with the time units and default technician the code was assigned.

e. Indicate if the customer is dropping off the vehicle, waiting at the dealership during the service, or using a loaner vehicle. Click to select the option, or type the letter that corresponds to the option you want to select in the field provided.

Cuct.	STEVE	CMITH		Memo :
GUSC:	STEVE	20110		Heldu :
Year:	2005	Make:	CHEVROLET	Model: BLAZER
		74	T	
	LOF	Time: 5	Tech:	Comp: LUBE-OIL-FILTER
Menu:	REC	Time:	Tech:	Comp: RECALL 1245780
	REC			
Menu:	REC	Time:	Tech:	Comp: RECALL 1245780
Menu: Menu:	REC	Time:	Tech: Tech:	Conp : RECALL 1245780 Conp :
Menu: Menu: Menu:	REC	Time:	Tech : Tech : Tech :	Conp : [RECALL 1245788 Conp : Conp : Conp :
Menu: Menu: Menu: Menu: Menu:		Time:	Tech : Tech : Tech : Tech : Tech :	Conp : [RECALL 1245788 Conp : Conp : Conp : Conp : Conp :
Menu: Menu: Menu: Menu: Menu:		Time:	Tech : Tech : Tech : Tech : Tech :	Conp : [RECALL 1245788 Conp : Conp : Conp : Conp : Conp :
Menu: Menu: Menu: Menu: Menu:		Time:	Tech : Tech : Tech : Tech : Tech :	Conp : [RECALL 1245788 Conp : Conp : Conp : Conp : Conp :

- f. When you are finished entering complaints, click **Next**. The system automatically saves the information you enter on this screen.
- g. Go to step 7 on page A:7 to finish scheduling the customer's appointment.

If the appointment is for a new customer,

a. Click **New Customer** on the Customer List screen. The New Customer screen appears.

New Customer	
	Name:
	Phone:
	Year:
	Make:
	Model:
	Complaint 1:
	Complaint 2:
	Complaint 3:
	Complaint 4:
	Dropoff/Waiting/Loaner:
ОК	

- b. Type the customer's name and telephone number.
- c. Type the vehicle's model year, make, and model name.
- d. Type descriptions for up to four complaints the customer wants addressed during the appointment.
- e. Indicate if the customer is dropping off the vehicle, waiting at the dealership during the service, or using a loaner vehicle. Type the letter that corresponds to the option you want to select in the field provided
- f. When you are finished, click **OK**.
- g. Go to step 7 below to finish scheduling the customer's appointment.
- 7. A list of the technicians scheduled for this day appears in the pink window on the left side of the screen, and a list of the complaints entered for the appointment is displayed in the window in the bottom-left corner of the screen.
- 8. Click the technician for the appointment. The technician's schedule is displayed in the blue window on the right side of the screen.

 Click a time slot. The customer's name and the first complaint entered appear. If the appointment requires more than one slot, click the additional slots needed to reserve them for this appointment.

Schedule Service				
Thursday, Jun 1, 2006	08:00	STEVE SMITH	LUBE-OIL-FILTER	
_	:15	STEVE SMITH	LUBE-OIL-FILTER	
	:30	(Open) 👋		
01 JOHN 88% 80% 83%	:45	(Open)		
02 STEPHEN 88% 100% 94%	09:00	(Open)		
03 DAVID 88% 100% 94%	:15	(Open)		
04 DAN 88% 100% 94%	:30	ROGER CRIM	LUBE-OIL-FILTER	
05 FRED 75% 80% 78%	:45	ROGER CRIM	LUBE-OIL-FILTER	
06 JOHN 88% 85% 86%	10:00	(Open)		
07 STEVE 100% 80% 89%	:15	(Open)		
08 RALPH 75% 90% 83%	:45	(Open) (Open)		
09 DARRELL 100% 90% 94%	11:00	(Open)		
40 0% 0% 0%	:15	(Open)		
Totals 88% 89% 89%	:30	(Open)		
10Cal2 88% 89% 89%	:45	(Open)		
	12:00	(Open)		
	:15	(Open)		
	:30	(Open)		
	:45	(Open)		
	01:00	(Open)		
	:15	(Open)		
	:30	(Open)		
	:45	(Open)		
	02:00	DELLIA CHRISTOPHER	HEATER WON'T STAY WARM	
LOF 5 00 LUBE-OIL-FILTER	:15	DELLIA CHRISTOPHER	HEATER WON'T STAY WARM	
	:30	DELLIA CHRISTOPHER	HEATER WON'T STAY WARM	
0 00 NEONEE 1249100	:45	DELLIA CHRISTOPHER	HEATER WON'T STAY WARM	
0 00	03:00	(Open)		
6 66	:15	(Open)		
0 00	:30	(Open)		
:45 (Open)				
Back Schedule Now	04:00	(Open)	=1	
	:15	(Open)	<u> </u>	

- 10. If there is more than one complaint scheduled, you can schedule the complaint for the same technician or with another technician. If necessary, select another technician from the list. Click the next complaint in the list displayed, and click the slot(s) you want to select for the appointment. Continue until all of the complaints have been scheduled.
- 11. When all of the complaints have been scheduled, click **Schedule Now**. This saves the appointment and advances you to the Prewrite Service screen where you can enter information about the appointment. This information can be pulled to a repair order when the customer comes in for the appointment.
- 12. The prewrite screen pulls the information entered for the customer. If necessary, enter any additional information. Press ENTER to advance through the fields.
- 13. Click **Next** when you are finished entering the information.
- 14. The Enter Complaints screen appears. The complaints entered for the appointment automatically fill in on this screen. If necessary, you can add complaints to this screen. You can enter up to six complaints that will be addressed during the appointment. You can select menu items from the list on the right side of the screen by clicking the item you want to select and clicking in the **Menu Service** field where you want to add the complaint. The menu number and description fill in. You can also manually type a complaint in the **Complaint** field and enter the technician for the service and a guoted time for the repair.
- 15. When you are finished entering the information, click Save/Print.
- 16. When prompted to verify your printer is ready, you have two options. Click **Print** to save and print the information, or click **Cancel** to save the information without printing it.
- 17. The system takes you back to the Service Prewrite screen. Click **Exit** to return to the Service Scheduling menu.

### Scheduling an Appointment by Selecting the Customer First

- 1. Click Customer Information on the Service Scheduling screen.
- 2. At this point, you have two options depending on whether the appointment is for an existing customer or new customer.

If the appointment is for an existing customer,

- a. Search for the customer by entering the last four digits of the customer's phone number, the first three digits of the customer's name, the last eight digits of the vehicle's VIN, or the vehicle's license plate number. If this is an appointment for an internal, you can search based on the vehicle's stock number.
- b. A list of customers who meet the criteria you entered is displayed in the list on the right side of the screen. Click the customer you want to select.
- c. The system will advance you to the Repairs screen. Enter the necessary repair information, and click the **Next**.

If the appointment is for a new customer,

- a. Click **New Customer** on the Customer List screen. The New Customer screen appears.
- b. Enter the customer information on this screen.
- c. When you are finished, click **OK**.
- 3. Click the calendar day you want to schedule the appointment. You will have to click the day twice if you are selecting/opening a new day.
- 4. The Daily Schedule screen appears and displays the times available to schedule for that day. The left side of the screen displays the morning hours, and the right side of the screen displays the afternoon and evening hours. If this day is not acceptable to the customer, click **Back** to return to the Service Schedule screen to select another day. Once the day is acceptable to the customer, click **Next**.
- 5. A list of the technicians scheduled for this day appears in the pink window on the left side of the screen, and a list of the complaints entered for the appointment is displayed in the window in the bottom-left corner of the screen.
- 6. Click the technician for the appointment. The technician's schedule is displayed in the blue window on the right side of the screen.
- 7. Click a time slot. The customer's name and the first complaint entered appear. If the appointment requires more than one slot, click the additional slots needed to reserve them for this appointment.

- 8. If there is more than one complaint scheduled, you can schedule the complaint for the same technician or with another technician. If necessary, select another technician from the list. Click the next complaint in the list displayed. Click the slot(s) you want to select for the appointment. Continue until all of the complaints have been scheduled.
- 9. When all of the complaints have been scheduled, click **Schedule Now**. This saves the appointment and advances you to the Prewrite Service screen where you can enter information about the appointment. This information can be pulled to a repair order when the customer comes in for the appointment.
- 10. The prewrite screen pulls the information entered for the customer. If necessary, enter any additional information. Press ENTER to advance through the fields.
- 11. Click **Next** when you are finished entering the information.
- 12. The Enter Complaints screen appears. The complaints entered for the appointment automatically fill in on this screen. If necessary, you can add complaints to this screen. You can enter up to six complaints that will be addressed during the appointment. You can select menu items from the list on the right side of the screen by clicking the item you want to select and clicking in the **Menu Service** field where you want to add the complaint. The menu number and description fill in. You can also manually type a complaint in the **Complaint** field and enter the technician for the service and a quoted time for the repair.
- 13. When you are finished entering the information, click Save/Print.
- 14. When prompted to verify your printer is ready, you have two options. Click **Print** to save and print the information, or click **Cancel** to save the information without printing it.
- 15. The system takes you back to the Service Prewrite screen. Click **Exit** to return to the Service Scheduling menu.
- **Tip:** The information entered on the Prewrite screen can be pulled to a repair order when the customer comes in for the appointment. Please see the Schedule Prewrite on page A:13 for complete instructions on entering, editing, and deleting prewrite information.
# Today's Schedule

Use the **Today's Schedule** button to view the service schedule either by date or by technician. You can also use this screen to find a customer's appointment. The information on this screen is for viewing only. You cannot make changes to the schedule from this screen.

- 1. Click Today's Schedule on the Service Scheduling menu.
- 2. The Daily Schedule screen appears and displays the day's schedule.

Daily Scl	hedu	le		Thursday, Jun 1,	2006	_		
Time	TN	₩N	Customer	Complaint	Vehicle	Phone	Waiting	•
08:00			ousconer	oonprorine	Venitore		nurcing	1
:00	61	<b>ß1</b>	STEVE SMITH	LUBE-0IL-FILTER	05 CHEVR BLAZER	(724) 555 1234	Waiting	-
:30	01	01	STEVE SMITH	RECALL 1245780	05 CHEVR BLAZER			
09:00								
:00	02		ETHAN DURICK	LUBE-OIL-FILTER	02 CHEVR CAVALI	(330) 534 9586	Waiting	
:00	85		SIENNA METZ	BRAKE PEDAL VIBRATES	<b>01 CHEVR CORVET</b>	(330) 758 6959	Waiting	
:30	01		ROGER CRIM	LUBE-OIL-FILTER	01 OLDSM BRAVAD	(330) 448 6523	Waiting	
:30	03		LAURA FRANKFORD	LUBE-OIL-FILTER	04 OLDSM ALERO	(724) 555 4067	Waiting	_
10:00								-
:00	05		ELIZABETH SCOTT	LUBE-OIL-FILTER	<b>04 DODGE DURANG</b>	(724) 555 4598	Waiting	
:00	08		WILLIAM P IVANY	REPLACE MOLDING	04 CHEVR MONTEC	(724) 555 9896	Waiting	
11:00								
:00	84		HAROLD E MUIR	LUBE-OIL-FILTER	<b>04 CHEVR BLAZER</b>	(330) 746 2564	Waiting	i
:30	86		ALICE BALDWIN	LUBE-OIL-FILTER	04 CADIL DEVILL	(724) 555 4206	Waiting	
12:00								
:00	85		AMANDA HARTMAN	COOLANT LEAKS	05 PONTI SUNFIR	(330) 755 9802	Waiting	
:00	86		BRIAN MYERS	REPLACE FRONT BRAKES	97 FORD F150	(724) 555 2636	Waiting	
01:00								
:00	07		JACK KELLER	FOUR WHEEEL ALIGNMENT	95 PONTI SUNFIR	(330) 545 9856	Waiting	•
Ba	ack		Previous Day	Today	Next Day	By Technician	Find	

### **Viewing Schedules for Other Days**

There are three viewing options available on this screen:

- Click **Previous Day** to display the schedule for the previous day. If you continue to click this button, the schedule will continue to go back one day.
- Click **Next Day** to display the schedule for the following day. If you continue to click this button, the schedule will continue to go forward one day.
- Click **Today** to display the current day's schedule again.

### Viewing a Technician's Schedule

- 1. Use the Previous Day, Today, and Next Day buttons to advance to the appropriate day.
- 2. Click By Technician. The schedule appears broken down by technician.

	Thursday, Jun 1, 2006		me Available			89% p.m		Day
Tech: O	1 63% 80% 72%	Tech: 0	2 88% 100	)% 94%	Tech: 0	3 88%	100%	94%
	Customer	Time	Cust	omer	Time		Customer	
08:00	STEVE SMITH	08:00	(Open)		08:00	(Open)		
:15	STEVE SMITH	:15	(Open)		:15	(Open)		
	STEVE SMITH	:30	(Open)		:30	(Open)		
:45	STEVE SMITH	:45	(Open)		:45	(Open)		
09:00	(Open)	09:00	ETHAN DURICK		09:00	(Open)		
	(Open)	:15	ETHAN DURICK		:15	(Open)		
	ROGER CRIM	:30	(Open)		:30	LAURA F	RANKFORD	
:45	ROGER CRIM	:45	(Open)		:45	LAURA F	RANKFORD	
10:00	(Open)	10:00	(Open)		10:00	(Open)		
:15	(Open)	:15	(Open)		:15	(Open)		
:30	(Open)	:30	(Open)		:30	(Open)		
:45	(Open)	:45	(Open)		:45	(Open)		
11:00	(Open)	11:00	(Open)		11:00	(Open)		
:15	(Open)	:15	(Open)		:15	(Open)		
:30	(Open)	:30	(Open)		:30	(Open)		
:45	(Open)	:45	(Open)		:45	(Open)		
12:00	(Open)	12:00	(Open)		12:00	(Open)		
:15	(Open)	:15	(Open)		:15	(Open)		
:30	(Open)	:30	(Open)		:30	(Open)		
:45	(Open)	:45	(Open)		:45	(Open)		
01:00	(Open)	01:00	(Open)		01:00	(Open)		
:15	(Open)	:15	(Open)		:15	(Open)		
4								

- 3. The top of the screen displays the date and the percentage of time available for scheduling in the morning, afternoon/evening, and for the whole day.
- 4. Each column represents a technician. The technician number is displayed for your reference. The percentages next to the technician's ID identify the percentage of the technician's day available for scheduling in the morning, afternoon/evening, and for the whole day.
- 5. Use the scrollbars to view information that will not fit on the screen.
- 6. If you click and hold the left mouse button on a customer's name, you can view appointment detail for the repair.

Today's Schedule								
Thursday, Jun	, 2006 Rep.	air Info		_	89% p.m.	87%	Day	
Tech: 01 63% 80	5 72% Te	ch: 01		Tech: 0	3 88%	100%	94%	
Time Cust	oner			Time	C	ustomer		
08:00 STEVE SMITH	Sta	rt: 08:00		08:00	(Open)			11
:15 STEVE SMITH	lio	rk: LUBE-0	TI _ CTI TEP	:15	(Open)			
:30 STEVE SMITH		IK. LUDL (	IL TILILN	:30	(Open)			
:45 STEVE SMITH				:45	(Open)			
09:00 (Open)	Cu	st: STEVE	SMITH	09:00	(Open)			
:15 (Open)	Dha	Phone: (724) 555-1234			:15 (Open)			
:30 ROGER CRIM		ne: (724)	555-1234	:30	LAURA FRA	NKFORD		
:45 ROGER CRIM				:45	LAURA FRA	NKFORD		
10:00 (Open)	Veh	icle: 05		10:00	(Open)			
:15 (Open)			BLAZER		(Open)			
:30 (Open)					(Open)			
:45 (Open)	Gus	Customer Will Wait			(Open)			
11:00 (Open)		conci niii	. Huit	11:00	(Open)			

7. Click **Back** to return to the Daily Schedule screen.

### Finding a Customer's Appointment

- 1. Click **Find**. The Find Schedule screen appears.
- 2. Search for the customer by typing the last four digits of the customer's phone number or the last eight digits of the vehicle's VIN.
- 3. The screen displays the appointments for any customers meeting the criteria.

Find Schedule	ind Schedule							
	06/01/2000	Tech:01						
	08:00 STEU	E SMITH	LUBE-OIL-FILTER	05 CHEVR	(W)			
	08:30 STEU	E SMITH	RECALL 1245780	05 CHEVR	(₩)			
Phone:								
Last 8:								
Back								

- 4. Click **Back** to return to the Daily Schedule screen.
- 5. Click **Back** on the Daily Schedule screen to return to the Service Scheduling menu.

# **Schedule Prewrite**

The Schedule Prewrite option on the Service Scheduling menu opens the same prewrite screen that appears when you are initially scheduling the customer's service appointment. You can use this screen to enter prewrite information for a customer without scheduling an appointment, or you can use this screen to view and edit prewrite information for a customer.

**Tip:** The Prewrite feature is also available on the Repair Orders menu. The screens that appear are the same screens that appear in Service Scheduling.

# Adding a Prewrite for a New Customer

- 1. Click Schedule Prewrite. The Service Prewrite screen appears.
- 2. The **P/W No.** field will fill in with the assigned prewrite number when the prewrite is printed.
- 3. Type the appropriate customer and vehicle information in the remaining fields.

Service Prewrite								
P/W No.: 000220 Customer: CAS190682								
Write:         [2]         [1]         Date:         [6]         [6]         [6]           Advisor:         [2]         [1]         Date:         [6]         [6]           Promised Time:         [6]         [6]         [6]         [6]           Name:         [EIILY CASSIDY         Address:         [153]         EEDFORD RD           City:         [HASURY         [1]         [4443]         Emait:           Home:         [33]         [448]         [1256]         Work:	VIN:         IGNDX83E 03D190682           Year:         2006           Make:         PONTIAC           Mode:         GRND PRIX           N/U/0:         N           Odometer:         61147           License:         ENC0830           Inspection:							
Memo Special Order Parts Contract: Term: Expires: 1								
Exit Prewrite List Customer List Service	e History Delete Clear Next							

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

4. Click **Next** to advance to the Enter Complaints screen.

Enter Complaints		
Menu Service: Tech: Quoted Time: Complaint: Cause:	LOF 15K LOF REC 1D	LUBE-OIL-FILTER 15,000 MILE SERVI LUBE-OIL-FILTER RECALL BROKEN
Menu Service: Tech: Quoted Time: Complaint: Cause:	TIRE4 TIRE3 TIRE2 TIRE1 ROT PLUG	MOUNT 4 TIRES MOUNT 3 TIRES MOUNT 2 TIRES MOUNT 1 TIRE ROTATE TIRES PLUG TIRE
Menu Service: Tech: Quoted Time: Complaint: Cause:	PLUG AIR 4WA 2WA 1H 1G	PLUG TIRE RECHARGE AC FOUR WHEEEL ALIGN TWO WHEEL ALIGNME CLOGGED/RESTRICTE CHIPPED
Menu Service: Tech: Quoted Time: Complaint: Cause:	16 1F 1E 1C	CARBON DEPOSIT BURNED Compression
Menu Service: Tech: Quoted Time: Complaint: Cause:		
Menu Service:     Tech:     Quoted Time:       Complaint:		
Back Service History Save/Print		

- 5. The **Menu Service** field is an optional entry. Type the menu code, or click the code in the list on the right side of the screen. The mouse cursor becomes a yellow folder. Click in a **Menu Service** field to drop the code.
- 6. In **Tech**, type the ID number for the technician who will be working on the repair. If you do not know which technician will be assigned the repair, leave this field blank. The technician can be assigned at the time of generating the repair order.
- 7. In **Quoted Time**, type the time units quoted for the repair. This is an optional entry.
- 8. In **Complaint**, type a description of the complaint. If you selected a menu code, the description of the code automatically fills in this field.
- 9. Use the **Cause** field to identify the cause of the problem if this information is available.
- 10. Click Save/Print.
- 11. When prompted to verify your printer is ready, you have two options. Click **Print** to save and print the information, or click **Cancel** to save the information without printing it.

#### Adding a Prewrite for an Existing Customer

- 1. Click **Schedule Prewrite**. The Service Prewite screen appears.
- 2. Type the customer number in the Customer field. You can also search for the customer by clicking Customer List. On the Customer Search screen, 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.
- 3. The customer's information fills in on the screen. Enter any additional information as needed.
- 4. Click **Next** to advance to the Enter Complaint screen.
- 5. Enter up to six complaints for the service.
- 6. Click Save/Print.
- 7. When prompted to verify your printer is ready, you have two options. Click **Print** to save and print the information, or click **Cancel** to save the information without printing it.

### **Editing a Customer's Prewrite Information**

Once a prewrite has been entered, it can be viewed and edited as needed.

- 1. Click **Prewrite List**. The Prewrite list appears and displays all of the prewrites that have been entered. If necessary, you can search for a customer in the list by entering the last four digits of the customer's phone number.
- 2. Click the prewrite you want to view. The prewrite information fills in on the screen.
- 3. Click in a field, and edit the information as needed.
- 4. Click **Next** to advance to the Enter complaints screen, and edit the complaint information as needed.
- 5. Click Save/Print.
- 6. When prompted to verify your printer is ready, you have two options. Click **Print** to save and print the information, or click **Cancel** to save the information without printing it.

#### Viewing a Customer's Service History

Once you have a customer's prewrite information displayed on the screen, you can view the customer's service history.

- 1. Select the customer.
- 2. Click **Service History**. The Service History screen appears and displays all of the repair orders entered for the customer.
- 3. Click a repair order to view a summary of the repair order.
- 4. Click **Back** to close the repair order.
- 5. Click **Back** to return to the Service Prewrite screen.

#### **Deleting a Prewrite**

In the event a customer cancels an appointment, you can delete a prewrite from the system. Deleting the prewrite removes the prewrite record but does not remove the customer's appointment. You must use the **Reschedule** option to remove the appointment. (See page A:18 for information about removing appointments.) Similarly, deleting a prewrite does not affect a customer's master file.

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

# Reschedule

Clicking **Reschedule** opens the Reschedule screen. You can use this screen to reschedule or delete service appointments.

### **Rescheduling an Appointment**

- 1. Click Reschedule.
- 2. Click a day on the calendar in the upper-left corner of the screen to display a list of technicians scheduled for that day.
- 3. Click the technician whose schedule you want to view. The schedule is displayed in the blue window on the right side of the screen.
- 4. Click the appointment (and all slots that correspond to the appointment) that you want to reschedule. The appointment times are highlighted to indicate you have selected them.

Res	sche	dule											
J	F	MA	A M I	JJ	A	s o	ND	08:00	STEVE	SMITH	LUBE-OIL-FILT	TER	
	UN	MON	TUE	WED	THU	FBI		:15	STEVE	SMITH	LUBE-OIL-FILT	TER	
Ē					1	2	3	:30	STEVE		<b>RECALL 124578</b>		
						_		:45	STEVE		<b>RECALL 124578</b>	B	
	4	5	Ó	7	8	9	10	09:00	(Open)				
1	11	12	13	14	15	16	17	:15	(Open)				
1	18	19	20	21	22	23	24	:30	ROGER		LUBE-OIL-FIL		
	25	26	27	28	29	30		:45	ROGER		LUBE-OIL-FIL	IER	
		20	21	20	27	00		10:00	(Open)				
	86	/01/	2006					:30	(Open) (Open)				
	JO			63		80%	72%	:45	(Open)				
		EPHE	N		\$ 11		94%	11:00	(Open)				
		VID			\$ 11		94%	:15	(Open)				
	DA				\$ 11		94%	:30	(Open)				
	FR			69		80%	75%	:45	(Open)				
	JO	FUE		88		85% 80%	86% 89%	12:00	(Open)				
		LPH		100		80% 90%	89%	:15	(Open)				
69		RREL		100		90% 90%	94%	:30	(Open)				
40		mee	-		n i	0%	6%	:45	(Open)				
11.0						0.0	0.0	01:00	(Open)				
	То	tals		84	% 8	89%	87%	:15	(Open)				
								:30	(Open)				
								02:00	(Open)	CHRISTOPHER	HEATER WON'T	STOU HODM	
								:15		CHRISTOPHER	HEATER WON'T		
								:30		CHRISTOPHER	HEATER WON'T		
								:45		CHRISTOPHER	HEATER WON'T		
								03:00	(Open)				
								:15	(Open)				
								:30	(Open)				
								:45	(Open)				
								04:00	(Open)				
1	Exi	. 1		Nove	1	D	move	:15	(Open)				
	E XI	(	h	nove		Hei	move	:30	(Open)				<b>•</b>

- 5. Click Move.
- 6. A blank calendar appears. (The month buttons on the calendar are light green.)
- 7. Click the day on which you want to reschedule the service.
- 8. A list of technicians scheduled for that day is displayed in the pink window in the left part of the screen.
- 9. Click the technician for the appointment. The technician's schedule is displayed in the blue window on the right side of the screen.

- 10. Click the first time slot where you want to move the appointment.
- 11. Click **OK** when prompted to verify you want to move the appointment.



- 12. The system returns you to the day you moved the appointment from so you can see it has been moved.
- 13. Select the day where you moved the appointment. The appointment appears in the selected slot.

#### **Deleting an Appointment**

- 1. Click a day on the calendar in the upper-left corner of the screen to display a list of technicians scheduled for that day.
- 2. Click the technician whose schedule you want to view. The schedule is displayed in the blue window on the right side of the screen.
- 3. Click the appointment (and all slots that correspond to the appointment) that you want to remove.
- 4. Click **Remove**.
- 5. Click **OK** when prompted to verify you want to delete the appointment. The appointment is removed from the schedule.

# **Print Schedules**

The **Print Schedules** button opens the Service Scheduling screen. This screen allows you to view and print three types of schedules. Click **Back** to return to the Service Scheduling menu when you are finished printing the schedules.

Servio	e Sche	duling								
JF	MA	A M	JJ	A	S O	N D	08:00	(Open)		<b>_</b>
SUN	MON	TUE	WED	THU	FRI	SAT	:15	(Open)		_
				1	2	3	:30	(Open)		
4	5	6	7	8	9	10	:45	(Open)		
		_					09:00	(Open)		
11	12	13	14	15	16	17	:15	(Open)		
18	19	20	21	22	23	24	:30	ROGER CRIM	LUBE-OIL-FILTER	01 OLDSM
25	26	27	28	29	30	_	:45	ROGER CRIM	LUBE-OIL-FILTER	01 OLDSM
	20				00	_	10:00	(Open)		
	6/01/	2006					:15 :30	(Open) (Open)		
<u>01</u> J			88		8 0%	83%	:30	(Open)		
	TEPHE	N		\$ 10		94%	11:00	(Open)		
03 D				\$ 10		94%	:15	(Open)		
04 D 05 F			88 69	10	86% 86%	94% 75%	:30	(Open)		
05 F			63		80% 85%	75%	:45	(Open)		
00 J 07 S			100		556 86%	89%	12:00	(Open)		
07 S			75		98%	83%	:15	(Open)		
	ARREL		100		9.6%	94%	:30	(Open)		
4.6		-		1%	6%	0%	:45	(Open)		
							01:00	(Open)		
Т	otals		84	1% 8	89%	87%	:15	(Open)		
							:30	(Open)		
							:45	(Open) DELLIA CHRISTOP	HEATER WON'T STAY	
							:15	DELLIA CHRISTOP	HEATER WON'T STAY	
							:30	DELLIA CHRISTOP	HEATER WON'T STAY	
							:45	DELLIA CHRISTOP	HEATER WON'T STAY	
							03:00	(Open)		
1							:15	(Open)		
P	int This	Tech		Prin	nt All Te	chs	:30	(Open)		
						:45	(Open)			
	Print No-Shows						04:00	(Open)		
(	Back			Prin	nt This I	Dau	:15	(Open)		_
	Jack				R THS	U UY	:30	(Open)		

# Printing a Selected Day's Schedule

- 1. Click **Print Schedules**.
- 2. Click the day on the calendar in the upper-left corner of the screen.
- 3. Click Print This Day.
- 4. When prompted to verify your printer is ready, click to select **To Printer**, and click **Print**.

### Printing a Selected Technician's Schedule

- 1. Click the day on the calendar in the upper-left corner of the screen.
- 2. A list of the technicians scheduled to work that day appears in the pink area on the left side of the screen. The percentage of the technician's day that is scheduled is displayed to the right of the technician's name.
- 3. Click the technician whose schedule you want to print. The schedule is displayed in the blue area on the right side of the screen.
- 4. Click **Print This Tech**.
- 5. When prompted to verify your printer is ready, click to select **To Printer**, and click **Print**.

### Printing the Schedule for All Technicians

- 1. Click the day on the calendar in the upper-left corner of the screen.
- 2. Click **Print All Techs**.
- 3. When prompted to verify your printer is ready, click to select **To Printer**, and click **Print**.

### **Printing the No-Show List**

The No-Show List will list all of the customers who did not come in for their scheduled appointment. This is based on the prewrites. Prewrites that are not pulled to repair orders in the Service Writing module remain in the prewrite list and are flagged as no-shows. These are the appointments that print on the list.

- 1. Click the day on the calendar in the upper-left corner of the screen.
- 2. Click **Print No-Shows**.
- 3. When prompted to verify your printer is ready, click to select **To Printer**, and click **Print**.

# Loaner/Rental

This button opens the Loaner/Rental screen. This screen pulls the loaner/rental vehicle schedule from the Daily Auto Rental module so you can see which vehicles are scheduled for rental and which vehicles are available. You cannot schedule a rental from this screen. Instead, you will have to send customers to the Rental Department when they need to schedule a loaner vehicle.

- 1. Click Loaner/Rental. The Loaner/Rental Schedule screen appears.
- 2. Click the day on the calendar you wish to view. The rental schedule for that day is displayed. Available vehicles are flagged **(A)**, and scheduled vehicles are flagged **\*\*S**\*\*.

Loaner/Rental							
	JAN FEB	MAR API				EP OCT	NOV DEC
Loaner/Rental Schedule	SUN	MON	TUE	WED	THU	FRI	SAT
•					1	2	3
	4	5	ó	7	8	9	10
	11	12	13	14	15	16	17
	18	19	20	21	22	23	24
	25	26	27	28	29	30	
Back	3P012 ( 4C019 ( 4C120 ** 4C939 ** 4P049 (	A) 2003 A) 2004 S** 2004 S** 2004 S** 2004 A) 2004		C GRA Let Ven Let Cau Let Mal C gra	RESS IND AM ITURE ALIER IBU IND AM IE	UAN Sedan Van Sedan Sedan Sedan Sedan	50.00 30.00 50.00 30.00 30.00 30.00 30.00 30.00

3. Click **Back** to return to the Service Writing menu.

# Setup & Maintenance

Click **Setup/Utilities** to open the Setup & Maintenance menu. In addition to entering and editing technician information (covered earlier in this chapter), you use this menu to purge schedules and prewrites, to refresh your schedules, to remove days from the schedule, and to remove technicians from the schedule. All other users must be out of the Service Scheduler when using any of the utilities on this menu.

### **Purge Schedules**

Use this button to remove schedules from the system. All of the schedules before the specified date will be removed. Once you remove the schedules, you cannot access them, so be sure you want to remove the schedules before running this utility. You should run this utility periodically to keep the service schedule files clean. This will save space and improve the service scheduler's performance.

- 1. Click Purge Schedules.
- 2. Type the date you want to use as the cutoff point for the purge. All of the schedules before this date will be removed. Enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not use slashes, press ENTER to continue.
- 3. The system warns you that all others users should be out of the scheduler. Click **OK**.
- 4. Click **OK** when prompted to verify you want to purge the old schedules.
- 5. The system displays a message when it is finished removing the schedules. Click **OK**.

### **Purge Prewrites**

Use this button to remove prewrites from the system. All of the prewrites before the specified date will be removed. Once you remove the prewrites, you cannot access them, so be sure you want to remove the prewrites before running this utility. You should run this utility periodically to keep the service schedule files clean. This will save space and improve the service scheduler's performance.

- 1. Click **Purge-Prewrites**.
- 2. Type the date you want to use as the cutoff point for the purge. All of the prewrites before this date will be removed. Enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not use slashes, press ENTER to continue.
- 3. The system warns you that all others users should be out of the scheduler. Click OK.
- 4. Click **OK** when prompted to verify you want to purge the prewrites.
- 5. The system will display a message indicating it is finished purging the prewrites. Click **OK**.

### **Refresh Schedules**

Use this button to refresh the schedule. You would use this utility, for example, if you added a technician to the schedule after creating a day and want the technician to be included in the existing days. The technician will be added to the schedule starting from the current calendar date (today).

**Tip:** Before refreshing the schedule, Autosoft suggests running the Purge Schedules and Purge Prewrites utilities. These utilities clean up the service schedule files and will improve the speed of the refresh utility.

#### 1. Click Refresh Schedules.

- 2. The system warns you that all others users should be out of the scheduler. Click OK.
- 3. Click **OK** when prompted to verify you want to refresh the schedules.
- 4. The system displays a message when it is finished. Click **OK**.

#### **Remove A Schedule**

Use this button to remove a day from the schedule. This utility is useful, for example, if you scheduled appointments on a day that was not supposed to be open. This will delete all of the appointments for the day, so reschedule any appointments as needed before removing the day.

- 1. Click **Remove A Schedule**.
- Type the date for the day you are removing. Enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not use slashes, press ENTER to continue.
- 3. The system warns you that all others users should be out of the scheduler. Click OK.
- 4. Click **OK** when prompted to verify you want to remove the schedule.

#### Change Technician

This utility has two functions. First, you can use it to switch the appointments for one technician to another technician. Second, you can use it to remove a technician from the schedule.

#### Switching Technicians

The following instructions walk you through moving all of one technician's appointments to another technician's schedule. This is useful, for example, if a technician calls in sick and you need to have another technician cover the appointments.

- 1. Click Change Technician.
- 2. In **From Tech**, type the ID number for the technician who originally had the appointments.
- 3. In **To Tech**, type the ID number for the technician who will be taking the appointments.
- 4. In **From Date** and **Through Date**, type the date range that applies to the move. Type the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not use slashes, press ENTER to continue.
- 5. The system warns you that all others users should be out of the scheduler. Click OK.
- 6. Click **OK** when prompted to verify you want to change technicians.
- 7. The system displays a message when it is finished moving the schedule. Click **OK**.

#### Removing a Technician from the Schedule

The following instructions walk you through removing a technician from the schedule for a specified period. This is useful, for example, when you need to remove the technician from the schedule due to vacation, personal leave, etc. The system does not check for existing appointments before removing a technician from the schedule, so you should reschedule any appointments before removing the technician.

- 1. Click Change Technician.
- 2. In From Tech, type the ID number for the technician you are removing.
- 3. Leave the **To Tech** field *blank*, and press ENTER.
- 4. In **From Date** and **Through Date**, type date range for the time you want to remove the technician from the schedule. Type the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not use slashes, press ENTER to continue.
- 5. The system warns you that all others users should be out of the scheduler. Click **OK**.
- 6. Click **OK** when prompted to verify you want to change technicians.
- 7. The system displays a message when it is finished moving the schedule. Click **OK**.

# Minimize

Once the Service Scheduler is open, you can minimize it. This allows you to keep the program open while you work on other things. Click **Minimize** on the Service Scheduling menu, and the Service Scheduling program is minimized to your task bar.

Start 🖸 Inbox - Microsoft Outlook	asi Service Scheduling 📐	« 🕫 🚙 % 🍎 11:14 AM

When you need to schedule an appointment, click the Service Scheduling item on your task bar at the bottom of your screen. This gives you instant access to the program whenever you need it.





# Appendix B Full Dispatching

The Service Writing module has a full dispatcher you can use to dispatch repair orders. You can use the Dispatcher to log repair orders on and off. The system tracks the time units spent on each repair and allows you to print the time flag. This information is used to run time reports for the technicians using the Reports & Updates menu option. This allows you to track your Service Department's productivity.

The full dispatcher is separate from the Electronic Repair Order dispatching (ERO) covered in Chapter 6. You can only use one dispatcher. The two dispatchers do not interface with each other. In order to ensure accurate time flags, you can only use one dispatch in the Autosoft DMS system. You must choose to use the full dispatcher or the ERO dispatcher (available from the Enter Conditions screen or Schedule Xpress Scheduler). You cannot use both.

🖨 Dispatcher	Time Cla	h Tash List	r .		Y Yesterday	( Estar	Y	X
Setup	Time Clo	ck Tech List		oday	Yesterday	Future		All
Thurs	dav. Mar	15 2008	R/0	l)	Name		icle	- <b>-</b>
Thurs	iday, may	12 2008	40409	GERALI	D P BARBAS	00 BUIC	PARK	4
			40408		ND MANNING	02 PONTIA	GRAND	<b>47</b>
			40407	HAUS (	CAR RENTAL	08 CHEVRO	AVALAN	4
			40406		ANSEN AUTOBODY	07 PONTIA		47
			40403		Y RENTAL	08 CHEVRO		4
			40401	DOROTI	HY M. HARMON	02 BUIC	CENT	47
			40397	FRANK	A. SALERNO	99 CHEV	SUBU	4
			40395	SARAH	CASSELL	03 BUICK	LESABR	47
	10:00:	23	40387	LARRY	BABCON	04 CHEVRO	TAHOE	4
	10.00.	20	40386	TIMOTH	HY B TERRY	04 CHEV	SILVER	47
			40385	BUFORI	D V HARDIN	01 BUIC	LESA	4
Re	epair Order:		40377	STACI	E TENNYSON	05 PONTIA	GRAND	47
	Condition:		40376	ROBER	T WILDER	04 CHEV	MONTE	<b>~</b>
	Condition.		40373	STEVE	SMITH	07 CHEVRO	BLAZER	<b>~</b>
1	echnician:	-	40372	DAVID	J MADSEN	04 CHEV	IMPALA	<b>~</b>
			40370	JAMES	M WALTON	02 CHEVRO	BLAZER	4
			40369	LILLY	JONES	01 MAZDA	TRIBUT	<b>4 4 4 4</b>
			40368	WILMA	SMITH	06 PONTIA	VIBE	47
Log Or	n	Log Off						
LUG UI								
Jobs Li	Jobs List Print Time Flag							
E. ia	<b>E</b> 11 <b>D Z</b> 1							
Exit	Exit Refresh			ervice	Body	QwikLube		All

# **Date and Time Prompt**

The first time you open the Dispatcher for the day, the system prompts you to verify the date and time. If the information is correct, click **OK**. If you need to adjust the information, click **Cancel**. You will have to edit your computer's date and time properties to correct the information. The date and time are displayed on the top of the Dispatcher screen.

# Setup

Before you begin using the Dispatcher, you must enter setup information that will be used to set the default printer and to determine which type of repair orders appear in the dispatcher repair order list. The setup only affects the local workstation. If additional workstations will be using the dispatcher, you must complete the setup on those workstations, too.

1. Click **Setup** on the top of the screen. The Dispatcher Setup screen appears.

Dispatcher Setup	
	Dispatcher Setup
Default Printer For Reports:   Paper Bin For Reports:   Thermal Label Printer For Time Flags:	Tray 1 💌
	Prompt To Print Time Flag Sticker (Y/N): Minimum Dispatch Time (Minutes):[6]
Back	Purge Stale Data Print Tech Bar Codes

- 2. Use the printer lists to select the printer you want to use to print reports and time flags, and use the paper bin list to select the paper bin for each printer selected.
- For the thermal printer options, a Zebra LP2844 thermal label printer is required to print the dispatcher time flags. Select this printer from the list. The printer requires 1x4 labels available through Zebra.
- 4. Use the **Prompt To Print Time Flag Sticker** field to indicate if you want the system to prompt you to print the time flag sticker. Type **Y** for yes or **N** for no.
- In Minimum Dispatch Time (Minutes), indicate the minimum minutes that must be logged in order for the log on to count. The minimum can be from 1 to 9 minutes. The default value is
   When a technician logs a repair on, the clock starts timing. If the technician logs off the repair before the minimum time is reached, the system will cancel the log on.
- 6. Click **Back** to save the information and to return to the Dispatcher screen.

# Logging a Repair on

- 1. A list of repair orders entered in the system is displayed on the right side of the screen. By default, the screen shows today's repair orders. Use the tabs at the top of the list to search for repair orders for yesterday or future dates. You can also select to view all repair orders in the system.
- 2. By default, the list includes all repair types. Use the tabs at the bottom of the list to search for repair orders based on the repair type: Service, Body Shop, or Quick Lube.
- 3. Type the repair order number, or click the repair order you want to dispatch.
- 4. The screen displays a list of the repairs on the repair order. Type the repair number, or click the repair in the list.
- 5. A list of the technicians is displayed on the left side of the screen. The columns next to each technician's name indicates the number of opened and closed repair orders for each technician as well as the current repair order the technician is working on. Click the technician you want to assign the repair.

	ispatcher								
T/N	Name	Que	Closed	Open	R/0	Today	Yesterday	Future	All I
01	TOM					40377 R/O	Is Open STACIE	TENNYSON	
02	STEPHEN		-Q						
03	DAVID		K			(1) LUBE OI	L FILTER		
64	FRANCIS								
05	FRED								
86	JOHN								
07	STEVE								
08	RALPH					1. Tech:	:	:	0
89	DARRELL					2. Tech:	:	:	0
		11.	10.0	/		3. Tech: 4. Tech:		-	0 A
	L					5. Tech:	:	:	8
Repair Order: 40377						6. Tech:	-	-	0
						7. Tech:	:	:	0
Condition: 1 Technician:						8. Tech: 9. Tech:		-	0 A
						9. Tech.	-	-	U
	Corrections			Tech List					
					-				
Log On Log Off									
Jobs List Print Time Flag			]						
	Exit			Refres	h	Service	Body	QwikLube	

- 6. The screen displays the log time that will post to the repair. Click Log On.
- 7. The repair order now has an "Open" status.
- 8. Continue to dispatch repairs for this repair order or other repair orders using the steps 1 through 6.

# Logging a Repair off

- 1. Once the repair is completed, click **Jobs List**.
- 2. Click **Open Jobs** to display a list of the open repairs. Click the repair order number. You must click the **R/O** column.

Open Jobs											
All Jobs				Open Jobs			Finished Jobs				Customer Waiting
R/0	Job	1	lame	V	ehicle	In	Prom	Status	WN	TN	Complaint
40377	40377	STACIE	TENNYSON	85	PONTIAC	11:15	00:00		01	02	LUBE OIL FILTER
40383	40383	NORMA J	J. WALTERS	99	BUIC	11:16	00:00		01	01	HEATER RUNS COLD.
40395	000263	SARAH C	ASSELL	03	BUICK	11:20	00:00		01	07	SES LIGHT ON
40400	40400	RALPH &	ILSON	03	CHEVROL	11:27	00:00		01	03	ROTATE TIRES
40408	40408	RAYMOND	MANNING	02	PONTIAC	11:30	00:00		01	64	LOF
40409	40409	GERALD	P BARBAS	00	BUIC	11:35	00:00		01	05	LOF
Back			n On "Name" ner Information		k "Vehicle" hicle Informa			Click "Statu To Chang			

3. Click the repair that is complete. If you want to select a different technician for the repair, click the line that contains the repair description, and the technician list will appear so you can select a different technician. If the technician ID is correct, click the line that displays the technician's ID number.

😵 Dispatcher						_ 🗆 X
Setup	Time Clock	Tech List	Today	Yesterday	Future	All
Re	day, May 1 11:40:3 pair Order: 403 Condition: echnician:	Click Repair Or Line From List	40377 R/O 1 (1) LUBE OIL 1. Tech: ( 2. Tech:		Open :	:25 :80
Log Or	า	Log Off				
Jobs Lis	st Pri	int Time Flag	-			
Exit		Refresh	Service	Body	QwikLube	



4. The screen displays the log time. Click Log Off to log off the repair.

- **Tip:** Remember, the minimum dispatch time can be set in the Dispatcher setup. If the technician logs off before the minimum time elapses, the time will not be added to the R/O.
  - 5. If you set the **Prompt To Print Time Flag Sticker** parameter in the Printer Setup to **Y**, the system prompts you to print the time flags. Generally, you will only print the time flags when you close the last repair on the repair order. This prints the time flags on a label you attach to the back of the repair order. You must have a thermal transfer printer in order to print the time flags on the label. Click **OK** to print the time flags or **Cancel** to skip printing. The time flag prints the log-on and log-off times and calculates the total time units spent on the repair. If there are multiple repairs dispatched for the repair order, you will not be prompted to print the time flag until the last open repair is closed. The printout will include the time flags for all the closed repairs.
- **Important:** If a Service Writer attempts to close a repair that a technician has logged on in the dispatcher, the system will display a warning that a technician is logged on to the repair. In the event a repair order is updated before the technician has finished or finalized a repair, the repair will stay in the technician's list indefinitely. In this event, you will have to purge the stale records using the purge utility available in the Dispatcher setup.

# Using the Jobs List

When you click **Jobs List**, the Open Jobs screen appears. You use this screen to view various lists of repair orders. The tabs at the top of the screen allow you to select to view all jobs, open jobs, finished jobs, or jobs with customers waiting.

**Tip:** On any list screen, you can click and hold the left mouse button on a customer's name in the **Name** column to view the customer and vehicle information and a list of repairs on the repair order. The list will only display the number of repairs that will fit on the list screen. If you click a vehicle in the **Vehicle** column, the system displays the VIN decoding data.

### All Jobs

This tab displays all of the jobs in the dispatcher. This is the default list that appears when the Open Jobs screen appears. You can click a repair order number to select a repair order for dispatching. The list displays the repair order number, job number, customer's name, vehicle year and make, time the repair order was opened, the time the repairs were promised to be complete, the status of the repair order, the technician assigned to the repair, and the customer complaint for the repair.

If you click the **Status** column, the Set Status screen appears. You use this screen to select the status for the repair order. Your options are Waiting For Parts, Authorization, Technician, Hold, and Other. When you select a status, the description fills in the **Status** column. The Open (Normal) status is the default status. The **Status** column remains blank when you select this status.

### **Open Jobs**

This tab displays all the open jobs. You can click a repair order number to select a repair order to close a repair. The list displays the repair order number, job number, customer's name, vehicle year and make, time the repair order was opened, the time the repairs were promised to be competed, if the customer needs to be called when the repairs are complete or if the customer is waiting at the dealership, the technician assigned to the repair, the elapsed time since the technician began working on the repair (hour and minutes), and the customer complaint for the repair.

### **Finished Jobs**

This tab displays all the finished jobs. You can click a repair order number to select a repair order to edit a repair. The list displays the repair order number, job number, customer's name, vehicle year and make, time the repair order was opened, the time the repairs were promised to be competed, if the customer needs to be called when the repairs are complete or if the customer is waiting at the dealership, the technician assigned to the repair, and the time flag data for the repair (log-on time, log-off time, and total time). The end of the list displays the total time for all of the finished repair orders, the total number of closed jobs, and the average time per job.

### **Customer Waiting**

This tab displays all the repair orders that have customers waiting at the dealership. This allows you to identify the repairs that need to be dispatched in order to keep customers from having to wait too long. The list displays the repair order number, job number, customer's name, vehicle year and make, time the repair order was opened, the time the repairs were promised to be compete, the technician assigned to the repair, and the customer complaint for the repair.

### Refreshing the R/O List

Click **Refresh** to periodically refresh the repair order list. This ensures that you are seeing repair orders in the list as they are added to the system. You can also use this button to return to the list of repair orders from any screen in the Dispatcher.

# **Opening the Tech List**

The **Tech List** button displays the technician list. You can use this list to select a different technician for the repair before logging the repair on and off.

- 1. The **Technician** field displays the technician ID for the selected repair.
- 2. Click **Tech List**. You can click either the **Tech List** button at the top of the screen or the **Tech List** button that appears under the repair order information in the middle of the screen.
- 3. Click the technician you want to select. The **Technician** field displays the selected technician's ID number.
- 4. Log the repair on or off as needed.

# **Making Corrections**

The **Corrections** button appears when you select a repair order and repair number. You use this button to adjust the repair number, technician, log-on time, log-off time, or the time units. It can also be used to delete time flag information from a repair.

# **Editing Time Flag Information**

- 1. Select the repair from the appropriate repair order.
- 2. Click Corrections.



3. The Corrections screen appears and displays the information for the selected repair.

Corrections									
Repair Order: 40377									
Repair N	Repair Number:1								
Tech	Date/Time On	Min.	Date/Time Off						
1. 02 2 3 4 5 6 7 8 9	05/15/2008       11:15		05/15/2008       11:40						
Back	Ren	move	Save						

- 4. Click in a field, and edit the information as needed. If you edit the time, the minutes automatically adjust.
- 5. Click **Save** to save the changes.

# **Deleting Time Flag Information**

You can remove the time flag records for repairs that have been opened or closed. The repair order remains in the list, but the time flag information is removed. The repair can be dispatched again as needed.

- 1. Select the repair from the appropriate repair order.
- 2. Click Corrections.
- 3. Click **Remove** at the bottom of the Corrections screen.
- 4. Click **OK** when prompted to verify you want to delete the record.