

Autosoft FLEX DMS Quick Lube Operations

Quick Lube (also referred to as Quick Lane) operations can be managed two different ways within the dealership: as a segregated operation independent from the Service Department or as an integrated part of the Service Department. This document reviews how to use Autosoft DMS system for Quick Lube operations based on each possible scenario. Information for a segregated Quick Lube begins below, and information for integrated Quick Lube begins on page 14.

Segregated Quick Lube

As a segregated department, the Quick Lube operations are completed in a location dedicated strictly to Quick Lube. Dedicated Quick Lube technicians perform all the work, and the Quick Lube parts inventory is controlled separately from the primary parts inventory.

Completing Accounting Setup

The first step in the Quick Lube setup is to assign the correct accounts in the Accounting Integrated Service Setup. This setup ensures that Quick Lube repairs post to the appropriate general ledger accounts and that the sales pull to the correct portion of the financial statement. This is also important to ensure accurate reports for your Quick Lube.

1. Click **Accounting** on the DMS main menu, and then click **Setup** on the Dealership Accounting menu.
2. Click **Integrated Service Sales** on the System Setup menu, and then click **Service Labor Sales**.

- Verify that a posting parameter exists for **Q1**, and verify that the correct accounts are set for each item on the screen. The system uses the accounts listed for **Q1** when you update Quick Lube repair orders to Accounting.

Integrated Service Posting Parameters (ABC Motors)

Service/Body/Contract/QuickLube (S/B/C/Q): **Q**
Line: **1**

Click From List

Customer Pay	Sale	Cost	Invt.		
Labor	5700	6700	1440		
Gas/Oil/Grs	5780	6780	1443		
S/S-Tires	7770	7770	7770		
Sublet	5750	6750	1441		
Q/L Labor	5705	6705	1440	Cust. Sales Journal Cash:	30 A/R: 30
Q/L G/O/G	5780	6780	1443	Labor Disc:	7731 Sales Tax: 2150
Q/L Sublet	5755	6755	1441	Cust. A/R:	1120 Other Tax: 2150
Q/L Parts	5435	6435	1412	Cash Sale:	1010 Tire Tax: 2150

Warranty

	Sale	Cost	Invt.		
Labor	5720	6720	1440	Warranty Sales Journal:	31
NVI				NVI Net Debit:	1195
Gas/Oil/Grs	5780	6780	1443	NVI Control (R/V):	
S/S-Tires	7770	7770	7770	Warranty Receivable:	1140
Sublet	5750	6750	1441		

Internal

	Sale	Cost	Invt.		
Labor	5730	6730	1440	Internal Sales Journal:	32
Gas/Oil/Grs	5780	6780	1443	Internal Inventory:	
S/S-Tires	7770	7770	7770	Customer Discounted	
Sublet	5750	6750	1441	Dealer Paid Tax Expense:	

Exit Print Delete Clear Save Next

80 5810
81 5810
82 5810
83 5812
84 5811
85 5810
88 5810
89 5810
C0 5700
C1 5700
C8 5700
C9 5700
Q0 5700
Q1 5700
Q2 5705
Q3 5705
Q4 5705
Q8 5705
Q9 5705
S0 5700
S1 5700
S2 5700
S3 5702
S4 5701
S5 5700
S8 5700
S9 5700

Note: GM dealers must create a **Q2** parameter for Commercial Fleet and Medium Duty trucks.

Verifying Technician Assignments

A segregated Quick Lube will have its own technicians. You should set up these technicians as dedicated Quick Lube technicians.

1. Click **Service** on the Autosoft DMS main menu.
2. Click **System Setup** on the Service Writing menu.
3. Click **Service Technicians** on the Service System Setup menu. The Technician Information screen appears.
4. For each Quick Lube technician, verify the **Dedicated Service/Body/QuickLube** field contains **Q**. This flags the technician as a dedicated Quick Lube technician. If you set a department here, the technician list in the Schedule Xpress scheduler will only display the dedicated technicians for each department when scheduling appointments.

Technician Information (ABC Motors)

Technician Number: 24

Short Name: GARY

Full Name: GARY SULLIVAN

Flat/Hourly (F/H): F

Full Social: 123457124

State ID Number:

ERO Password:

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

Cost Per Hour		
C/P	W/C	Int.
(A): 50.00 %	(A): 50.00 %	(A): 50.00 %
(B): 50.00 %	(B): 50.00 %	(B): 50.00 %
(C): 50.00 %	(C): 50.00 %	(C): 50.00 %
(D): 50.00 %	(D): 50.00 %	(D): 50.00 %
(E): 50.00 %	(E): 50.00 %	(E): 50.00 %
(F): 50.00 %	(F): 50.00 %	(F): 50.00 %
(G): 50.00 %	(G): 50.00 %	(G): 50.00 %
(H): 50.00 %	(H): 50.00 %	(H): 50.00 %
(I): 50.00 %	(I): 50.00 %	(I): 50.00 %
(J): 50.00 %	(J): 50.00 %	(J): 50.00 %

Employee ID	
MFC	Emp ID
FD	7124

01 HOUSE
10 PIT
24 GARY
25 DAVE
26 JOEL
29 BRYAN
33 DENNIS
34 DOUG
35 ED
43 BEN
72 DION
91 JASON
97 GRANT

Exit Print Delete Clear Save

Completing Miscellaneous Service Parameters

The workstation(s) in the Quick Lube should be set to default all repair orders as Quick Lube. This ensures all repair orders created on this workstation are flagged as **Q** for Quick Lube.

1. Click **Miscellaneous Parameters** on the Service Writing System Setup menu. The Miscellaneous Parameters screen appears.

Miscellaneous Parameters (ABC Motors)

Is Service Writing Interfaced With Accounting (Y/N):

Shop Supplies

Service Based On Labor/Total/None: 10.00 % Min:\$.00 Max:\$ 20.00 Shop Supplies

Body Based On Labor/Total/None: 0.00 % Min:\$.00 Max:\$.00 Hazardous Material

Charge Applies To Internals (Y/N):

R/O Print

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

2. 'Service Come Back' Message On Repair Order (Y/N): 11. Always Print File Copy At Close (Y/N):

3. 'Customer Labor Rate' On Repair Orders (Y/N): 12. Warranty Copy With Pre-Close Customer Copy (Y/N):

4. 'Customer Pay' Labor Time On Repair Orders (Y/N): 13. Accounting Summary on Accounting Copy (Y/N):

5. 'Warranty Sale' Figures On W-R/O's (Y/N): 14. Mirror Hanger With Hard Copy (Y/N):

6. 'Internal Sale' Figures On Customer Pay R/O's (Y/N): 15. Customer Copy With hard Copy At Open (Y/N):

7. Separate Internal Copy With Customer Pay R/O's (Y/N): 16. Bar Code On Hard Copy (Y/N):

8. Technician Name & State ID On Repair Orders (Y/N): 17. CSI Copy With Customer Close Copy (Y/N):

9. Labor/Parts/GOG/Sublet Totals Each Repair (Y/N):

Miscellaneous

Restrict Charge Customers To 'Special Customer Parameters' (Y/N):

Allow An R/O To Be Started Without 'Miles In' (Y/N):

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

Default Manufacturer Warranty Repairs Prompt: FO - Ford

Include Costs When Viewing an R/O (Y/N):

Require A Menu, Trouble Code, or LOP On All R/O's (Y/N): (GM Canada Only)

Require Confirmation When Closing Warranty And C/P Concurrently:

Default First Tech On Subsequent Repairs:

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

Default Minimum Miles Between Maintenance Service:

Setup "ERO" On This Client

Cancel Save

2. Under the **Miscellaneous** section of the screen, type **Q** in the **Default R/O's For This Client Are Service/Body/Quick Lube {S/B/Q}** field.

Miscellaneous

Restrict Charge Customers To 'Special Customer Parameters' (Y/N):

Allow An R/O To Be Started Without 'Miles In' (Y/N):

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

Default Manufacturer Warranty Repairs Prompt: FO - Ford

Include Costs When Viewing an R/O (Y/N):

Require A Menu, Trouble Code, or LOP On All R/O's (Y/N): (GM Canada Only)

Require Confirmation When Closing Warranty And C/P Concurrently:

Default First Tech On Subsequent Repairs:

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

Default Minimum Miles Between Maintenance Service:

3. Click **Save** to save the setting. The system returns you to the System Setup menu.

Defining Repair Discounts

It may be useful at this time to create discounts for Quick Lube services to ensure consistent pricing. For example, you could create a repair discount that prices an oil change at \$25.95. When you apply the discount to a repair, it automatically adjusts the repair totals to the specified price or by the specified discount percentage.

1. Click **Define Discounts** on the Service Writing System Setup menu.
2. Use the **Discount Repair** section to create a discount that applies to a specific repair order.
3. When creating the discount, you determine how the discount is applied to the labor and parts. You also specify the general ledger accounts used to post the discounts.

Define Discount Codes (ABC Motors)

Discount Code: Help

Description:

Discount Total R/O Customer Pay

Labor Discounts Parts Discounts

Rate: Rate:

Amount: Amount:

Discount Repair

Discounted Repair To A Flat Charge Of:

Discount Repair By:

Labor Discount Ratio:

Parts Discount Ratio:

Dealer Pays Customer Taxes (Y/N):

Common To All Repairs

Include Sublet With Labor Discount (Y/N):

Include GOG With Parts Discount (Y/N):

Discount G/L For Labor:

Discount G/L For Parts:

Dealer Paid Tax G/L For Expense:

Total R/O

By Repair

BL15 BLINN 5 QT OIL CHANGE
BLI6 BLINN 6 QT OIL CHANGE
BLI7 BLINN 7 QT OIL CHANGE
COB5 COB OIL CHANGE 5 QT
COB6 COB OIL CHANGE 6 QT
COB7 COB OIL CHANGE 7 QT
COB8 COB OIL CHANGE 15QT DIE
OC05 OIL CHANGE 5 QT
OC06 OIL CHANGE 6 QT
OC07 OIL CHANGE 7 QT
OC08 OIL CHANGE 8 QT
OC10 OIL CHANGE DIESEL 10 QT
OC12 OIL CHANGE DIESEL 12 QT
OC15 OIL CHANGE DIESEL 15 QT

Exit Print Delete Clear Save

Creating Trouble Codes and FasQuotes

You must flag any Trouble/Condition Codes and/or Service FasQuote Operations that are used for Quick Lube. This ensures the Quick Lube repairs are properly flagged **Q** when you apply a Quick Lube code to a repair. This is important because this flag determines how the repairs are updated to Accounting and how the sales are pulled to reports.

Flagging Trouble/Condition Codes

1. Click **Trouble/Condition Codes** on the Service System Setup menu. The Trouble/Fail Codes screen appears.
2. Verify that all codes used for Quick Lube contain **Q** in the **Repair Is Usually** field.

Trouble/Fail Codes (ABC Motors)

Default Sort For Trouble Codes & Menus On R/O Screens Code Sort Usage Sort

Code: L0F
 Desc.: LUBE OIL AND FILTER CHANGE

Special Labor Sale: 19.00 Exclude Shop Supplies
 Default Labor Units: 3

Customer Complaint Code: L0F
 Labor Operation:

Labor Rate (A Thru J) ... Svc: D Contract: D Body: D Q/L: D
 Repair Is Usually [C/Q/W/N/I]: Q

Most Qualified Technician: 00

Commissionable: .00%
 Commissionable: .00

Special Labor Posting Accounts
 Labor Sale Account:
 Labor Cost Account:
 Labor Inventory Account:

Statistical ... From: / To Current
 Volume MTD: Units:
 YTD: Units:

Exit Print Delete Save

BB01	BODY PANEL DENTS OR DINGS
BB02	BODY PANEL FITS POORLY
BB05	BODY PANEL HARD TO OPEN
BB06	DENTS AND DINGS IN BUMPER
BB07	BUMPER FITS POORLY
BB09	BODY PANEL OR HINGE SQUEAK
BB15	BODY PANEL HARD TO CLOSE
BB19	OTHER BODY PANEL TROUBLES
BB43	LOOSE POOR FIT WARPED OR V
BB44	DOOR TRIM PANELS TEARS SNF
BB45	DOOR TRIM PANELS FADED OR
BB47	DR TRIM PANELS BLISTERED E
BB50	DOOR TRIM PANELS SPLIT SEF
BB53	INSTRUMENT PANEL LOOSE WAF
BB54	LOOSE POOR FIT WARPED OR V
BB62	EXTERIOR TRIM HOLDINGS COF
BB63	EXTERIOR TRIM HOLDING LOOS
BB64	EXTERIOR HOLDINGS TRIM ALI
BB65	WHEEL OR HUBCAP TROUBLES
BB66	OTHER EXTERIOR TRIM TROUBL
BB69	OTHER BUMPER TROUBLES
BB73	HEADLINER LOOSE POOR FIT V
BB74	CARPET LOOSE POOR FIT WARF
BB75	LOOSE POOR WARPED OR WRINP
BB78	INTERIOR ODOR
BB81	TEARS SNAGS CRACKS IN INST
BB82	FADED OR DISCOLORED INSTR
BB84	BLISTERED BUBBLED PEELED J
BB85	GLOVE BOX DOR GAPS FITS OF
BB91	CONSOLE WITH TEARS SNAGS C
BB92	FADED OR DISCOLORED CONSOL
BB94	BLISTERED BUBBLED OR PEELE
BB95	OTHER INSTRUMENT PANEL OR
BC23	BACK WINDOW DEFROSTING OR

Flagging Service FasQuote Operations

1. Click **Service FasQuotes** on the Service Writing main menu.
2. Click **Enter FasQuote Operations**. The Enter FasQuote Service Op's screen appears.
3. Verify that all FasQuotes operations used for Quick Lube contain **Q** in the **Cust/Warr/Int/QkLube** field.

The screenshot shows the 'Enter FasQuote Service Op's' window for 'ABC Motors'. The menu is set to 'Q001P' and the description is 'LUBE OIL AND FILTER CHANGE'. The 'Cust/Warr/Int/QkLube' field is set to 'Q'. The 'Special Price' is \$19.00. The 'Labor Operation' field is set to 'Q1010'. The 'Parts Source' is set to '1'. A list of service codes and descriptions is visible on the right, with 'Q001P LUBE OIL AND FILTER CHANGE' highlighted.

Code	Description
QABS	ABS LIGHT ON, CHECK AND A...
Q4WA	INSPECT 4 WHEEL ALIGNMEN...
Q370P	REPLACE SPARK PLUGS
Q2WA	INSPECT FRONT END ALIGNM...
Q068P	INSPECT NEOPRENE DRIVE B...
Q054P	INSPECT BRAKE SYSTEM \$24.00
Q002P	LUBE OIL AND FILTER CHANG...
Q001P	LUBE OIL AND FILTER CHANGE
PSF	POWER STEERING FLUSH SE...
PDI	PERFORM PREDELIVERY INSP...
N	NWP
MBT	MOUNT AND BALANCE TIRES
LOF	LUBE OIL AND FILTER CHANGE
KEY2	CUT AND PROGRAM 2 KEYS
KEY1	CUT AND PROGRAM 1 KEY
HOSE	COOLING SYSTEM HOSES RE...
GTIRE	7/32 OR GREATER ON TIRES ...
GT	7/32 OR GREATER ON TIRES ...
GBK	(DISC OVER 5MM) (DRUM OVE...
G	(DISC OVER 5MM) (DRUM OVE...
FEA	CHECK FRONT END ALIGNMENT
EXH	EXHAUST SYSTEM REQUIRES...
E150S	REPLACE FRONT CRANK SEAL
DS05	7.3L AIR INDUSTION SYSTEM ...
CV	C/V BOOTS REQUIRE FUTURE...
COOL	COOLING SYSTEM REQUIRES ...
COB5	LUBE OIL AND FILTER CHANGE
CLTCH	CLUTCH WILL REQUIRE FUTU...
CERT	PERFORMED QUALITY-CHECK...

Building the Quick Lube Inventory

The next step will be to set up the parts portion of Quick Lube operations. With segregated Quick Lube, it will be necessary to segregate the Quick Lube parts inventory from the primary parts inventory. First, it will be necessary to determine what parts are to be included and controlled within this inventory. Once established, it will be necessary to determine how these parts will be received within the Quick Lube inventory—either moved from the primary parts inventory or purchased separately and applied to the Quick Lube inventory. If moved from the primary inventory, a parts counter slip will be processed for accounting purposes. If purchased separately, an outside purchase order will be used.

Once this is established, enter the starting inventory using the **Quick Lube** option in the Parts Special Inventories. This setup allows some control of price changes by the Parts Department or allows the Quick Lube manager to control pricing depending on your dealership's policies.

The Quick Lube purchases are then managed by editing quantities on the Quick Lube Parts Inventory screen when purchases are made. Sales will relieve quantities as items are sold. Inventory validation can be performed by printing a list and then performing an audit at any given time. Autosoft recommends you validate the inventory regularly, generally when stock is replenished.

1. Click **Parts** on the Autosoft DMS main menu
2. Click **Special Inventories**.
3. Click **Quick Lube Parts**. The Quick Lube Parts Inventory screen appears.
4. Add all the Quick Lube parts. This creates the Quick Lube inventory you will use to add parts to repair orders.

Enter Inventory Update Data (ABC Motors)

Quick Lube Parts Inventory

Part:

Desc:

On Hand:

Cost:

List:

Internal:

Allow Price Change:

1F129155CA	4	14.20	31.56	AIR F	▶
1S726731DA	10	3.45	7.67	OIL F1	
2C529155BC	4	10.46	23.24	AIR F1	
2L129155AA	4	16.09	35.76	AIR F1	
2L229155AB	4	12.87	28.60	AIR F1	
2U2217528CA	12	5.19	7.98	WIPER	
2U2217528EA	12	6.49	9.98	WIPER	
2U2217528GA	12	6.49	9.98	WIPER	
2U2217528JA	12	6.49	9.98	WIPER	
2U2217528KA	12	7.15	11.00	WIPER	
3C326731AA	10	17.40	29.00	OIL F1	
3C329N184CA	3	43.38	72.30	FUEL F	
3S726731A	10	4.73	10.51	OIL F1	
4H226731AA	10	5.60	12.44	OIL F1	
8C329N184A	3	43.51	72.52	FUEL F	
9001732023500	4	51.99	63.95	P195/ℓ	
900215481000000	8	98.00	119.95	P235/ℓ	
900215483380000	4	75.00	91.95	P215/ℓ	
900467515	8	125.07	152.95	LT225/ℓ	
90051419900	8	92.23	112.95	P205/ℓ	
900831807	4	55.78	68.95	P195/ℓ	
BR1047B	4	39.98	66.63	PAD	
BR1083	4	34.89	58.15	PAD	
BR1270	4	31.98	53.30	PAD	
BRR108	4	61.03	101.72	ROTOR	
BRR07	4	55.47	92.45	ROTOR	
BXT36R	2	87.96	109.95	BATTEF	
BXT40R	2	87.96	109.95	BATTEF	
BXT59	2	79.96	99.95	BATTEF	
BXT65850	2	95.96	119.95	BATTEF	
BXT96R590	2	91.96	114.95	BATTEF	▼

Exit
Print List
Delete Part
Save

Generating Quick Lube Repair Orders

Once these setup have been completed, Quick Lube is ready to start operations.

1. Click **Service** on the Autosoft DMS main menu, and then click **Repair Orders**.
2. Click **Start Repair Order**. Follow normal procedures for generating a repair order. The **Service/Body/Contract/Quick Lube {S/B/C/Q}** field will default to **Q**.

Start Repair Order (ABC Motors)

R/O: 29526 Schedule Xpress

Customer Number: SHIB55814 Memo

Writer: 24 GARY Date: 03 03 10

Advisor: 24 GARY

Name: Andrew J Smith

Individual: ANDREW J SMITH

Address: 1818 Ward St

City: Essexville MI 48732

E-Mail:

Memo:

Phone: 555 529 5555 Work: [] [] []

Cell: [] [] [] On Do Not Call List:

Send Marketing Followup Letter (Y/N):

Odometer In: 20084 When Finished [C/W/E/D/P]:

Time In: 02:45 Cash/Recv.:

Promised: 00:00 Job Number: 29526

Taxable:

Service/Body/Contract/QuickLube (S/B/C/Q): Q

VIN: 1FTPX14U87FB

Year: 2007

Make: FORD

Model: F150

N/U/O: U

License: [] MI

First Use: 08 13 09

Delivered: 08 13 09

Inspection:

Color: BLACK

Cust Code: []

Car Line: 9

Warranty Parts (A/B/C/L/N): C

Warranty Manufacturers

Warranty Repair: F0

Contract: []

Term: 00 Expires: 00/00 Contract Mileage: []

Exit R/O List Search Names Void Clear History Customer Next

- Click **Next** once all data on Start Repair Order screen is complete. This advances you to the Enter Conditions screen. On this screen, use the **Menus** button to apply the FasQuotes or the **Fail Codes** button to apply Trouble/Condition Codes. If your codes are set up correctly, the **C/W/I/Q** field will default to **Q**.

The screenshot shows the 'Enter Conditions' window for ABC Motors. The main form includes the following fields and sections:

- R/O:** 29526
- Customer:** Andrew J Smith
- Vehicle:** 2007 FORD F150
- VIN:** 1FTPX14U87F8
- Repair:** 1
- Menu:** Q001P
- Trouble/Fail Code:** (empty)
- Customer Pay Repair Is NON-Taxable
- Complaint:** LUBE OIL AND FILTER CHANGE
- Technician:** 24
- Estimated Labor Time:** 3
- Writer:** 24
- Labor Sale:** 19.00
- C / W / I / Q:** Q
- Labor Level:** D
- LOP:** Q1010
- Complaint Code:** (empty)

The right-hand pane, titled 'R/O Data', displays the following information:

- VIN:** 1FTPX14U87F8
- Year:** 2007
- Make:** FORD
- Model:** F150
- New/Used:** U
- 1st Use:** 08/13/09
- Delivered:** 08/13/09
- Inspection:** (empty)
- Odometer In:** 20084

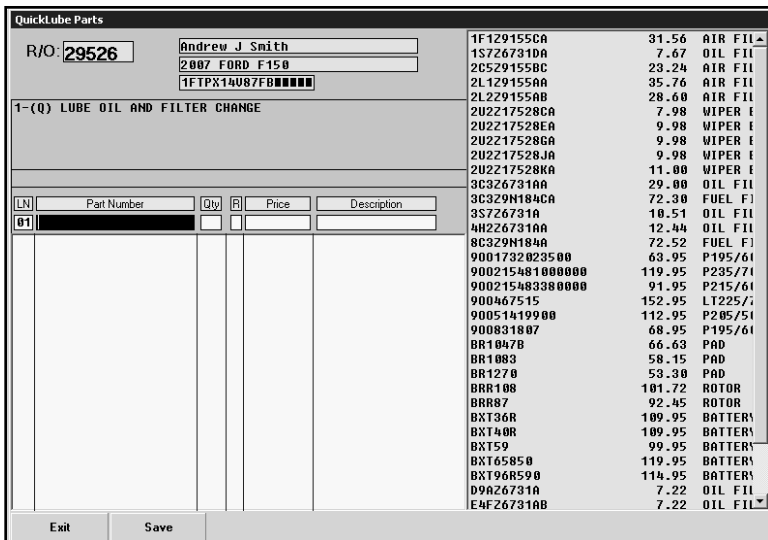
The bottom navigation bar contains the following buttons: Exit, R/O List, Print, History, View R/O, Clear, Back, Next.

Note: Other types of repairs may be added to this R/O in the case of up sales to the Service Department or if warranty repairs are required. All repairs will post to the correct accounts and appear correctly on reports. If your manufacturer requires separate repair orders for these instances, create a continuation R/O using the **Continuations** option on the Repair Orders menu.

- Quick Lube parts will be applied to the repair order on the Close Parts screen using the **Quick Lube Parts** button.



- This pulls all the Quick Lube parts you added to the Quick Lube inventory. Add the required parts.



- Once repairs are completed, process the repair order through to the Review & Print screen. At this time, you will use the **Discounts** button on the Review & Print screen to apply any discounts to the Quick Lube repairs. Using discounts makes it easy to ensure consistent pricing for Quick Lube repairs. The system will use the setup for the selected discount code to discount the repair to a certain dollar amount or by a certain percentage.

The screenshot shows the 'Discounts' dialog box. At the top, it displays the repair order number 29526, customer name Andrew J Smith, date 2007, and vehicle FORD F150. Below this, there are two main sections:

- Discount Code Selection:** A list of codes with columns for Code, Discount, Total, and R/O. Codes include BL15 (BLINN 5 QT OIL CHANGE), BL16 (BLINN 6 QT OIL CHANGE), BL17 (BLINN 7 QT OIL CHANGE), COB5 (COB OIL CHANGE 5 QT), COB6 (COB OIL CHANGE 6 QT), and COB7 (COB OIL CHANGE 7 QT).
- Repair Summary:** A table showing the cost breakdown for a repair.

Code	Description	Labor	Parts	Total
1-(Q)	LUBE OIL AND FILTER CHANGE			
	Code :COB5			
	Labor:	20.90	-4.31	16.59
	Parts:	16.60	-7.24	9.36
	Total:			25.95

At the bottom, there is a 'Manual Discount' section with a 'Code' field and a table for 'Total R/O Customer Pay' with columns for Rate, C/P Amount, and Discount. A 'Total Discounts' summary shows Labor: 4.31, Parts: 7.24, and Total: 11.55.

- Once the discounts have been applied and the repair totals are correct, close repair order or send it to the Cashier for closing.

The screenshot shows the 'Print Dialog' box with the following options:

Option	Description	Notes
Y	Print & Close R/O	Closes All Repairs
P	Print & Close C/P	Warranty Remains Open <input checked="" type="checkbox"/> Print Warranty Copy Now
C	Customer Copy	All Repairs Remain Open
I	Invoice R/O	Invoice All Repairs to Cashier <input type="checkbox"/> Print Customer Copy Now
W	Invoice C/P	Invoice C/P & INT Repairs to Cashier <input type="checkbox"/> Print Customer Copy Now
M	Print Memo	All Repairs Remain Open
N	No Action	Close Print Dialog With No Action

Buttons at the bottom:

Updating Repair Orders

The Daily R/O Update sends the closed repair orders to the Accounting module. The repair orders are closed in Accounting and updated to the books. The system uses the Integrated Service Setup in the Accounting module to determine which sales update to which accounts. The Quick Lube repair orders are flagged **Q**; therefore, the sales on these repair orders are updated based on the Q parameter set.

Integrated Service Posting Parameters (ABC Motors)

Service/Body/Contract/QuickLube [S/B/C/Q]: **Q**
Line: **1**

Customer Pay	Sale	Cost	Invt.
Labor	5700	6700	1440
Gas/Oil/Grs	5780	6780	1443
S/S-Tires	7770	7770	7770
Sublet	5750	6750	1441
Q/L Labor	5705	6705	1440
Q/L G/O/G	5780	6780	1443
Q/L Sublet	5755	6755	1441
Q/L Parts	5435	6435	1412

Cust. Sales Journal Cash: **30** A/R: **30**
 Labor Disc: **7731** Sales Tax: **2150**
 Cust. A/R: **1120** Other Tax: **2150**
 Cash Sale: **1010** Tire Tax: **2150**

Warranty	Sale	Cost	Invt.
Labor	5720	6720	1440
NVI			
Gas/Oil/Grs	5780	6780	1443
S/S-Tires	7770	7770	7770
Sublet	5750	6750	1441

Warranty Sales Journal: **31**
 NVI Net Debit: **1195** Sales Tax: **2150**
 NVI Control (R/V): Other Tax: **2150**
 Warranty Receivable: **1140** Tire Tax: **2150**

Internal	Sale	Cost	Invt.
Labor	5730	6730	1440
Gas/Oil/Grs	5780	6780	1443
S/S-Tires	7770	7770	7770
Sublet	5750	6750	1441

Internal Sales Journal: **32**
 Internal Inventory: Sales Tax: **2150**
 Customer Discounted: Other Tax: **2150**
 Dealer Paid Tax Expense: Tire Tax: **2150**

Click From List

- B0 5810
- B1 5810
- B2 5810
- B3 5812
- B4 5811
- B5 5810
- B8 5810
- B9 5810
- C0 5700
- C1 5700
- C8 5700
- C9 5700
- Q0 5700
- Q1 5700**
- Q2 5705
- Q3 5705
- Q4 5705
- Q8 5705
- Q9 5705
- S0 5700
- S1 5700
- S2 5700
- S3 5702
- S4 5701
- S5 5700
- S8 5700
- S9 5700

Exit Print Delete Clear Save Next

Printing Reports

Some service reports (for example the Service Writer Analysis report) allow you to specify which departments you want to include on the report. To print reports for Quick Lube, you will select **Quick Lube**. The system generates the report for all repair orders and repairs that have been flagged **Q** for Quick Lube.

Service Time Summary (ABC Motors)

Print Effective Rate Summary

Writer Time Summary

Technician Time Summary

Technician Time Report

Writer Sales Report

Writer 'Specials' Usage

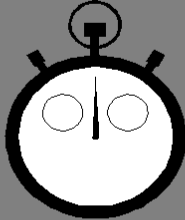
Writer Analysis

Work In Process Worksheets

Flagged Time

Exit

Service Time Summary



Writer Analysis

Include ... Service Contracts Quick Lube
 Body Shop

Enter Report Dates

From: **3 / 3 / 2010** To: **3 / 3 / 2010** Go

Integrated Quick Lube

As an integrated part of the Service Department, the Quick Lube operations are treated as a specific repair type added to a repair order, and the work is completed by any or all technicians in the Service Department. Parts required for the Quick Lube repairs are applied from the primary parts inventory through the Parts Inventory module.

Completing Accounting Setup

The first step in the Quick Lube setup is to assign the correct accounts in the Accounting Integrated Service Setup. This setup ensures that Quick Lube repairs post to the appropriate general ledger accounts and that the sales pull to the correct portion of the financial statement. This is also important to ensure accurate reports for your Quick Lube.

1. Click **Accounting** on the DMS main menu.
2. Click **Setup** on the Dealership Accounting menu.
3. Click **Integrated Service Sales** on the System Setup menu, and then click **Service Labor Sales**.
4. Verify that the posting parameters for any **S** lines (S1, S2, etc) contain the correct accounts. Verifying that the various pay types (customer pay, warranty, and internal) are directed to the correct accounts ensures that individual repair types will update correctly on mixed repair orders. It is also important to verify that the correct accounts are specified for Quick Lube labor, gas-oil-grease, sublet, and parts since these are the accounts that will be used to post Quick Lube repairs (individual repairs flagged **Q** for Quick Lube).

Integrated Service Posting Parameters (ABC Motors)

Service/Body/Contract/QuickLube (S/B/C/Q): Line:

Customer Pay	Sale	Cost	Invt.
Labor	5700	6700	1440
Gas/Oil/Grs	5780	6780	1443
S/S-Tires	7770	7770	7770
Sublet	5750	6750	1441
Q/L Labor	5705	6705	1440
Q/L G/O/G	5781	6781	1443
Q/L Sublet	5755	6755	1441
Q/L Parts	5435	6435	1400

Cust. Sales Journal Cash: A/R:

Labor Disc: Sales Tax:

Cust. A/R: Other Tax:

Cash Sale: Tire Tax:

Warranty	Sale	Cost	Invt.
Labor	5720	6720	1440
NVI			
Gas/Oil/Grs	5780	6780	1443
S/S-Tires	7770	7770	7770
Sublet	5750	6750	1441

Warranty Sales Journal:

NVI Net Debit: Sales Tax:

NVI Control (R/V): Other Tax:

Warranty Receivable: Tire Tax:

Internal	Sale	Cost	Invt.
Labor	5730	6730	1440
Gas/Oil/Grs	5780	6780	1443
S/S-Tires	7770	7770	7770
Sublet	5750	6750	1441

Internal Sales Journal:

Internal Inventory: Sales Tax:

Customer Discounted Dealer Paid Tax Expense: Other Tax:

Tire Tax:

Click From List

- B0 5810
- B1 5810
- B2 5810
- B3 5812
- B4 5811
- B5 5810
- B8 5810
- B9 5810
- C0 5700
- C1 5700
- C8 5700
- C9 5700
- Q0 5700
- Q1 5700
- Q2 5705
- Q3 5705
- Q4 5705
- Q8 5705
- Q9 5705
- S0 5700
- S1 5700
- S2 5700
- S3 5702
- S4 5701
- S5 5700
- S8 5700
- S9 5700

Exit Print Delete Clear Save Next

Miscellaneous Parameters

The workstation(s) in the Service Department should be set to default all repair orders to **S** for Service. Since Quick Lube is an integrated part of the Service Department, repair orders will be flagged as **S**.

1. Click **Service** on the Autosoft DMS main menu, and then click **System Setup**.
2. Click **Miscellaneous Parameters** on the System Setup menu. The Miscellaneous Parameters screen appears.

3. Under the **Miscellaneous** section of the screen, type **S** in the **Default R/O's For This Client Are Service/Body/Quick Lube {S/B/Q}** field.

4. Click **Save** to save the setting. The system returns you to the System Setup menu.

Defining Repair Discounts

It may be useful at this time to create discounts for Quick Lube services to ensure consistent pricing. For example, you could create a repair discount that prices an oil change at \$25.95. When you apply the discount to the Quick Lube repair, it automatically adjusts the repair totals to the specified price or by the specified discount percentage.

1. Click **Define Discounts** on the Service Writing System Setup menu.
2. Use the **Discount Repair** section to create a discount that applies to a specific repair order.
3. When creating the discount, you determine how the discount is applied to the labor and parts. You also specify the general ledger accounts used to post the discounts.

The screenshot shows the 'Define Discount Codes' window for 'ABC Motors'. The 'Discount Code' is 'COB5' and the 'Description' is 'COB OIL CHANGE 5 QT'. The 'Discount Repair' section is configured with a flat charge of 25.95, a discount repair by amount of .00, a labor discount ratio of 25.00%, and a parts discount ratio of 75.00%. The 'Common To All Repairs' section has 'Include Sublet With Labor Discount' and 'Include GOG With Parts Discount' set to 'N', with 'Discount G/L For Labor' at 6705 and 'Discount G/L For Parts' at 6435. The 'By Repair' list on the right includes codes from BL15 to OC15, with 'COB5 COB OIL CHANGE 5 QT' highlighted.

Creating Trouble Codes and FasQuotes

You must flag any Trouble/Condition Codes and/or Service FasQuote Operations that are used for Quick Lube. This ensures the Quick Lube repairs are properly flagged **Q** when you apply a Quick Lube code to a repair. This is important because this flag determines how the repairs are updated to Accounting and how the sales are posted to reports.

Flagging Trouble/Condition Codes

1. Click **Trouble/Condition Codes** on the Service System Setup menu. The Trouble/Fail Codes screen appears.
2. Verify that all codes used for Quick Lube contain **Q** in the **Repair Is Usually** field.

Trouble/Fail Codes (ABC Motors)

Default Sort For Trouble Codes & Menus On R/O Screens Code Sort Usage Sort

Code: Desc.:

Special Labor Sale: Exclude Shop Supplies

Default Labor Units:

Customer Complaint Code:

Labor Operation:

Labor Rate (A Thru J) ... Svc: Contract: Body: Q/L:

Repair Is Usually [C/Q/W/N/I]:

Most Qualified Technician:

Commissionable: %

Commissionable:

Special Labor Posting Accounts

Labor Sale Account:

Labor Cost Account:

Labor Inventory Account:

Statistical ... From: / To Current

Volume MTD: Units:

YTD: Units:

Exit Print Delete Save

BB01	BODY PANEL DENTS OR DINGS
BB02	BODY PANEL FITS POORLY
BB05	BODY PANEL HARD TO OPEN
BB06	DENTS AND DINGS IN BUMPER
BB07	BUMPER FITS POORLY
BB09	BODY PANEL OR HINGE SQUEAK
BB15	BODY PANEL HARD TO CLOSE
BB19	OTHER BODY PANEL TROUBLES
BB43	LOOSE POOR FIT WARPED OR V
BB44	DOOR TRIM PANELS TEARS SNF
BB45	DOOR TRIM PANELS FADED OR
BB47	DR TRIM PANELS BLISTERED E
BB50	DOOR TRIM PANELS SPLIT SEF
BB53	INSTRUMENT PANEL LOOSE WAF
BB54	LOOSE POOR FIT WARPED OR V
BB62	EXTERIOR TRIM HOLDINGS COF
BB63	EXTERIOR TRIM HOLDING LOOS
BB64	EXTERIOR HOLDINGS TRIM ALI
BB65	WHEEL OR HUBCAP TROUBLES
BB66	OTHER EXTERIOR TRIM TROUBL
BB69	OTHER BUMPER TROUBLES
BB73	HEADLINER LOOSE POOR FIT V
BB74	CARPET LOOSE POOR FIT WARP
BB75	LOOSE POOR WARPED OR WRINP
BB78	INTERIOR ODOR
BB81	TEARS SNAGS CRACKS IN INST
BB82	FADED OR DISCOLORED INSTR
BB84	BLISTERED BUBBLED PEELED I
BB85	GLOVE BOX DOR GAPS FITS OF
BB91	CONSOLE WITH TEARS SNAGS C
BB92	FADED OR DISCOLORED CONSOL
BB94	BLISTERED BUBBLED OR PEELE
BB95	OTHER INSTRUMENT PANEL OR
BC23	BACK WINDOW DEFROSTING OR

Flagging Service FasQuote Operations

1. Click **Service FasQuotes** on the Service Writing main menu.
2. Click **Enter FasQuote Operations**. The Enter FasQuote Service Op's screen appears.
3. Verify that all FasQuotes operations used for Quick Lube contain **Q** in the **Cust/Warr/Int/QkLube** field.

Enter FasQuote Service Op's (ABC Motors)

Complaint Lines

Menu:

Labor Units:

Labor Rate (A Thru J) ... Svc: Contract: Body: Q/L:

Cust/Warr/Int/QkLube: Exclude Shop Supplies

Update List Price on Parts:

Calculate S/S with Quote:

Special Price:

Discount Code:

Repair Is NON-Taxable [Y/N]:

Repair Net G/L Account:

Commission: % or \$

Technician:

Labor Operation:

Customer Complaint Code:

Trouble Code:

Default Next Service:

Parts Source:

Exit Discount Codes Delete Clear Next

Code /	Description
QABS	ABS LIGHT ON, CHECK AND A...
Q4WA	INSPECT 4 WHEEL ALIGNMEN...
Q370P	REPLACE SPARK PLUGS
Q2WA	INSPECT FRONT END ALIGNM...
Q068P	INSPECT NEOPRENE DRIVE B...
Q054P	INSPECT BRAKE SYSTEM \$24.00
Q002P	LUBE OIL AND FILTER CHANG...
Q001P	LUBE OIL AND FILTER CHANGE
PSF	POWER STEERING FLUSH SE...
PDI	PERFORM PREDELIVERY INSP...
N	NWP
MBT	MOUNT AND BALANCE TIRES
LOF	LUBE OIL AND FILTER CHANGE
KEY2	CUT AND PROGRAM 2 KEYS
KEY1	CUT AND PROGRAM 1 KEY
HOSE	COOLING SYSTEM HOSES RE...
GTIRE	7/32 OR GREATER ON TIRES ...
GT	7/32 OR GREATER ON TIRES ...
GBK	(DISC OVER 5MM) (DRUM OVE...
G	(DISC OVER 5MM) (DRUM OVE...
FEA	CHECK FRONT END ALIGNMENT
EXH	EXHAUST SYSTEM REQUIRES...
E150S	REPLACE FRONT CRANK SEAL
DS05	7.3L AIR INDUSTION SYSTEM ...
CV	C/V BOOTS REQUIRE FUTURE...
COOL	COOLING SYSTEM REQUIRES ...
COB5	LUBE OIL AND FILTER CHANGE
CLTCH	CLUTCH WILL REQUIRE FUTU...
CERT	PERFORMED QUALITY-CHECK...

Generating Repair Orders

1. Click **Service** on the Autosoft DMS main menu.
2. Click **Repair Orders**.
3. Click **Start Repair Order**. The Start Repair Order screen appears. Follow normal procedures for generating a repair order. The **Service/Body/Contract/Quick Lube {S/B/C/Q}**: field will default to **S**. This field can be edited if a different repair order type is required.

4. Click **Next** once all data on Start Repair Order screen is complete. This advances you to the Enter Conditions screen. On this screen, use the **Menu** button to apply the FasQuotes or the **Fail Codes** button to apply Trouble/Condition Codes. If your codes are set up correctly, the **C/W/I/Q** field will default to the correct pay type. For Quick Lube repairs, this should be **Q**.

Note: Other types of repairs may be added to this R/O in the case of up sales to the Service Department or if warranty repairs are required. All repairs will post to the correct accounts and appear correctly on reports. If your manufacturer requires separate repair orders for these instances, create a continuation R/O using the **Continuations** option on the Repair Orders menu.

- Quick Lube parts will be applied to the repair order through the Parts Inventory module on the Service R/O Parts screen in the same manner that any other part would be added to the R/O.

Service R/O Parts (ABC Motors)

OEM Source: 1 FORD (MAR '10) 1-(Q) LUBE OIL AND FILTER CHANGE

R/O: 29526 Salesman: 56 Andrew J Smith
 Price Code: 07 FORD F150
 Discount Level: 1FTPX14V87F8 Ddom In: 20084

QwikLook Special Parts Discount: %

LN	Part Number	Qty	P	T	F	Cost	Price	Description	W	C	Req	FS	SD	S	O/H	Bin
01	F1A26731BD	1	1	Q		3.46	10.00	FILTER ASY - 01			1	N	N	1		
02	X05W20QSP	5	1	Q		3.15	4.20	OIL - ENGINE								

Part Information for F1A26731BD:
 BIN: /
 SS: Special Ord
 LIST: 7.69
 RETAIL: 10.00
 TRADE: 5.77
 COST: 3.46
 CORE: 0.00
 O/H: -1
 O/O:
 B/O:
 O/Q: No
 FROM:
 TO:

Retail Matrix Pricing
 List Plus 130.00

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

- Once repairs are completed, process the repair order through to the Review & Print screen. At this time, you will use the **Discounts** button on the Review & Print screen to apply any discounts to the Quick Lube repairs. Using discounts makes it easy to ensure consistent pricing for Quick Lube repairs. The system will use the setup for the selected discount code to discount the repair to a certain dollar amount or by a certain percentage.

Discounts

29526 Andrew J Smith 2007 FORD F150

(Hold Right Mouse Button Down For Discount Code Profile) "Click" Line To Select Repair

Code	Discount	Total	R/O
?			

1-(Q) LUBE OIL AND FILTER CHANGE
 Code : COB5
 Labor: 20.90 -4.31 16.59
 Parts: 16.60 -7.24 9.36
 Total: 25.95

Code	Discount	By Repair
BL15	BLINN 5 QT OIL CHANGE	
BL16	BLINN 6 QT OIL CHANGE	
BL17	BLINN 7 QT OIL CHANGE	
COB5	COB OIL CHANGE 5 QT	
COB6	COB OIL CHANGE 6 QT	
COB7	COB OIL CHANGE 7 QT	

Manual Discount
 Code: []
 Total R/O Customer Pay: []
 Rate [] C/P Amount [] Discount []
 Labor: .00 .00 .00
 Parts: .00 .00 .00

Total Discounts
 Labor: 4.31
 Parts: 7.24
 Total: 11.55

Warranty	Internal	Customer
.00	.00	Labor 19.00
.00	.00	Parts 16.60
.00	.00	Sublet .00
.00	.00	S/Sup 1.90
.00	.00	G-0-6 .00
.00	.00	W/Ded .00
.00	.00	Disc 11.55
.00	.00	Subtotal 25.95
.00	.00	Labor 4.31
.00	.00	Parts 7.24

Abort Remove All Discounts Save Changes

- Once the discounts have been applied and the repair totals are correct, close repair order or send it to the Cashier for closing.

Print Dialog		
Y	Print & Close R/O	Closes All Repairs
P	Print & Close C/P	Warranty Remains Open <input checked="" type="checkbox"/> Print Warranty Copy Now
C	Customer Copy	All Repairs Remain Open
I	Invoice R/O	Invoice All Repairs to Cashier <input type="checkbox"/> Print Customer Copy Now
W	Invoice C/P	Invoice C/P & INT Repairs to Cashier <input type="checkbox"/> Print Customer Copy Now
M	Print Memo	All Repairs Remain Open
N	No Action	Close Print Dialog With No Action

Updating Repair Orders

The Daily R/O Update sends the closed repair order to the Accounting module. The repair orders are closed in Accounting and updated to the books. The system uses the Integrated Service Setup in the Accounting module to determine which sales update to which accounts. The Quick Lube repairs are flagged **Q**; therefore, the sales for these repairs are updated based on the accounts added for the Quick Lube section of the corresponding S line used for the repair order.

Integrated Service Posting Parameters (ABC Motors)				Click From List	
Service/Body/Contract/QuickLube [S/B/C/Q]: S				B0 5810	
Line: 1				B1 5810	
				B2 5810	
				B3 5812	
				B4 5811	
				B5 5810	
				B8 5810	
				B9 5810	
				C0 5700	
				C1 5700	
				C8 5700	
				C9 5700	
				Q0 5700	
				Q1 5700	
				Q2 5705	
				Q3 5705	
				Q4 5705	
				Q8 5705	
				Q9 5705	
				S0 5700	
				S1 5700	
				S2 5700	
				S3 5702	
				S4 5701	
				S5 5700	
				S8 5700	
				S9 5700	

Customer Pay	Sale	Cost	Int.		
Labor	5700	6700	1440	Cust. Sales Journal Cash:	30 A/R: 30
Gas/Oil/Grs	5780	6780	1443	Labor Disc:	7731 Sales Tax: 2150
S/S-Tires	7770	7770	7770	Cust. A/R:	1120 Other Tax: 2150
Sublet	5750	6750	1441	Cash Sale:	1010 Tire Tax: 2150
Q/L Labor	5705	6705	1440		
Q/L G/O/G	5781	6781	1443		
Q/L Sublet	5755	6755	1441		
Q/L Parts	5435	6435	1400		

Warranty	Sale	Cost	Int.		
Labor	5720	6720	1440	Warranty Sales Journal:	31
NVI				NVI Net Debit:	1195 Sales Tax: 2150
Gas/Oil/Grs	5780	6780	1443	NVI Control (R/V):	
S/S-Tires	7770	7770	7770	Warranty Receivable:	1140 Tire Tax: 2150
Sublet	5750	6750	1441		

Internal	Sale	Cost	Int.		
Labor	5730	6730	1440	Internal Sales Journal:	32
Gas/Oil/Grs	5780	6780	1443	Internal Inventory:	
S/S-Tires	7770	7770	7770	Sales Tax:	2150
Sublet	5750	6750	1441	Other Tax:	2150
				Customer Discounted	
				Dealer Paid Tax Expense:	
				Tire Tax:	2150

Printing Reports

Some service reports (for example the Service Writer Analysis report) allow you to specify which departments you want to include on the report. To print reports for Quick Lube, you will select Quick Lube. The system generates the report for all repair orders and repairs that have been flagged **Q** for Quick Lube.

The screenshot shows a software window titled "Service Time Summary (ABC Motors)". On the left is a vertical menu with the following options: "Print Effective Rate Summary", "Writer Time Summary", "Technician Time Summary", "Technician Time Report", "Writer Sales Report", "Writer 'Specials' Usage", "Writer Analysis", "Work In Process Worksheets", "Flagged Time", and "Exit". The "Writer Analysis" option is selected. The main area on the right is titled "Service Time Summary" and features a large stopwatch icon. Below the icon is a "Writer Analysis" section with the following options: "Include ..." (checked), "Service" (unchecked), "Body Shop" (unchecked), "Contracts" (unchecked), and "Quick Lube" (checked). Below this is an "Enter Report Dates" section with "From:" and "To:" dropdown menus, both set to "3 / 3 / 2010", and a "Go" button.

Conclusion

It is possible to use a combination of these two processes to best meet your dealership's individual requirements. It is important to complete the necessary setup and ensure the repair order and repairs are properly flagged. This ensures accurate books and reports.