Make A New Appointment

How	What
1. From the **Side Tool Bar**, click **Make New Appointment**	Click the Make New Appointment button on the side tool bar to schedule an appointment on the Service Counter.
2. Enter **Search By** criteria in the **Find** entry field and click **Next**	Enter the Customer's Last Name or Company Name (the default search criteria) in the Find entry field and click the Next button to display the results of the search in the customer list window.
3. Select **Customer** and click **Next**	Select the customer from the customer list by double-clicking the customer name on the list or with the customer name highlighted, click Next.
4. Select **Vehicle** and click **Next**	Select the Vehicle from the vehicle list by double-clicking or highlight the vehicle and click the Next button to open the Appointment Information screen.
5. Enter **Appointment Date**	On the Appointment Information screen, enter the Appointment Date or click the Select button to choose from the calendar.
6. Enter **Appointment Time**	Enter the Appointment Time or choose from the drop list by clicking the down arrow to the right.
7. Enter **Promised Date**	Enter the Appointment Date or click the Select button to choose from the calendar.
8. Enter **Promised Time**	Enter the Promised Time or choose from the drop list by clicking the down arrow to the right.
9. Check **Customer Waiting** box (if applicable)	Click the Customer Waiting box to display WAITING in red type in the Promised column on the Service Counter.
10. Click **Next** and **Next** again	Click the Next button to open the Select Recommended Services screen, and then click the Next button again to open the Reason for Service screen.
11. Click **Add Vehicle Problem** or **Add Request** or **Add Free Form Note**	Click the Add Vehicle Problem button to open the Select Vehicle Problem/Request window and choose from the Select Vehicle Problem list or Add A Free Form Note.
12. Edit **Request for Service**/**Vehicle Problem**/**Note** and click **OK**	Once a Request for Service, Vehicle Problem, or Note is selected, a window opens to edit or add to the selection any notes from the customer about the problem, requests the customer may have asked of the service writer, etc.
13. Click **Finish**	Click the Finish button to save the Appointment to the Service Counter.

Start A Repair Order

How	What
1. From the Side Tool Bar, click **Write New Repair Order**	Click the Write New Repair Order button to open the New Repair Order window to create a new repair order on the Service Counter.
2. Enter **Search By** criteria in the **Find** entry field	Enter the Customer Name or Company Name in the Find entry field to search for the customer record. The Search By criteria defaults to Last, First/Company Name.
3. Click **Next**	Click the Next button to display the results of the search in a customer list window.
4. Select Customer and click **Next**	Select the customer on the customer list by double-clicking the customer name or highlight the customer name and click the Next button.
5. Select Vehicle and click **Next**	Select the Vehicle on the vehicle list by double-clicking the vehicle or highlight the vehicle and click the Next button.
6. Click **Add Vehicle Problem** – or -	Click the Add Vehicle Problem button to select from a list of vehicle problems describing the reason the vehicle is in the shop. All services and repairs must be associated with a "Reason for Service" to be able to add labor and parts to the Repair Order. Each labor and associated part (and/or sublet labor) will have its own Reason for Service to be associated with on the Repair Order.
7. Click **Add Request** – or -	Click the Add Request button to select from a list of requested services to be performed on the vehicle.
8. Click **Add Free Form Note**	Click the Add Free Form Note button to write a custom reason the vehicle is at the shop.
9. Select the Reason for Service	Select the Reason for Service, either a Vehicle Problem or a Request for Service by double-clicking the selection or highlight the selection and click the Next button.
10. Click **OK**	Click the OK button to save changes and entries made to the Reason for Service. There is a spell check button to the right of this entry field to spell check your entries.
11. Click **Finish** then **Cancel**	Click the Finish button to close the Repair Order wizard and click the Cancel button to close the Update Repair Order Information window and return to it later.

Add A Labor to a Repair Order

How	What
1. Select and open the Repair Order on the Service Counter	Double-click the Repair Order or highlight the Repair Order and press Enter to open the Repair Order, and highlight the Reason for Service line the Labor is associated with.
2. Highlight Reason for Service line and click **Add Labors**	With the Reason for Service line highlighted, click the Add Labors button or right-click on the Reason for Service line. *Note: A Reason for Service line must be highlighted to activate the Add Labor button*.
3. Select **Labor Service from List**	Select Labor Service from List from the drop list to open the Labor Search window.
4. Enter **Labor Code**	Enter the Labor Code to activate the progressive search function. The Note: The Printed Descriptions will display in the read-only text box across the bottom of the window to preview the Labor content before selecting that Labor.
5. Select Labor	Select the Labor from the list by double-clicking the labor or highlight the labor and click the Select button to open the Labor Service – Sales Detail Information window.
6. Enter/Edit **Hours Billed to Customer**	Enter the Hours Billed to customer by keying in amount or using spin buttons. Hours can be described in tenths by using a decimal before the number.
7. Click **OK**	Click OK to save this labor operation of the repair order.

Add A Part to a Repair Order

How	What
1. Select and open the Repair Order on the Service Counter	Double-click the Repair Order or highlight the Repair Order and press Enter to open the Repair Order, and highlight the Labor service line the Part will be associated with.
2. Highlight **Labor** line and click **Add Parts**	With the Labor line highlighted, click the Add Parts button below the Repair Order entry field and click on a Parts method from the drop list or right-click on the Labor line and select a part method from the Add drop list. The Add Parts button will only be active if you have a Labor line to associate it with.
3. Select **Part from Part list**	Click on Part from Part List to display the Part Search window. Selecting the Part List will display all parts that have been entered in the system and posted to inventory by the Add A Part function, the Buyout function, and/or the Parts Catalog function if the Add Buyout/Catalog Parts to Inventory List was checked.
4. Search for Part from the Part List	Start to enter the part number and the progressive search will narrow the part list down. Click on the part number as soon as it appears in the list or continue to enter the entire part number to narrow the list to the exact part number. If the part has not been entered into the system before, the list window will eventually list no parts.
5. Select a part from the list	Double-click the part or highlight the part and click the Select button to add the part to the repair order.
6. Enter **Quantity**	The Part – Sales Detail Information window will open with the quantity box highlighted. Enter the part quantity be added to the repair order. The default quantity is one.
7. Click **OK** – or – click **Add Another Part** to return to the Part List	Click OK to close the Part – Sales Detail Information window, add the part to the repair order, and return to the Repair Order or click the Add Another Part button to add the part to the Repair Order and return to the Part List.

Add A Sublet to a Repair Order

How	What
1. Select the Repair Order on the Service Counter	Double-click the Repair Order or highlight the Repair Order and press Enter to open the Repair Order, and highlight the Labor line the Sublet is associated with.
2. Highlight the Labor Line and click **Sublets**	With the Labor line highlighted, click the Sublets button to open the Sublets window. *Note: The Add Sublets button will only be active if you have a Labor line highlighted to associate it with.*
3. Enter **Sublet Code**	Enter the Sublet Code to activate the progressive search function.
4. Select **Sublet**	Select the Sublet operation from the list by double-clicking the sublet.
5. Enter **Invoice Cost**	Enter the Invoice Cost for the sublet labor to be performed.
6. Enter **Sublet Price**	Enter the Sublet Price to be charged to the customer for the sublet labor performed.
7. Enter **Quantity**	Enter the Quantity of sublet labors to be charged to the customer.
8. Click **OK**	Click the OK button to add the Sublet to the Repair Order.

Pay Completed Repair Order

How	What
1. Select and open the Completed Repair Order on the Service Counter	Double-click the Repair Order or highlight the Repair Order and press Enter to open the Repair Order.
2. Click **Close**	Click the Close button in the lower right corner. *If the RO is not completed, the button in the lower right corner will say OK/Save; click OK/Save and select Pay (or Pay & Print).*
3. Select **Close & Pay**	Select Close & Pay (or Close, Pay & Print to print out an RO marked paid with the method of payment printed on it) and the Cash Drawer screen will open. *Warning/Notice screens that may appear when closing and paying a completed invoice are explained below.*
4. Edit invoice date/time or date paid/ time (if applicable)	The invoice date and time as well as the date paid and time can be edited before the invoice payment is selected and the invoice is posted and closed (if applicable).
5. Key in the **Amount to Post** (if applicable)	The system defaults to the total amount due to pay off the balance of the invoice; however, if there is more than one method of payment being used, enter the amount of each method and the system will display the remaining amount after the previous amount method is selected and posted.
6. Select method of payment	Select a method from the drop list using the down arrow to the right of the Method of Payment entry field.
7. Click **Apply Payment**	Click the Apply Payment button. If the payment method is by check, the Check Number window will open. Enter the check number and click OK. If the payment method is by Third-Party Billing, the Customer Search window will open to select the customer the invoice is to be billed to. Once the customer name is selected, the invoice is charged to that customer's account and their name is printed on the invoice under the third-party billing summary section. For Credit, key in the Amount to Post and the system deducts the amount needed to pay the invoice from the total credit amount available – or - Click the Use Credit for Payment button to select the individual credit amounts to be used.
8. Click **Payment Details** (if applicable)	Click the Payment Details button to open the Payment Details window to view and if needed delete a payment. Click the Close button to return to the Cash Drawer screen.
9. Click **Finish**	Click the Finish button to close the invoice, post the payment, and if selected, print the final paid invoice.