

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

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Section 1

Using This Manual

Section 1

Introduction

Brief Description

C.A.R.S. (Computerized Automotive Repair order System) is designed to increase sales and replaces hand written repair orders. Over 500 jobs or repair orders may be in progress at one time. The systems' "work in progress" rack allows you to jump from job to job, making additions or changes to any repair order at any time.

Concept

C.A.R.S. is designed to increase sales. While entering an appointment or starting a repair order, the needed services flash on the screen making it almost impossible to miss the opportunity for selling add-ons. You can also view the previous repair order written on each vehicle to see what additional services you recommended the last time the vehicle was in.

C.A.R.S. allows an in-depth analysis of shop operations by tracking labor and part sales in detail. Parts are instantly removed from inventory as they are billed to the repair order.

C.A.R.S. also fully integrates with The Manager's Assistant TM, The Service Manager TM, Precision Parts Manager, and Tickler Letter.

Overview

At the end of the shift or day, paid work orders are appropriately marked. At this time, work orders that are to go on account (charge sales) are also marked. The Transfer Paid Repair Order function will print a job-costed posting copy of each repair order. A recap report will summarize sales, cost of goods, and gross profits for the day and for the month. This process will also store a copy of the repair order in Filedrawer.

The system and this instruction manual assume that you have a good working knowledge of The Manager's Assistant TM, The Service Manager TM, and Precision Parts Manager. The instruction manual will lead you through all the necessary steps needed to implement and use the system profitably. The instructions are organized so that following the manual will teach you how to use the system step-by-step.

Organization of this manual

Section 2 explains how to step up the system and the information required to do so. Sections 3.0 through 3.8 explain the day to day use of the system.

It is recommended that you read through this manual prior to installing the system. This will provide an overview that will make the implementation of the system easier.

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

Section 1

Using this Manual

Interchangeable terms

The words "Repair Order", "Job", and "Work Order" are used interchangeably. The words "Work in Progress Rack" and "Repair Orders Pending" are used interchangeably.

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

Section 2

Setting Up The System

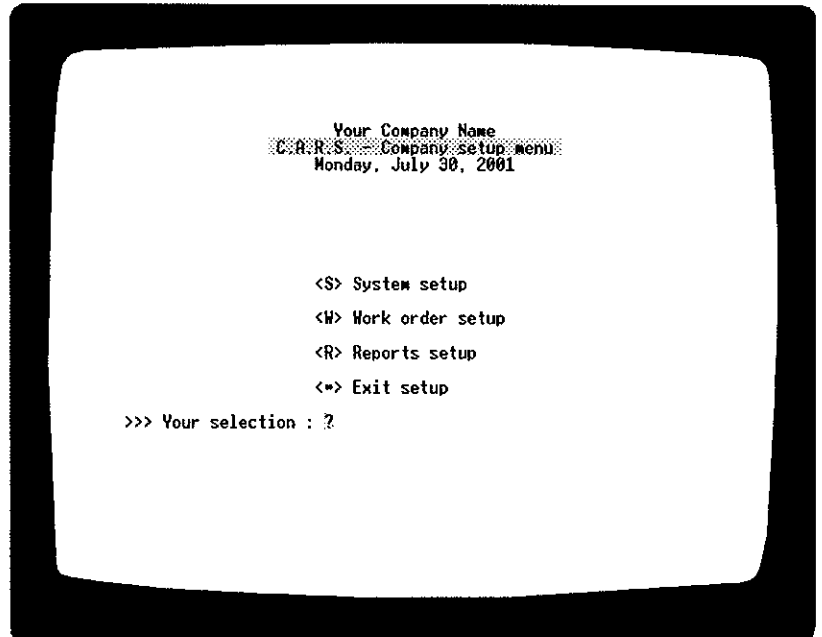
Setting up the system

To enter the C.A.R.S. set up function, at the Precision Main Menu, press **C**. At the C.A.R.S. main menu press **U** for the Utilities menu. Then press **C** for Company setup.

Precision tip: You **MUST** do the set up for the Filedrawer before trying to enter the C.A.R.S. function. (See the Filedrawer instruction manual for more information.)

C.A.R.S. Company setup function

The following will appear:



Company setup menu

Briefly, this is what each choice will do:

System setup

Allows you to enter a password for the C.A.R.S. function. The System setup section contains the settings for Repair order entry, Repair order printing, Repair order transferring, Invoice sales department, Sales tax tables, Automatic billing of shop supplies, Group definitions, Instant tire quote and Discount plans.

Work order setup

Allows you to enter the standard information that appears on printed repair orders. The Work order setup section contains the information for the Top line advertisement, Add a name built-in answers, Standard warranty, Description of work, Extended status code titles and Disclaimers.

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Report setup

Allows you to adjust report information and to print versions of some reports. The Reports setup section contains information for the Transfer recap MTD and YTD, Transfer recap sales tax table, Business source code (Titles) and Business by source code totals.

Exit setup

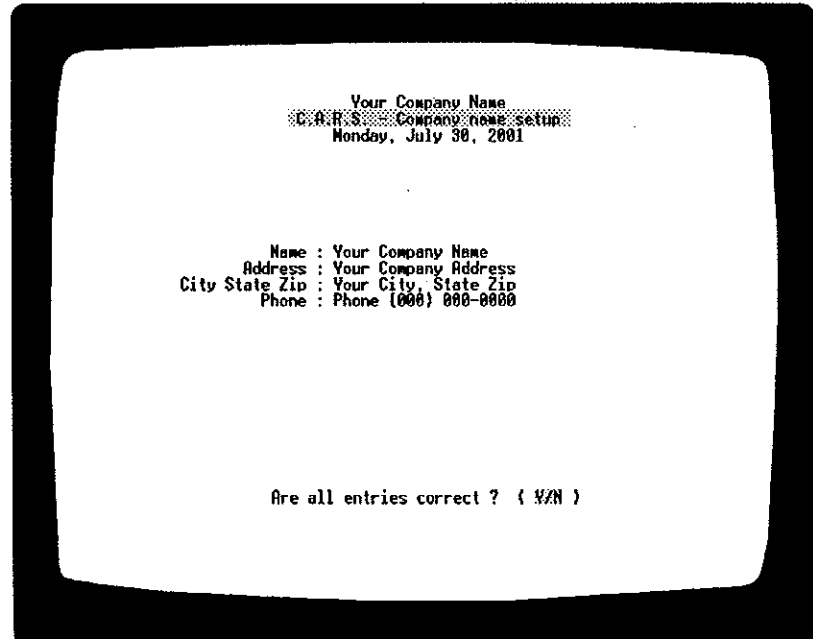
Returns you to the C.A.R.S. main menu.

System Setup

System setup

If this is the initial setup complete this section of the setup before setting up the Work order or reports sections. To enter the System setup, press **S**.

The following will be displayed:



Password

The system will allow you to protect the information by using a password. When using a password, the system will ask for the password when changing a completed or paid repair order back to pending. The system will also ask for the password when changing the status to codes "5-Void/Erase" or "8-Void/File".

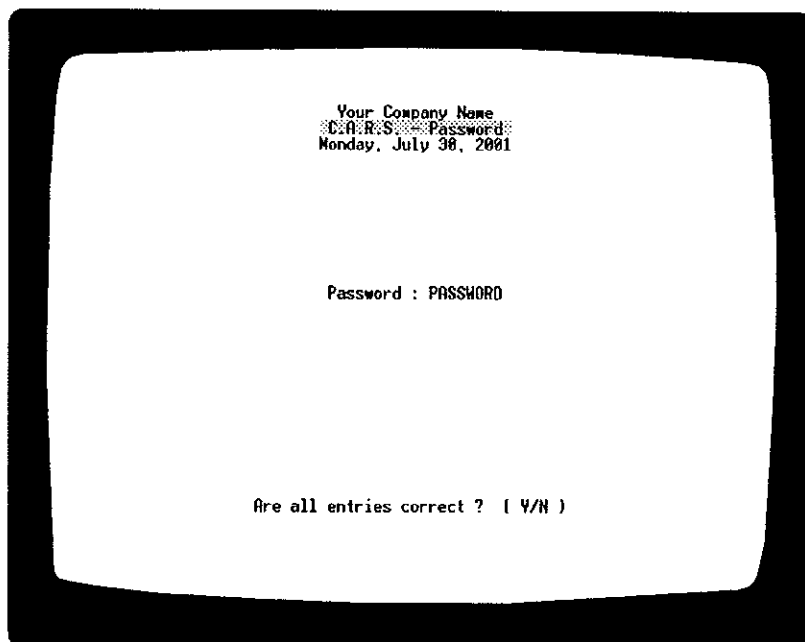
Enter password

The use of a password is optional. To enter a password press **[Esc]**. The password entry screen will appear.

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Using a password

A password may contain up to 8 characters. The characters can be letters, numbers, and/or punctuation marks. The word "PASSWORD" when used in the system as a password will prevent the system from asking for a password. This will allow anyone to access all information. To enter a new password, answer No to the question "Are all entries correct?". Press [F5] to erase the existing password. Next, type in the password you would like to use. After entering the password, you will be asked "Are all entries correct?". Answer Yes to return to the Company name setup screen.

Precision tip: The system will not accept a password of just a blank space.

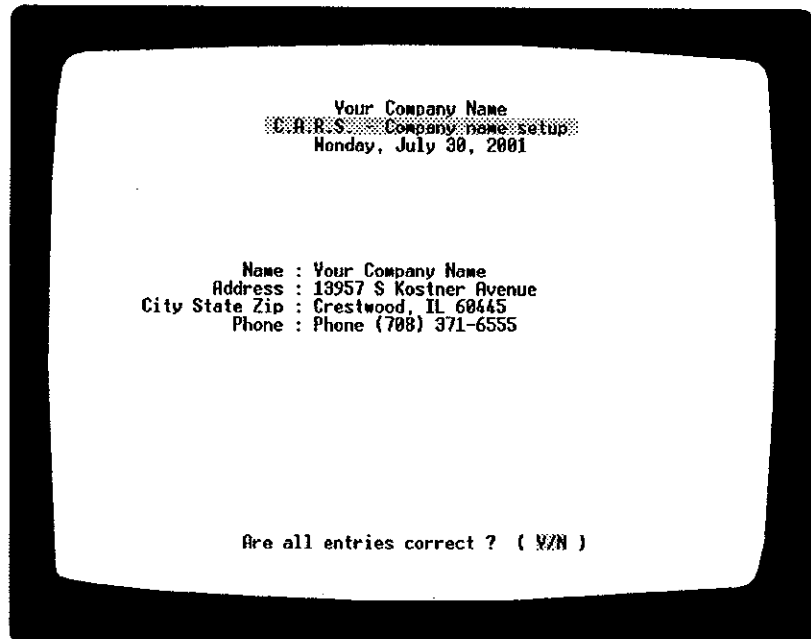
Editing the address

If you are performing the initial setup, the information shown is not correct. To change the information shown, press N in response to the question, "Are all entries correct?". The system will allow you to enter your correct address, city, state, zip code, and phone number on the appropriate lines.

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

Section 2 Setting Up The System

Type your company address as you would like it printed on the top of you repair orders, including any spaces, commas, periods or other punctuation. When printing, the computer will adjust the information so that all lines will be centered on the repair orders. Do **NOT** attempt to center the information on the screen.



Your company name

You cannot change your company name. Your company name can be changed only by Precision Data Systems. Attempting to change your company name may cause the system to malfunction.

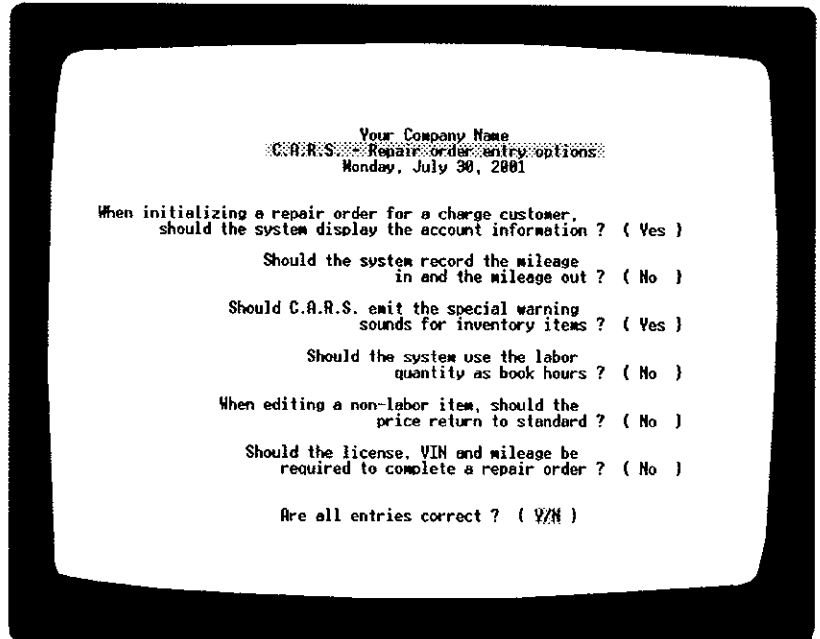
COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

Section 2

Setting Up The System

Repair order entry options

Once the information is correct, answer es. The system will show the Repair order entry options screen:



Precision tip: If you would like to change the answers to the questions, answer o in response to "Are all entries correct?".

Display charge
account information

When initializing a repair order for a house charge customer the system displays the account number, account name, current posted balance, available credit (if credit limit is used) and the date of the last payment. If you do not want this information displayed when initializing a repair order, answer o to the question "When initializing a repair order for a charge customer, should the system display the account information?".

Precision tip: The current posted balance and the date of the last payment shown are as of the last time The Manager's Assistant™ - Post invoices function was performed.

Mileage in / Mileage out

Answering es to this question will cause the system to ask for the mileage on the vehicle when it came in and for the mileage when the vehicle left the shop. If you do not enter a mileage in and the mileage out as the same.

Precision tip: The system will store the mileage out for the Service history and last service information.

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Section 2 Setting Up The System

Warning sounds for inventory items

Ordinarily, the system will emit special warning sounds with the following warning messages: "STOCK IS LOW", "LAST ONE", "OUT OF STOCK", and "BELOW COST". If you wish to have the system emit the sounds with these messages, answer Yes. If you do not wish to have the sounds with the messages answer No.

Precision tip: The reorder high and low levels must be set for the "STOCK IS LOW", and the "LAST ONE" messages to appear. See pages 20 and 23 for information on reorder levels.

Labor Quantity as book hours

When a labor item is entered the system will multiply the quantity times the price each to calculate the price charged to the customer. Normally when editing the labor quantity in the repair order the system will recalculate the price charged to the customer. If you do not pay commissions or if you pay commissions based upon a percentage of labor sales, answer No to the question.

The Manager's Assistant™ bookkeeping function can calculate employee commission by book hours. To do this the quantity must be changed to the book hours that are to be credited to the employee. Answering Yes, will allow you to edit the labor quantity to the book hours. The dollars charged to the customers will not change.

Precision tip: If commissions are based upon a dollar amount per book hour, the amount per book hour must be entered into The Manager's Assistant™ - Employee Inquire/Edit. See Section 2.3 of The Manager's Assistant™ instructions manual for more information.

Precision tip: For more information on using this feature see the section on "Billing labor using Book Hours" option in this manual.

Editing a non-labor item

There are times when entering a non-labor item (part) on a repair order that you may find it necessary to change the price from the retail price listed in the inventory for this item. If you later edit the line, the system puts back the retail price listed in the inventory. If you wish to have the system do this answer Yes to the question "when editing a non-labor item, should the price return to standard?".

If when editing the item you would like the system to retail the price you entered, answer No.

License, VIN and
Mileage required

Answering Yes to this question will prevent changing the status of a repair order to complete or paid if the License plate number, VIN number and/or the Mileage is missing from the repair order. If you

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Setting Up The System

do not wish the system to prevent the changing of the status if the information is missing, answer No.

Repair order
printing options

Once the information is correct, answer Yes. The system will display the following:

```

Your Company Name
C.A.R.S. - Repair order printing options
Monday, July 30, 2001

Should "DO NOT PAY, THIS IS NOT A BILL!" appear on
completed repair orders that are not marked paid ? ( No )

Should customer copy of repair order be printed
by pressing "small"<H> instead of <SHIFT>-<H> ? ( No )

First group that does not print as "Labor" ? 02

Should stock numbers be suppressed when printing
a customer-copy of a repair order ? ( No )

Should the system group repair order
line items by Sub-Job ? ( Yes )

Should Sub-Job subtotals include sales tax ? ( Yes )

Are all entries correct ? (  )
```

"DO NOT PAY" Message

When a password is used any repair order with a status other than "Complete" or "Paid" can have the following message period:

*******DO NOT PAY! THIS IS NOT A BILL*******

This line prints just above and below the "TOTAL DUE" line. A customer will be hesitant to pay when the repair order says that it is not a bill.

If you would like this message to print on repair orders not marked "Completed" or "Paid", answer Yes to this question. If you do not wish to have this message printed, answer No.

Printing customer-copy
of repair orders

There are certain features which effect only the customer-copy of printed repair orders. (The suppress stock numbers and suppress history are two examples.) If you would like the customer-copy of the repair order to be printed by pressing [Shift]-[H] answer No to this question.

First Group not
printed as "Labor"

The system is supplied with only Group number 01 assumed to be labor. When printing repair orders any stock number in Group

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Section 2 Setting Up The System

number 01 is blanked out and the word "Labor" is printed in it's place. It is possible to have additional groups treated a "Labor".

The "Labor" groups must be consecutive Group numbers. These additional groups may be directed to the same labor sales department or may be directed to additional sales departments. These groups could be used for such things as Body Shop labor, Mechanical labor or Tire Labor. If you would like to use groups 01 through 04 for "Labor" groups enter as the first groups that does not print as "Labor".

Suppress stock numbers

Ordinarily, the system will print stock numbers on all copies of the repair order. Answering to this question will prevent stock numbers from appearing on the customer-copy of the repair order. Stock numbers will appear when printing a shop copy of the repair order. If you wish to have stock numbers on all repair orders, answer to the question.

Sub-jobs

Answering to "Should the systems group work order line items by sub-job?" adds a column on to Page 2 of the repair order. The "Sj" column will appear between the Stock No. and the Qty columns.

Precision tip: If you are using a macro program such as Newkey and you already have macros which enter the parts and labor, turning on Sub-jobs will cause your macros to malfunction. You must edit the macros to include the "Sj" column. See the instruction manual for your macros program for more information on editing the macros.

Using sub-jobs enables you to group the labor for each specific service with the parts related to that service. For example, if you have billed an oil change and a brake job on the same repair order, using sub-jobs will cause the system to list the labor and parts for the oil change, print a subtotal for the oil change, list the labor and parts for the brake job, the print a subtotal for the brake job.

Sub-jobs subtotals
include sales tax

When using Sub-jobs the subtotals displayed on the screen and printed on the repair order will include any applicable shop supplies and sales tax. It is possible to display and print the subtotals without the sales tax included.

If you would like the subtotals displayed and printed without the sales tax included, answer to the question "Should Sub-job subtotals include sales tax?".

If you would like the Sub-job subtotals to display and print with both shop supplies and sales tax included, answer .

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Repair order
transfer options

Once the information is correct, answer es. The system will show the following.

```

Your Company Name
C.A.R.S. Repair order transfer options
Monday, July 30, 2001

Should Transfer Paid Repair Orders print a
job costed copy of each repair order ? ( Yes )
Complete or Abbreviated ?      Abbreviated

Should Transfer Paid Repair Orders print a
Tax Audit copy of No Tax repair orders ? ( No )

Should C.A.R.S. inventory transactions be
included in the posting report ? ( Yes )

Should oil sales (dept. B) automatically
transfer to shift checkout ? ( Yes )

Are all entries correct ? ( Y/N )
```

Job costed copies

Normally, the Transfer Paid Repair Orders function will cause C.A.R.S. to print a final copy of all paid repair orders showing your cost. If you wish to have the system print this copy, answer es to the question. If you do not want C.A.R.S. to print this final copy, answer o.

Precision tip: The transfer Paid Repair Order function will always print a final copy of voided repair orders and will always print a transfer recap.

Completed or
Abbreviated copies

If you have answered es for job costed copies you will be allowed to choose complete or abbreviated copies of the repair orders.

Pressing for a complete copy will print the repair orders in complete detail including individual part numbers, description of work and service history.

Pressing for an abbreviated copy will print the invoice number, customer name, address, type or payment, vehicle description and mileage. It will show the cost, retail and profit figures for each sales department. It will not print the description of work, service history or individual part numbers.

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Tax audit copies

Normally, the Transfer Paid Repair Order function will print an extra copy of all repair orders excluded from sales tax. This extra copy is called the "Tax Audit Copy". These copies may be kept separately so that in the event of a sales tax audit, you have complete documentation as to the exemptions you have claimed on your sales tax return. If you wish to have the system print these extra copies, answer Yes. If you do not wish to have the system print these extra copies, answer No.

Precision tip: If you are printing abbreviated copies the Tax Audit copy will not print.

Inventory Posting report

At the end of the shift or end of the day, you will have C.A.R.S. transfer all paid repair orders to The Manager's Assistant TM, the Service Manager TM, and Precision Parts Manager. During this process, Precision Parts Manager will produce a posting report of any sale, received or on-order transaction entered into Precision Parts Manager or C.A.R.S.. Transactions entered directly into Precision Parts Manager will always appear on the posting report. It is your option, however, to have sale and received transactions entered directly into C.A.R.S. appear on the posting report.

If you wish items directly entered into C.A.R.S., to appear on the posting report, answer Yes to the third question. Otherwise, answer No.

Precision tip: You should allow the system to print all transactions on the posting report until you have become very familiar with the operations of C.A.R.S. and its interaction with Precision Parts Manager.

Transfer Oil sales

As supplied, The Manager's Assistant TM will not accumulate amounts entered into the Oil department (department B) unless the system had been modified per Appendix C of The Manager's Assistant TM manual. The modification, if it was used, in effect answered the fourth question shown with a "Yes". If you wish oil sales entered on the C.A.R.S. repair order to accumulate in the sales summary of the shift checkout, answer Yes to the fourth question. If, however, you depend upon the key item inventory to compute oil sales, answer No.

Repair orders marked
paid cash

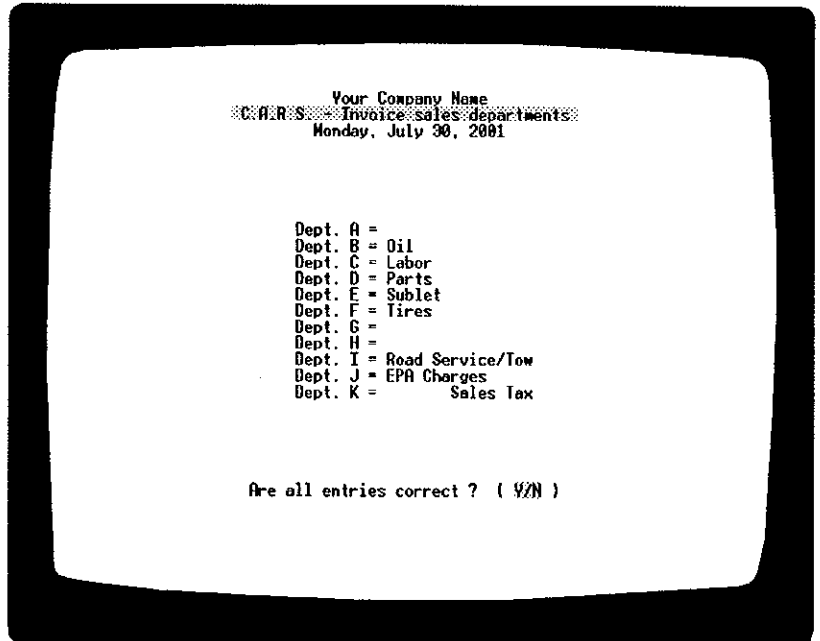
On a repair order in C.A.R.S. you have the option of having the system calculate change due for repair orders that are marked PAID CASH. When the option is turned on the system will prompt you for the tendered amount and calculate change due.

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Section 2

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Once the information is correct, answer Yes in response to "Are all entries correct?". The following will appear:



Invoice sales departments

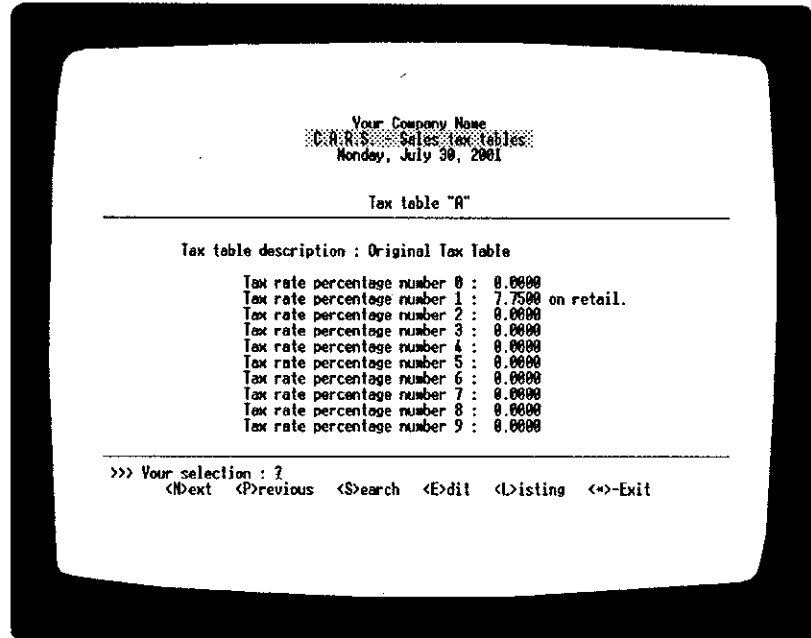
The computer will summarize the sales by sales department on the customer's repair order. The names of the sales department that you use internally in The Manager's Assistant TM may not be what you wish to have printed on the C.A.R.S. repair order. Therefore, you may enter the names of the sales department as you wish them to appear on the repair order. Remember that these sales departments (A through K) correspond to sales department A through K in The Manager's Assistant TM.

Precision tip: Sales department K is usually used for recording sales tax.

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Section 2 Setting Up The System

Once the information is correct, answer es in response to "Are all entries correct?". When the Sales tax tables screen appears, tax table "A" will be displayed.



Sales tax tables

The system will compute sales tax based upon the sales tax percentages contained in any of 10 different sales tax tables. This is usually sales tax table "A". At least one sales tax table must contain all zeros. This is usually sales tax table "J". Having the system calculate the sales tax using a sales tax table with all zeros calculates no sales tax. This is used for tax exempt sales.

Multiple sales tax tables

Multiple sales tax tables allows the system to automatically calculate the sales tax for taxable sales made in multiple taxing districts. By using more than one sales tax table for no tax sales, it enables the system to divide no tax sales by wholesale, interstate commerce ICC exempt, tax exempt organizations, tax exempt sales to government, etc..

Because the system will total sales made using each sales tax table, you can also separate and track sales from different activities of your business and monitor the profitability of the different activities. For example, you can separate over-the-counter parts sales from the repair shop sales. You could separate the truck repairs from the welding sales or the mechanical shop from the body shop. You can even see a sales tax table to easily monitor the sales made to a very large commercial account or sales made to customers who receive a discount.

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Sales tax rates

Ten different sales tax rate percentages (Tax rate number 0 through Tax rate number 9) may be entered into each sales tax table. When an item is entered onto a repair order in C.A.R.S., the system will look at the repair order to determine which sales tax table to use. It then looks at the Group definition for that part to determine which sales tax rate within the sales tax table to use. It reads the sales tax percentage stored there and uses it to automatically compute the appropriate sales tax, if any, and adds the sales tax to the repair order.

Each Sales tax table contains ten different Sales tax rates to accommodate all possible methods of calculating sales. For example, in some states labor is not taxed. Thus, the Group definitions for labor (usually Group 01) must have a Tax rate number that contains a sales tax percentage of zero. In some states, repairs which have the labor and parts packaged together at one price are often taxed at a sales tax percentage that is half the normal. This percentage could be entered into Tax rate number 2. The applicable tax rate is assigned to the group in the Group Definitions. (See section on Group Definitions starting on page 18 of this manual.)

Precision tip: For clarity, we recommend you leave Tax rate number 0 at 0.00%. We also recommend that Tax rate number 1 contain the sales tax percentage normally used to calculate sales tax.

Sales tax tables Mini-menu

One the bottom of the Sales tax tables screen is a mini-menu. The mini-menu displays the options available. Pressing **[N]** for Next, will take you to the next Tax table. Pressing **[P]** for Previous, will take you to the previous Tax table. Pressing **[S]** for Search, will allow you to go directly to a specific Tax table. Pressing **[L]** for Listing, will allow you to print a list of all 10 Sales tax tables.

Pressing **[E]** for Edit, will allow you to change the Tax table shown on the screen. When editing the Tax table you will be allowed to enter a description for the Tax table. Some examples are: Farm (Agricultural) sales, Over-the-counter parts sales, Welding shop sales, Wholesale sales, ICC exempt, etc...

Precision tip: If you add a new Sales tax table at a later time, you will have to change the sales tax table that is stored on the customers' vehicle files in The Service Manager TM- Inquire/Edit.

Tax on retail

Sales tax may be calculated on the retail price of the item or on the cost of the item. If you enter the sales tax percentage as a positive number (without a minus sign), the system will calculate sales tax based on the retail price. The sales tax will be put in sales department K. (Department K corresponds to sales department K

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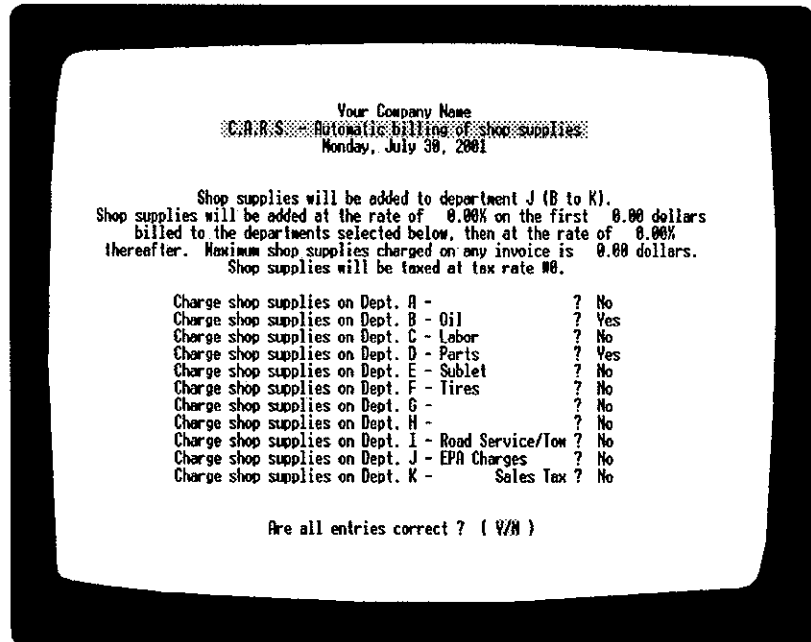
in The Manager's Assistant TM. See The Manager's Assistant TM Instruction Manual, Section 2.1 for more information about sales departments.)

Tax on cost

Entering the sales tax as a minus percentage (beginning it with a minus sign) will cause the computer to calculate the sales tax based upon the cost of the item. Sales tax calculated on cost rather than on retail price will NOT appear as a separate item in sales department K; the sales tax will be ADDED to the retail price of that item as shown on the work order.

After editing the sales tax table, the computer will show if the sales tax will be calculated based on retail price or cost for each of the nine tax rates.

After editing the Sales tax tables, press . The following will appear:



Automatic billing
of shop supplies

The system can automatically add a percentage charge to the repair orders. Most frequently used for shop supplies, this percentage charge can be for shop supplies, hazardous waste disposal charges (EPA charges) or for a city sales tax that must be collected separately from states sales tax. This percentage may be based upon sales billed to any sales departments you select.

Shop supplies sales
department

To have the system automatically bill shop supplies to the repair orders you must assign a sales department to accumulate the shop supplies. (If possible use Department "J".)

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

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Precision tip: If you are using The Manager's Assistant™, you must also set up the sales department in The Manager's Assistant™ Company Setup.

Two percentage rates

Shop supplies may be added at two different rates; the first rate will be used until a specified dollar amount has been reached and then at the second rate thereafter. The system can stop adding shop supplies after a specified maximum charge for shop supplies has been reached.

The first rate can be higher or lower than the second rate. For example, you may add shop supplies at the rate of 2.73% on the first \$500.00 billed to the repair order and 1.28% thereafter; or you may add shop supplies at the rate of 1.28% on the first \$500.00 billed to the repair order and 2.73 thereafter.

Maximum shop supplies

You must put a maximum on the amount of shop supplies billed to any repair order. The system will be prevented from charging more than this amount. The maximum can be as high as \$999.99.

Precision tip: A fixed amount for shop supplies/EPA charges can be "simulated" by using a very high percentage. An example would be to set the percentage at 999.99 up to a maximum of \$4.50. The system will add a \$4.50 as soon as there is as little as \$0.45 on a repair order.

Tax on shop supplies

You can charge sales tax on shop supplies. Enter the tax rate number from the Sales tax table discussed earlier. To prevent the system from charging sales tax on shop supplies, enter the tax rate for shop supplies as zero.

Sales departments charged
shop supplies

Shop supplies may be calculated on one, some or all sales departments. To cause shop supplies to be computed on the dollars billed to a sales department, enter yes to the right of the sales department. To prevent the shop supplies from being computed on the dollars billed to a sales department, enter No.

Precision tip: Shop supplies must not be charged on shop supplies or on sales tax. DO NOT allow the system to charge shop supplies on shop supplies or sales tax.

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Group definitions

Once the information is correct, answer Yes. The group definitions screen will appear:

```

Your Company Name
C.A.R.S. Group definitions

Group: 00
Description: Internal use only
Vendor:
Location:
Payables abbreviation:
SB:
Retail: 0.00 Reorder low-level: 0
Reorder high-level: 0

Calculate job cost by method: Average cost
Sales department (A-K): A - Tax rate # (0-9): 0
Should items in this group add to inventory totals ? No
Should decimal quantities be allowed ? No
Service Manager automatic service trigger :
Quick catalog reference code (A-Z) :
Calculate price using Profit percent or Cost plus amount ? Profit percent
Gross profit of 0.00% up to a cost of 0.00 and then 0.00% thereafter.
Comment: * DO NOT USE FOR PARTS *

>>> Your selection : ?
<N>ext <P>revious <S>earch <E>dit <L>isting <R>enumber <*)-Exit
<I>nstant tire quote setup

```

Inventory groups

The Precision Parts Manager system will allow you to divide your inventory into 1296 groups. A group can be any logically related number of parts that, when sold, are charged to the same sales department. An example of an inventory group would be fan belts. All fan belts, when sold, get charged to the same sales department. Radiator hoses could be another group. That group may contain molded radiator hoses, flexible radiator hoses, bypass hoses and heater hoses; or molded hoses could be one group, flexible hoses could be another, bypass hoses a third, etc..

Group definitions allow you to set up your inventory system by entering generalities about each group. When items are entered into the system your number preceded by its two character group definition. The system will look up the generalities entered into the Group definitions based upon the two character prefix.

Precision tip: Group definition prefixes may be two numbers, two letters or a combination of a number and a letter.

Uses of Group Definitions

The generalities for each group as entered into the Group definitions have several uses. When entering your parts for the first time, the information entered into the group definitions will eliminate most of the redundant typing by automatically supplying the part description, location, and vendor from whom the part is normally purchased. When appropriate, the system will

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automatically supply the retail price, reorder low-level and reorder high-level of each new part entered.

Group 00 (internal use)

Group 00 is reserved for internal use. When C.A.R.S. prints the customer's copy of the repair order, any stock number beginning with 00 will NOT appear on the customer's copy. Thus, Group 00 stock numbers are referred to as "invisible" stock numbers.

Invisible stock numbers WILL appear on the job costed copy printed by the Transfer Paid Repair Orders function. Generally, all sales generated by invisible stock numbers will transfer to the Manager's Assistant TM and thus to the Employee Compensation system if Group 00 is assigned to a sales department. Because Group 00 amounts are invisible to the customer, Group 00 amounts are prevented from affecting Accounts Receivable.

Invisible stock numbers
for commission adjustments

Group 00 can be used for adjusting employee commissions. When Group 00 is routed to a sales department, care must be taken to prevent Group 00 amounts from registering as a bogus sale in The Manager's Assistant TM and thus causing a cash shortage. Routing Group 00 to a sales department is usually used to make corrections to Employee Commissions due to come-backs or when more than one employee participates in the same repair job. This is done using equal but off-setting entries.

An example

For example, suppose that employee number 7 originally received commissions on a job that was billed at \$10.00 labor, and suppose that the come-back was assigned to employee number 4. By making a new repair order in C.A.R.S. and billing the labor using an invisible stock number, a minus quantity for employee 7 and a positive quantity for employee number 4, the computer will deduct the commission from employee number 7 and give the commission for this job to employee number 4. By making this commission adjustment using Group 00, the customer's copy of the repair order will not show the adjustment. However, the adjustments WILL show on the job costed copy produced by the Transfer Paid Repair Orders function and the adjustment will be transferred to The Manager's Assistant TM and into the Employee compensation system.

Tracking Bulk Oil Usage

Group 00 can be used for tracking bulk oil usage. This can be useful if you wish to track bulk oil usage in a quick oil change operation. Instead of entering a dollar amount in the price field, enter the number of quarts of oil used. For example, 4 ¾ quarts should be entered as 4.75. The total of bulk oil used that day would be printed on the Transfer Recap but would not transfer to The Manager's Assistant TM. The Manager's Assistant TM must be told to completely ignore invisible part numbers. This is done by assigning Group 00 to no sales department (enter a blank space within the sales department field of the Group definitions for the 00 Group.)

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Invisible stock numbers for commissions not based on a percentage

Group 00 can also be used for paying employee commissions when the commissions paid are not based on a percentage of sales. To do this, the invisible part numbers must be prevented from appearing as sales within The Manager's Assistant TM assign Group 00 items to sales department "A" (gasoline). Sales amounts in Department "A" on repair orders are ignored by The Manager's Assistant TM, although the dollars transfer into the Employee Compensation system. You would use amounts posted to the Gasoline department in Employee Commissions as the basis for paying the employee.

Precision tip: When using this method, do not credit and real gasoline sales to employee who will be paid commission using this method. Doing so will cause the gasoline sales to be erroneously added to his commissioned sales.

Group 01 (labor)

Group 01 is reserved for labor. When C.A.R.S. prints the repair order, all part numbers beginning with 01 will be replaced by the word "labor". Refer to Appendix A-Sample Reports for a typical repair order.

Retail price

When receiving items into the inventory system the system will recommend a retail selling price based on the cost of the item entered and the gross margin percentages stored in the definition for the group.

Reorder low-level & high level

The reorder low-level is the quantity on hand of an item which will cause the computer to suggest a reorder. The reorder high-level is the maximum quantity of an item you wish to stock. When the computer suggests an order, the system will recommend ordering enough of the item to bring the quantity on hand up to the reorder high-level.

Assigning your inventory groups

When assigning your inventory groups, try to place related inventory groups adjacent to one another. For example, if you decide that inventory Group CO will be the cooling system catch-all, perhaps Group CB should be fan belts, Group CC should be hose clamps, Group CH should be cooling system hoses, Group CW should be water pumps, etc.. If your particular business does not sell many cooling systems parts, you may wish to place all items related to the cooling system into one group and simply call that group "cooling system parts".

When assigning your inventory groups, begin by organizing your inventory on the computer into the same groups that you currently organize your inventory. Keep in mind, however, that Precision Parts Manager can also keep track of items that are sold but not stocked regularly. You may wish to establish groups for these items.

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For example, you may frequently selling bearing but do not keep them in stock. By setting up a group for bearings, every time one is purchased for resale, you can record the receipt of that item into inventory, then record the sale of the item. The net effect on your overall inventory value will be zero; one received, one sold, net change; zero. The system will, however, develop a sales history of these items. This information will help you decide if you can benefit by stocking that item.

Group Definitions Mini-menu

On the bottom of the Group definitions display is a mini-menu. The mini-menu displays the options available. Pressing **N** for Next will take you to the next group. Pressing **P** for previous, will take you to the previous group. Pressing **S** for search, will allow you to go directly to a specific group. Pressing **E** for edit, will allow you to change the Group definition shown on the screen.

Listing of Group Definitions

Pressing **L** for listing will allow you to print a list off all 1296 groups or just the active groups. (An active group is a group which has a description and/or a comment.) You will also have a choice of a complete or abbreviated listing of the Group definitions set up in the system. The complete report will give you the following information: Group prefix, description, vendor, department, tax rate, gross profit, low percentage, break point, high percentage, type (add or non-add), comment, retail price, and reorder low and high. The abbreviated report will not print the comment, retail price or reorder levels.

Renumber Group Definitions

Pressing **R** for renumber will allow you to renumber the Group definition shown on the screen.

Precision tip: The Group definition Renumber function does not renumber the items in the group. Use the Precision Part Manager-Utilities-Move group function to move any parts from the old groups to the new group. See the Precision Parts Manager manual for more information.

An example of a Group Definition

Let us suppose that you have decided that Group CB will be your group for fan belts ("CB" stands for Cooling system, fan Belts.) Let us further suppose that your supplier, A Parts Company, charges you the same price, \$6.20, for most fan belts you buy from them. Also, let's suppose that you have made it your company policy charge \$12.90 for all fan belts bought at this price. For belts which you purchase at a cost other than \$6.10, you have decided to figure into the selling price a gross profit of 45 percent, if the belt costs more than \$20.00 the gross profit percentage will be 40 percent. Also suppose that the number of each fan belt stocked and the reorder levels vary according to the popularity of the particular item.

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Entering a Group Definition

To go to group CB press **[S]**. The system will show the prompt ">>>Group:" in the lower left hand side of the screen. Type **[CB]**, then press **[Enter]**. The current Group Definition for group CB will appear. If you are setting up the system for the first time, there will be nothing shown on the screen because no group definition for group CB has ever been entered.

```

                                Your Company Name
                                C.A.R.S. Group Definitions
                                Group: CB
                                Description: Fan belt
                                Vendor:
                                Location:
                                Payables abbreviation:
                                Sb:
                                Retail: 0.00      Reorder low-level: 0
                                           Reorder high-level: 0

                                Calculate job cost by method: Average cost
                                Sales department (A-K): D - Tax rate # (0-9): 1
                                Should items in this group add to inventory totals? Yes
                                Should decimal quantities be allowed? No
                                Service Manager automatic service trigger: R
                                Quick catalog reference code (A-Z):
                                Calculate price using Profit percent or Cost plus amount? Profit percent
                                Gross profit of 47.00% up to a cost of 15.00 and then 42.50% thereafter.
                                Comment:
                                >>> Your selection : ?
                                <N>ext <P>revious <S>earch <E>dit <L>isting <R>enumber <->-Exit
                                           <I>nstant tire quote setup

```

Description & Vendor

To enter a Group definition for group CB, press **[E]** to edit the information. The system will allow you to type the description of "fan belt" and the name of the vendor from which the fan belts are usually purchased, "A Parts Co."

Location field

If you wish you can enter the location of the parts within your building (for example, "East wall".) If you do not wish to enter the location, press **[Enter]** to skip the location field.

Payables Abbreviation

The Payables abbreviation field appears only if you have The Manager's Assistant TM- Accounts Payable function. Enter the Accounts Payable vendor abbreviation for the vendor which usually supplies you with items in this group. When receiving in C.A.R.S., the Payables Abbreviation entered here will automatically appear on the Vendor/Invoice # field. Putting the Payables Abbreviation into the Group Definition will cause the Payables Abbreviation to appear on all new items received.

Precision tip: The Vendor and the Payables Abbreviation usually refer to the same vendor but the entries in those fields do not have to be the same.

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Precision tip: Use Precision Parts Manager-Inquire/Edit function to enter the Payables Abbreviation onto existing items.

Sb (Sold By) field

The Sb (Sold by) field only appears if the following are true:

1. You have The Manager's Assistant™
2. The "calculate commission for salesmen" feature has been turned on in The Manager's Assistant™. (See The Manager's Assistant™ manual Section 2.1-Company setup for more information.)
3. The "Use Salesmen (Sb) to track sales dollars by categories" feature in Precision Parts Manager has been turned on. (See the Precision Parts Manager manual Section 2-Company setup for more information.)

All new items received to this group will automatically contain the number entered here in the Sb field. (See the Precision Parts Manager manual Section 2-Company setup for more information.)

Press [F3] for a list of employees

When the cursor is in the SB field the prompt "Press <F3> for list" will appear near the bottom of the screen. Pressing [F3] at this time will display a list showing the employee names and numbers as assigned in The Manager's Assistant™- Employee information. To have the system insert the employee number, use the arrow keys to highlight the employee number you would like to use and press [Enter]. If you do not wish to use an entry on the display and would like the display to disappear, press [Esc].

Precision tip: See The Manager's Assistant™ manual Section 2.3- Employee information for more information on entering employees.

Retail price

In our example, we generally pay \$6.10 for a fan belt and sell it for \$12.90. Enter the retail price of \$12.90 into the retail field. If you sell fan belts for all different prices, you would not enter a retail price. Because the retail price is different for each item within this group, you cannot make a generality about the retail price of the group, and therefore should not enter that information into the definition for that group.

Reorder low-level & high-level

After entering the retail price, the computer will allow you to enter the Reorder low-level and Reorder high-level for this group. If you generally stock three of each fan belt, and wish to place an order for a particular fan belt when its quantity falls to one you would enter one as the reorder low-level, and three as the reorder high-level because these quantities generally apply to most fan belts in inventory.

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Calculate job-cost

As items are put in the repair order the system records the cost of the item on a hidden portion of the repair order. When using cost-plus discounting the discount is calculated using the cost-plus percentage in the discount plan for that group. As supplied the system will calculate the cost using the Average cost.

The system has the ability to use Average cost, Current cost or the higher of the two to change the calculation of cost-plus discount prices from average cost plus the percentage to current cost plus the percentage. This question allows you to tell the system to record the cost of the line item using Average cost, Current cost or the Highest cost. Press 1 to use Average cost, 2 to use Current cost or 3 to use the Highest of the two.

Precision tip: Note that changing the job cost calculation method for a group affects any discount plans set to cost-plus discount pricing for that group.

Precision tip: This option is only available in C.A.R.S.-Company setup-Group definitions. It will not appear in Precision Parts Manager.

Sales department

When an item is used, its sales will be accumulated in one of eleven sales departments designated by letters A through K.

Manager's Assistant™ user note: Sales Department A corresponds to gasoline, Sales Department B corresponds to oil department and Sales Department C through K correspond to departments C through K. (See the Manager's Assistant™ instruction manual, Section 2.1 for more information.)

C.A.R.S. user note: Sales tax, if used, must be placed in Manager's Assistant™ sales department K. Prior to using C.A.R.S., make sure that all groups (including unused groups) are assigned to a sales department.

Enter the letter to indicate the appropriate sales department to which the sale of an item from this group should be charged.

Press [F3] for list of Sales Departments

When the cursor is in the Sales department (A-K) field the prompt "Press <F3> for list" will appear near the bottom of the screen. Pressing [F3] at this time will display a list showing the Sales departments. To have the system insert a letter from the list, just press the letter you would like to use or use the arrows to highlight the entry and press [Enter]. If you do not wish to use an entry on the display and would like the display to disappear, press [Esc].

Precision tip: The system uses the information from the invoice sales department entered earlier. See the section

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on invoice sales department in this manual for more information on invoice sales department.

Tax rate

Enter the Tax rate number (0-9) from the Sales tax table. (See section on Sales tax rates, on page 14 of this manual for more information.)

Precision tip: Enter the number of the sales tax rate, no the sales tax percentage. Remember that sales tax rate number zero means no sales tax.

Add to inventory totals

The Precision Parts Manager system will maintain the value of your inventory four ways: at retail, at current (last) cost, average cost, and at the lower cost or market (L.C.M).

Non-add items

As the system is supplied, the inventory groups 01 through 09 have been reserved for items in your inventory that are not added to the inventory values. The system will maintain all information on non-add items just as it will for items which are added to the inventory values. More or fewer groups may be reserved for non-add items by changing the answer to the question "Should items in this group add to inventory totals?"

Items placed in a non-add group will never be included in the total value of your inventory as maintained Precision Parts Manager. These groups are reserved specifically for items which are stock but are on consignment, or for accumulating sales history on abstract (imaginary) items such as labor, road service, machine shop/radiator gasoline charged on repair orders, discounts, coupons, and for non-itemized charges such as shop supplies or miscellaneous hardware. The system will keep track of the quantity on hand, the quantity sold, and all of the information maintained on a regular item, but the value of those items will not be included in the totals on printed reports of your inventory.

Decimal quantities

As the system is supplied quantities entered must be a whole number. If items in the group you are entering are sold in quantities of less than one, for example labor and oil, answer to the question:

"Should decimal quantities be allowed? (Y/N)"

When entering quantities, whole numbers are allowed. You may enter quantities of 1 to 9999. You may enter a decimal point as long as the total number of characters entered (including the decimal point) is four or less. That means you may enter a quantity with one place past the decimal up to 99.9 or two places past the decimal up to 9.99. The four character limitation does not include the use of a minus sign (if necessary). However, minus quantities are still limited to -999.

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Precision tip: Only groups which contain items which can be sold in quantities less than one should have the answer to this question be changed to Yes. You should consider changing groups that contain labor, lubricants, other fluids hoses purchased in bulk quantities, bottles chemicals and welding materials (structural shapes and plates). Other groups should not be changed.

Service Manager™
automatic service trigger

The Service Manager™ automatic service trigger field will only appear if you have The Service Manager™. Enter the appropriate Service Manager™ category code. All new items received to this group will automatically contain the automatic service trigger entered into this field.

When an item from this group is entered onto a repair order the automatic service trigger will automatically update the appropriate service history category.

Precision tip: If there are existing parts in this group you must enter the Automatic service trigger for each part in Precision Parts Manager-Inquire/Edit.

Quick Catalog

The Quick catalog feature will force the system to memorize up to 26 items and the quantity used on each specific Year/make/model engine combination. Once memorized the item can be put on the repair order by just typing the group number.

Each vehicle Year/make/model engine combination has 26 Quick catalog storage spaces. The storage spaces are designated A through Z. Putting a Quick catalog reference code on a group tells the system which catalog storage space to use when remembering the part used from that group. A Quick catalog reference code should NOT be used on more than one group.

For example, assume oil filters are stored in group "OF". Also assume that you wish to remember which oil filters fit which Year/make/model engine combinations. Putting the letter "A" in the Quick catalog reference code of group "OF" will cause the system to store the LAST oil filter used on that Year/make/model engine combination in storage space "A".

Normally, you would not want to use Quick catalog reference code "A" on any other group. For example, if you also put code "A" on your ignition wires group, when trying to put to use the Quick catalog to put an oil filter on the repair order, you may get ignition wires instead. There are exceptions to the one code/one group rule. Suppose you sell radiators and you have three different lines of radiators, each in three separate groups.

Using the same Quick catalog reference code on all three radiator groups will cause the system to remember a radiator used on each

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Year/make/model engine combination regardless of which line of radiator was used.

Calculate price using

The system can calculate the retail price using one of two methods: "Profit percent" or "Cost plus amount". There are times while receiving items, when it is preferable to add a fixed dollar amount to the cost of the item to calculate the retail price rather than to use a percentage to calculate the retail price.

An example of this is when receiving a tow done by another company. You may prefer to add ten dollars to the cost of the tow up to a cost of fifty dollars. After fifty dollars you want to add fifteen dollars.

Pressing in answer to the question "Calculate Price using Profit percent or Cost plus amount?" will allow you to enter a dollar amount to add to the cost of the item. For the above example you would enter 10.00 for the "Gross profit of \$" field. For the "up to a cost of" field, you would enter 50.00 and the "then" field you would enter 15.00.

Gross profit

Pressing will calculate the retail price of an item using the Gross profit percentages you have entered for this group. Enter into the "gross profit percentage" field the percentage of profit you typically make on items sold out of this inventory group. In the above example, you would enter into the first percentage field. This percentage will be used in calculating a recommended retail price based on a cost you have paid for an item. The next field tells the system up to what cost to use the 45 percent. In the above example, you would enter . Next, enter the percentage to be used for belts which cost more than \$20.00. In the above example you would enter in the second percentage field.

Comment field

After typing in the comment or pressing [Enter] to skip the comment, the system will record the information for this group and the mini-menu will appear.

Precision tip: The comment field is 61 characters long.

Set up a few groups at a time

You do not have to set up all Group Definitions at once. You may set them up, one at a time, or several at a time, then, work with those groups setting up your inventory. After you have set up the inventory in these groups, you could then return to the Group Definitions and set up other groups.

Instant tire quote

Once the Instant tire quote has been set up on each tire group, by displaying any tire in your inventory, the Instant tire quotation will display the price for 1 through 7 tires. The price will include whatever you include when you quote prices on tires. (Some of the

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charges normally included would be: valves mount & balance, tire disposal, shop/EPA charges, road hazard and sales tax.)

Precision tip: The Instant Tire Quote can only be selected on groups which contain the word "Tire" in the description.

Precision tip: If you sell tires which have higher charges than those included in a normal passenger tire sale you will need to set up the Instant tire quote on each group of tires. Follow the procedure below to figure the amounts for each type of tire.

Obtaining the amounts
for Instant tire quote

After you have set up the system go to C.A.R.S. Repair orders pending and find a repair order than has nothing on page 2. (If you have no repair orders pending, create a repair order.)

If your system has been set up to automatically add shop supplies temporarily disable the shop supplies on this repair order. You may do this by putting NO SHOP on the first line of the Description of work (page 3). If your system has been set up to charge sales tax temporarily disable the sales tax on this repair order. You may do this by putting TAX TABLE J on the first line of the Description of work (page 3).

Next, go to page 2 and enter all of the part numbers and labor operation codes (using a quantity of 1) that you would enter on a tire sale repair order. **DO NOT ENTER THE TIRE.** Print a copy of this repair order. After printing the repair order remove the items from the repair order. Don't forget to remove the words NO SHOP and TAX TABLE J from the Description of work.

Next, go to C.A.R.S. Utilities Company setup System setup. Return to the Group Definitions. Search for the first Group Definitions for Tires.

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Entering the Instant
tire quote amounts

Press , to display the "Instant tires quote" screen.

Your Company Name
C.A.R.S. Instant Tire Quote For Tires in group T0
Monday, July 30, 2001

Department	Per Tire
A:	0.00
B: Oil	0.00
C: Labor	0.00
D: Parts	0.00
E: Sublet	0.00
F: Tires	0.00
G:	0.00
H:	0.00
I: Road Service/Tow	0.00
J: EPA Charges	0.00
K: Sales Tax	0.0000

Are all entries correct ? (Y/N)

Answer to the question "Are all entries correct?". Edit the amounts in the "Per tire" column to match the amounts in the "Totals" box on the repair order you just printed. Repeat this process for each of your tire groups.

Correctly figure the sales tax

To correctly figure the sales tax for the Instant Tire quote do the following:

1. Add up the amounts shown on the screen that are normally taxable.
2. Multiply the result by your sales tax rate.
3. Divide the result by 100. If the result has more than five decimal places, round it to four places.
4. Enter that amount on the sales tax line of the Instant Tire Quote screen.

For example, if the taxable amounts add up to \$2.25 and your sales tax rate is 7.75%, multiply 2.25 by 7.75. The result is 17.4375. Divide 17.4375 by 100. The result is .174375. Round that number to four decimal places. The result is .1744. You would enter on the sales tax line.

Precision tip: If you are using a calculator with a control for the decimal places make sure it is in the "F" or "floating decimal" mode.

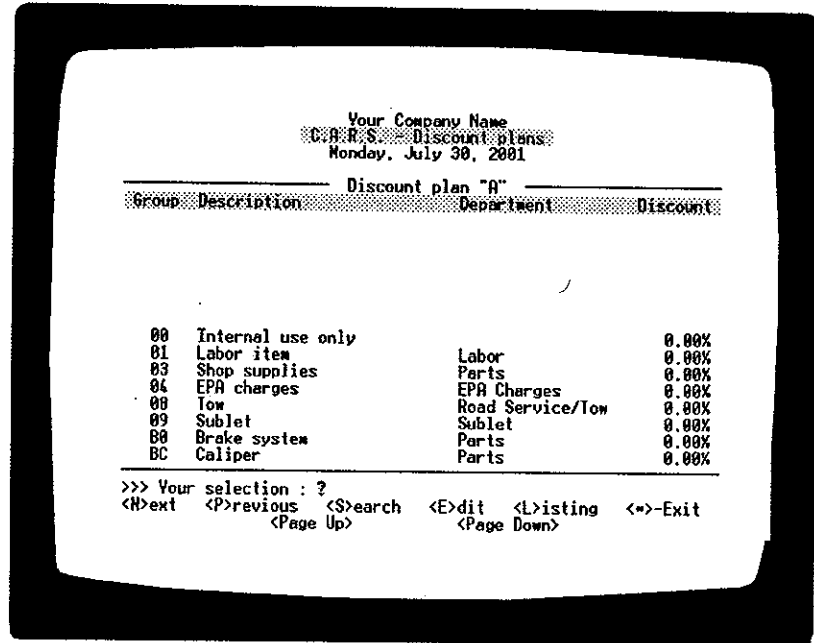
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Group definitions

Once you have entered the "Instant fire quote" information for each of your fire groups, press * to exit Group definitions. The following will appear:



Discount plans

You may have the system discount repair orders by percentage of the total price or by applying a discount plan. Using a discount plan will enable you to discount the repair order by applying a different percentage to each group. Using a discount plan will allow you to discount parts but not discount labor, or vice versa. Using a discount plan will also allow you to discount some things more than others. Discount plans will allow you to provide different discounts to different classes of customers. With 26 different discount plans, you will be able to adjust this discount by altering the discount plan or by moving the customer from one discount plan to another.

How discounts are calculated

If the discount for a group is a minus percentage, the selling price of items in the group will equal the retail price less the indicated percentages of the retail price. If the discount for a group is a positive percentage (no minus sign) the selling price of items in that group will equal the cost (Average, Current or Higher) plus the indicated percentage of the cost.

Precision tip: *If you are using a cost plus discount the system will use either Average cost, Current cost or the Highest of the two depending upon how you have set up the group for job-costing. (See section ?? on Group definitions, starting on page ?? for more information.)*

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Discount Plan Mini-menu

Press **[N]** to display the next discount plan. (If discount plan "A" was displayed, the system will display discount plan "B".) Press **S** to search for and display a specific discount plan. You will be asked to press a letter (A through Z) indicating the desired discount plan.

Edit

To edit the discount plan displayed, press **[E]**. You will be allowed to enter the discount percentage for all active groups starting with Group 00. Entering a minus percentage will cause the system to calculate the selling price for the item in this group by subtracting the percentage from the retail price. Entering a positive percentage (no minus sign) will cause the system to calculate the selling price for items in this group by adding the percentage to the cost. Entering a zero will prevent items in this group from being discounted. After entering the discount for Group 00, the system will allow you to enter the discount for Group 01, etc..

Precision tip: An active group is one which has a description and/or a comment.

Listing of Discount Plans

To print a list of all 26 discount plans, press **[L]**. You can press **[S]** to print the list to the screen or press **[P]** to send the list to the printer.

[Page Up]
& [Page Down]

You may examine a discount plan on the screen by scrolling the information using [Page Up] and [Page Down].

Exit System setup

To exit the Discount Plan entry screen, press **[*]**. The system will return to the Company setup menu.

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WORK ORDER SETUP

Work order setup

To enter the Work order setup, press **[W]** at the company setup menu. The following will be displayed:

```

Your Company Name
C.R.S. top line advertisement
Monday, July 30, 2001

C.R.S. top line advertisement

Are all entries correct ? ( Y/N )
```

Precision tip: If this is the initial setup, complete the System setup section before setting up the Work order or Reports sections.

Top line advertisement

A single line advertisement may be printed just below your company name and address on the repair order. The advertisement may be up to 128 characters long. Because the advertisement line is longer than the longest line that can be displayed on the screen, the line will scroll to the left as you type. The system will display the character position to the lower right on the field. The system will center the information on the repair orders.

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Once the information is correct, answer es. The system will show the following:

Your Company Name
Add new name built-in answers
Wednesday, September 1, 2004

Engine:
License:
VIN:
Color:
Service schedule:
Discount code:
Sales tax table: A
Shop supplies: Yes
Require Employee: No
Require Status: No

Are all entries correct ? ()

Add new name
built-in answers

As supplied, the system assumes that when using the Add new name function to create repair orders, most of the repair orders created are not discounted, will have sales tax added at the rate in Sales tax table "A" and will have shop supplies added to them.

If most of your repair orders are discounted or most repair orders are not taxable or if you charge shop supplies only on a few select repair orders, you can change the built-in answers to these fields here. You can also have the system require an employee's technician number when initializing a new repair. In addition to this, you can also have the system require that a status, other than "initialized", is assigned to a repair order upon its creation.

Precision tip: See the section on System setup, starting on page 4 of this manual for more information on Discounts, Sales tax tables and Shop supplies.

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Once the information is correct, answer Yes in response to "Are all entries correct?". The following will appear:

Your Company Name
C.A.R.S. Standard warranty
Monday, July 30, 2001

Stock no.	Qty	In St.	Description	Each	Price
-----------	-----	--------	-------------	------	-------

Are all entries correct ? (Y/N)

Standard warranty

You may have the system print your standard warranty in the lower left-hand corner of the C.A.R.S. repair orders. In lieu of using this area for your standard warranty, you may have the system print a customer authorization, current specials, company policy, vehicle inspection report for shop use or information required under local or state disclosure laws.

Precision tip: Check local & state disclosure laws for information on how the standard warranty must appear on repair order if required.

When entering this information, remember that this area is shared with the labor and materials charges you will enter on the repair order. The standard warranty information should be entered so that it will appear on the bottom of the repair order.

Precision tip: When the labor and materials charges you enter on the repair order will overlap the standard warranty, the standard warranty will not print.

Precision tip: There are 31 lines in this section. Each line will hold up to 78 characters. As you enter information into this section the screen will scroll up and down. Start typing in the information at the top of the screen. When you have entered everything you would like, move the information to

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

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Setting Up The System

the bottom. Be careful not to push the information past line 31.

Precision tip: See Section 1 of the Precision Main Menu manual for information on Full-window text entry.

Once the information is correct, answer es. The system will show the following:

Your Company Name
C.A.R.S. Description of work
Monday, July 30, 2001

Description of work

OUR INSPECTION OF YOUR VEHICLE SHOWS IT NEEDS THE FOLLOWING:

Are all entries correct? (Y/N)

Description of work

The C.A.R.S. repair order has 11 lines for you to type the description of work, the customer's comments and complaints, and the results of the technician's inspection. For example, you may wish to put in your standard warranty, disclaimer or a monthly special. When the system starts a fresh repair order (initializes a repair order), it will automatically put in these 11 lines on the new repair order. This information may be over-written when filling out each repair order.

Enter the description of work as you wish it to appear.

Precision tip: Each of the 11 lines will hold up to 78 characters. The title "Description of work" may be changed by contacting Precision Data Systems.

Precision tip: See Section 1 of the Precision Main Menu manual for information on Full-window text entry.

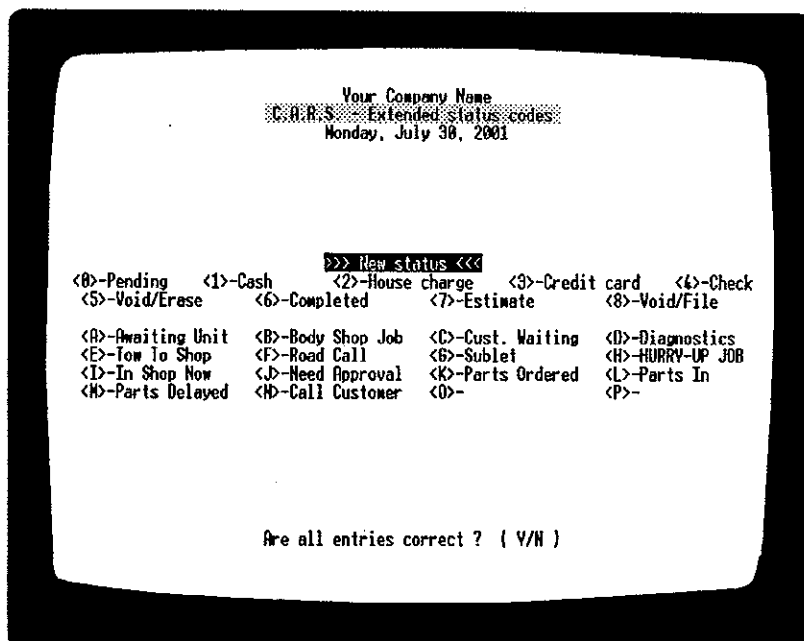
When the information is correct, answer es in response to the question, "Are all entries correct?".

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

Section 2 Setting Up The System

Extended status codes

The status of repair orders is used to inform the system as to which repair orders have been paid for, which ones are voids, which ones are pending and which ones are estimates. The status may also be used to inform you or others as the status of the actual repairs. A repair order may be assigned one of 25 status codes.



To help keep track of the progress of each job, 16 extensions to the pending status are available. The Extended status codes are entered by pressing a letter. (The letters that are used to select the extended status codes are "A" through "P" and cannot be changed.) To enter the extended status codes, answer No in response to "Are all entries correct?". You may then type in the status codes you would like to use. To change an existing code, press [F5], then type in what you would like to use. To delete a code, press [F5], then the [Space Bar], then [Enter]. You can use any or all of the extended status codes. To skip over a code press [Enter]. After you have entered all of the extended status codes you would like to use, press [Enter] until the question "Are all entries correct?" (Y/N)" is displayed.

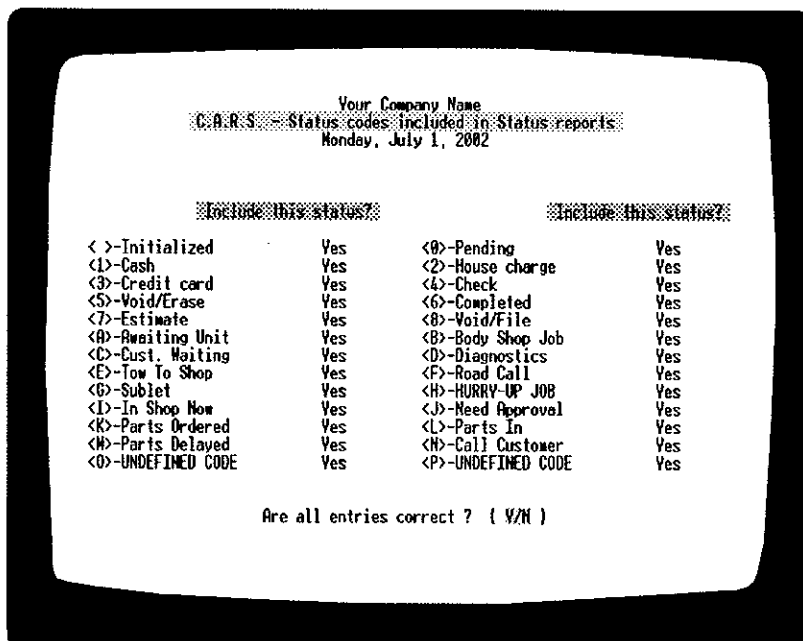
COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

Section 2

Setting Up The System

Include status codes
on System status

The "Status codes included in Status reports" allows you to choose which Status codes you would like to be included in the [Shift]-[S] version of the System status and the Included version of the Reports – Status report.



For example, if you did not want the estimates and voided repair orders to show or be printed, you would say No to the question "Are all entries correct?". Then change the Yes to a No for codes 5, 7, and 8.

Exit work order setup

Once the Extended Status Code information is correct, press [Y] in response to "Are all entries correct?". The system will return to the Company setup menu.

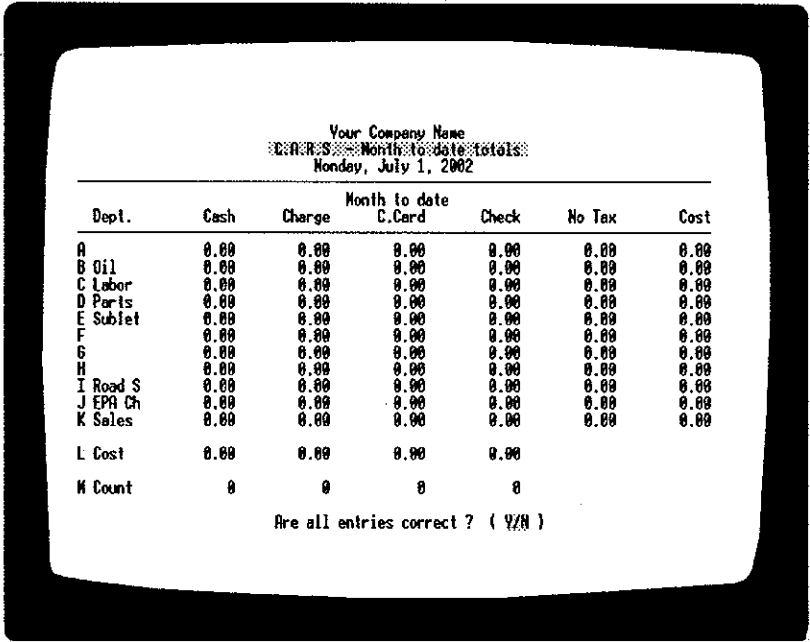
COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

Section 2 Setting Up The System

REPORTS SETUP

Reports setup

The Reports setup section of the Company setup will allow you to Review, edit and print versions of the C.A.R.S. reports. To enter the Reports setup, press **F1** at the Company setup menu. The following will be displayed:



The screenshot shows a terminal window with the following content:

Your Company Name
CARS Month to date totals
Monday, July 1, 2002

Dept.	Cash	Charge	Month to date			Cost
			C.Card	Check	No Tax	
A	0.00	0.00	0.00	0.00	0.00	0.00
B Oil	0.00	0.00	0.00	0.00	0.00	0.00
C Labor	0.00	0.00	0.00	0.00	0.00	0.00
D Parts	0.00	0.00	0.00	0.00	0.00	0.00
E Sublet	0.00	0.00	0.00	0.00	0.00	0.00
F	0.00	0.00	0.00	0.00	0.00	0.00
G	0.00	0.00	0.00	0.00	0.00	0.00
H	0.00	0.00	0.00	0.00	0.00	0.00
I Road S	0.00	0.00	0.00	0.00	0.00	0.00
J EPA Ch	0.00	0.00	0.00	0.00	0.00	0.00
K Sales	0.00	0.00	0.00	0.00	0.00	0.00
L Cost	0.00	0.00	0.00	0.00		
M Count	0	0	0	0		

Are all entries correct ? (Y/N)

Month to Date Transfer recap totals

The Month to Date amounts shown here will appear on the Transfer Recap. If you have this information available, enter it. If the information is not available the amounts will be correct after closing your first month.

Enter Month to Date recap figures

To enter Month to Date figures, answer **N** in response to "Are all entries correct?". The system will ask ">>>Change which line? (A to M)". Press the letter for the line you would like to change. Enter the figures for each column.

Precision tip: Editing the MTD sales figures and YTD sales figures is recommended only when setting up the system for the first time.

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

Section 2

Setting Up The System

Once the information is correct, press Y in response to the question, "Are all entries correct?". The following will be displayed:

Dept.	Cash	Charge	Year to Date C. Card	Check	No Tax	Cost
A	0.00	0.00	0.00	0.00	0.00	0.00
B Oil	0.00	0.00	0.00	0.00	0.00	0.00
C Labor	0.00	0.00	0.00	0.00	0.00	0.00
D Parts	0.00	0.00	0.00	0.00	0.00	0.00
E Sublet	0.00	0.00	0.00	0.00	0.00	0.00
F	0.00	0.00	0.00	0.00	0.00	0.00
G	0.00	0.00	0.00	0.00	0.00	0.00
H	0.00	0.00	0.00	0.00	0.00	0.00
I Road S	0.00	0.00	0.00	0.00	0.00	0.00
J EPA Ch	0.00	0.00	0.00	0.00	0.00	0.00
K Sales	0.00	0.00	0.00	0.00	0.00	0.00
L Cost	0.00	0.00	0.00	0.00		
M Count	0	0	0	0		

Are all entries correct? (Y/N)

Year to Date Transfer
recap totals

The Year to Date amounts shown here will appear on the Transfer Recap. If you have this information available enter it. If the information is not available the amounts will be correct after closing your first year.

Enter Year to Date
recap figures

To enter Year to Date figures, answer N in response to "Are all entries correct?". The system will ask ">>>Change which line? (A to M). Press the letter for the line you would like to change. Enter the figures for each column.

Transfer recap sales
totals by tax table

The Transfer recap sales totals by tax table screen allows you to view, edit and print the sales accumulated by each of the 10 tax tables. Each tax table has four screens: Retail M.T.D., Retail Y.T.D., Cost M.T.D., and Cost Y.T.D.. When display Retail system will display the total cost and gross profit percentage for each sales department.

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

Section 2 Setting Up The System

Your Company Name
CARS: Transfer recap sales totals by tax table
Monday, July 1, 2002

H.T.D. RETAIL Dept.	Cash	Tax table "A" - Charge	Regular C.Card	Taxable Check	Cost	G.P.X
A	0.00	0.00	0.00	0.00	0.00	0.0%
B Oil	0.00	0.00	0.00	0.00	0.00	0.0%
C Labor	0.00	0.00	0.00	0.00	0.00	0.0%
D Parts	0.00	0.00	0.00	0.00	0.00	0.0%
E Sublet	0.00	0.00	0.00	0.00	0.00	0.0%
F	0.00	0.00	0.00	0.00	0.00	0.0%
G	0.00	0.00	0.00	0.00	0.00	0.0%
H	0.00	0.00	0.00	0.00	0.00	0.0%
I Road S	0.00	0.00	0.00	0.00	0.00	0.0%
J EPA Ch	0.00	0.00	0.00	0.00	0.00	0.0%
K Sales	0.00	0.00	0.00	0.00	0.00	0.0%
L Count	0	0	0	0		

>>> Your selection : ?
 <N>ext <P>revious <S>earch <E>dit <L>isting <R>-Exit
 <R>etail <C>ost <X>id

Transfer recap sales totals
by tax table Mini-menu

Next or Previous

Search

Edit

Listing of Transfer recap
sales totals by tax table

Retail screen

Cost screen

The mini-menu displays the options available.

Pressing **[N]** for next will take you to the next Tax table. Pressing **[P]** for previous, will take you to the previous Tax table.

Pressing **[S]** for search, will allow you to go directly to a specific Tax table.

Pressing **[E]** for edit will allow you to change the Tax table shown on the screen. When you press Edit the system will ask "Edit which line? (A to L)". When editing the Retail screens the cost and gross profit percentage columns cannot be edited. The cost can be edited on the Cost screen. The Gross profit percentage is calculated by the system.

Pressing **[L]** for listing, will allow you to print a report showing the sales, cost, profit and average R/O information for each Tax table used. The report breaks out sales by cash, charge, credit card or check. If more than one tax table is used, M.T.D. and Y.T.D. Grand Totals are printed.

Pressing **[R]** for Retail will allow you to switch from the Cost screen to the Retail screen.

Pressing **[C]** for cost, will switch from the Retail screen to the Cost screen.

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

Section 2

Setting Up The System

Month to date screen

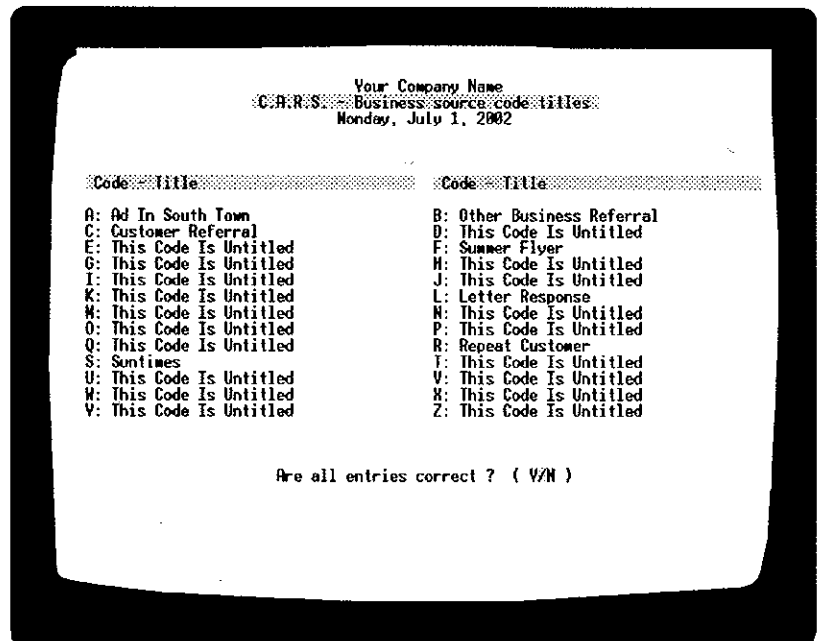
Pressing **[M]** for M.T.D., will switch from the Y.T.D. screen to the M.T.D. screen.

Year to date

Pressing **[Y]** for Y.T.D., will switch from the M.T.D. screen to the Y.T.D. screen.

Precision tip: The Transfer recap totals by tax table month-to-date totals will not be correct until you start a new month. The year-to-date totals will not be correct until you start a new fiscal (business) year.

Once the information is correct, press **[*]** to exit. The system will now display the following:



Business by source
code titles

The system will allow you to keep track of how much business has been generated from various advertising activities. For example you can track how much business came in from referrals, from each of several newspaper ads, from sending promotional letters, follow-up letters and tickler letters. Up to 26 forms of advertising may be tracked.

The titles entered here will be used as the titles on the Business by source code reports. To enter the titles, press **[N]** in response to "Are all entries correct?". You can enter titles for all or any of the 26 source codes (A thru Z). Press **[Enter]** until you are on the code (A thru Z) you would like to enter. Next, press **[F5]** to clear the field and enter the title you would like to use. To skip a code, just press **[Enter]**.

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

Section 2 Setting Up The System

Once the information is correct, press **[Y]** in response to "Are all entries correct?". The business by source screen appears, and Business by source code "A" will be displayed:

The screenshot shows a terminal window with the following content:

```

                                Your Company Name
                                C:\A:RCS Business by source code
                                Monday, July 30, 2001
-----
Current RETAIL      Business source "A" - This Code Is Untitled
Dept.  Cash      Charge      C.Card      Check      Cost      G.P.X
-----
A      0.00      0.00      0.00      0.00      0.00      0.0%
B Oil  0.00      0.00      0.00      0.00      0.00      0.0%
C Labor 0.00      0.00      0.00      0.00      0.00      0.0%
D Parts 0.00      0.00      0.00      0.00      0.00      0.0%
E Sublet 0.00      0.00      0.00      0.00      0.00      0.0%
F Tires 0.00      0.00      0.00      0.00      0.00      0.0%
G      0.00      0.00      0.00      0.00      0.00      0.0%
H      0.00      0.00      0.00      0.00      0.00      0.0%
I Road S 0.00      0.00      0.00      0.00      0.00      0.0%
J EPA Ch 0.00      0.00      0.00      0.00      0.00      0.0%
K Sales 0.00      0.00      0.00      0.00      0.00      0.0%
-----
L Count      0      0      0      0
-----
>>> Your selection : ?
      <N>ext  <P>revious  <S>earch  <E>dit  <L>isting  <*)>-Exit
      <R>etail  <C>ost  <D>isplay cumulative  <#>-Reset current

```

Business by source code

The Business by source code allows you to view, edit and print the sales accumulated by each of the 26 Business by source codes. Each Business by source code has four screens: Current Retail, Cumulative Retail, Current Cost, and Cumulative Cost. When displaying Retail, the system will display the total cost and gross profit percentage for each sales department.

Business by source code Mini-menu

The mini-menu displays the options available.

Next or Previous

Pressing **[N]** for Next will take you to the next Business by source code. Pressing **[P]** for previous, will take you to the previous Business by source code.

Search

Pressing **[S]** for Search, will allow you to go directly to a specific Business by source code.

Edit

Pressing **[E]** for Edit will allow you to change the business by source code shown on the screen. When you press Edit the system will ask "edit which line? (A to L)". When editing the Retail screen the cost and gross profit percentage columns cannot be edited. The cost can be edited on the cost screen. The Gross profit percentage is calculated by the system and can not be edited.

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

Section 2

Setting Up The System

Listing of Business by source code sales	Pressing <input type="checkbox"/> for Listing, will allow you to print a report showing the sales, cost, profit and R/O information for each Business by source code used. The report breaks out sales by cash, charge, credit card or check. If more than one Business by source code is used, Current and Cumulative Grand Totals are printed.
Retail screen	Pressing <input type="checkbox"/> for Retail, will allow you to switch from the Cost screen to the Retail screen.
Cost screen	Pressing <input type="checkbox"/> for Cost, will switch from the Retail screen to the Cost screen.
Display Cumulative or Current	If displaying the Current Retail or Cost screen, pressing <input type="checkbox"/> for Display Cumulative, will switch from the Current screen to the Cumulative screen. If displaying the Cumulative Retail or Cost screen, pressing <input type="checkbox"/> for Display Current, will switch from the Cumulative screen to the Current screen.
Resetting Business by source code figures	Each Business by source code keeps track of the sales made during the Current period and the Cumulative period. The Current and Cumulative periods may represent a different time period for each of the 26 Business by source codes. At any time you may reset (clear) the amounts stored in Current for any one of the 26 Business by source codes without affecting any of the others. The Current and Cumulative totals for the Business by source codes are NEVER automatically cleared by the system. These totals MUST be manually reset. Thus it is possible to track the response from a newspaper ad that runs from December 29 th through January 4 th while tracking in a different code the response from Oil change reminders for the first 2 weeks of January.
Reset current sales	To reset the current sales for a specific Business by source code, display the Current Cost or current Retail screen for that code and press <input type="checkbox"/> - Reset current. This will reset both the Current Cost and Current Retail for just the displayed Business by source code.
Reset current and cumulative sales	To reset the cumulative sales for a specific Business by source code, display the Cumulative Cost or Cumulative Retail screen for that code and press <input type="checkbox"/> -Reset current and cumulative. This will reset the Current Cost, Current Retail, Cumulative Cost and Cumulative Retail for just the displayed Business by source code.
Exit reports Setup	After completing the setup of the Business by source code, press <input type="checkbox"/> , the system will return to the Utilities menu.

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

Section 2

Setting Up The System

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

SECTION 3.0

THE MAIN MENU

Start the system

When starting your computer, make sure that there is no disk in drive "A" or the system will attempt to start up on that disk.

On Ms-Dos

Turn on your computer. When the computer has finished the start-up process the "Precision" Main Menu will appear.

Precision tip: If your computer does not have a built-in clock, the system will request the date and time. After you enter the time, the "Precision" Main Menu will appear.

On Windows

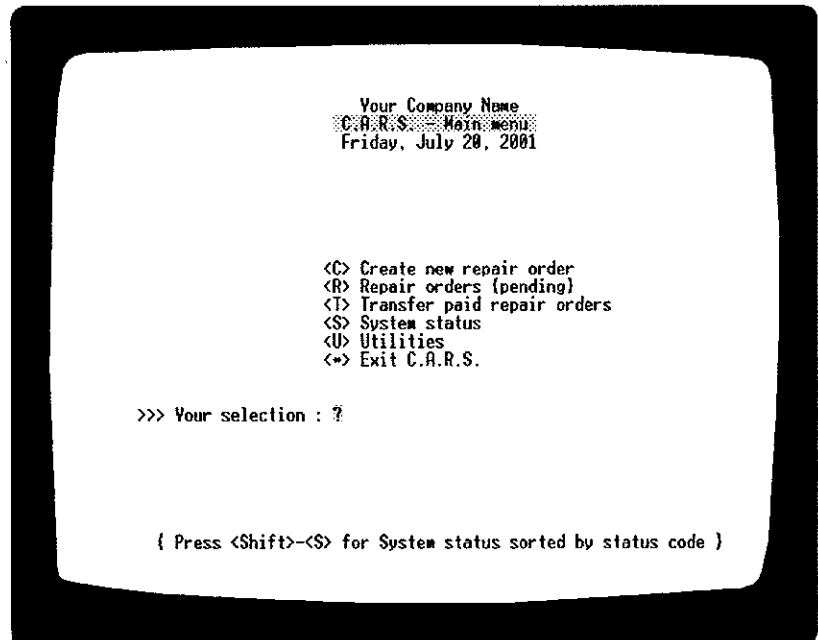
Turn on your computer. When the computer has finished the start-up process the "Windows desktop" will appear. The "PDS" window will appear. Double click on the "PDS_Menu" icon in the PDS window. The "Precision" Main Menu will appear.

Entering C.A.R.S.

At the "Precision" Main Menu, press **C** for C.A.R.S.. The system will go to the C.A.R.S. Main Menu.

C.A.R.S. Main Menu

The C.A.R.S. Main Menu looks like this:



Concept

The C.A.R.S. computerized repair order system can be thought of as a rack containing repair orders, one repair order to a slot. There are two types of repair orders in the rack: blank repair order forms, and repair order forms that have been written on. Repair orders that have been written on may be in any stage of completion. Some might contain only the customer name and address while others may have been completed and paid for.

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM
SECTION 3.0
THE MAIN MENU

Other repair orders may fall anywhere in between these two extremes.

Create New Repair Order

The Create New Repair Order function allows you to take a blank repair order out of the rack and write the customer information on it. Once the customer information is on a repair order, it becomes a "pending" repair order.

Repair Orders (pending)

The Repair Orders (pending) option allows you to display any repair order that has been written on, add to it or make changes. There is no limit to the number of times that a repair order may be changed, nor is there a limit to the amount of time that a repair order may be pending.

Transfer Paid Repair Orders

The Transfer Paid Repair Orders function will be used at the end of the shift or end of the day. It will remove the paid repair orders from the C.A.R.S. repair order rack, print a job-costed copy of the repair order, transfer the appropriate information to Precision Parts Manager, The Service Manager™, Tickler Letters and The Manager's Assistant™, and file a copy of the repair order in Filedrawer.

System status

Gives information about the status of repair orders.

Utilities

Allows access to the Reports, Manager's Assistant™ invoice entry, Company Setup, Expansion of the repair order pending rack, Design repair order wizard, and Appointment scheduler maintenance. (Install Mitchell CD and View/print Mitchell service info. will only appear if you have purchased the Mitchell Interface.)

Exit C.A.R.S.

Pressing to exit C.A.R.S. will cause the system to return to the "Precision" main menu. Once at the "Precision" main menu, you may select any other system, return to C.A.R.S. or exit Precision Data Systems.

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

SECTION 3.1

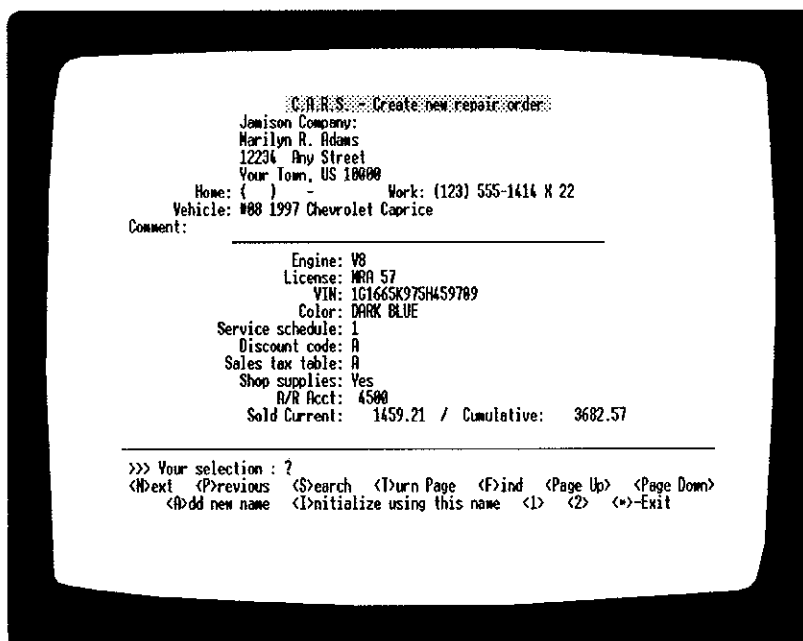
CREATE NEW REPAIR ORDER

Description

This function will allow you to start a repair order by entering the customer's name, address, etc.. If you wish, at this time, you may enter the work he requests and make notes about his complaints about his vehicle. (See the section on Description of Work, starting on page 36, for more information.)

Create new repair order

To create a new repair order, press **C** at the C.A.R.S. main menu. The create new repair order display screen will appear:



Precision tip: If there are no customers in the customer follow-up system, the system will automatically go into the "Add" mode. This will allow you to type in the customer's name, address, phone numbers and vehicle description. (See the section on Creating a Repair order for a new customer, starting on page 50 For more information.)

If the Service Manager™ customer follow up system contains customers, the system will display the last customer viewed. If you have not previously viewed a customer, the first customer (alphabetically) in your customer follow up system will be displayed.

Creating a new repair order

A repair order may be created in one of three ways.

1. Use the "add new name" function to type in the customer's name, address, phone numbers and vehicle description

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

SECTION 3.1

CREATE NEW REPAIR ORDER

from scratch.

2. Search for and display the customer's vehicle for which you wish to create the repair order, then use the "Initialize using this name" function to start a repair order using the customer information displayed.
3. If the customer for which you wish to create the repair order has more than one vehicle but the vehicle brought in is not yet in the computer, search for and display the correct customer. Then, use the "Initialize using this name" function and use the [Up Arrow] to move into the vehicle field, correct the vehicle information by editing it.

Precision tip: If you do not have The Service Manager™, you must use method 1.

Precision tip: If your system includes the Appointment Scheduler, consult Section 3.2, starting on page 71 of this manual for an additional way to Create a new repair order.

FOR A NEW CUSTOMER

Creating a Repair order
for a new customer

When the customer is not in your customer follow up system, you may add the customer to the system by pressing **[A]**. You will be prompted to enter the customer's name, address and other information.

Precision tip: If you have searched for the customer by last name and the system fails to find the name, pressing **[A]** to add a new name will cause the name just searched for to appear on the "Name" line.

Entering a new customer

A name is required. The way you enter your customer's name is very important. Names entered into the system are either individuals or businesses.

Entering an individual

When entering the name of an individual, the name must be entered last name first, followed by a comma, followed by his title and/or first name. If a space is entered after the comma, the system will delete it. For example, if the customer's name is John Smith, you would enter him as **[S][M][I][T][H], [J][O][H][N]** or **[S][M][I][T][H], [M][R.] [J][O][H][N]**.

Entering a business name

A colon (:) is reserved to inform the system that the name of a business is being entered. The colon must be the last character typed. "A.B.C. Company" will be entered into the system as

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM
SECTION 3.1
CREATE NEW REPAIR ORDER

A.B.C. COMPANY. The colon, like the comma, will never actually appear on the letter. A business name may include both a comma and a colon, but the colon must be the last character typed. Therefore "ABC, Inc." must be entered as ABC INC.

Entering address lines 1 & 2

The cursor will now move to the Address 1 field. An address is required. The system will not let you skip both address fields. The information on Address line 2 will be used by the system for sorting and filing purposes. If you enter information into Address line 1 and leave Address line 2 blank, the system will automatically move the information from Address line 1 to Address line 2. Make sure the house number or box number you wish to use for sorting and filing purposes appears on Address line 2. Always use proper punctuation.

Address line 1 can be used as an extension of the name field for long company names, for entering the name of a person at a company, or for an apartment or suite number. Enter the address and press [Enter].

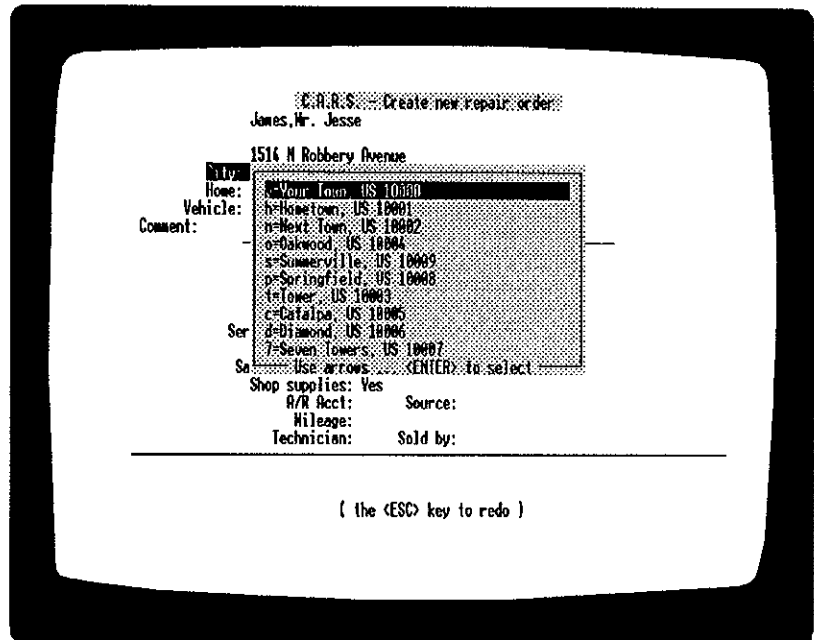
Precision tip: If the word "Box" appears in the Address line 2, the box number will be used as the house number.

Entering a city

The cursor will move to the city field. An entry in the city field is required. The system will not let you skip the city field. Type in the city and then press [Enter]. Do not type a comma after the city name. The system will insert the comma for you when it prints the address.

Precision tip: If you have the Service Manager™ and the city, state and zip code were entered as one of your abbreviated city entry codes, you can use the code. (See Section 2.1 of The Service Manager™ Manual for more information.)

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM
SECTION 3.1
CREATE NEW REPAIR ORDER



Press [F3] for list of cities

When the cursor is in the "City" field the prompt "Press <F3> for list" will appear near the bottom of the screen. Pressing [F3] at this time will display a list showing the "Abbreviated city entries" as assigned in The Service Manager™. To have the system insert the abbreviated city entry, just press the letter of the entry you would like to use or use the arrow keys to highlight the entry and press [Enter]. If you do not wish to use an entry on the display and would like the display to disappear, press [Esc].

Precision tip: See The Service Manager™ manual section 2 - Company Setup for more information on entering Abbreviated city entries.

Enter the state

If you have not used an abbreviated city code, the cursor will move to the state field. An entry in the state field is required. The system will not let you skip the state field. The state abbreviation must be two letters long. Use the standard two letter Post Office abbreviations for the state. You can type the state in lower case letters. The system will convert the state abbreviation to all capital letter. After entering the state, press [Enter].

Zip code/Postal code

The cursor will now move to the zip code field. A zip code is optional. Press [Enter] to skip it. If you do not enter the zip code, it must contain five or nine digits.

Canadian users note: Postal codes will be capitalized by the system.

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM
SECTION 3.1
CREATE NEW REPAIR ORDER

Erasing a zip code

If you had entered a zip code and then decided that you wanted no zip code, move the cursor back up to the zip code field, type 0 (zero) and press [Enter]. This will erase any zip code entered. The zero will also disappear.

Canadian users note: Postal codes are erased by pressing [Alt]-[Delete], [F5] or [Backspace] to erase the old postal code. After the postal code is erased, press [Space Bar] before pressing [Enter].

Entering the home phone number

After entering or skipping the zip code, the cursor will move to the home phone number field. A home phone number is optional. The phone number must contain 7, 8 or 10 digits. The phone number may contain 8 digits only if the first digit is a "1". Type the phone number and press [Enter], or press [Enter] to skip it.

Entering the work phone number

The cursor will move to the work phone number field. The work phone number is optional. As with the home phone number, press [Enter] to skip it or type it and press [Enter]. If you have entered a work phone number the cursor will move to the extension field. The extension is optional, press [Enter] to skip it or type it and press [Enter].

Precision tip: The extension field is 5 characters long. You may enter letters as well as numbers. To erase the extension field press [F5], [Space-Bar] and then press [Enter].

Precision tip: If you have made a mistake entering the home or work phone use the [F1], [F2] or [Up Arrow] to move back to the phone number. Then use the editing features explained in the Precision Main Menu - Section 1 to correct the number.

The "Other" phone number field allows you to enter a third phone number for your customer. The field has room for a ten character phone number.

The email address field allows you to add an email of up to 54 characters for each of your customers.

Precision tip: If you have created any macros that work in Create new repair order or on Page 1 in repair orders pending, you will have to edit them for the two new fields.

Precision tip: The "Other" phone number and the email address can be added while entering repair orders in the "Book Appointment" function.

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM
SECTION 3.1
CREATE NEW REPAIR ORDER

Erasing a phone number

If you had entered either the home or work phone number, or email address by mistake and wish to delete it, use the [F1], [F2] or [Up Arrow] key to move up to that field, press [F5], [0] (zero), and then press [Enter]. The phone number in that field will be cancelled and will disappear.

Entering a vehicle description

The cursor will move to the vehicle field. Generally, the vehicle description is entered as the model year followed by the make and model. (For example, 1995 Chevrolet Caprice.) The system automatically keeps information for different vehicles in their own separate file folders. The system uses the vehicle description to decide whether to create a new file folder or put the information into an existing file folder.

Precision tip: If you are using The Service Manager™ and/or Filedrawer, how the vehicle is entered is very important. (See Sections 2.1 & 3.3 of The Service Manager™ manual for more information.)

The system comes supplied with lists for the year, make and model. The lists go from 1983 to the current year. Updates to the list will be added to the system periodically.

The vehicle description can be entered by typing in the four digit model year followed by the make and then the model or you may press [Enter] to leave the field blank. When you press [Enter], the system will compare what you have entered with the list. If you have left the vehicle description blank or the system does not recognize something you have entered, the "Year, Make, and Model" fields will temporarily appear in place of the "Comment" field.

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM
SECTION 3.1
CREATE NEW REPAIR ORDER

C.A.R.S. Create new repair order

Acme Products:
1000 East Avenue
Hometown US 10001
Home: () - Work: (123) 555-1245

Year: 2002 Make: _____ Model: _____

2001
2000
1999
1998
1997
1996
1995
1994
1993
1992
1991
1990
1989
1988

Engine:
License:
VIN:
Color:
Service schedule: 1
Discount code:
Sales tax table: A
Shop supplies: Yes POH:
A/R Acct: 1000 Source:
Mileage:
Technician: Sold by:

Use arrows ... <ENTER> to select, <ESC> to exit

Precision tip: If you leave the Vehicle field blank you **MUST** enter something into the "Year", "Make" AND "Model" fields.

Precision tip: If the vehicle description must include a unit number, do not leave the Vehicle (Unit) description field blank. Type the unit number into the Vehicle (Unit) description field. (The unit number **MUST** be the first thing in the vehicle description.)

Entering the Model

While on the "Year" field, you may type in the year or press [F3] to display a list of years. You can use the arrow keys to highlight your choice. Pressing [Enter] will insert the highlighted year and move you to the "Make" field. If the year of the vehicle is not on the list, you must press [Esc] to exit the list of years and type in the year.

While on the "Make" field, you may type the make or press [F3] to display a list of makes that the system knows were made in that year. You can use the arrow keys to highlight your choice. Pressing [Enter] will insert the highlighted make and move you to the "Model" field. If the make of the vehicle is not on the list, you must press [Esc] to exit the list of makes and type in the make.

Precision tip: The system will convert commonly used "Make" abbreviations. As supplied, the system recognizes Caddy, Chev, Chevy, Chry, Mercedes, Mit, Mits, Olds, Pont,

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

SECTION 3.1

CREATE NEW REPAIR ORDER

Toy, VW, and V.W.. This list can be customized. Call for assistance.

While on the "Model" field, you may type the model or press [F3] to display a list of models that the system knows were made in that make. You can use the arrow keys to highlight your choice. Pressing [Enter] will insert the highlighted model and move you to the "Comment" field. If the make of the vehicle is not on the list, you must press [Esc] to exit the list of models and type in the model.

Precision tip: If the Year, make or model did not appear on the list, you MUST fill in all three fields. When the repair order is transferred from C.A.R.S., using the Transferred Paid repair orders function, the system will add the Year, make, model combination to the list.

If you have entered information into the Year field and into the Make field and into the Model field, the information in those fields will be added together to make a vehicle description and it will appear in the Vehicle description field. At the same time, the Year, Make and Model fields will disappear and the Comment field will reappear.

There may be times when you enter a vehicle description and the system shortens the model. For example you type: 1999 Jeep Cherokee Sport, press [Enter] and the cursor goes to the comment field. Then you notice the system has changed the vehicle description to: 1999 Jeep Cherokee. This will occur because the list contains the model as a "Cherokee".

To have the system recognize "Cherokee Sport" as a model, use the [Up Arrow] to return to the vehicle description. Use the [Backspace] to erase "Cherokee" and press [Enter]. The system will now show the Year, Make and Model fields. Press [Enter] for the year and make, now type the model as "Cherokee Sport". The system will now display the vehicle description as 1999 Jeep Cherokee Sport, when the repair order is transferred the system will add this Year, make and model to the list.

Two of the same vehicle type

If however your customer has (2) 1995 Chevrolet Blazers (for example, one Blue and the other Green) the system will treat these vehicles as one vehicle. To avoid having the records for the 2 vehicles combined enter vehicle descriptions as follows: "Blue 1995 Chevrolet Blazer" and "Green 1995 Chevrolet Blazer". The vehicle descriptions are no longer the same for both vehicles. If by chance both vehicles happen to be the same color, assign unit numbers to each vehicle. For example, #1 1995 Chevrolet Blazer and #2 1995 Chevrolet Blazer.

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

SECTION 3.1

CREATE NEW REPAIR ORDER

Commercial account vehicles

If the customer is a commercial account with multiple vehicles of the same year, make and model (for example, 17 different 1994 Ford E150 Vans) their vehicle information should be entered as the Unit number, the year, then the make and model. If the customer has not given the vehicles unit numbers, you will have to assign them. Using the last 6 digits of the VIN works very well for the unit number. This will also assist you in finding the correct vehicle at a later time without having to look through pages of vehicles. (See the section on Extended search on page 64 of this manual for more information.)

Sometimes it is best to prevent the system from creating a file folder for each customer vehicle. If your customer is a commercial account such as an auto service business or in used car sales you will see each vehicle only once. In that case a separate file folder for each vehicle with only one repair order in it would be undesirable. You can prevent a file folder from being create for each vehicle sent to you by this customer by using a vehicle description of "Commercial account".

To have the system put "Commercial Account" in the Vehicle (unit) description, type **CA** and press [Enter]. If the Vehicle (unit) description is "Commercial Account" the Year, make and model fields will always appear. If you fill in these fields, the system will write the year, make, model information on the top line of the Description of work (page 3).

Precision tip: When creating a repair order using the "Initialize using this name" function from a vehicle description of "Commercial Account" will cause the system to erase the information in the Engine, License, VIN and Color fields. The system will also put a blank service history on the newly created repair order.

Over the counter

If the customer only purchases parts which are not for a particular vehicle keeping track of the service history is not necessary, the system can create a "Parts ticket" for the customer. This is done by using a vehicle description of "Over the counter".

Precision tip: See Section 3.1 on page 56 For more information on Parts tickets. AAAA

To have the system put "Over the counter" in the Vehicle (unit) description, type **OTC** and press [Enter]. If the Vehicle (unit) description is "Over the counter" the Year, make and model fields will always appear. If you fill in these fields, the system will write the year, make, model information on the top line of the Description of work (page 3).

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM
SECTION 3.1
CREATE NEW REPAIR ORDER

Precision tip: When creating a repair order using the "Initialize using this name" function from a vehicle description of "Commercial Account" will cause the system to erase the information in the Engine, License, VIN and Color fields. The system will also put a blank service history on the newly created repair order.

Comment field

The Comment field can be used to store private information about the customer or vehicle. Information entered into the Comment field will appear only on the screen. This information will never appear on any repair order.

Precision tip: The Comment field will hold up to 69 characters.

Precision tip: The system allows you to highlight the comment field on your customer file in red. This red highlight alerts you to any special circumstances related to this customer. To use this feature, place a caret [^][Shift-6] anywhere within the Comment field of the customer record.

Engine specs.

Entering the engine size is optional. While on the "Engine" field you may type in the engine or press [F3] to display a list of engines that the system knows were used on that year, make and model by remembering previously transferred repair orders. You can use the arrow keys to highlight your choice. Pressing [Enter] will insert the highlighted engine and move you to the "License" field. If the engine of the vehicle is not on the list, you must press [Esc] to exit the list of engines and type the engine. If you wish to skip the Engine specs, just press [Enter].

Precision tip: As supplied, there are no engine sizes on the list. They will be added to the list as repair orders with the Year, Make, Model and Engine fields filled in are transferred. It is important to be consistent. The system will interpret a 5.0 LITER, a 5.0 LITRE, a 5.0L, a 5.0 L, 5.0 TURBO and a 5.0 as six different engines! It is safest to check the list before typing in an engine. Because the Engine field is optional and may be left blank, the system contains a BLANK engine for each combination of year, make and model.

Precision tip: If you will be using the "Quick catalog" feature explained in Section xx starting on page 26 you must have the Year, Make, Model and Engine entered.

Precision tip: You may add Year, Make, Model and Engine entries to the list by entering them in the Year/Make/Model Maintenance - Inquire/Edit.

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM
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CREATE NEW REPAIR ORDER

License number Enter the license number. After you press [Enter], the computer will capitalize letters.

VIN number Enter the VIN number or any other pertinent information you may wish to place there, then press [Enter]. If you wish to skip the VIN number just press [Enter].

Color Entering the Color of the vehicle is optional. While on the Color field, you may type a color or press [F3] to display a list of generic colors. You can use the arrow keys to highlight your choice. Pressing [Enter] will insert the highlighted color and move you to the Service schedule field. If the color you want is not on the list, you must press [Esc] to exit the list and type in the color. The system will add that color to the list when the repair order is transferred from C.A.R.S. using the Transfer paid repair orders function. All the common colors are on the list. Keep your color description simple. Don't use colors like Midnight Black. Black is sufficient. If you wish to skip the Color field, just press [Enter].

Precision tip: The "Engine", "License", "VIN" and "Color" fields each hold 17 characters.

Precision tip: the titles "Engine", "License", "VIN" or "Color" may be changed. Contact Precision Data Systems, Inc. for more information.

Service schedule The system will automatically enter the Service schedule 1. If you would like to use a different Service schedule you must enter the number of that schedule. Valid Service schedules are 0 through 9. (For more information on Service schedules, see Section 2 of The Service Manager™ manual.)

Press [F3] for list of Service schedules When the cursor is in the "Service schedule" field the prompt "Press <F3> for list" will appear near the bottom of the screen. Pressing [F3] at this time will display a list showing the "Service schedules" as assigned in The Service Manager™. To have the system insert the Service schedule entry, just press the letter of the entry you would like to use or use the arrow keys to highlight the entry and press [Enter]. If you do not wish to use an entry on the display and would like the display to disappear, press [Esc].

Precision tip: See The Service Manager™ manual Section 2 - Company Setup for more information on Service schedules.

Discount code The Discount code field is used to keep track of the discount, if any, normally given to the owner of this vehicle. The valid Discount codes are:

1. A blank - no discount given.

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM
SECTION 3.1
CREATE NEW REPAIR ORDER

2. "A" through "Z" - Discount plan A through Z. (See the section on Discount Plans, starting on page 31 of this Manual, for more information).
3. "1" through "64" - discounts of 1% through 64% of entire repair order.

If you need to over-ride this discount for a special circumstance, see the section on Description of work for more information. (See the section on Discount plans, starting on page 30 Of this manual for more information.)

Sales tax table

The system handles 10 different sales tax tables. The Tax tables are labeled A through J. As the system is supplied, your state sales tax percentage is assigned to "Tax table A". For vehicles which will normally be charged sales tax, enter an "A". As the system is supplied "Tax table J" has no sales tax percentage. For vehicles which normally will not be charged sales tax, enter a "J". The answer here should be the normal for this vehicle. (If you need to over-ride this answer for a special circumstance, see the section on Description of work, starting on page 36 of this manual, for more information.)

Press [F3] for list of Sales tax tables

When the cursor is in the "Sales tax table" field the prompt "Press <F3> for list" will appear near the bottom of the screen. Pressing [F3] at this time will display a list showing the "Sales tax tables" as assigned in C.A.R.S. - Company setup - System setup. To have the system insert the Sales tax table entry, just press the letter of the entry you would like to use or use the arrow keys to highlight the entry and press [Enter]. If you do not wish to use an entry on the display and would like the display to disappear, press [Esc].

Precision tip: For more information on Sales Tax tables, see page 15 of this manual.

Shop supplies charge

The Shop supplies field will tell the system whether or not to add the automatic shop supplies charges to repair orders for this vehicle. The answer here should be the normal for this vehicle. (If you need to over-ride this answer for a special circumstance, see the section on Description of work, starting on page 36 of this manual, for more information.)

Precision tip: The system will not charge shop supplies until you have set up the "Automatic billing of shop supplies" in Company setup - System setup.

PO#

The PO# field (Purchase order #) will appear only on repair orders for companies. If the company you are creating the repair order for

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

SECTION 3.1

CREATE NEW REPAIR ORDER

uses purchase order numbers enter the PO# here. If you do not have a purchase order number, press [Enter].

Precision tip: The purchase order number will appear on the repair order and on the Accounts Receivable statement if they have an account with you.

Precision tip: The PO# field will hold 12 characters.

A/R Acct

If repair orders for this vehicle are normally charged on a house charge account enter the Manager's Assistant™ Accounts Receivable account number here. When the job is complete and you mark the repair order paid by house charge (status code 2) the system will enter the account number for you.

Your system can be set to display the account information when creating a repair order for a charge customer. If the account is beyond the set credit limit the account information will display with the following message: "Credit alert! Continue (Y/N)". Pressing No or [Esc] will cancel the creation of the repair order. To create the repair order anyway press Yes.

When creating a new Accounts Receivable account from C.A.R.S. the system will prompt you by asking if the new account should be an Open Item account. If you answer "Yes" the system will create the account as Open Item, if you answer "No" the system will create the account as a Balance Forward account.

C.A.R.S. Repair orders (pending) Page 1

Misericordia Howe
2916 W. 47th Street
Chicago, IL 60632
Phone: () 254-9595
Work: () 254-9595

Invoice# 885745 Job 24
Total 50.79
August 31, 2004
Other: () -

Howe: ()
Vehicle: 1994 Toyota Tercel
Comment:
Email:

Engine: 1.5L
License: CCR641
VIN: JT2EL4319R8414832
Color: BLUE
Service schedule: 1
Discount code:
Sales tax table: A

Status
Arrived on: 85/14/2004
Initialized

To transfer: 88/31/2004
A/R Acct: 1234
New account ? (Y/N)

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM
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CREATE NEW REPAIR ORDER

Source(Business)

If you have set up Business by source codes, enter the appropriate business by source code. If you do not want to have this repair order tracked under Business by source codes, press [Enter]. (See page 42 for more information on Business source codes.)

Press [F3] for list of
Business source codes

When the cursor is in the "Source" field the prompt "Press <F3> for list" will appear near the bottom of the screen. Pressing [F3] at this time will display a list showing the "Business source codes" as assigned in C.A.R.S. - Company setup - Reports setup. To have the system insert the Source code entry, just press the letter of the entry you would like to use or use the arrow keys to highlight the entry and press [Enter]. If you do not wish to use an entry on the display and would like the display to disappear, press [Enter].

Mileage in/out

Enter the vehicle odometer reading (do not include the tenths).

Precision tip: If you have turned on the mileage in/out feature, enter the mileage out or press [Enter] to skip this field. (See Section 2, page 8 of this manual, for more information.) The mileage out may be edited at a later time.

Precision tip: The titles "Engine", "License", "VIN", "Color" and "Mileage" may be customized for unusual circumstances. Contact Precision Data Systems for assistance.

Technician

Enter the employee number of the technician that is likely to be assigned the vehicle. If it is not known who will be assigned this vehicle, press [Enter] to skip this field. You may enter this information at a later time.

Press [F3] for list
of employees

When the cursor is in the "Tn" field the prompt "Press <F3> for list" will appear near the bottom of the screen. Pressing [F3] at this time will display a list showing the employee names and numbers as assigned in The Manager's Assistant™ - Employee information. To have the system insert the employee number, use the arrow keys to highlight the employee number you would like to use and press [Enter]. If you do not wish to use an entry on the display and would like the display to disappear, press [Esc].

Precision tip: The [F3] function for Technician will only work if you have purchased The Manager's Assistant program. See The Manager's Assistant™ manual Section 2.3 - Employee information for more information on entering employees.

Sb(sold by)

If you have turned on the "Salesman" feature in The Manager's Assistant™, enter the employee number of the salesman who sold the job. (See the Manager's Assistant™ manual, Section 2.1 for

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

SECTION 3.1

CREATE NEW REPAIR ORDER

more information on Salesman commission.)

Press [F3] for list of Employees

When the cursor is in the Sb field the prompt "Press <F3> for list" will appear near the bottom of the screen. Pressing [F3] at this time will display a list showing the employee names and numbers as assigned in The Manager's Assistant™ - Employee information. To have the system insert the employee number, use the arrow keys to highlight the employee number you would like to use and press [Enter]. If you do not wish to use an entry on the display and would like the display to disappear, press [Esc].

Precision tip: The [F3] function for Sb (Sold by) will only work if you have purchased The Manager's Assistant™ program. See The Manager's Assistant™ manual Section 2.3 - Employee information for more information on entering employees.

After entering the technician number (or Sb number if turned on) to the new repair order, the repair order will become a "pending" repair order. The system will now be in the Repair Orders Pending section. You can now enter the customer's complaints on the Description of work (page 3) or add the parts and labor for the job.

To create another repair order

To create another repair order, return to the C.A.R.S. main menu by pressing they select the "Create New Repair Order" function by pressing .

FOR AN EXISTING CUSTOMER

Create a Repair order for an existing customer

To create a repair order for a customer that is currently in your customer follow up system, you should search for the customer. This will eliminate the need to type a customer's name and address into the computer more than once.

Precision tip: If you have The Service Manager™ or Filedrawer this will allow access to additional information. This information is useful in selling additional services as you are creating the repair order. (See the section on "Service History", discussed on page 66, for more information. Also see the section on "Description of work - Previous repair order", discussed on page 67 for more information.)

The order of the data

The customer records are filed in alphabetical order by last name or company name. Therefore, all of the customers with the same last name are filed consecutively. Next, those customers are sub-filed in order by the numeric portion of the address. For example, all the Burnside's who live at 301 Main will be filed before the ones

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

SECTION 3.1

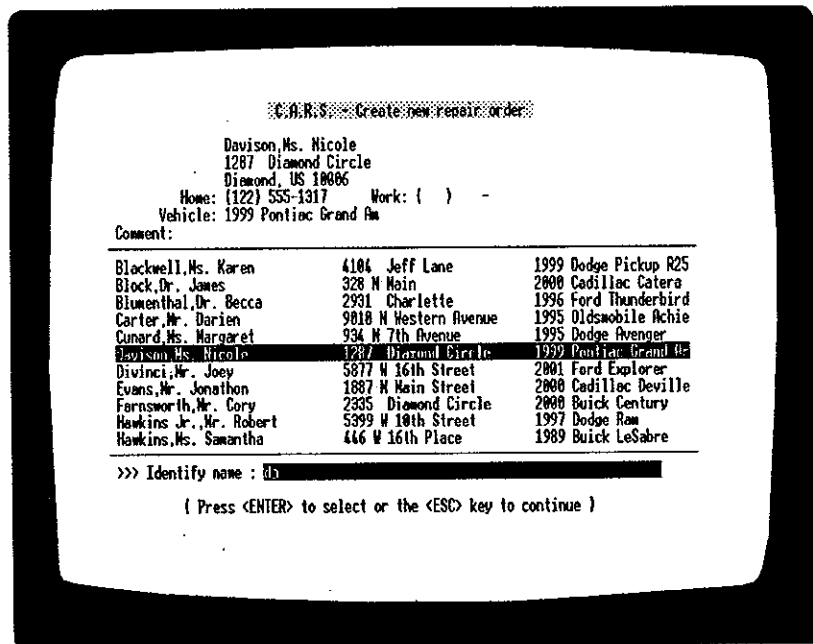
CREATE NEW REPAIR ORDER

living at 1027 W. Fifth. Last, all customers with the same last name and the same numeric portion of their address will be filed in alphabetical order by vehicle. Recall that only the first characters of the vehicle type are used by the system for filing purposes. (The number of characters the system uses depends upon how you have set up The Service Manager™. See The Service Manager™ instruction manual, Section 2 for additional information.)

Precision tip: For sorting purposes, a Box number is treated as a house number.

Search

Pressing **[S]** (search) will allow you to search for and display a particular customer record. You will be prompted to identify the desired customer by last name or by company name. The records are stored by company name or last name only. Do not enter titles, initials or first names.



Extended search

When searching for a customer the system will display a list of names as soon as you type the first letter of the name. As you continue to type, the system will zero in on the name you are searching for. By watching the list of names as you type you may notice the customer's name displayed above or below the highlighted name. You can then use the arrow keys to highlight the name you need or keep typing until the name is displayed.

The search function can be used to find a customer who lives at a particular address. This will make it easier to find the information when the owner has a common last name. To do this, type in the WHOLE last name followed by a comma, followed by the numerical

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

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CREATE NEW REPAIR ORDER

portion of the house address. (Example: Smith, 1227)

The search function can also be used to find a particular vehicle in a fleet of vehicles belonging to a company. To do this, type in part of the company name, followed by a colon ([:]), followed by at least one character of the vehicle description. (Example: Smith Corporation:B241)

Precision tip: See The Service Manager instruction manual, Section 3.6 Inquire/Edit the file, for more information.

[Page Up] & [Page Down] keys

Pressing [Page Up] or [Page Down] will display the five names before and the five names following the name on the top of the screen.

Once the list of eleven names is displayed, pressing [Page Up] will display the eleven names following the name shown at the top of the screen. Once the list of eleven names is displayed, pressing [Page Down] will display the previous eleven names preceding the name shown at the top of the screen. Using this feature will aid in finding a name when you are unsure of the spelling.

[Up Arrow] & [Down Arrow] keys

With the list of eleven names displayed pressing [Up Arrow], [F1] or [F2] will move the names up into the highlight bar one name at a time. Pressing [Down Arrow], [F9], or [F10] will move the names down into the highlight bar one name at a time.

Reverse direction of page
& arrow keys

If you would like to reverse the direction the [Page Up], [Page Down], [Up Arrow] and [Down Arrow] work, press [Ctrl-↵]. The action of [Ctrl-↵] will be saved only if a repair order has been created before exiting C.A.R.S..

Find

Pressing F (find) will allow you to search for and display a vehicle by License, by VIN or by phone. You do not have to type in the complete License or VIN. When using Find by phone, you **MUST** enter the phone number as 7 OR 10 digits. When using Find the system will display the first vehicle record it finds with a matching License, VIN or phone number. If the record displayed is not the record you are looking for and you wish to find another match, repeat the Find. This will display the next match.

Precision tip: If you have entered the phone number as 10 digits (phone number with the area code) and the system does not find the phone number, repeat the Find. This time enter the 7 digit phone number (phone number without the area code).

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

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CREATE NEW REPAIR ORDER

Turn page

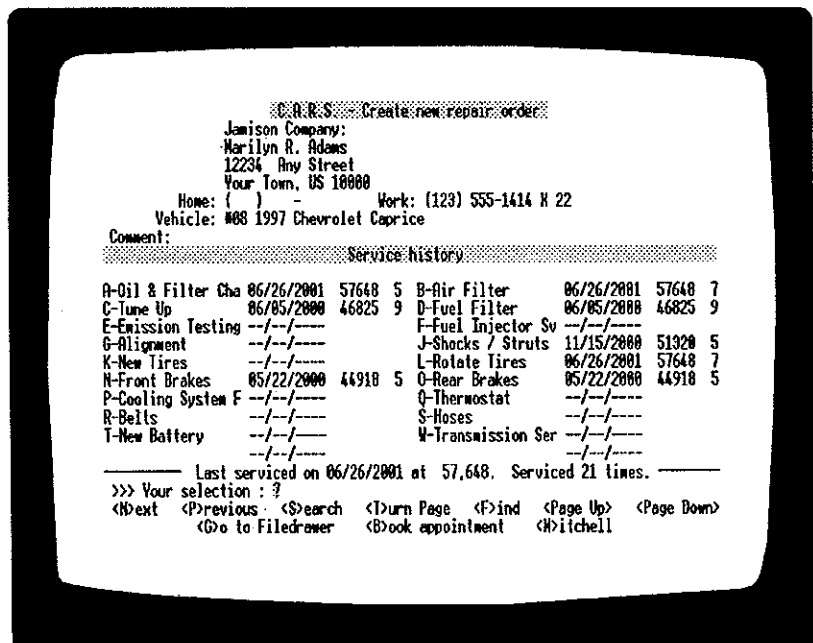
The information is displayed in several "pages." To go from page to page, press **[1]** (turn page). The first page contains the name, address, phone numbers, vehicle description, engine specs, etc. The second page contains the vehicle's service history as retrieved from the Customer follow up system. The third page contains the Description of work from the previous repair order stored in the Filedrawer. (See 1, 2, 3 below.)

1,2,3

Similar to the Turn Page function, pressing **[1]** will cause the system to display the Name and Address page regardless of what page is currently displayed. Pressing **[2]** will cause the system to display the Service history page, pressing **[3]** will display Description of Work from the previous repair order.

Service history

After you have located and displayed the correct vehicle on the screen, you may view the Service history by pressing **[2]** or **[1]** to turn the page. The following will be displayed:



The Service History page will allow you to view the date, mileage and the technician (who performed that service) at the time of the last service for each of the service categories.

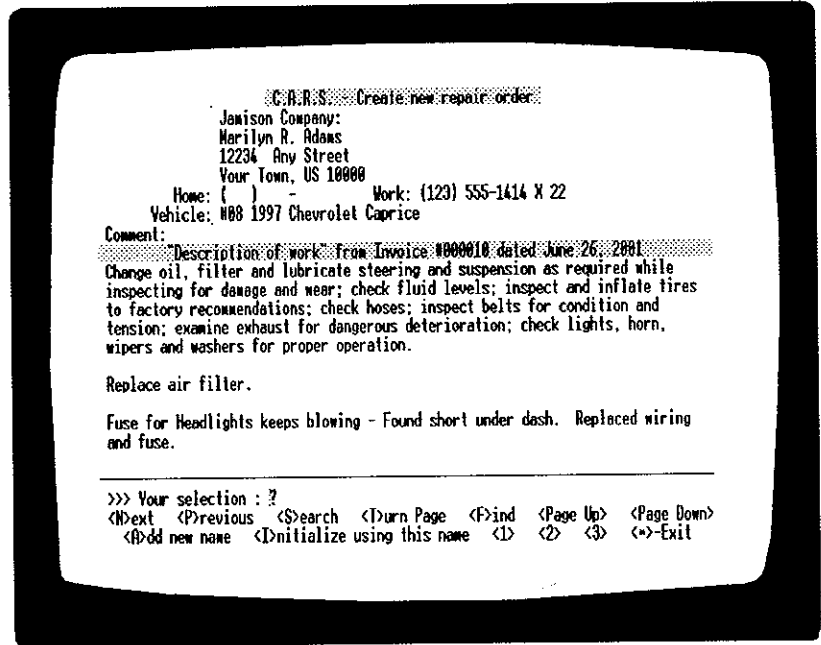
COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

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CREATE NEW REPAIR ORDER

Service needed

Certain service categories and the message "SERVICE NEEDED" may be flashing. This will occur when The Service Manager™ has sent or is about to send a reminder letter for that service category. (See The Service Manager™ manual Section 2 for more information.)



Description of work- Previous repair order

If you have Filedrawer and if there are repair orders in Filedrawer for this vehicle you may display the description of work from the last repair order. This will show the last repairs made to the vehicle and any service recommendations you may have made. To view the description of work press **[B]** or press **[P]** to turn the page.

Precision tip: If the Description of Work box had been expanded on this repair order use the [Page Up] and [Page Down] to scroll the information.

Go to Filedrawer

If there are repair orders in Filedrawer for this vehicle, you can go directly to Filedrawer to look at the previous repair orders. Pressing **[G]** will cause to system to go to Filedrawer and display the file folder for the customer you had displayed in Create new repair order.

Once in Filedrawer, pressing **[E]** will allow you to view or print the earlier repair orders for this customer. When you have finished viewing the file, press **[G]** again and you will be returned to C.A.R.S. - Create new repair order.

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

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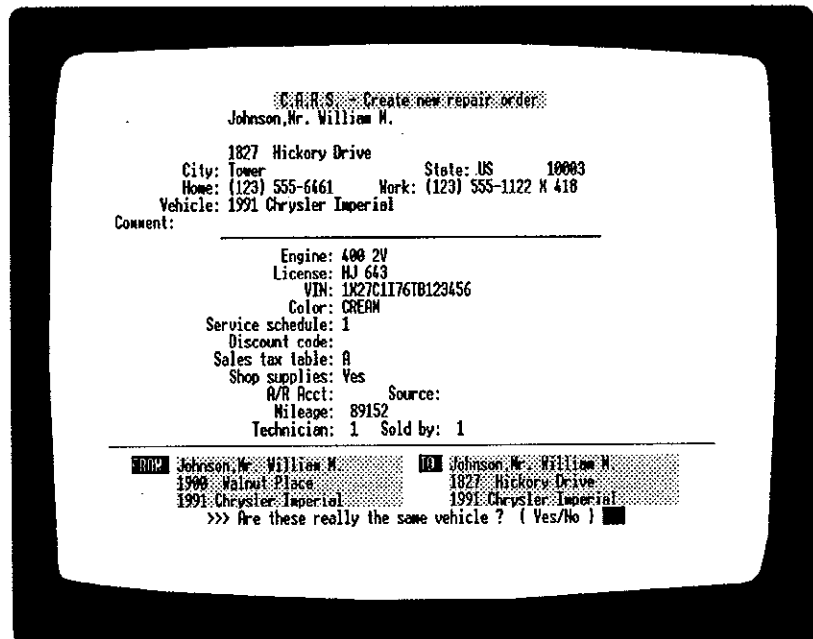
CREATE NEW REPAIR ORDER

Initialize the repair order

If you locate the correct vehicle, press to initialize the repair order. That will cause the computer to take the information shown and enter it onto the new repair order.

Correcting customer or vehicle information

If you have changed the Customer's name, address or the Vehicle (Unit) description the system will display the following:



On the lower left side of the screen, listed as FROM:, the system will show the customer's name, address and the vehicle (unit) description as appeared before any changes were made. ON the lower right side of the screen, listed at TO:, the system will show the customer's name, address and the vehicle (unit) description with the changes you have made.

The system now asks, "Are these really the same vehicle ? (Yes/No)". If you made the changes to correct the name, address and/or vehicle (unit) description on the existing file, type **YES**. This will correct the file in The Service Manager™. If you made the changes to add a new vehicle file to the system, type **NO**. This will leave the old vehicle file in the system too.

Precision tip: Starting a repair order using the "Initialize using this name" function from a vehicle description of "Commercial Account" or "Over the Counter" will cause the system to erase the information in the Engine, License, VIN & Color fields as well as blank out the information in the Service History.

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM
SECTION 3.1
CREATE NEW REPAIR ORDER

EXISTING CUSTOMER
DIFFERENT VEHICLE

Create a repair order for an
Existing customer, different vehicle

If you have found the correct customer, but the vehicle brought in is not yet in the computer, press I to use the "Initialize using this name" function. Use the [F1], [F2] or [Up Arrow] to move into the vehicle field. Once in the vehicle field, press [F5], [Backspace] or [Alt]-[Delete] to erase the vehicle information. Enter the new vehicle information.

At this time, if you wish to add the home phone number or work phone number, press the [F1], [F2] or [Up Arrow] again to move to those fields so the appropriate information may be entered.

After entering the new vehicle description, press [Enter]. Enter the engine specs., license number, VIN number and the mileage for this vehicle. After you have entered the technician number the system will flash "New Unit" in the upper left hand corner of the screen. The system will create a record for the new vehicle.

Precision tip: Creating a repair order in this way will not change the information stored in the system for the other vehicle.

Press to exit to the C.A.R.S. main menu.

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SECTION 3.1
CREATE NEW REPAIR ORDER

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

SECTION 3.2

APPOINTMENT SCHEDULER

Appointment scheduler

This feature eliminates hand written appointments by integrating an appointment schedule into C.A.R.S.. Most appointments are made through the Create New Repair order function. This gives you the opportunity to search for the customer, eliminating the need to type a customer's name and address more than once.

Precision tip: If you have The Service Manager™ or Filedrawer this will allow access to additional information. This information is useful in selling additional services as you are booking the appointment. (See the section on "Service History", discussed on page 66, for more information. Also see the section on "description of work-Previous repair order", discussed on page 67, for more information.)

Precision tip: Be aware that the Appointment scheduler requires maintenance. Failure to maintain the Appointment Scheduler will force you to needlessly expand it. This can increase your BACKUP 1 to use additional diskettes. See pages 77 for more information on Appointment Schedule maintenance.

Create new repair order

Book an appointment

After examining the Service history and the Description of work from the previous repair order (if available), select the Book appointment function. (It is easiest to sell additional services as you are making the appointment.)

Precision tip: If the customer has never been in before, you are still able to book an appointment for them. Just press with ANY customer showing.

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Section 3.2

APPOINTMENT SCHEDULER

[Right Arrow] key	Pressing the [Right Arrow] moves the flashing date to the next day. If you are on the last day of a month, pressing [Right Arrow] moves to the first day of the next month.
[Left Arrow] key	Pressing [Left Arrow] moves the flashing date to the previous day. If you are on the first day of a month, pressing [Left Arrow] moves to the last day of the previous month.
[Down Arrow] key	Pressing [Down Arrow] moves the flashing date forward one week. [Down Arrow] does not move the flashing date into a different month. If you are on the last day of the month, pressing [Down Arrow] moves to the first day of the next month.
[Up Arrow] key	Pressing [Up Arrow] moves the flashing date back one week. [Up Arrow] does not move back into a different month. There is one exception. If you are on the first day of a month, pressing [Up Arrow] moves to the last day of the previous month.
[Page Down] key	Pressing [Page Down] moves the flashing date to the first day of the next month.
[Page up] key	Pressing [Page Up] moves the flashing date to the last day of the previous month.
Mark as booked	Pressing <input type="checkbox"/> Mark as booked changes the flashing date to white numbers on a red background. This allows you to indicate to others that the day is booked up and that you do not want any more appointments booked for that day. Pressing <input type="checkbox"/> while on a day that is marked as booked un-marks that day. Using Mark as booked is also useful for highlighting holidays for which you will be closed.

Precision tip: Marking a day as booked does not prevent you from making additional appointments for that day.

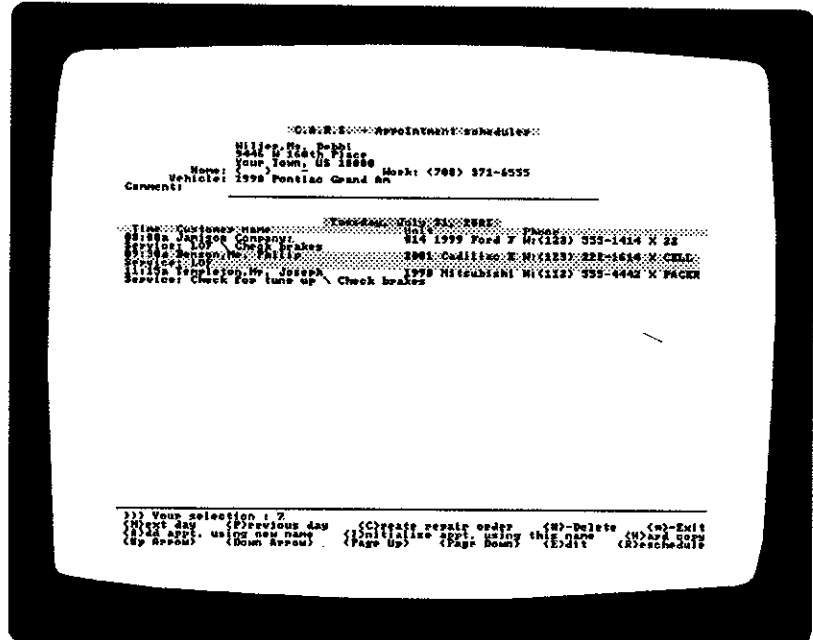
Computerized Automotive Repair Order System

Section 3.2

APPOINTMENT SCHEDULER

Going to a specific date

Use the arrow and/or page keys to get to the date you would like to book the appointment for. Press [Enter]. You will see the following:



The customer information at the top of the screen belongs to the customer that was displayed when you selected the Book appointment function. Below the customer information, the date is displayed highlighted in green. If the date was marked as booked, the date will be displayed highlighted in red. The large areas below the date will show the appointments previously made for this date.

Next day/ Previous day

Pressing [N]ext day moves to the next day. Pressing [P]revious day moves to the previous day.

Initialize appt. using this name

[I]nitialize appt. using this name books an appointment for the customer displayed at the top of the screen.

Service(s) to be performed

The cursor will move to the "Service" field. Enter the service(s) to be performed on the vehicle. You have only the one line, so be brief. When a repair order is created from this appointment, the information you enter on the service line will automatically transfer to the top line of the Description of work box.

When a repair order is created from the Appointment Scheduler the requested services are now put in the Description of work starting on line 2. This leaves the first line open for Sales tax, Shop supplies, and Discount over-rides. If the repair order started has a vehicle

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Section 3.2

APPOINTMENT SCHEDULER

description of "Commercial Account" or "Over-the-Counter" and you have filled in the Year, Make, and Model fields the system will write the Year, Make, and Model information on the first line of the Description of work.

Multiple services

Sometimes it is desirable to have multiple services appear on separate lines in the Description of work box. To do this, separate the services requested using backward slashes `\`. You can separate up to eight services using this method. (The system will see only the first 7 backward slashes.)

Precision tip: If you are booking an appointment and the customer has changed their name or moved since they were last in, initialize the appointment using the old information. Before completing the entry of the appointment, use the [Up Arrow] to go up to the information that needs to be changed. Change the information accordingly.

Entering the time of the appointment

After entering the service, the cursor will move to the "Time" field. Entering a time is optional. If you are entering an appointment that's "drop it off in the morning and leave it" don't enter a time. If the appointment is for a specific time of the day, enter the time. The appointment will be displayed on the screen in time order. The "drop it off in the morning and leave it" appointments don't have any time and will therefore appear first followed by the appointments for a specific time.

Some shops schedule most of their appointments as "drop it off in the morning and leave it" while they schedule oil change appointments evenly throughout the day. By putting a time on the oil change appointments you can easily see when you have an appointment available.

The time is entered by typing two digits for the hour. The system automatically enters a colon. You also can enter two digits for the minutes. Unless specified, the system assumes the appointment is before noon (am). Afternoon appointments may be entered by typing a `P` after the minutes or by entering the time in military (24 hour) format. For example, an appointment for 3pm may be entered as 03:00p, 15:00 or 15:00p. (On-the-hour appointments do not need their minutes entered.) An appointment for noon may be entered as 12:, 12:00 or 12:00n. An appointment for 12 midnight may be entered as 24:, 24:00 or 12:00m. 12 midnight is treated as the last appointment for the day. Appointments after midnight but before 1am are entered starting with 00:. Therefore, an appointment for 12:30am would be entered as 00:30, 00:30a or 12:30a.

Add Appt. Using New Name

If you wish to make an appointment for a customer who is not yet

Computerized Automotive Repair Order System

Section 3.2

APPOINTMENT SCHEDULER

in your computer, press **A** to add an appointment using a new name. This function works exactly like the Create new repair order-Add new name function. (See Section 3.2 above for more information.)

Selecting an appointment

To Edit, Reschedule, or Delete an appointment, or Create a repair order from an appointment, the appointment must first be selected by highlighting it. To highlight an appointment, press [Page Up], [Page Down], [Up Arrow] or [Down Arrow]. The system will highlight the first appointment. Once any appointment is highlighted, pressing [Up Arrow] or [Down Arrow] will highlight the next appointment above or below.

Precision tip: The direction of the [Page Up], [Page Down], [Up Arrow] and [Down Arrow] can be reversed while scrolling through customers in Create new repair order or while scrolling through Inventory in Inventory Lookup. To reverse the direction of the arrow and page keys, while scrolling in Create new repair order, press **[Ctrl]-[R]**.

If there are more appointments than fit on the screen, pressing [Page Up] or [Page Down] will scroll the appointments up or down one screen-full.

Delete appointment

To delete an appointment, highlight the appointment you wish to delete and then press **D**. The system will ask, "Delete the highlighted appointment?" Typing **[Y][E][S]** and pressing [Enter] will delete the highlighted appointment. Pressing [Esc] or typing anything but "yes" will not delete the highlighted appointment.

Reschedule an appointment

To reschedule an appointment, highlight the appointment you wish to reschedule and then press **R**. The system will take you back to the calendar. Select the day onto which you wish to reschedule the appointment and press [Enter]. Next, press **I** initialize appt. using this name to make a new appointment for the customer. You MUST finish rescheduling the appointment before leaving the Appointment Scheduler or scheduling an appointment for someone else.

Edit an appointment

To edit an appointment, highlight the appointment you wish to edit, then press **E**. You will be allowed to edit the appointment.

Precision tip: Editing the appointment will not allow you to change the appointment time or date. Use **R** reschedule instead.

Hard copy

To print a copy of all appointments for the day shown, press **H**.

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Section 3.2

APPOINTMENT SCHEDULER

Create a Repair Order
from an appointment

To create a repair order from an appointment, highlight the appointment you wish to make into a repair order, then press **[C]**. The system will create the repair order, delete the appointment, transfer you to Repair orders (pending) and display page 1 of the new repair order.

Appointment Scheduler
Emergency re-link

The Emergency re-link function should only be used when trouble has been found with the Appointment scheduler. The Emergency re-link process will reattach the appointment entries to the correct day's schedule and retrieve misplaced empty appointment entries. To re-link the whole Appointment Scheduler system, press **[Ctrl]-[R]** with the calendar displayed. To re-link just one day, press **[Ctrl]-[R]** while displaying the day you wish to re-link.

Repair orders (pending)

Book an appointment
from a repair order

Sometimes you need to book an appointment in the future for a vehicle that is in your shop now. An appointment may be created directly from a pending repair order. In Repair orders (pending), search for and display the vehicle you wish to make an appointment for. Press **[B]**. The system will ask, "Book a future appointment for this vehicle?". Typing **[YES]** will take you directly to the Appointment Calendar. Pressing **[Esc]** or typing anything other than "yes" will not book an appointment.

Precision tip: Scheduling an appointment from an existing repair order does nothing to the repair order.

Appointment Scheduler Maintenance

Appointment scheduler
maintenance

An **[A]**ppointment Scheduler Maintenance function is found on the C.A.R.S. -Utilities menu. This function allows you to expand the number of appointment the system can handle and will delete all no-show appointments prior to a certain date.

Expand appointment scheduler

[E]xpanding the Appointment scheduler will increase the number of appointments that the system can handle by 100 appointments. The maximum capacity is 32,767 appointments.

Precision tip: Every 100 appointments takes 64,000 bytes of disk space. Don't expand the Appointments scheduler any more than necessary. Once expanded, it cannot be un-expanded.

Delete no-show appointments

When the **[D]** Delete no-show appointments function is selected, the system will ask "Delete no-show appointments prior to MM/DD/YY" where "MM/DD/YY" represents today's date. You may change this date back as far as you wish.

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APPOINTMENT SCHEDULER

Precision tip: If you are using the Appointment scheduler properly, you should follow up the no-show appointment and reschedule them or manually delete them as required. That makes using this function unnecessary.

COMPUTERIZED AUTOMOTIVE REPAIR ORDER SYSTEM

Section 3.3

Repair Orders (Pending)

Description	<p>Immediately after a repair order is created, it becomes a "pending" repair order. A "pending" repair order at least has the customer's name and address entered onto it. It may to may not have the some or all of the Description of Work entered onto it. It may have all, some, or none of the parts and labor charges entered onto it.</p> <p>The "Repair Orders (pending)" function will allow you to add the parts and labor charges to the repair order, the customer's complaints, the work requested, print a copy of the repair order, edit the information on the repair order, and change the status of the repair order.</p>
The invoice number	<p>When the repair order is created, the system automatically assigns an invoice number and a "job" number. The job number may be thought of as the number of the "slot" in the repair order rack that the repair order occupies. Once the repair order has been created, neither the invoice number nor its "job" number will ever change. Repair orders may be called up by "job" number. When the repair order is marked paid, the invoice number will be assigned to The Manager's Assistant™ invoices (work order number or charge sale) generated by the Transfer Paid Repair Orders function.</p>
The Arrived on date	<p>To accommodate disclosure laws in some states the system keeps track of the date at the time the repair order was created. (The system will use the computer's current date as the Arrived on date.) This information is displayed in the Status box as "Arrived on: MM/DD/YYYY". It will print on the repair order in the upper right-hand corner as "Arrived: MM/DD/YYYY".</p> <p>If you need to change the Arrived on date due to the computer's date being incorrect, do the following to correct the date:</p> <ol style="list-style-type: none"><li data-bbox="682 1346 1538 1436">1. Go to Precision Main Menu-Utilities-Enter current date and time. Change the computer date to the correct date. Press <input type="checkbox"/> to return to the Precision Main Menu.<li data-bbox="682 1472 1538 1535">2. Return to C.A.R.S.-Repair orders (pending) and change the status of the repair order to code 5-Void/Erase or code 8-Void/File.<li data-bbox="682 1570 1538 1696">3. Edit the last name or company name to something different, the press [Enter] until "Your selection:?" appears. The "Arrived" date will change. Edit the last name or company name back to what it was originally.<li data-bbox="682 1732 1513 1757">4. Change the status of the repair order back to a pending status.