Moving Around The Repair Order

Turn Page

The information is displayed in several "pages". To go from page to page, press ⊤ (turn page). The first page contains the name, address, phone numbers, vehicle description, engine specs, etc. The second page contains the stock numbers, quantities, employee number and description and prices of items entered onto the repair order. The third page contains the description of work. The fourth page contains the vehicle's service history as retrieved from the customer follow up system. (See 1,2,3,4 below.)

1,2,3,4

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 Parts & Labor page, pressing ③ will display Description of Work page, and pressing ④ will display the Service History page.

When editing page 1 of a repair order the system will check what is in the Vehicle (Unit) description field against the lists. If the system doesn't recognize something in the Vehicle (Unit) description field the cursor will go to the Vehicle (Unit) description field. This can be caused by one of three things:

-The vehicle description contains a misspelling.
-The combination of year, make & model were not found in the list.
-There is no year, make, model information in the "Year", "Make" & "Model" fields because the repair order was created before the upgrade was installed.

If the vehicle description is obviously misspelled you may either edit it to correct this spelling or press [F3] to select from the lists. If you have entered info into a field, the info in those fields will be added together to make a Vehicle (Unit) description, the description will appear in the Vehicle (Unit) description field & when the repair order is transferred from C.A.R.S., using the Transferred Paid repair orders function, the year, make & model will be added to the lists.

Description of Work

Record requested work

The work requested by the customer is recorded in the Description of Work section (page 3) of the repair order. As you enter the work requested by the customer keep in mind that you will eventually add additional information to this section; what you did to correct the customers complaints, a detailed description to justify the amount charged for repairs, information about the warranty or lack of warranty provided, and additional services recommended. The Description of Work is also used to inform the system of special handling required for this repair order.

```
            C.A.R.S.   Repair orders (pending)   Page 3
         Jamison Company:
         Marilyn R. Adams                    Invoice# 000011 Job 3
         12234  Any Street                   Total         0.00
         Your Town, US 10000                 July 30, 2001
       Home: (   )   -           Work: (123) 555-1414 X 22
     Vehicle: #14 1999 Ford F250 Pickup
   Comment:
                          Description of work

   Lube, oil and filter change
   Check rear brakes
   Check anti-freeze leak




   OUR INSPECTION OF YOUR VEHICLE SHOWS IT NEEDS THE FOLLOWING:



   >>> Your selection : ?
   <N>ext  <P>revious  <S>earch  <T>urn Page  <F>eed  <Page Up> <Page Down>
   <$>-Status  <E>dit  <R>eceive  <H>ard copy  <D>isplay by department  <V>iew
```

Entering the Description of Work

There are 11 lines available for the Description of Work when a repair order is initialized. If you need more room for the Description of Work may be expanded. (See the section on Expanding the Description of Work below.) The Description of Work may be edited as often as you wish. To add or change the information shown in the Description of Work, display the Description of Work page, then press E to edit the information shown.

> *Precision tip: If while entering the Description of Work you accidentally push the last line of text past the bottom of the screen, you will see the message: TEXT HAS EXCEEDED AVAILABLE SPACE. To retrieve the bottom line of the text delete a line, the text pushed off will return. The expand the Description of Work following the instructions below.*

You would type into the Description of Work such things as "Oil change, filter, lubrication, check all fluid levels", "Check noise in back when car goes in reverse", "Tune up engine-idles rough, stalls in morning, black smoke, may need choke unloaded".

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

Entering Results of mechanic's inspection

You may also enter the results of the mechanic's inspection. For example, you could type in such things as "Car needs shock absorbers-estimate $81.00", or "Carburetor need overhaul-performance of vehicle not guaranteed". Use this section just as

you would normally use the Description of Work section of a handwritten repair order. After you have entered the desired information into the Description of Work, press [Esc].

Expanding the Description of work

As mentioned earlier the Description of Work box may be expanded one line at a time until it contains 29 lines. Each line added to the Description of Work box **DECREASES** the space available for parts and labor by one line. As lines are added to the Description of Work box, will **NOT** get bigger on the screen. The information will scroll. You may scroll the information while editing the Description of Work box by pressing [Up Arrow] or [Down Arrow]. When not editing, you may scroll the information by pressing [Page Up] or [Page Down].

To expand the Description of Work by one line, press [Ctrl]-Ⓐ. The following message will flash at the bottom of the screen:

>>>Description of work is now 12 lines<<<

Precision tip: When the Description of work box is fully expanded, you will have room for 12 parts and/or labor charges. Once expanded, the Description of Work box cannot be un-expanded. Expanding the Description of Work box only affects the one repair order. It does not affect any continuation sheets that had been made or will be made from the repair order.

Precision tip: Each line of the Description of Work will hold up to 78 characters. If you need more than 29 lines for the Description of Work, it is possible to start a continuation sheet. (For more information see the section on Continuation sheets.)

Tickler Letters users note: The Tickler Letters program will only print the bottom 11 lines of the Description of Work box. If you have expanded the Description of Work box and have recommendations make sure they appear in the bottom 11 lines of the Description of Work box.

Over-writing the normal discount on a repair order

The system automatically applies the standard discount entered in the Discount code field on Page 1 of the repair order. The system may be prevented from applying this discount on this repair order even though this customer normally received a discount. To prevent the system from applying a discount, enter "Discount 0" or "No discount", or "Discount" onto the top line of the description of work. The words "No discount" or the word "Discount" when used by itself must be followed by at least three blank spaces.

Changing the normal discount for just this repair order

The system can change the discount amount normally given the customer for just this particular repair order. Do this by entering the

word "Discount" followed by the discount percentage or discount plan on the first line of the Description of Work. For example, if you wanted this repair order to receive a 15 percent discount in place of the 10 percent normally given, you would type "Discount 15".

> *Precision tip: Do not change the Discount code on Page 1 of the repair order unless the new discount will be the normal discount given to this vehicle in the future.*

Over-riding the normal Taxable status on a repair order

The system automatically applies the standard taxable status entered in the Sales tax field on Page 1 of the repair order. The system may be prevented from adding sales tax on this repair order even though this vehicle may normally be subject to sales tax. To prevent the system from adding sales tax, enter "Tax table J" onto the top line of the Description of Work.

The system may be forced to add sales tax to this repair order even though this customer normally is not charged sales tax. To do this enter "Tax Table A" onto the top line of the Description of Work.

> *Precision tip: Do not change the Tax Table on Page 1 of the repair order unless the new Tax Table will be the normal Tax Table given to this vehicle in the future.*

Over-riding the normal shop supplies charges on this repair order

The system automatically applies the Shop supplies status entered in the Shop supplies field on Page 1 of the repair order. The system may be prevented from adding shop supplies charges on this repair order even though this vehicle may normally be subject to shop supply charges. To prevent the system from adding shop supplies charges, enter "No shop" or "No EPA" onto the top line of the Description of Work.

The system may be forced to add shop supplies charges to this repair order even though this vehicle normally is not charged shop supplies charges. To do this enter "Add shop" or "Add EPA" onto the top line of the Description of Work.

> *Precision tip: Do not change the Shop supplies status on Page 1 of the repair order unless the new shop supplies status will be the normal status given to this vehicle in the future.*

Advanced Deposit

Taking advanced deposits for work to be done

The money taken for an advance deposit on a job has to be accounted for when doing bookkeeping for the day. The system can automatically keep track of the repair order total, advance deposits taken and the balance due on the repair order.

When performing the Transfer Paid Repair Orders function at the end of the day, the system will automatically make a Received on account transaction for the advance deposit taken to A/R Acct # 9999-Miscellaneous and temporary. This will balance the bookkeeping for the day.

> *Precision tip: If you have The Manager's Assistant* ™ *function the system will not allow an advance deposit to be recorded on a repair order that belongs to someone who has a house charge account with you. An advance deposit taken on a house charge account is a payment on the house charge account. Use Received on Account invoice entry in the Shift checkout to record the advanced deposit to the house charge account. (For more information on Received on account transactions see Section 3.1 of The Manager's Assistant* ™ *manual.)*

Receiving the advanced deposit to the job

When you receive an advanced deposit for the work being done, display the repair order on the screen. With the mini-menu showing, press 🖸. Next, press 🖸-Deposit. The system will display the following:

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

          Thomas,Mr. William                Invoice# 019504 Job 1
          1234 Any Street                    Total        308.68
          Your Town, US 10000                March 14, 2000
     Home: (112) 555-8777      Work: (   )
  Vehicle: 1999 Chevrolet Monte Carlo
Comment:
          _____
                  Engine: 350V                   ___Status___
                 License: ABC 123              Arrived on: 03/14/2000
                     VIN: 1G1665975H6459790    Initialized
                   Color: BURGUNDY
         Service schedule: 1
           Discount code:
          Sales tax table: A

                 Date deposit rec'd:     03/14/2000
                  Amount of deposit:       100.00
                 Transferred prior deposits:
                                             0.00
```

The system will ask for the date on which the deposit was received. The system date will appear. If this is correct, press [Enter]. If the date displayed is not the date that the deposit was received, type the correct date. Next, enter the amount of the deposit and press [Enter].

After the deposit is entered, the status box on page one of the repair order will show the balance due. If the deposit exceeds the running total of the repair order, the balance due will be a negative amount (a credit balance). When the repair order prints, the deposit amount will be printed at the top of the total box. The invoice total will be labeled "Balance due". (If the balance due is a negative amount the invoice total will be labeled "Credit memo".)

Taking more than one deposit on a job

Taking more than one deposit on a job is allowed by the system. When the deposit received is transferred to bookkeeping the amount received is moved from the "Amount of deposit" field to the "Transferred prior deposits" field. A second deposit taken, when transferred, will be added to the "Transferred prior deposits" field.

> *Precision tip: When recording a second deposit which was taken on a different bookkeeping day you MUST do bookkeeping in-between entering the deposits.*

Changing deposits

To correct a deposit shown in "Amount of deposit", return to Status-Deposit and edit the amount shown. To correct a deposit shown in "Transferred prior deposits", enter an amount so that the amount you enter when added to the amount shown in "Transferred prior deposits" equals the correct deposit amount.

> *Precision tip: If the deposit amount in "Transferred prior deposits" was incorrect the bookkeeping for that day could not have balanced. Correcting the deposit amount in this way will not correct the bookkeeping. You will be short one day and over the next day or vise-versa.*

To record a second deposit taken on the same bookkeeping day, the amount of deposit must be changed to the total of the deposits received that day.

To refund a deposit that appears in "Transferred prior deposits", enter a minus amount for the "Amount of deposit". To refund a deposit that still appears in the "Amount of deposit', enter a zero (0).

When the repair order is marked paid (cash, credit card or check) and then transferred, the system will reverse out the original received on account transactions. This will cause the books to balance for that day.

Printing the Repair Order

Printing the repair order

To print a hard copy, press ⛶. The computer will recalculate the invoice total and then print the invoice. If additional copies are

required, press ⒣ repeatedly. You will receive one copy for each time you press ⒣.

> *Precision tip: If you have set up the system to prevent stock numbers from printing, pressing [Shift]-⒣ will print a copy with stock numbers.*

> *Precision tip: When using the Disclaimer section, if you would like to print a copy of the repair order without the Disclaimer, press [Shift]-⒣.*

You may print a copy of the repair order at any time and as often as you wish. For example, you may wish to print a copy of the repair order after entering the customer's request for service and complaints about his vehicle. You can then give the repair order to the technician so he will know what to do with the vehicle. When the copy gets too soiled to use, simply print another. You may consider having the technician use this copy as a scratch copy to record the parts used. Later, this information may be entered into the computer and billed to the repair order. At that time, you may wish to print another updated copy.

> *Precision tip: If you are using pre-printed forms, you can have the system not print the horizontal and vertical lines. To remove the lines use the "Toggle repair order lines" function under the Precision Main Menu-Utilities. The characters which make the lines can also be changed. Contact Precision Data Systems for assistance.*

Printing an Audit copy of the repair order

An Audit copy is a special form of Hard copy. Printing an Audit copy of the repair order will prevent the system from replacing the labor operation codes with the work "labor". This will enable you to read the labor operation code and quantity of labor from the printed repair order. An audit copy is printed by pressing ⒜ or [Shift]-⒜.

Feed

Pressing ⒡ will cause the printer to eject a blank page. This will make it easier to remove a printed repair order from some printers.

Moving Around The Rack

Next, Previous

Pressing ⒩ for Next will give you the next pending repair order. Pressing ⒫ for previous will give you the previous pending repair order.

> *Precision tip: When pressing ⒩ or ⒫, only PENDING repair orders will appear. Blank (un-initialized) repair orders and repair orders that have been marked "completed", "paid", "estimate" or "void" will be skipped.*

Search by name

To find and display a particular repair order by customer name, press Ⓢ. You will be prompted to identify the repair order. Type in the last name or company name, then press [Enter]. The system will scan the repair order rack and display the first repair order found with that name. If by chance the system contains two or more repair orders with the same name, you may use the search function to display other repair orders with the same name. After the system displays the first repair order with that name, press Ⓢ, then press [Enter] to display the next repair order with the same name.

> *Precision tip: When using the search function to display other repair orders with the same name, do NOT press any keys in between the searches, that will cause the search to start from the beginning.*

Search by vehicle

To find and display a particular repair order by vehicle, press Ⓢ. You will be prompted to identify the vehicle. Type in part of the vehicle description, then press [Enter]. The system will scan the repair order rack and display the first repair order found with that vehicle description. If by chance the system contains two or more repair orders with the same vehicle description, you may use the search function to display other repair orders with the same vehicle description. After the system displays the first repair order with that vehicle description, press Ⓢ, then press [Enter] to display the next repair order with the same vehicle description.

> *Precision tip: When using the search function to display other repair orders with the same name or vehicle, do NOT press any keys in between the searches, that will cause the search to start from the beginning.*

Search by Job number

To find a display a particular repair order by job number, press S. You will be prompted to identify the repair order. Type in the "job" number, then press [Enter]. The system will display that repair order.

Scan the rack

To call up a repair order when unsure of the name or job number, press S to search, then, instead of typing the name, type a question mark ? or slash /, then press [Enter]. Near the bottom of the screen, the computer will display the name on the first repair order in the rack. (Blank repair orders will be ignored.) Press [Enter] to display the next name, or once the correct name is found, press [Esc] to display that repair order.

Pressing Go will cause the system to leave Repair orders (pending) & go directly to Filedrawer and display the same vehicle you were just viewing in Repair orders (pending). Once in Filedrawer, pressing Ⓖ again will return to the same place you were in C.A.R.S..

Billing Out The Repair Order

Billing out the repair order

Repair orders are billed by entering parts and labor items onto page 2 of the repair order. This is done from within the "Repair Orders (pending)" function.

All items that are billed to a repair order (parts, labor, outside services, shop supplies, etc.) must flow through Precision Parts Manager. This way the system is able to monitor the sales of all items. Items not normally stocked and items never before purchased are monitored by Precision Parts Manager just as if the item is routinely kept in stock.

Item billed to a repair order are either taken from stock or special-ordered for the job. If then item is taken from stock, list it on the repair order and the system will reduce the inventory, add it to the total, and add applicable sales tax. If the item is special-ordered, use the C.A.R.S. receive function (described below). Here is what it will do:

1. The system will look up the item being received. If no information is found, the information about this item will be added.

2. The receipt of the item into inventory will be recorded.

3. The sale of the item from inventory will be recorded.

4. The item will be billed to the repair order.

5. Applicable sales tax will be added.

6. Applicable shop supplies will be added.

7. The item will be added to the running-total of the repair order.

It sounds like a lot of work but it is not. C.A.R.S. does it **ALL IN ONE STEP!!**

Receiving inventory

All items when physically received must be entered into inventory. The received items may have been ordered to replenish stock or may have been ordered for a specific job. If an item had been ordered for a specific job, note the job number for which that part was ordered. This information will be required when recording the receipt of that item.

The receive function should also be used whenever a cost is being received for an "imaginary" item. An example of an "imaginary" item is towing performed by an outside towing service. The towing charge has to be received and put on the repair order so that the job cost shown is the cost of this tow and not any previous tows.

Precision tip: The receive function should be used to put items on a repair order when you are just beginning to use the system and the item has not yet been added to your inventory. In effect you are lying to the computer by telling it the item has just been received when in fact it was received days or weeks ago.

To Receive an item

To receive inventory, you must be in the "Repair Orders (pending)" section and the mini-menu must be displayed. (If the mini-menu does not show, press [Esc] to leave the edit mode.) Then press 🄁. The "Receive Inventory" screen will appear. (See Precision Parts Manager Instruction Manual, Section 3.6, Transactions, for supplementary information.) When using the C.A.R.S. Receive Inventory function, the system will allow you to change the comment line, vendor, reorder low level, reorder high level, or the description of the item , as well as enter the quantity, vendor invoice number, cost and retail price.

```
                    C.A.R.S. - Repair orders (pending) - Page 2
                    Jamison Co.:
                    Ms. Marilyn Adams                    Invoice# 019504 Job 1
                    12223  Any Street                    Total         9.99
                    Your Town, US 19999                  March 14, 2000
               Home: (   )   -          Work: (112) 555-1414
            Vehicle: #08 1995 Chevrolet Caprice
         Comment:
         ══════════════════════════════════════════════════════════════════
           Stock number: OF-B111
                Comment:
                 Vendor: ABC PARTS      A/P Abbr: ABC
         Service trigger:
            Reorder low:     6      Reorder high:   24
            Description: Oil filter
               Quantity:     1
         Vendor/Invoice#: ABC
           Current cost:     2.03     Margin= 67.00%
           Retail price:     6.15
         Job# / Sub-job:               /
         Tech. / Sold by:
                       On hand:       12       Current sales:       6
                  Last received: 03/14/2000    Cumulative sales:   104
                  Invoice number: ABC 12345    Sold last 24 months: 148
                            ( the <ESC> key to redo )
```

Stock number

Enter the stock number of the item received. (The stock number consists of the two character group prefix and the actual part number.)

If there is previous information about this item in Precision Parts Manager, the system will display the item's quantity on hand, date & invoice number the item was last received on, current, cumulative and last 24 months sales. This information is provided so that you may make decisions about stocking this item.

Changing the Comment

If you would like to change the information in the comment field you may do so. Use the [Up Arrow] to move to the comment field and edit the information.

Inventory Item Warning

You may have the system emit a distinctive warning sound when any stock number is received or sold. This sound along with your notes in the comment area can be used to alert you to any special circumstances related to that stock number, including the need to Ask LODI for more information. To use this warning sound place a carat (^) in the comment field of that part number.

> *Precision tip: This can be done when receiving parts in C.A.R.S. or in Precision Parts Manager Inquire/Edit.*

Change the Vendor

If this is a new item add the vendor you usually order this item from. When a purchase order is produced in Precision Parts Manager the item will be ordered from this vendor.

If the item was already in stock and was purchased from other than the normal vendor and you have paid less for the item, you may wish to change the vendor. From then on, when Precision Part manager is used to produce a purchase order for that new vendor, the item will be ordered from the new vendor instead of the old vendor.

A/P Abbreviation

If you have purchased The Manager's Assistant ™-Accounts Payable system, the system will display an A/P Abbr. field. Enter the Vendor abbreviation for the vendor you normally purchase this item from.

> *Precision tip: Make sure you use the Vendor abbreviation you have set up in The Manager's Assistant ™-Accounts Payable system.*

> *Precision tip: If you have purchased The Manager's Assistant ™-Accounts Payable system and have added the Payables abbreviations for the item in Precision Parts Manager the vendor abbreviation will automatically appear in the Vendor/Invoice # field.*

Automatic Service update

The inclusion of any item on the repair order may be used to trigger an automatic update of the appropriate service history category. This is accomplished by putting the desired Service Code (letter) in the "Service trigger" field of that item.

> *Precision tip: On an already existing part this can be done in Precision Parts Manager Inquire/Edit.*

Changing the Reorder levels

To cause the system to keep this item in stock, edit the reorder low and high levels if necessary.

Change the Description of item	If you wish to change the description of the item, you may do so.
Quantity received	Once the comment, vendor, reorder low level, reorder high level and description fields are as you wish, enter the quantity of the item received. Pressing [Enter] without typing a quantity will cause the system to assume a quantity of one.
Vendor/Invoice #	Next, enter an abbreviation for the vendor and the vendor invoice number from which this item was received.

> *Precision tip: The vendor/invoice # will be shown in Precision Parts Manager under the Last received. The vendor/invoice # will also be stored on the repair order in Filedrawer.*

Duplicate Vendor/Invoice #

When using the Receive function if you enter the same Vendor/Invoice # the system will display the following warning:

Duplicate Vendor/Invoice # / Receive it anyway? (Y/N)

If you do not want to receive the part a second time, press Ⓝ. To receive the part a second time, press Ⓨ.

Current cost

Enter the amount paid for the item (cost) on this vendor invoice.

Retail price

After entering the cost of the item the system will calculate a suggested retail price. This price is calculated based upon the Gross Profit percentage entered into the Group Definitions. (See page 17 of this manual and Precision Parts Manager manual Section 2 Company setup for more information on Group Definitions.) The suggested retail price will be displayed to the right of the old retail price. If the item is a new item and if you do not type in a retail price, the system will insert the suggested retail price when you press [Enter].

If the item is not a new item, the system will display the suggested retail price to the right of the old retail price. To leave the old retail price press [Enter]. If the suggested retail price is higher than the old retail price you may force the system to replace the old retail price with the suggested retail price by pressing [F9], [F10] or [Down Arrow].

> *Precision tip: If the suggested retail price is lower than the old retail price and you wish to use the lower suggested retail price, you MUST type in the lower price.*

Job number

If the item was ordered for a specific vehicle being repaired rather than to replenish stock, enter the "job" number of the repair order number as noted previously.

Precision tip: Entering a "JOB" number on the job number line will cause the computer to add the information about this item to inventory (if necessary), record the receipt of the item increasing inventory, record the sales of the item reducing inventory, simultaneously put the item on the repair order, add applicable sales tax and applicable shop supplies, and adjust the running job total.

Sub-job code

Using sub-jobs enables you to force the system to print all labor and parts related to one specific service performed on the repair order together and to print a total for that service. It will allow you to divide up the items on the repair order in to am many as eleven Sub-jobs and print a sub-total for each. The total of the sub-job includes shop supplies and sales tax less discounts.

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 sub-total for the oil change, list the labor and parts for the brake job, then print a sub-total for the brake job.

Precision tip: The sub-total is not the sum of the lines printed above because the sub-total includes shop supplies and sales tax and less any discounts.

Valid Sub-job codes

When Sub-jobs have been turned on, the system will ask for the sub-job code after asking for the job number. Valid codes are a blank space and the letters A through J. As you enter items onto a repair order, the system will remember the last sub-job code used much as it remembers the last technician number used.

If all items on the repair order contain a blank space for the sub-job, the system will print the repair order as if the Sub-jobs feature did not exist. If any item on the repair order contains any sub-job code other than a blank space, the system will group together all of the items that have a sub-job code of a blank space and print a sub-total. This will be followed by items with sub-job code "A" (if any), followed by its sub-total. This will be followed by items with sub-job code "B", etc..

You should avoid skipping sub-job codes because to wastes lines. You can regain the use of the wasted lines by forcing the system to reset the highest sub-job code entered. First, edit the repair order lines and use the sub-job codes at the low end of the alphabet. Next, use the Display by dept. function, the View function, print a Hard copy or print an Audit copy.

Precision tip: If you turn on Sub-jobs after creating any macros (short-hand typing) which enter items onto page 2 of the repair order, you will have to change your macros to include another [Enter] on each line. You may wish to make the first [Enter] a variable field so you will have the opportunity to enter a sub-job code.

The job select function will allow you to temporarily remove the sub-total for those repairs the customer does not want from the on screen running total. Choosing Job select will display the following:

Selected Sub-job subtotals are indicated by the <= = = arrow. The system starts with all sub-job subtotals selected. To remove the Sub-job subtotal for jobs the customer does not want from the work order running total, use the arrow keys to highlight the Sub-job subtotal for that job & press the [Space bar] or [Enter]. The <= = = arrow will be removed from the Sub-job subtotal line and the system will subtract this amount from the work order running total shown on the screen.

Sub-job subtotal amounts that have been subtracted from the running total can be added back by highlighting the Sub-job subtotal & pressing the [Space bar] or [Enter]. The <= = = arrow will appear on the subtotal line and the system will add this amount to the job running total shown on the screen.

Pressing the ⊡ or [Esc] will restore the repair order to the way it appeared before using job select. To remove the items permanently you can just delete them , or export them to another work order. See "Import/Export" below for more information.

Precision tip: If your system is set to automatically add shop supplies & the shop supplies are calculated using 2 different percentages with a break point in between, the calculated running total may be off because of the shop supplies. If you have set the system with a maximum amount of shop supplies and the shop supplies are at maximum on this repair order, removing a subtotal may cause the customers final price to be higher because of the shop supplies. If either of these conditions causes problems, change the settings for the shop supplies to use only one percentage and set the maximum shop supplies to $999.99.

Precision tip: The new Job select function is only available if you have set the system to include sales tax in the Sub-job subtotals.

Technician number

If the item is being received to a job, the system will display the employee number currently assigned to this repair order. You may

type in a different employee number to credit the item to a different employee. This will also change the employee assigned to that repair order.

Sb(Sold by)

If you have turned on the Salesman commission feature, the system will also display a sold-by employee number. You may credit this item to this employee or change it to credit another employee.

Creating special stock numbers

Recall from Precision Parts Manager, if an item is received into inventory, and if that item was not found during the posting function, Precision Parts Manager would create a space for that item and then post the receipt of that item. The same thing happens in C.A.R.S. but C.A.R.S. posts instantly. The space for the item is created immediately.

> *Precision tip: If you have set up Precision Part Manager to use stock numbers longer than 18 characters (the two character group prefix plus the dash plus 15 characters) you may use the comment field as an extension of the description field.*

You can use this feature to create stock numbers for billing labor, towing, shop supplies, or any imaginary item. Use the receive function as described above and receive a quantity of zero.

Automatic stock number conversion

The same part is often available through many sources, each source using a different part numbering system. Automatic stock number conversion will convert one stock number into another. This will force the system to maintain all sales information gathered on a part under one stock number, regardless how many alternate stock numbers are used in purchasing this part.

> *Precision tip: Automatic stock number conversion is useful where there is little difference in quality, pricing or brand recognition. Therefore, you do not need to keep the items separate in the computer just because manufacturers use different part numbering systems. If there is a difference in quality, pricing or brand recognition you will want to keep the items separate in the computer. (See Section 3.3 of the Precision Parts Manager manual for more information on Equivalent stock numbers.)*

To force the system to convert one stock number to another, you must use the system's ability to create special stock numbers (described above) to record the conversion information. Use the receive function to record the receipt of the stock number you wish converted to something else. Edit the description of the item so that the first character of the description is a greater-than

symbol (>) followed by the stock number you wish this item to be converted to.

> *Precision tip: The stock number must consist of the two character group prefix followed by the actual manufacturer's part number as already stored in Precision Parts Manager. DO NOT ENTER THE DASH THAT IS NORMALLY PRESENT AFTER THE TWO CHARACTER GROUP PREFIX.*

> *Precision tip: Do NOT convert a stock number to a stock number that already converts to another stock number.*

Enter a quantity of zero. You may also enter the cost and retail price of the item when purchased under the alternate part number. The cost and retail price will be maintained for information purposes only and will not be used in billing a repair order.

An example

For example, suppose you buy the same part from two sources. You normally purchase the part as a "OF-Q1109". Sometimes you purchase the same part from another source as a "OF-141109QZ". To have the system convert the second stock number into the first, use the receive function and receive a "OF-141109QZ". Change the description to read ">OF1109". Enter a quantity of zero. From then on, whenever you receive or sell a "OF-141109QZ", the system will switch the stock number entered to "OF-Q1109".

Billing Labor

Labor billed to a repair order can only be calculated in three ways. The first way is to charge the customer a set price for a specific job. For example, the charge for a tire rotation or cooling system flush are usually "menu priced" items.

The second way is to charge the customer an amount that you determine by applying you hourly shop rate to an amount of time recommended by a flat rate manual. Replacing a water pump or installing a new power steering hose are examples of jobs that will have the labor billed this way.

The third way of billing labor is to charge an amount for a specific job. This amount is based solely on your judgment and experience. You charge this amount just because you feel this is how much you should charge.

Menu priced items

You may have standard or menu prices for things like tune up, tire rotation, safety inspection, tire repair and battery charge. You labor charge for tire rotation might be stock number 01-ROTATE. If you charge one price for a four-tire rotation and a different price for a five-tire rotation, you could have two separate stock numbers for tire rotation, 01-ROTATE4 and 01-ROTATE5. The description for a

four-tire rotation could be "Rotate tires". The description for a five-tire rotation could be "Rotate tires and spare".

For example, if you have different menu process for different tune ups (four cylinder, six cylinder, V-6, eight cylinder, with air conditioning, without air conditioning and so forth) you may make up stock numbers like 01-TU4, 01-TU6, 01-TUV6, 01-TU8, 01-TU8AC, etc..

> *Precision tip: When labor is billed on a menu basis, Precision Parts Manager will track how many of each package have been sold during the current month, the "Current Period" and "Cumulative Period".*

To bill labor on a flat rate basis, establish a stock number for hourly labor using the procedure for creating stock numbers as described above. You may wish to use the stock number 01-L for flat rate labor. (Recall that group 01 is specifically for labor.)

> *Precision tip: The stock number could as easily be 01-FR, 01-FLAT, 01-CHILTON, 01-LABOR, 01-LABOR30, or 01=Z. Using 01-L is easy to remember and requires the minimum number of key strokes.*

If your shop rate is $45.00 an hour, make the price of 01-L $45.00. When entering the quantity if labor you may enter whole hours from 1 to 9999.

You may also enter quantities with a decimal point as long as the total number of characters entered (including the decimal point) does not exceed four or less. This means you may enter a quantity with one place past the decimal point up to 99.9 or two places past the decimal point up to 9.99.

For example, if you would like to bill for 1 ¼ hours you would enter the quantity as 1.25. The system will multiply the 1.25 by $45 for a retail price of $56.25. For 10 and 3/10 hours you would enter the quantity as 10.3. The retail price will be $463.50.

> *Precision tip: The four character limitation does not include the use of a minus sign. However minus quantities are limited to -999.*

Multiple labor rates

Your shop may have one labor rate for general repair, another labor rate for electrical work, a third labor rate for foreign car repair. You may wish to establish as many labor rates as you wish. Your electrical labor rate may be 01-E, your foreign car rate might be 01-F. If you charge a different labor rate when repairing radiators, your labor rate for radiator repair might be 01-R, 01-RR, 01-RAD, or any stock number that is meaningful to you. When

assigning stock numbers to labor items, there are no restrictions as to the stock numbers that may be used except that the stock numbers must begin with "01-".

Creating your labor stock numbers

You may create your labor stock numbers by entering them into Precision Part Manager directly via the Add New Items function or may create them "on the fly" by using the "Receive Inventory" function in C.A.R.S.. Recall that the Receive Inventory function in C.A.R.S. will instantly insert the new items into Precision Parts Manager. To create your labor stock numbers "on the fly", use the Receive Inventory function and receive a quantity of zero.

Billing Labor using the "Book hours" option

When the "Book hours" option has been turned on, the labor quantity will be posted to the "Book hours" field stored in The Manager's Assistant ™- Employee Information. However, sometimes the amount of hours you wish to pay the employee is different than the amount of hours you wish to charge your customer. The "Book hours" option allows you to edit the labor quantity (hours) without changing the dollars charged the customer.

> *Precision tip: See the section on "Editing a labor line" on page 101 for more information on turning on the "Book hours" option.*

When billing out labor for jobs with set prices (menu priced items) such as oil changes, alignments or cooling systems flushes, the quantity billed is usually 1. The system will give the employee credit for 1 book hour for these jobs. If using the "Book hours" option, you must go back and edit the quantity on these jobs to reflect the actual book hours you would like to pay the employee for this type of job.

To use the "Book hours" option follow this procedure:
1. Put the labor on the repair order so that the customer is charged the correct amount.

2. Next, (or any time before the repair order is transferred) go back and edit the labor. Enter into the quantity field the number of hours you wish the number of hours you wish to pay the employee for this labor. The dollar amount charged to the customer will not change.

> *Precision tip: When using this option you cannot go back to edit the amount that you charged the customer. To change the dollar amount you must delete the labor line and re-enter it. (See the section on "Editing repair order items" on page 101 for more information.)*

Billing gasoline

To bill gasoline or other fuel to the repair order, you must have a group established in Precision Parts Manager for gasoline. Any non-add group except 00 and 01 may be used. Establish a stock number for each of the various grades of fuel that you sell. For example, if you decided that group 04 would be the group for fuel, you may establish stock numbers 04-REGULAR, 04-UNLEAD, and 04-DIESEL.

The easiest way to bill fuel to a repair order is by billing a quantity of one, add the number of gallons sold to the end of the item description, then enter the dollar amount of the sales in the "Each" column.

Precision tip: Ignore gasoline profit as reported on job costed copies and on the Transfer Recap. Profit on total fuel sales is reported on the Business Analysis Report.

An alternate method is to use the Receive Inventory function to record the fuel sale. When recording the receipt of fuel, edit the description so it contains the number of gallons sold, enter a quantity of one, and enter into the cost and retail fields the total amount of the sale. This will cause the dale of fuel to show no profit. The quantity on hand as shown in Precision Parts Manager will always show zero because the receipt of the fuel is always balanced by the sale.

Billing an item from stock

To bill out the repair orders, turn to the "Parts" page, then press E to edit the information shown. You will see "(1)" flashing on the screen. This indicates you are on the first of 31 lines.

Precision tip: If the item was not taken form stock, you must use the Receive function described earlier.

Stock number

To bill an item to a repair order that is in the inventory system, enter the stock number of the item. For example, if the item is IR-OF51, you would type IROF51, then, press [Enter]. The computer will type the dash for you, just as it does in Precision Parts Manager. When you press [Enter], the computer will immediately look up that stock number. If the item is found the inventory system, the computer will display the employee number of the technician assigned to the job, the description of the item and the retail price of the item. The contents of the comment field will be displayed at the bottom of the screen. (If the comment field contains only service trigger the comment field will not appear.) If that stock number is not found in your inventory system, the system will reject it.

Precision tip: Don't forget to enter the two character group prefix first.

> *Precision tip: All items billed to the repair order are funneled through Precision Parts Manager. As items are entered onto the repair order, the sales are immediately recorded and inventory is immediately reduced.*

Sub-job code

Enter the Sub-job code you would like to use for this part. (See Sub-job above for more information.)

Quantity

Next, enter the quantity of the item to be billed to this repair order. Pressing [Enter] without first typing in a quantity will cause the system to assume a quantity of one.

If the quantity entered reduces the "Quantity on hand" to the "Reorder low-level" point or below, the message "STOCK IS LOW" will flash. If the item being entered is the last one on stock the message "LAST ONE" will flash. If the Quantity on hand falls to zero or below the message "OUT OF STOCK" will flash.

Employee commission

The employee number that appears in the technician column will receive commission for this item. If you wish a different employee to receive commission on this item, type in the number of the employee you wish to receive credit for this item, then, press [Enter]. If you wish the commission on this item to go to the employee displayed, press [Enter] without typing an employee number.

> *Precision tip: Once a different employee number has been entered, all subsequent items added to the invoice will be credited to that employee until another employee number is entered.*

Salesman commission (Sold-by)

If you have turned on the Salesman commission feature, the system will also display a sold-by column will receive the commission for this item. You may credit this item to this employee or change it to credit another employee.

Description of item

Next, the system will move to the "Description" field. If you wish, you may change the description of the item as shown on the repair order, then press [Enter].

> *Precision tip: Changing the description of the item on the repair order will not change the description of that item as stored in Precision Parts Manager.*

Price each

The system will move to the "Each" field. You may change the retail price of the item by entering a new price. If the retail price entered is lower than average cost for the item, the massage "BELOW COST" will flash. (If the price entered is $0.00 the message "BELOW COST" will not flash.) Once you press [Enter], the

computer will multiply the quantity times the price each and enter this total amount into the price column.

>*Precision tip: Changing the price of the item on the repair order will not change the "standard" price of that item as stored in Precision Parts Manager.*

Sales tax

If sales tax on the group to which this item belongs is computed on retail, the invoice total will be increase by the amount of this item plus the applicable sales tax. If the sales tax for the group to which this item belongs is calculated on cost, the sales tax will be added directly to the price of the item and that price will be added to the invoice total. (See the section on Description of Work for instructions on how to make a repair order not subject to sales tax.)

>*Precision tip: The invoice total is displayed below the invoice # at the top right hand side of the screen.*

Automatic billing of shop supplies

If the system is set up to use the Automatic billing of shop supplies, the invoice total will be increased by the amount of the applicable shop supply charges.

Discount

If this repair order is discounted, the invoice total will reflect the discount method. (See pages 83 for more instructions on how to apply a discount to a repair order.)

Displaying repair order items

A repair order may contain as many as 31 parts and/or labor items. The screen will display these items 12 at a time. If the repair order contains too many parts and/or labor items for all of them to appear on the screen, you may scroll the parts and labor items up and down using [Page Up] and [Page Down].

Editing repair order items

Once items are entered onto the repair order, they may be edited. To edit an item that has been entered onto a repair order, display the "Parts" page, then, press E to edit information on the page. The cursor will drop to the first available blank line. Using [F1], [F2] or [Up Arrow] move the cursor up to the stock number you wish to edit. (The stock number will flash). Now press E or the [Right Arrow] to edit the line. (This is an edit function within an edit function.)

When editing repair order items you will be allowed to change the sub-job code, the quantity, the employee number (technician) receiving credit for installing the part, the employee number (sold-by) receiving credit for the sale, the description of the item and the each price.

>*Precision tip: When editing a non-labor item on which you have previously changed the price the system will restore*

the item's "standard" price. The system may be set up to always retain the previously entered price.

Precision tip: If you have turned on the "Book hours" option you cannot go back to edit the dollar amount charged to the customer. To change the dollar amount charged to the customer you must delete the labor line and re-enter it. (For more information on using the "Book hours" options see page 96 of this manual.)

Credits and special discounts

Credits may be billed to the repair order in one of two ways. The can be entered onto the repair order by entering a positive quantity with a minus dollar amount. This will cause the quantity on hand to decrease while lowering the repair order total. This method is appropriate to record a discount due to a special promotion.

> *Precision tip: Establish a special stock number for this purpose within a non-add group. Precision Parts Manager will monitor the number of such discounts given.*

Credits may be entered onto a repair order by entering a minus quantity with a positive dollar amount. This will cause the quantity of the item on hand to increase. This method is appropriate to give the customer credit for labor performed previously, or to return an item to stock.

Erasing an item

Once billed to the invoice, an item may be erased by editing the item and changing the quantity to zero. After entering a zero quantity, press [Enter]. The system will erase that item from the invoice and subtract the price of the item, any sales tax and shop supply charges associated with the item from the invoice total.

> *Precision tip: Erasing items from the repair order may leave blank lines on the screen. There will be no blank lines on the printed repair orders.*

Receiving special order parts to an estimate

Special ordered parts are often put on estimates. To prevent the inventory from being off and to insure any work order resulting from an estimate includes all important you must use the following procedure:

1. Make sure the status of the repair order is an **ESTIMATE**. If it is not marked as an estimate change the status to a code 7 (estimate).

2. Use the receive function. Receive the part using the actual part number and description. Next, enter the quantity you wish to appear on the **estimate.**

3. Press [Enter] to skip the Vendor & Invoice # information. This information will be entered when you actually receive the part.

4. When asked for the current cost, press [Enter]. It is not necessary to enter the current cost. This information will also be entered when you actually receive the part.

5. Enter the retail price you wish to charge. Next, enter the job number, sub-job code (if applicable), the technician number and sold-by number (if applicable). (Be sure the job has a status of **estimate.**)

> **Precision tip: Never receive real parts directly to an estimate.**

6. If the job gets sold leave the status as estimate. As the special ordered parts come in, receive them, but this time enter the Vendor & Invoice # information and enter the cost.

7. Do not enter a job number, just press [Enter]. The part will be put into stock.

8. After all of the special ordered parts have been received to stock, change the repair order status from "Estimate" to any other code (except VOID). The system will remove the parts from stock and update the job cost and the Vendor & Invoice # by reading the information from Precision Parts Manager.

If the job does not get sold change the status of the job to "Void/Erase" or "Void/File".

> **Precision tip: If the job does not get sold using "Void/File" will file a copy of the estimate in Filedrawer. If the customer comes back a month later and wants the work done you will have a copy of the original estimate to work from.**

It is now possible to write an estimate without receiving the new stock numbers needed to complete the estimate. The items may be directly entered onto page 2 as if the items were in the system. The system will display the message "Unknown Item" at the bottom of the screen. Enter the retail price you would like to charge the customer.

When changing the estimate to any other status code except Void/Erase or Void file, the system will check for the existence of all stock numbers in Precision Parts Manager. If any stock # is not found, the system will display a message showing "xx-xxxxx" not found. Receive it first, then try again.

Precision tip: Directly entering unknown stock numbers onto page 2 of the repair order will cause the system to ignore cost. If you use the "Display by department" function to determine your profit on the estimate, it will be wrong. Use receive to put unknown stock numbers onto the estimate.

Display by department

There may be times when you need to know how the sales on a repair order are distributed (how much in labor, parts, sales tax, etc.). If you wish to see this information on the screen, press ▣. The following will be displayed:

```
                 C.A.R.S. · Repair orders (pending) - Page 2
              Jamison Co.:
              Ms. Marilyn Adams                    Invoice# 019504 Job 1
              12223 Any Street                     Total      275.51
              Your Town, US 10000                  March 14, 2000
         Home: (   )    ·          Work: (112) 555-1414
      Vehicle: #08 1995 Chevrolet Caprice
  Comment:
  Department              Retail:          Cost:          Margin:   Percent:
                          0.00             0.00           0.00
  Oil                     10.00            3.75           6.25      62.5%
  Labor                   166.00           58.68          107.32    64.7%
  Parts                   90.76            42.45           48.31    53.2%
  Sublet                  0.00             0.00           0.00
  Tires                   0.00             0.00           0.00
                          0.00             0.00           0.00
                          0.00             0.00           0.00
  Road Serv/Tow           0.00             0.00           0.00
  EPA/Shop Supplies       8.75             0.00           8.75      100.0%
         Sales Tax        0.00             0.00           0.00

        TOTAL DUE         275.51           104.88         170.63    61.9%

                >>> Press <ENTER> to continue <<<
```

Precision tip: To get an accurate invoice total after changing the discount percentage or changing a non-taxable repair order to taxable or vice-versa, use the Display by department or print a Hard copy. The system will recalculate the invoice total.

View Repair order

The Ⓥiew repair order function displays a copy of the repair order on the screen as it will appear on paper. To use the View repair order, press Ⓥ, the following will appear:

```
        Jamison Co.:
        Ms. Marilyn Adams                    Invoice# 019504 Job 1
        12223  Any Street                    Total      275.51
        Your Town, US 10000                  March 14, 2000
        Home: (   )   -          Work: (112) 555-1414
      Vehicle: #08 1995 Chevrolet Caprice
  ::::::::::::::::::::::::::::Description of work::::::::::::::::::::::::::::::::
  Rear brakes.
  Oil & filter change.
  Check anti-freeze leak.


  OUR INSPECTION OF YOUR VEHICLE SHOWS IT NEEDS THE FOLLOWING:

  :Stock no.::::Qty:Description::::::::::::::::::::::::Each::::::Price::::::::::::::::Tn:Sb:
  Labor           Change filter & lube              4.00          5  1
  OF-8111       1 Oil filter          6.15          6.15          5  1
  OO-1040       5 Valvoline 10w/40    2.00         10.00          5  1
                                ===> Subtotal ->     20.65 <===
  Labor           Replace rear brakes              90.00          5  1
  BS-462        1 Brake shoes        21.95         21.95          5  1
                                ===> Subtotal A>    115.15
  Labor           Replace water pump               72.00          5  5
  CO-1040ST     1 Thermostat          7.60          7.60          5  5
  CO-AF         1 Anti-freeze (gallon) 10.89        10.89         5  5
  CO-G          1 Gasket              1.00          1.00          5  5
  CW-32445      1 Water pump         43.17         43.17          5  5
                                ===> Subtotal B>    130.71 <===

  SIGNATURE: _____
```

Precision tip: The Page 1 information has been condensed due to lack of space. The Service History and Totals box will not appear.

Precision tip: If your system is set up to produce different copies using Ⓗ and [Shift]-Ⓗ (for example, suppress part numbers on customer copy is set to Yes) the screen display will produce similar results using Ⓥ and [Shift]-Ⓥ.

Changing The Status

Invoice status

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

Precision tip: On the screen the status is shown on Page 1 of the repair order. One printed copies of the repair order the status prints below the Total due.

Initialized

A status of "Initialized" is automatically assigned to a repair order when it is created. This status indicates that the status of this job has not been assigned manually. The status of "Initialized" is one of eighteen forms of "Pending" status. Any repair order with any

"Pending" status indicates that the repair order is still in progress. See "Extended pending status" below.

Changing status

To change the status of a repair order, you must be in the "Repair Orders (Pending)" section. The repair order on which you wish to change the status must be displayed with the mini-menu showing, press 🖃. The system will display the following:

```
            C.A.R.S. · Repair orders (pending) · Page 1
          · Jamison Co.:.
          Ms. Marilyn Adams                    Invoice# 019504 Job 1
          12223  Any Street                    Total        275.51
          Your Town, US 10000                  March 14, 2000
      Home: (   )    -          Work: (112) 555-1414
   Vehicle: #08 1995 Chevrolet Caprice
 Comment:

                    Engine: V8                      _____Status_____
                   License: MRA 57            Arrived on: 03/14/2000
                       VIN: 1G1665975H6459709  Initialized
                     Color: DARK BLUE
           Service schedule: 1
             Discount code:
            Sales tax table: J

                        >>> New status? <<<
  <0>-Pending     <1>-Cash      <2>-House charge  <3>-Credit card  <4>-Check
  <5>-Void/Erase  <6>-Completed <7>-Estimate      <8>-Void/File    <9>-Deposit

      <A>-Awaiting Unit  <B>-Body Shop Job  <C>-Cust. Waiting  <D>-Diagnostics
      <E>-Tow To Shop    <F>-Road Call      <G>-Sublet         <H>-HURRY-UP JOB
      <I>-In Shop Now    <J>-Need Approval  <K>-Parts Ordered  <L>-Parts In
      <M>-Another        <N>-And Another    <O>-And Another    <P>-Etc.
```

Status code 0-Pending

This is a generic status code that indicates the job is still in progress. (Also see Extended pending status codes below.)

Extending pending status code

To help keep track of the progress of each job, up to sixteen extensions to the pending status are available. They are chosen by using the letter code assigned to them (A through P). (You may define codes A-P as anything you would like to use. See Section 2 of this manual for more information.)

Status code 7-Estimate

A repair order may be marked as an estimate rather than an actual repair order by changing its status to code 🧎. Items put on an estimate are not removed from inventory. However, if the customer later decides to purchase the service, changing the status from estimate to pending or paid will remove the billed items from inventory. (See the section on Estimates earlier in this section.)

Status code 5-Void/Erase

A repair order may be voided by changing its status to code 🖃. When a repair order is voided, all items on the repair order will be added back to inventory. When the Transfer Paid Repair order function is selected the repair order will be erased from the system.

Precision tip: Except for marking a repair order "Paid", a repair order may be removed from the system only by changing its status to "Void".

Status code 8- Void/File

A repair order may be voided by changing its status to code ⑧. When a repair order is voided, all items on the repair order will be added back to inventory. The totals on the repair order will not transfer to the bookkeeping system. When the Transfer Paid Repair order function is selected a copy of this invoice will be stored in Filedrawer.

Precision tip: Status code 8 will only appear on systems with the Filedrawer in operation.

Status code 9-Deposit

An advanced deposit may be applied to the repair order by changing the status to code ⑨. (See page84 For more information on taking advanced deposits.)

Status code 6-Completed

A repair order may be marked as "Completed" (not paid) by changing its status to code ⑥.

Precision tip: Once the repair order is marked completed, voided or paid (whether paid by cash, house charge, credit card or check) you will not be allowed to add, edit or delete items billed to the repair order (page 2). To add, edit or delete the billed items, the status must be changed to code 0 Pending, or to any extended pending status described below.

Repair order date

When the repair order is created, the current system date is put on the repair order. If you print a copy of the repair order at this time, this date is labeled the "Started" date. Just below the "Started" date is the date and time this copy of the repair order was printed. When a copy if a repair order is printed, the system uses the current system date and time for this date. The date and time are there so that if a job was to span several days, you can easily see which printed copy of the repair order is most current.

Precision tip: The Time Stamp maybe turned off at any time. See Section 2 of this manual for more information.

When the status of the repair order is changed from any pending status, void or estimate to "completed" (code 6), the system will change the date of the repair order to the current system date ("Completed date"). When you print a copy of the repair order the "Completed" date will print to the right of the "Started" date.

Complete service history

If the status of a repair order is changed to "Completed" (code 6) for the FIRST time, the "Customer Follow Up Service History Information" screen will appear:

```
                   C.A.R.S. - Repair orders (pending) - Page 4
              Jamison Co.:
              Ms. Marilyn Adams                      Invoice# 019504 Job 1
              12223  Any Street                      Total      275.51
              Your Town, US 10000                    March 14, 2000
          Home: (   )   -              Work: (112) 555-1414
       Vehicle: #08 1995 Chevrolet Caprice
       Comment:
   :::::::::::::::::::::::::::::::::::::::Service history:::::::::::::::::::::::::::::::::
       Technician ---> 5                              :: <--- Service code
   A-Oil & Filter Chang 07/01/99  93112  5 B-Air Filter         06/22/99  92711  5
   C-Tune Up            --/--/--            D-Fuel Filter        --/--/--
   E-Emission Testing   --/--/--            F-Fuel Injector Svc. --/--/--
   G-Alignment          --/--/--            J-Shocks / Struts    02/17/97  58669  7
   K-New Tires          --/--/--            L-Rotate Tires       06/22/99  92711  5
   M-Balance Tires      --/--/--            O-Front Brakes       --/--/--
   P-Rear Brakes        07/01/99  93112  5 Q-Cooling System Flu --/--/--
   R-Thermostat         07/01/99  93112  5 S-Belts              --/--/--
   T-Hoses              --/--/--            W-New Battery        --/--/--
   Y-Transmission Servi --/--/--            Z-Clutch Adjustment  --/--/--
              Select services performed by letter or press
        <?>-Automatic thank you   <SHIFT><X>-No thank you   <+>-Force thank you

                     ( the <ESC> key to redo )
                         SERVICES PERFORMED
```

Precision tip: If you have changed the status of the repair order and edited the information on Page 2 of the repair order the system will go to the Service history page again when the repair order is marked completed or paid.

Recording service

Suppose that employee #3 did an oil change on this vehicle. Type ③ into the technician field, then, press [Enter]. The cursor will move to the Service Code field. Using the above example, since employee #3 did an oil change, press Ⓐ for Oil Change. The employee number will appear to the left of the Oil Change category.

Precision tip: If pressing the correct letter does not record the service performed, your keyboard is locked in caps mode. Press the [Caps Lock] key to return the keyboard to its normal un-shifted mode.

Precision tip: The Service Code field is one character long. Recall that after typing a response in a field one character long, you need not press [Enter].

Splitting service credit

Suppose that this vehicle also had a front brake job and employee #3 did not do the brakes; the brakes were done by employee #11. You must change the number in the employee field to employee #11. To return to the employee field, press [F1], [F2] or [Up Arrow],

type ⬚⬚ into the employee field, then, press [Enter]. The cursor will return to the Service Code field. Since employee #11 did the brakes, press ⬚. His employee number will appear to the left of the Front brakes category.

Assigning overall credit

Although a different employee can receive credit for each category of service, only one employee can receive overall credit for servicing each vehicle. Overall credit for servicing this vehicle is assigned to the employee last displayed in the technician field.

Erasing service

While on the "Service Code" field, a service category mistakenly entered may be erased by pressing and holding [Shift]. While [Shift] is held down, press the letter corresponding to the service category you wish to erase. For example, if ⬚ was pressed to record an oil change, pressing [Shift]-⬚ (typing a capital "A") will erase the oil change.

> *Precision tip: Pressing ⬚ records the oil change by entering a small letter "⬚". Pressing [Shift]-⬚ erases the oil change by entering a capital letter "⬚".*

Service recall date

You may record in any service history category the date you wish a reminder letter to be sent in lieu of the date that the service was actually performed. For example, you can offer your customer a vehicle exhaust emission test in advance of his annual state emission test.

This is accomplished by editing the vehicle service history page. When asked to enter the Service Code, press and hold [Ctrl], then press the appropriate category code. The system will allow you to enter the date of service, the mileage at that time and an employee number. For the employee number in this case enter employee 99 or do not enter an employee number. By doing this you will know the service was not done in your shop.

> *Precision tip: The follow up interval for that service category should be set to zero days. The Service Manager™ will send out the reminder letter for that category as soon as the entered date arrives.*

Record service performed by others

You may use the above technique to record the date and mileage of services that your customer purchased from other shops. This will make your service records more complete and your customer will get **YOUR** service reminder letter when this service is due again.

Forcing or preventing Thank you letters

Last, you must decide if this customer will definitely get a thank you letter, definitely not get a thank you letter, or if the computer will be allowed to decide. If you want to be certain that the customer

will **NOT** receive a thank you letter, press [Shift]-☒. If you want to make sure that the customer gets a thank you letter (regardless of when he last received one) press [Shift]-⊕. This will force the computer to send a thank you letter. Most of the time, you will allow the system to decide who is to receive a thank you letter based on the criteria entered into The Service Manager™ System Setup function. To use the system criteria, press [Shift]-⍰.

> *Precision tip: Repair orders that are going to be put on the customer's House charge account should never be marked "Completed". Since no money is going to change hands at this time, the repair order should be marked Status code 2 – House charge immediately after the repair order is finished. See the section on "Collecting the money" below for more information.*

Paid (status codes 1,3,4)

Status codes 1, 3 and 4 are used to describe the method of payment of the repair order.

Status code 1 -Cash

Status code ① represents paid by cash.

Status code 3- Credit Card

Status code ③ represents paid by credit card.

Status code 4 -Check

Status code ④ represents paid by check.

Record payment date

After you have chosen status code 1, 3 or 4 the computer will show the following:

Marked paid on: MM/DD/YYYY

The system will supply the current computer date for the MM/DD/YYYY. If the repair order was paid for on the date shown, press [Enter] to use that date. If the repair order was paid for on a prior day, type in that date and press [Enter].

Credit card info

After entering the "Marked paid on:' date, if you have marked the repair order paid by Status code 3 – Credit card, the system will allow you to enter a 21 character message. Use this space to enter the type of credit card and the authorization number.

> *Precision tip: Do NOT enter the credit card number in this space.*

Check information

If you have marked the repair order by Status code 4 – Check, the system will allow you to enter a 21 character message. Use this space to enter the check number and authorization number if applicable.

> *Precision tip: See the section on "Collecting the money" starting on page 109 for more information.*

Status code 2-House charge

Status code 2 represents paid by house charge. When the status of the repair order is changed to status ②, house charge, the system will ask:

<div align="center">To transfer: MM/DD/YYYY</div>

The system will supply the current computer date for the MM/DD/YYYY. If the repair order is to be transferred to their house charge account on the date shown, press [Enter]. If the repair order should go on to their house charge account on a different date, type in that date and press [Enter].

A/R account number

Next, if there is an A/R account number stored on the customer's file, the system will display that house charge account number. (If the customer's account number does not appear, type in the account number.) If this is the correct account number, press [Enter]. The system will display the account name, the current posted balance, available credit (if applicable) and the date of the last payment information from The Manager's Assistant™-Account Receivables.

If you would like to charge this to a different house charge account, enter the number of that house charge account. For example, if this repair order was for damage caused by an accident, you may want to charge this repair order to an insurance company. You would enter the account number for the insurance company here.

> *Precision tip: If the account has a credit limit amount the system will display the Available credit. This amount displayed does not take into consideration the amount of the repair order you are currently marking paid. If the Available credit is less than 0 the message "Available credit" flashes in red and the system emits a warning sound.*

If this is a new customer and you would like to start a house charge account for the customer, enter the account number you would like to use. If the account number is already in use the system will display the account information. If the account does not exist in The Manager's Assistant™-Account Receivables, the system will ask "New Account". Answering Ⓨes will cause the system to create the account.

> *Precision tip: If you have marked the repair order with any "Paid" code without first changing the status to*

"Completed" the system will display the "Service history" page as explained above.

When C.A.R.S. creates a new house charge account the account will now be established as an "Open item account". If you would like the account to be a balance forward account you must go to The Manager's Assistant™ - Accounts Receivable – Customer accounts and convert the account to "Balance Forward."

COLLECTING THE MONEY

Collecting the money

There are two methods you can use when collecting for repair orders paid by cash, credit card or check. The first method involves marking the repair order completed as described above. In the first method the repair order is marked completed and then two copies are printed. When the customer arrives to pay for the repair order both of the previously printed are marked paid by hand. One copy is given to the customer, the other copy is put in a "paid" pile. The repair order can be marked paid in the computer now if it is convenient to do so. Otherwise, the repair order can be marked paid in the computer later.

Using the second method, the repair order is marked completed but not printed until the customer arrives. After the customer tells you how he is going to pay (cash, check, credit card), the repair order is marked paid and two copies are printed. One is given to the customer and one is put in the "paid" pile.

Using either method, you will need the pile of "paid" repair orders when you are getting ready to transfer the paid repair orders from the system. This will allow you to verify that all of the paid repair orders are indeed marked paid and have the correct "Marked paid on" date.

Charge sales require different handling regardless of which method you use. As explained above, when the charge repair orders are finished they are marked paid by Status code 2 – House charge and two copies are printed. One copy is given to the driver picking up the vehicle. The other copy should be signed by the driver and put in the "paid" pile.

For your protection the signed copy of the repair orders for house charges should be saved. The copies of the other repair orders (paid by cash, credit card and check) can be thrown away after the transfer has been completed.

BOOK APPOINTMENT

Book appointment

This function is used to book an appointment for future service using the information on the current repair order. (For further

instructions on Booking an appointment see Section 3.2 starting on page 71 of this manual.)

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

CONTINUATION SHEET

Concept

If you have run out of room on a repair order, you can create a continuation sheet. If you run out of room on your continuation sheet, you can create another. Continuation sheets are separate repair orders. When the system creates a continuation sheet all of the customer's information, vehicle information and service history is copied on to the continuation sheet. When a continuation sheet is displayed on the screen the running total is the total of only the items on the displayed repair order. (To get the total of all continuation sheets, see Printing continuation sheets below.) The job status is the status of only the displayed repair order.

Create a Continuation sheet

To create a continuation sheet, display the repair order to be continued on the screen, then press Ⓒ. the system will ask: "Make a continuation sheet for this repair order?". Type ⓎⒺⓈ to make the continuation sheet.

> *Precision tip: Just as you would on a hand written repair order when you run out of space, the system will start a second repair order. The continuation sheet will have different invoice and job numbers.*

The phrase "CONTINUATION SHEET" will appear, highlighted in red, to the right of the vehicle description on the original repair order and on its continuation sheet.

> *Precision tip: All of the continuation sheets must also have the same mileage for the system to know that they are continuation sheets.*

Printing continuation sheets

When printing a hard copy of a continued repair order the system will ask: "This repair order has multiple printed sheets. Print all sheets? (Y/N)". Pressing Ⓨ will print a copy of each of the continuation sheets and a grand total sheet. Pressing Ⓝ will print only a copy of the repair order displayed on the screen.

INVENTORY LOOK-UP

Inventory look-up

The Inventory Look-up will allow you to display any inventory item on the screen.

> *Precision tip: Although Inventory Look-up displays the same information as Precision Parts Manger-Inquire/Edit, you will not be allowed to edit or renumber the items displayed.*

At the Repair Orders pending mini-menu, press ⌷. The system will display the first item in your inventory in alphanumeric order. The following will be displayed:

```
                      C.A.R.S. - Inventory look-up
                   Stock Number : OF-B111
                   Description : Oil filter
                        Vendor : ABC PARTS
           Payables abbreviation : ABC

    Current cost : ######.##              On hand :      12
    Retail Price :     6.15  ###.##%     Consigned :       9
                                   Reorder low level :       6
                                  Reorder high level :      24
    Average cost : ######.##           M.T.D. sales :       8
    L.C.M. cost : ######.##           Current sales :       8
                                      Cumulative sales :     104
                                    Sold prior 24 months :    148

                          Sb : 0
                 Service trigger :
         Equivalent stock number :
    Comment :

    >>> Your selection : ?
    <N>ext   <P>revious   <S>earch   <T>urn Page   <F>ind   <Page Up>   <Page Down>
    <1>  <2>  <3>  <I>nstant tire quote  <$>-Cost on/off  <?>-Equivalent parts
```

When leaving a repair order to go to Inventory look-up, the system remembers the Year/Make/Model/Engine information on the repair order you just left. You can use the Quick catalog feature to search for a part used on that Year/Make/Model/Engine by selecting Search. Type just the group number. If the part is stored in the Quick catalog, the system will make a special beep and the stock number will appear. Press [Enter] to retrieve the item.

When using the Quick Catalog feature for tires you can find the last tire put on this Year/Make/Model/Engine combination by selecting Search as described above. To view other tires of the same size, press [Page Up] or [Page Down].

The information is contained in four "pages." The first page contains the general information about the item, including current cost, retail price, average cost, L.C.M. cost, quantity on hand, amount consigned, reorder low-level, reorder high-level, month-to-date sales, current sales, cumulative sales and sold prior 24 months. If there is a Payables abbreviation, Sb number (Sold by), Service trigger, Equivalent stock number or a comment for this item it will also be displayed on the first page.

Cost on/off

The Inventory look-up function hides the cost information on page 1 under "#" characters. This is useful when using the Instant tire quote. It allows you to print the screen and give your customer a copy of the tire quote without giving them your cost information. To display your cost information, press Ⓢ. To hide the cost information, press Ⓢ again.

Second Page

The second page contains information about when this item was last Received, Sold, put On-order and the Sales history for the last 24 months.

Multiple shop transfer info.

If you have multiple shops sharing the same inventory the system will also display a column showing the last time the item was transferred between locations. If the item was transferred into the location displayed the invoice # will show "IN FROM x". ("x" refers to the location from where it was transferred.) If the item was transferred from the location displayed the Invoice # will show "OUT TO x". ("x" refers to the location to where it was transferred.)

> *Precision tip: The Inter-store transfer function can be accessed from Precision Parts Manager-Inquire/Edit.*

Third page

The third page shows the information for the prior four times this item was received.

If your shop carries a particular item that is exclusive to your area or shop, you may want to charge a premium on that item. Even if you give certain customers discounts, it's possible to exclude this item's cost from the customer's discount. This is called the "override of calculated discount".

Inventory look-up mini-menu

At the bottom of the screen is a mini-menu. It lists the commands you will use to look up information.

Next & Previous

Pressing Ⓝext will display the next inventory item in alphanumeric order on the screen. Pressing Ⓟ will display the previous inventory item in the inventory in alphanumeric order on the screen.

[Page Up] & [Page Down]

Using [Page Up] will display the seventeen items following the item shown on the top of the screen. Using [Page Down] will display the

seventeen items preceding the item shown at the top of the screen.

[Up Arrow] & [Down Arrow]

Using [Up Arrow], [F1] or [F2] will move the items following the highlight bar up one item at a time. Using [Down Arrow], [F9] or [F10] will move the items preceding the highlight bar down one item at a time.

Search

Pressing ⑤earch will allow you to display any item on the screen. You will be prompted to enter the desired stock number. After entering the desired stock number and pressing enter, the computer will attempt to find the desired item. If the computer cannot find the item requested, the system will display the item that comes closest to that number. You can then use Ⓝext and Ⓟrevious to hunt for the desired item. (Also see Column display below.)

To display information contained on the second page, press Ⓣurn page. The following will be displayed:

```
                    C.A.R.S. - Inventory look-up

               Stock Number : OF-B111
               Description : Oil filter
               Vendor : ABC PARTS

Last ==>     Received :        Sold :         On-Order :
Quantity        24               1                9
Date        04/12/2000      04/13/2000        --/--/----
Invoice #   ABC 123456      019504 1
                            Sales History
Mar'98   Apr'98   May'98   Jun'98   Jul'98   Aug'98   Sep'98   Oct'98
  4        4        7        5        3        2        3        6
.............................................................
Nov'98   Dec'98   Jan'99   Feb'99   Mar'99   Apr'99   May'99   Jun'99
  6        6        1        4        6        1        6        2
.............................................................
Jul'99   Aug'99   Sep'99   Oct'99   Nov'99   Dec'99   Jan'00   Feb'00
  2        8        2        5        17       19       17       12

>>> Your selection : ?
<N>ext   <P>revious   <S>earch   <T>urn Page   <F>ind   <Page Up>   <Page Down>
<A>dd to Job      <C>olumn display       <D>isplay discounted price   <*>-Exit
```

Pressing ⊡urn page again will display the third page.

```
                         C.A.R.S. - Inventory look-up


                    Stock Number : OF-6111
                    Description : Oil filter
                    Vendor : ABC PARTS
                          >>> Previously received <<<
Quantity            1                    18            0              0
Date         04/12/2000           04/13/2000      --/--/----     --/--/----
Invoice #      WAS 87087          ABC 87253
Cost each           2.93                1.98        0.00           0.00
                             Sales History
   Mar'98    Apr'98   May'98   Jun'98   Jul'98   Aug'98   Sep'98   Oct'98
     4.        4        7        5        3        2        3        6
   ...........................................................................
   Nov'98    Dec'98   Jan'99   Feb'99   Mar'99   Apr'99   May'99   Jun'99
     6         6        1        4        6        1        8        2
   ...........................................................................
   Jul'99    Aug'99   Sep'99   Oct'99   Nov'99   Dec'99   Jan'00   Feb'00
     2         8        2        5        17       19       17       12

>>> Your selection : ?
<N>ext    <P>revious   <S>earch   <T>urn Page   <F>ind   <Page Up>   <Page Down>
<A>dd to Job    <C>olumn display      <D>isplay discounted price   <*>-Exit
```

Pressing ⊡urn page again will display the fourth page.

```
                 C.A.R.S.   Inventory look-up   Page 4



                    Stock Number : 01-AC
                    Description : Charge AC System
                    Vendor :
                    >>> Override of calculated discount <<<
            Discount plan A :                Discount plan N :
            Discount plan B :                Discount plan O :
            Discount plan C :                Discount plan P :
            Discount plan D :                Discount plan Q :
            Discount plan E :                Discount plan R :
            Discount plan F :                Discount plan S :
            Discount plan G :                Discount plan T :
            Discount plan H :                Discount plan U :
            Discount plan I :                Discount plan V :
            Discount plan J :                Discount plan W :
            Discount plan K :                Discount plan X :
            Discount plan L :                Discount plan Y :
            Discount plan M :                Discount plan Z :

>>> Your selection : ▮
<N>ext   <P>revious   <S>earch   <T>urn Page   <F>ind   <Page Up>   <Page Down>
<1> <2> <3> <4>   <I>nstant tire quote   <$>-Cost on/off   <?>-Equivalent parts
```

1,2,3,4

Similar to the Turn Page function, pressing ① will cause the system to display the information on page 1 regardless of what page is currently displayed. Pressing ② will cause the system to display the

page 2 information, pressing ③ will display the page 3 information, and pressing ④ will display the page 4 information.

Hard copy

You may print a copy of the information displayed by pressing [Print Screen]. (On a Windows 95/98 system press [Shift]-[Print Screen].)

Precision tip: Make sure the printer is on line and available.

Find

The Find function will allow you to find a part without knowing which group it is in. To use Find, press Ⓕ, then type in the part number without the group number. The system will display a list of all matching part numbers. To zoom in on the desired part use the [Up Arrow] or [Down Arrow] to highlight the part and then press [Enter].

Display discounted price

You may have the system display the selling price of the items with a discount applied. The system will display the discounted price along with all other information.

To display a discounted price, press Ⓓ. You will be asked to enter a discount code. You may enter a discount code (a Letter A through Z representing the discount plan desired). You may also enter a discount percentage. If you enter a minus percentage, the displayed discounted price will equal the retail price less the indicated percentage. If you enter a positive percentage (no minus sign) the displayed discounted price will equal the average cost plus the indicated percentage of average cost.

> *Precision tip: If the repair order displayed on the screen you entered Inventory look-up was discounted, the item displayed will show a discounted price. To change the discount press Ⓓ, and enter the new discount code or amount.*

Equivalent stock numbers

To display the Equivalent stock numbers, press Ⓠ. The system will display all of the Equivalent stock numbers in column display format. To view the information for any of the stock numbers displayed use the [Up Arrow] or [Down Arrow] to highlight the stock number, then press [Enter], [Esc] or ⊡. The system will display the information for that item. To look at yet another Equivalent stock number press Ⓠ to repeat the above.

> *Precision tip: Equivalent stock numbers must be entered in Precision Parts Manager-Inquire/Edit. See Section 3.3 of the Precision Parts Manager manual for more information.*

Column display

The column display function will allow you to show key information about many items at once. The Column display function can sort

the display by quantity on hand and can also limit the information displayed by Minimum on hand, Description and Comment. To show the information in the column format, press Ⓒ. The system will display the following:

```
                    C.A.R.S. - Inventory look-up


                  Stock Number : TA-205754RNAVW
                   Description : Kelly Navigator
                       Vendor : KSTC
         Payables abbreviation : KSTC

  Current cost : ######.##                    On hand :      20
  Retail Price :    69.11  ###.##            Consigned :       0
                                       Reorder low level :       3
  Average cost : ######.##           Reorder high level :       4
  L.C.M. cost : ######.##                   M.T.D. sales :       0
                                         Current sales :       0
                                      Cumulative sales :      84
                                  Sold prior 24 months :     148

                           Sb : 0
                Service trigger : K
       Equivalent stock number :
 Comment : Retail $85.20

  Stock Number : :::::::::::::::::       Minimum on hand :
  Description :
       Comment :
                     ( the <ESC> key to cancel )
```

You will be asked to enter a stock number. By entering a portion of a stock number, then pressing [Enter], the system will display all stock numbers that begin with the portion of stock number entered. For example, if spark plugs are in group IS, entering a stock number of IS-R46 may display IS-R46, IS-S46T, IS-R46TSX, and any other spark plugs that start with IS-R46. If tires are grouped TA, entering TA-205754 will display all 205754 tires, regardless of speed rating or brand.

Minimum on hand

After typing in the partial stock number, pressing [Down Arrow] instead of [Enter] will cause the cursor to move to the "Minimum on hand" field. Entering a number here will cause the items to be displayed in order of quantity on hand, highest to lowest. If you would only like to show items with a quantity on hand of 4 or more enter 4 in the "Minimum on hand" field.

> *Precision tip: You may enter zero (0) as the minimum on hand. This will show all items that start with the partial stock number. If the quantity on hand for an item is zero the computer will display a blank space.*

Description

After entering the minimum on hand cursor will move to the "Description" Field. If you enter anything in the "Description" field the items displayed will include only items that contain the

information entered. The position of the words in the Description field and/or the capitalization of the words do not matter.

Comment

Next, the cursor will move to the "Comment" field. If you enter anything in the "Comment" field the items displayed will include only items that contain the information entered. The position of the words in the Comment field and/or that capitalization of the words do not matter.

Instant tire quote

Once set up, by displaying any tire in your main tire group, the Instant tire quotation will display the price for 1 through 7 tires. The price will include what ever you include when you quote price on tires. (Things that are normally included would be; valves, mount & balance, tire disposal, shop/EPA charges, road hazard and sales tax.)

> *Precision tip: Before using Instant tire quote it must be set up in the C.A.R.S.- Company setup. For more information see Section 2 of this manual.*

To use the Instant tire quotation, ⑤earch for the tire you would like to quote on. Press ⑪nstant tire quotation. The system will display "Instant tire quotation based upon (price each):". The system will display the current retail price. If you would like to use a different price, enter the price you wish the Instant tire quotation to be based on. After you have entered the price the following will be displayed:

```
                    C.A.R.S. · Inventory look-up


               Stock Number : T0-195754E
               Description : Kelly Explorer
                    Vendor : KSTC
       Payables abbreviation : KSTC
   _____
   Current cost : ######.##              On hand :      14
   Retail Price :    59.59  ###.##%      Consigned :      0
                                      Reorder low level :  7
   Average cost : ######.##         Reorder high level :  8
     L.C.M. cost : ######.##              M.T.D. sales :  0
                                       Current sales :    0
                                    Cumulative sales :     0
   _____
    Tire    One     Two    Three    Four    Five     Six    Seven
   59.59   79.44  141.35  212.66  283.96  355.26  426.56  497.86
   This instant tire quote includes 0% sales tax, includes shop supplies.
   Comment : Retail $77.67
   _____
   >>> Your selection : 2
   <N>ext   <P>revious   <S>earch   <T>urn Page   <F>ind   <Page Up>   <Page Down>
   <A>dd to Job    <C>olumn display      <D>isplay discounted price   <*>-Exit
```

Precision tip: The instant tire quotation will use the taxable and discount status from the repair order which was displayed on the screen when you entered Inventory look-up. If the repair order was discounted, the price displayed will be the discounted price.

Add to job

While in Inventory look-up, if you would like to put the part displayed on the screen onto a repair order, press Ⓐ. The system will display the job number of the repair order last displayed in Repair orders pending. If this is the job you would like this part added to, then press [Enter]. If it is for another job, type in the job number for that job. Then press [Enter].

Exit

To exit Inventory Look-up, press ⊡.

System status

To display the system status in job number order, press Ⓢ at the C.A.R.S. Main menu. The following will be displayed:

```
                        C.A.R.S.  System status
Job# / Name                    Unit      Amount  Status       Invoice#
  1 Jamison Company:          #11 2000 For  306.90 Initialized   000014
  2 Adams,Mr. John            2000 GMC Env   91.00 Completed      000019
  3 Acme Products:            #23 1998 For  570.00 Charge# 1000   000015
  4 Swart,Mr. Butch           1995 Chevrol   23.85 Paid - Cash    000020
  5 Hawkins,Mr. Robert        1998 Ford Ra   87.11 Pending        000017
  6 Savage,Ms. Debbi          2001 Chevrol  102.43 Completed      000018
  7 Hawkins,Ms. Samantha      1989 Buick L   75.85 Initialized    000021
  8 Bandish,Ms. Debbie        1999 GMC Yuk    0.00 Parts Ordered  000022
  9 Bandish,Ms. Debbie        1999 GMC Yuk    0.00 ** VOID **      000023
 10 Acme Products:            #3 1995 Ford   12.26 Initialized    000024
 11 Jamison Company:          #08 1997 Che    0.00 Initialized    000025
 12 Krause,Mr. Mark           1986 Chevrol  254.12 Paid - C.Card  000026
 13 Hubbard,Mr. Charles       1994 Hyundai  378.45 Estimate       000027
 14 Blumenthal,Dr. Becca      1996 Ford Th   31.53 Paid - Check   000028
 15 Farnsworth,Mr. Cory       2000 Buick C    0.00 Initialized    000029
 16 North Area Parts:         #4 1998 Chev    0.00 Body Shop Job  000030
 17 Walker,Mr. Jeremy         1998 Buick L  380.06 Need Approval  000031


     0.00 Paid today       0.00 Completed today
   879.50 Paid total     193.43 Completed total    862.10 Pending
          <Up Arrow>  <Down Arrow>  <Page Up>  <Page Down>
             <ENTER>-Retrieve repair order   <*>-Exit
```

The System status will display the job number, customer name on each repair order, part of the vehicle description, the current invoice total, the status of each repair order and the invoice number.

Precision tip: The System status can be displayed in Status code order. For more information see the section on "Display System status in status order" on page 125.

The bottom of the System status screen will display the total of repair orders paid for today and the total of repair orders completed today. It will also show the total of paid repair orders in the system, and the total of all completed repair orders in the system and the total of all pending repair orders.

Go to a repair order from system status

The repair orders will be displayed in job number order. Use the [Page Up] and [Page Down] to look through the System status. You can go directly from System status to a specific repair order. To do this use the [Page Up], [Page Down], [Up Arrow] or [Down Arrow] to locate and highlight the desired repair order and then press [Enter]. To exit the System status to the C.A.R.S. main menu, press *.

Precision tip: To reverse the movement of [Page Up], [Page Down], [Up Arrow] and [Down Arrow], press [Ctrl]-Ⓡ. The action of [Ctrl]-Ⓡ will only be saved if a repair order is created before exiting the C.A.R.S. system.

Precision tip: See the page 140 of this manual for information on printing Status reports.

Display System status in status order

To display the System status in status code order, press [Shift]-[S] at the C.A.R.S. Main menu.

```
                           C.A.R.S.  System status
Job# / Name                    Unit             Amount Status        Invoice#
  1 Jamison Company:          #11 2000 For       306.90 Initialized    000014
  7 Hawkins,Ms. Samantha       1989 Buick L       75.85 Initialized    000021
 10 Acme Products:            #3 1995 Ford        12.26 Initialized    000024
 11 Jamison Company:          #08 1997 Che         0.00 Initialized    000025
 15 Farnsworth,Mr. Cory        2000 Buick C        0.00 Initialized    000029
  5 Hawkins,Mr. Robert         1998 Ford Ra       87.11 Pending        000017
 16 North Area Parts:         #4 1998 Chev         0.00 Body Shop Job  000030
 17 Walker,Mr. Jeremy          1998 Buick L      380.06 Need Approval  000031
  8 Bandish,Ms. Debbie         1999 GMC Yuk        0.00 Parts Ordered  000022
  2 Adams,Mr. John             2000 GMC Env        91.00 Completed      000019
  6 Savage,Ms. Debbi           2001 Chevrol      102.43 Completed      000018
  4 Swart,Mr. Butch            1995 Chevrol       23.85 Paid - Cash    000020
  3 Acme Products:            #23 1998 For       570.00 Charge# 1000   000015
 12 Krause,Mr. Mark            1986 Chevrol      254.12 Paid - C.Card  000026
 14 Blumenthal,Dr. Becca       1996 Ford Th       31.53 Paid - Check   000028
 13 Hubbard,Mr. Charles        1994 Hyundai      378.45 Estimate       000027
  9 Bandish,Ms. Debbie         1999 GMC Yuk        0.00 ** VOID **     000023

      0.00 Paid today        0.00 Completed today
    879.50 Paid total      193.43 Completed total      862.18 Pending
          <Up Arrow>  <Down Arrow>  <Page Up>  <Page Down>
             <ENTER>-Retrieve repair order  <*>-Exit
```

When displaying the System status by Status code the repair orders will be display in the following order: Initialized, Pending - code 0, Pending - codes A through P, Complete - code 6, Paid by cash - code 1, Paid by house charge - code 2, Paid by credit card - code 3, Paid by check - code 4, Estimate - code 7, Void file - code 8, Void erase - code 5.

Precision tip: If your system displays the status sorted by Status code when you expect the display to be by Job number, the [Caps Lock] is on. Press the [Caps Lock] to turn it off.

Description

The "Transfer Paid Repair Orders" function will remove the repair orders that were paid by the date you specify. It will print a copy of voided repair orders and remove them. It will also print a sales recap. This function should be performed every day.

If your system has Precision Parts Manager the system will print an inventory posting report. It will also transfer the information about those parts to the Precision Parts Manager. If your system has The Manager's Assistant ™ the system will transfer the sales dollars to The Manager's Assistant ™ (which will handle accounts receivable, employee commissions and split repair orders). If your system has The Service Manager ™ the system, will enter the customer follow up information (as an unprocessed repair order) into The Service Manager ™ customer follow up system and store a copy of the repair order in Filedrawer.

> *Precision tip: See Appendix C-Checklists for a Transfer & Shift Checkout checklists.*

Preparation for doing a Transfer

As explained in Section 3.3, starting on page 106, as customers picked up their vehicles a copy of their repair order was put in a "paid" pile. Using the "paid" pile make sure that all of the repair orders are marked paid and show the correct "Marked paid on" or "Transfer" date.

From within C.A.R.S. -Repair orders (pending), press Ⓢearch. Type in the job number for the first repair order from the "paid" pile and press [Enter]. The system will display that job. Check the status shown Page 1 of the repair order and confirm that it is marked paid and that the "Marked paid on" date is correct. If the status or the "Marked paid on" date is not correct, press Ⓢ and correct the status as described in Section 3.3 starting on page 106.

Print Status report

After you have checked all of the repair orders, exit to the C.A.R.S. Main menu by pressing Ⓔ. Go to the Ⓤtilities menu-Ⓡeports to print a Ⓢtatus report for Ⓟaid repair orders. Print the report in Ⓓate order. Ⓒomplete report and enter the date of the bookkeeping you will be doing.

> *Precision tip: Although printing the report is optional, it is recommended. The report can be useful if there is a problem later.*

> *Precision tip: Printing the Status report for Ⓟaid repair orders, using the date of the transfer, will give you a report showing the total of the repair orders that will be transferred.*

Do a backup

The Transfer paid repair orders is a posting function for the system. As discussed earlier this function will send data to other parts of the system. If something were to happen during this process, such as

the power going out, there would be no way of knowing what has been transferred and what has not. Therefore, it is VERY important to do a backup of the data before performing the Transfer paid repair orders function.

Do a backup on Ms-Dos system

After printing the report, press ⊡ to exit Precision Data Systems' programs to the "C" (C:\PDS>) Prompt. Do the backup by typing Ⓗ ⒟ Ⓑ Ⓐ Ⓒ Ⓚ Ⓤ Ⓟ and press [Enter]. Answer Ⓨes to the question" Do you wish to continue?". When the backup is complete, type Ⓟ Ⓓ Ⓢ, then press [Enter]. At the Precision Main Menu, press Ⓒ to return to the C.A.R.S. system.

Do a backup on Windows 95/98 system

Press ⊡ to exit from the Precision Data Systems' program to the Windows Desktop. Do a backup by clicking on the **"HdBackup"** icon. Answer Ⓨes to continue. When the backup is complete, click on the **"PDS Menu"** icon to return to the system. At the Precision Main Menu, press Ⓒ to return to the C.A.R.S. system.

Transfer paid repair orders

To transfer paid repair orders, press [Shift]-Ⓣ (type a capital letter "T"). The transfer paid repair orders screen will appear:

```
             C.A.R.S.   Transfer paid repair orders




          Transfer :

                     <P> Paid repair orders
                     <C> Complete and paid repair orders
                     <A> All repair orders
                     <*> Return to C.A.R.S.

          >>> Your selection : ?
```

Paid repair orders only

Selecting Ⓟ will transfer only the repair orders marked paid. Pressing [Esc] or ⊡ will return you to the C.A.R.S. main menu.

> *Precision tip: All methods of Transferring Paid repair orders will transfer any repair orders marked with the status of "Void".*

Work in progress

C.A.R.S. can work with the Manager's Assistant ™ to automatically handle commissions paid to employees on work in progress. There are two ways of paying commissions on work in progress. The first is to pay commissions on only repair orders marked paid and completed. The second, is to pay commissions on all repair orders which have parts or labor billed to them.

Complete and paid repair orders

If you are about to transfer the repair orders that were paid on the last day of your payroll period and wish to have the system calculate commission on paid and complete repair orders only, press Ⓒ when doing the last transfer of the pay period. The system will ask "Is this the last transfer for the commission period? (Y/N). If this is not the last transfer of the commission period, pressing Ⓝ will return you to the transfer paid repair order menu. Pressing Ⓨ will cause the system to transfer only the repair orders marked paid. It will also create temporary charge sale invoices (accounts receivable account number 9998 - Work in progress) in The Manager's Assistant ™ for all repair orders that have a status of "Completed" and transfer them to Shift Checkout. These amounts will automatically be posted to the employee commission system.

> *Precision tip: If you do more than one shift a day the Transfer Complete or Transfer All should be done on the last shift.*

> *Precision tip: Transfer Complete or Transfer All should not be done unless necessary. They can use a lot of extra space in the Manager's Assistant ™ which causes the "Archive Backup" to take additional disks.*

All repair orders

If you wish to have the system calculate commissions on all paid, complete and pending repair orders, press Ⓐ. The system will ask "Is this the last transfer for the commission period? (Y/N)". If this is the last transfer of the commission period, pressing Ⓝ will return you to the transfer paid repair order menu. Pressing Ⓨ will cause the system to transfer only the repair orders marked paid. The system will create temporary charge sale invoices for all other repair orders (except voids and estimates) and transfer them to Shift Checkout. These amounts will automatically be posted to the employee commission system.

Reversal invoices

Transferring Completed and Paid repair orders or transferring All repair orders causes the system to create reversal invoices which are held by the system. These reversals will automatically appear on the next transfer.

Using work in progress, an example

Suppose, in C.A.R.S., there is a repair order on which you will bill $900.00 worth of labor and suppose the employee receives a 50 percent commission on labor. Also suppose that the job was one third complete at the end of this pay period. Before transferring paid repair orders, make sure that $300.00 of labor (one third of the
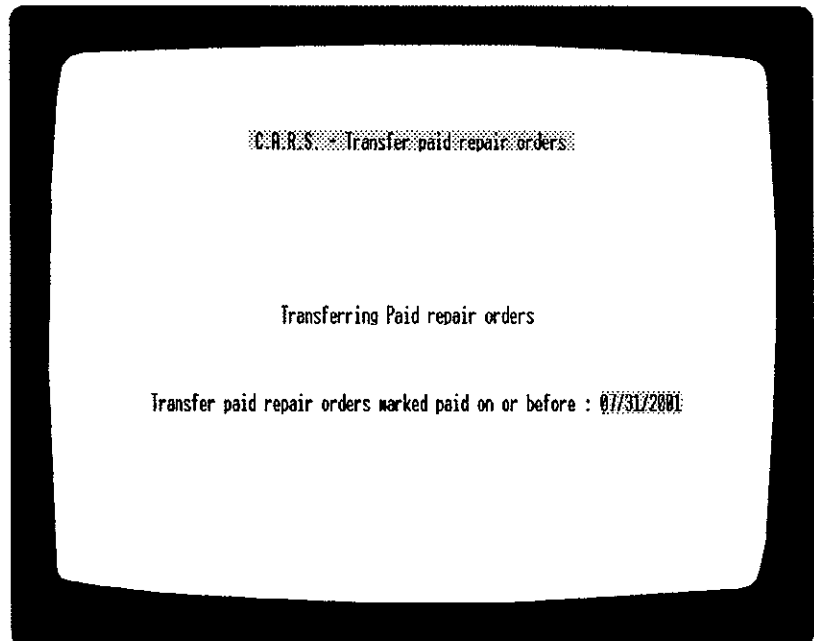
total labor) had been billed on the repair order. Transferring all repair orders will make a temporary charge transaction for $300.00 worth of labor (plus any parts currently entered onto this repair order). The temporary charge will be made to account 9998, Work in Progress. When the resulting invoice is posted in the employee commission system, the employee will receive credit for $300.00 worth of labor on which he will receive $150.00 commission for that week. Automatically, the system will create a reversal of this amount.

On the next transfer the reversal will appear. After the reversal is posted to the employee commission, the employee will be "in the hole" $300.00 in labor sales, or $150.00 in commission.

Suppose that later in the week, the work is completed, the job billed, and the repair order paid for. When the paid repair order is transferred to shift checkout, and posted to the employee commission system, the employee will get credit for the full $900.00 in labor sales. The system will calculate that, based on labor sales of $900.00, the employee is due commission of $450.00. But because the employee started "in the hole" $150.00, he would only receive $300.00 additional commission for the job this commission period.

After selecting the type of transfer, the system will show the following:

```
C.A.R.S.    Transfer paid repair orders




                    Transferring Paid repair orders


Transfer paid repair orders marked paid on or before : 07/31/2001
```
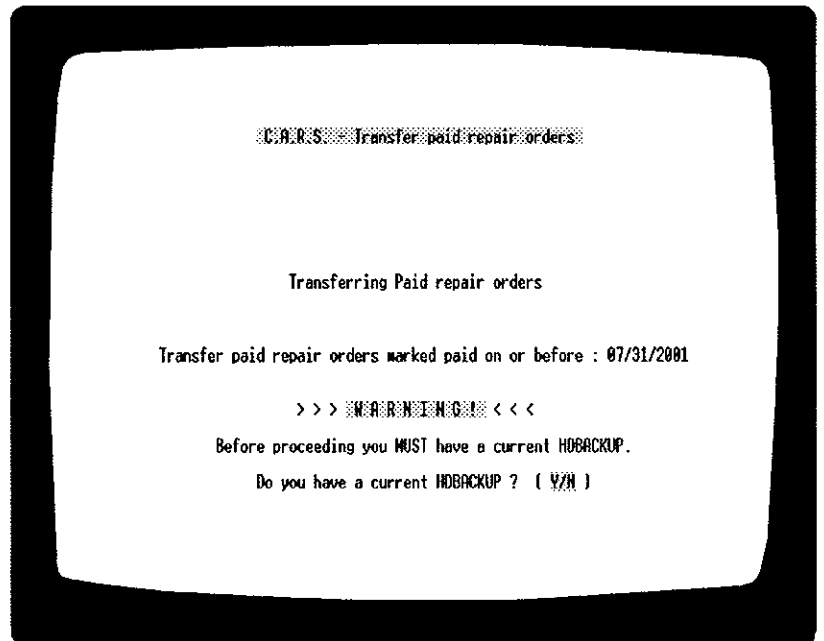
Transfer paid repair orders marked paid on or before

Most shops find to most convenient to do the book work the following day. Correctly answering this question makes it possible for the system to separate the paid repair orders from yesterday

from any repair order that may have been paid for so far today. The system will supply the current computer date. If you are preparing to transfer the repair orders that were paid on some prior date, enter that date here.

Backup warning

The system will now show the following:

```
         C.A.R.S.   Transfer paid repair orders




                Transferring Paid repair orders


Transfer paid repair orders marked paid on or before : 07/31/2001

               > > >   W A R N I N G !   < < <
      Before proceeding you MUST have a current HDBACKUP.
        Do you have a current HDBACKUP ?   ( Y/N )
```

The system will now ask: "Do you have a current HDBACKUP? (Y/N). If you have not done an HDBACKUP, pressing Ⓝ will return to the C.A.R.S. main menu. If you have done an HDBACKUP, pressing Ⓨ will cause the system to proceed with the "Transfer Paid Repair Order" function. The system will print an abbreviated job cost copy of each repair order.

> *Precision tip: The printing of job costed copies may be changed to print complete copies of the repair order or may be "turned off" completely. (See page 12 For more information on Job costed copies.)*

> *Precision tip: If printing complete job cost copies the system can be set to print a second copy of NO TAX repair orders. One is for you, the other is for your accountant so that he may verify the reported exemptions to your sales tax liability. (See page 12 For more information on tax audit copies.)*

Transfer recap report

The system will print a Transfer recap showing the sales and cost for this Transfer (Current). Month-to-date and Year-to-date. If you have Precision Parts Manager the system will print a Precision Parts Manager posting recap.

Shift checkout

If you have The Manager's Assistant ™, the system will go directly to Shift Checkout. (See The Manager's Assistant ™ manual, section 3.1 for more information.)

If you do not have The Manager's Assistant ™ the system will return you ti the C.A.R.S. Main menu.

2nd Transfer, same checkout

While in the Shift checkout if you discover that a paid repair order had not been marked paid, you can do the following:

Exit the Shift checkout function. When asked "ready to Close/Erase this shift., type in ⒠⒭⒜⒮⒠ and [Enter]. If the system asks "Should the manually entered information be retained?", answer Ⓨes

Return to C.A.R.S., change the status of the repair order to "paid" (status codes 1-4), and select the transfer function again. When you do this, only this one additional paid repair order will transfer because the previous transfer has cleared out the other paid repair orders from C.A.R.S.. This one additional repair order will be added to the repair orders previously transferred. None will be lost.

Starting End-of-Month Processing

If you have not purchased The Manager's Assistant™ function, after using the Transfer Paid Repair Orders the last time in a month, you must perform the end-of-month processing. At the C.A.R.S. - Utilities menu, press [Shift]-Ⓜonth end processing.
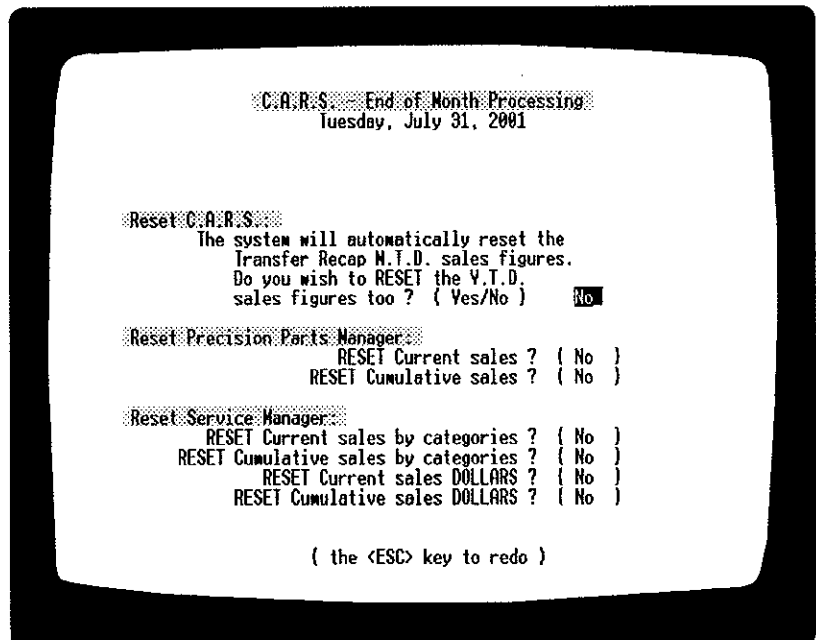
> *Precision tip: Make backup copies before starting the End-of-month processing.*

If you have purchased The Manager's Assistant™ function, the C.A.R.S. end-of-month processing will automatically occur after ending the month from within The Manager's Assistant™.

> *Precision tip: See The Manager's Assistant™ manual, Section 3.7, Ending the Month, for additional information.*

> *Precision tip: See Appendix C - Checklists, for End-of-Month checklists.*

The following will appear:

```
              C.A.R.S.   End of Month Processing
                     Tuesday, July 31, 2001



     Reset C.A.R.S.
             The system will automatically reset the
             Transfer Recap M.T.D. sales figures.
             Do you wish to RESET the Y.T.D.
             sales figures too ?  ( Yes/No )      No

     Reset Precision Parts Manager
                           RESET Current sales ?  ( No  )
                        RESET Cumulative sales ?  ( No  )

     Reset Service Manager
            RESET Current sales by categories ?  ( No  )
         RESET Cumulative sales by categories ?  ( No  )
                 RESET Current sales DOLLARS ?   ( No  )
              RESET Cumulative sales DOLLARS ?   ( No  )


                  ( the <ESC> key to redo )
```

Reset C.A.R.S. MTD & YTD sales

The C.A.R.S. Transfer Recap report Month-to-Date totals will be erased. This will prevent next month's figures from being added to last month's figures.

If this is the end of your fiscal year or if this is your first month using the system and you started using the system in the middle of the month you should answer ⓎⒺⓈ to the question: "Do you wish to RESET the Y.T.D. sales figures as well ?".

Precision tip: The system has a built-in answer to this question. Pressing [Enter], [Down Arrow], [F9] or [F1] will cause the system to answer this question with NO. To answer ⓎⒺⓈ *to this question you must first erase the "NO" by pressing [F5] or [Backspace].*

Reset Precision Parts Manager

The reset Precision Parts Manager function when performed here will do the same as End of Period processing function in Precision Parts Manager. (See Precision Parts Manager, Section 3.8, End of Period, for additional information.)

Reset Service Manager

The reset Service Manager™ sales-by-category function when performed here will do the same as The Service Manager™ Employee Performance - End of Period Processing function. (See The Service Manager™ manual, Section 3.8, Employee Performance, for additional information.)

Precision tip: The built in system default answers will prevent the resetting of The Service Manager™ sales-by-category.

After answering the reset questions, press Ⓨ in response to "Are all entries correct ?".

Print Transfer Recap by tax table report

The End-of-month processing will now print a copy of the Transfer Recap by tax table report. After answering the questions on the C.A.R.S. - End of Month Processing screen the system will display:

"Do you want to print Transfer Recap by Tax Table Report ? (Y/N)".

If you would like to print the report, press Ⓨ. If you do not wish to print the report, press Ⓝ.

If your Accounts Receivable statements are printed on the reports printer (LPT1) the following question will appear:

"Do you need to set the reports printer back to condensed mode ? (Y/N)"

Switch printer back to condensed

The Accounts Receivable statements are printed in 10 characters per inch mode and the Transfer Recap by tax table report must be printed in condensed (17 characters per inch) mode. If your printer does not have an easy to use method of switching the printer into condensed mode you can do so by pressing Ⓨ.

Precision tip: If you have an OkiData printer, you may reset the printer by pressing the Character pitch Reset button on the front panel until the light is on under 17.

Precision tip: This may not work on certain printers such as older Tandy printers unless the system has been modified to make it work.

Printer codes

The codes that tell the printer to go into the condensed mode are stored in the PdsPrn.Dta file. The first number in the file must be 17. The second number in the file tells the system how many codes are required to tell the printer how to select condensed printing. The next number(s) are the actual ASCII codes themselves. For example, if the printer requires 1 code to switch into condensed mode there will be only one number. The PDSPRN.DTA file used with Epson compatible printer contains 17, 1, 15. The PDSPRN.DTA file used with Tandy DMP series printers contains 17, 2, 27, 20.

After the End of Month Processing is complete, the system will return to The Manager's Assistant™ main menu.

Precision tip: If you do not have The Manager's Assistant™ you will be returned to the C.A.R.S. Main menu.

Utilities

Selecting the ⊡tilities function will display the Utilities menu as shown below.

```
        C.A.R.S. - Utilities
        Tuesday, July 31, 2001




        <R> Reports
        <M> Manager's Assistant (tm) invoices
        <C> Company setup
        <S> System expansion
        <A> Appointment scheduler maintenance
        <Y> Year/Make/Model maintenance
        <D> Design repair order
        <I> Install Mitchell CD
        <V> View/print Mitchell service info.
        <*> Exit Utilities

  >>> Your selection : ?
```
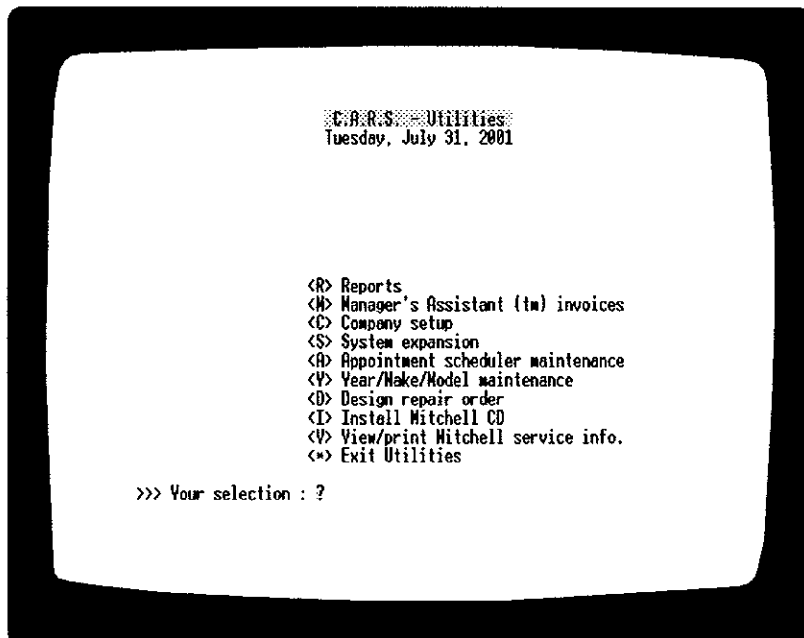
Utilities menu

Briefly, this is what each choice will do:

Reports
> Allows you to print a Status report, Transfer Recap by tax table report or a Business by source code report.

Manager's Assistant invoice entry
> Allows you to enter information into the next Shift checkout.

Company setup
> Will allow the changing of information entered into the company setup program,

System Expansion
> Allows you to expand C.A.R.S.

Appointment scheduler maintenance
> Allows you to expand the number of appointments the system can handle and delete no-show appointments.

Year/Make/Model maintenance
> Will allow you to look-up, add and edit the year, make, model and engine information. Check system status, post newly added entries, for a file compression and re-sort the

Year/Make/Model file. Also allows you to view or edit the stock numbers and quantities stored in the Quick catalog function.

Design repair order

Allows you design the way the Shop copy, Customer copy and Parts invoices look.

Install Mitchell CD

Allows you to install the Mitchell Parts and Labor guides. This choice will only appear if you have purchased the Mitchell Interface. (See your Mitchell Interface Instruction Manual for more information.)

View/Print Mitchell service info.

Allows you to view or print the Mitchell Scheduled Services information. This choice will only appear if you have purchased the Mitchell Interface. (See your Mitchell Interface Instruction Manual for more information.)

Exit Utilities

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

Reports

Print reports

Pressing 🄡 at the Utilities menu will display the following:

```
C.A.R.S - Utilities - Reports
Tuesday, July 31, 2001




            <S> Status report
            <T> Transfer Recap by tax table
            <B> Business by source code
            <W> Work In Progress report
            <*> Exit Reports

    >>> Your selection : ?
```
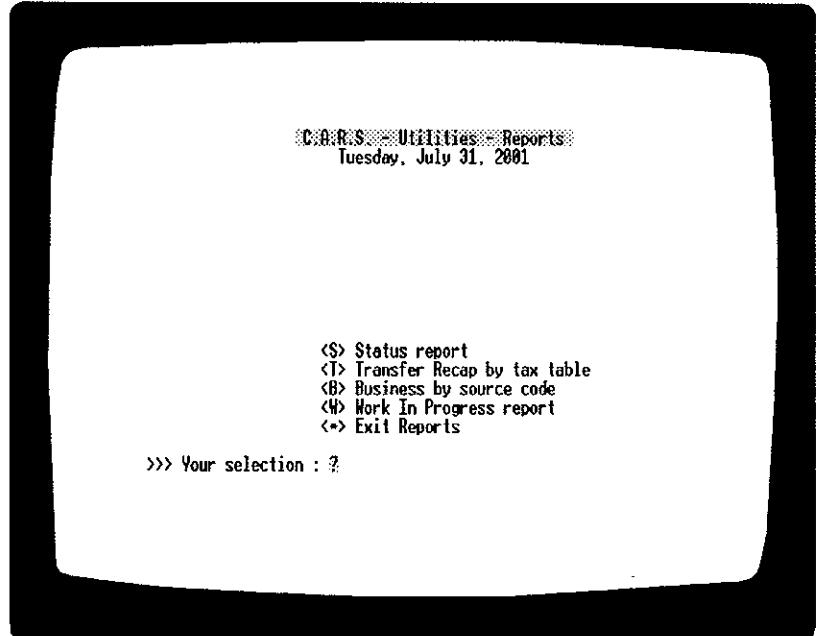
Status report

Pressing 🅂 at the Reports menu will bring up the Status report menu.

```
C.A.R.S - Utilities - Reports
Wednesday, September 1, 2004




                 <A>ll, <P>aid or <I>ncluded repair orders ?    Paid
        Print by:
        <S>tatus, <N>ame, <I>nvoice#, <D>ate paid or <E>mployee ?  ( ▓▓▓▓▓ )
                        <C>omplete or <A>bbreviated ?  ( C/A )
             Print repair orders marked paid on or before :    09/01/2004




                          ( the <ESC> key to exit )
```

All or paid repair orders

Using the option will allow you to print a report of Ⓐll the repair orders appearing in the system status or a report of just the Ⓟaid repair orders in the system status. The status reports can be printed in order by Status, Name or Invoice number.

Status code order

When printing the status report by Ⓘncluded repair orders, the system will check the "Company Setup - Status codes included in Status reports" setup to see which Status Codes to include on the report. There are no changes when using the Ⓐll or Ⓟaid repair order choices.

When printing the Status report for All repair orders in Ⓢtatus order the repair orders will be printed in the following order: Initialized, Pending (Code 0), Extended pending codes (Codes A-P), Completed (Code 6), Paid (Codes 1-4), Estimates (Code 7), Void/File (Code 8) and last will be Void/Erase (Code 5).

When printing the Status report for Paid repair orders in Status order the repair orders will be printed in the following order: Cash (Code 1), House charge (Code 2), Credit card (Code 3), Check (Code 4), Void/File (Code 8) and last will be Void/Erase (Code 5).

Name order

Printing the Status report by Ⓝame order will print the report in alphabetical order making it easier to find repair orders written for the same customer.

Invoice number order

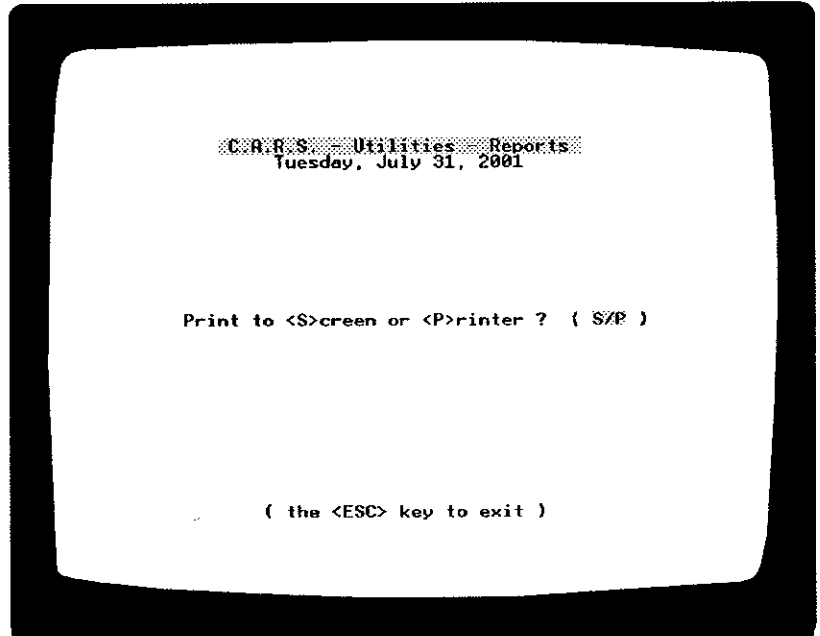Printing the status report in Ⓘnvoice number order will allow you to see the oldest repair orders created at the top of the report going down to the newly created repair orders at the bottom.

Date Paid

Printing the Status report in Ⓓate paid order will sub-total the report for each date.

Complete or Abbreviated

The Ⓒomplete status report will print the job number, customer name, vehicle description, invoice number, notes, amount, status, date paid and the first line of the description of work from the repair order.

The Ⓐbbreviated status report will print the job number, customer name, vehicle description, invoice number, notes, amount and status.

Report totals

When printing a Status report of Paid repair orders the report will show two total lines. The "Printed totals is the total of the repair orders printed on the report. The "System totals" is the total of all repair orders in the system.

After answering the last question on the screen the system will display the following:

```
C.A.R.S. - Utilities - Reports
Tuesday, July 31, 2001




Print to <S>creen or <P>rinter ?  ( S/P )




( the <ESC> key to exit )
```

Precision tip: If you have the Printer port assignment for the reports set to "Write to disk' the prompt for "Screen or Printer" will NOT appear.

Print to Screen or Printer

Pressing Ⓟ will cause the report to print immediately. Pressing Ⓢ will cause the report to be displayed on the screen. Viewing a blank screen means there was nothing to print.

When the report appears on the screen, you can press the arrow keys to scroll (move) the report around on the screen to see different parts of the report. [Page Up] and [Page Down] will scroll the information up and down a screen-full at a time. Pressing [End] will scroll to the right side of the report.

Hard Copy

Pressing Ⓗard copy will print the report on the printer and exit the reports viewer. Pressing any other key will exit the reports viewer without printing the report.

Precision tip: To reverse the action of the Arrow and Page keys press [Ctrl]-Ⓡ.

Precision tip: Reports printed from the reports viewer by pressing [H]ard copy will print on the printer designated as the reports printer in Precision Main Menu-Utilities-Printer port assignments.

Transfer Recap by tax table

Pressing [T] 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.

When printing the Transfer recap by tax table report you will be asked: "Print totals only?". If you answer [Y]es, the system will print a two page report showing the "Grand Totals" for all tax tables. Page 1 will show the Month-to-date grand totals and Page 2 will show the Year-to-date grand totals.

If you answer [N]o to the question: "Print totals only?", the system will print a Month-to-date total page for each tax table and a Grand totals page for all tax tables. The system will then print a Year-to-date total page for each tax table and a Grand totals page for all tax tables.

Business by source code

Pressing [B] will allow you to print a report showing the sales, cost, profit and average 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.

When printed the Business by source code report you will be asked: "Print totals only?". If you answer [Y]es, the system will print a two page report showing the "Grand totals" for the all Business by source code categories. Page 1 will show the "Current" period Grand totals and Page 2 will show the "Cumulative" period Grand totals.

If you answer [N]o to the question: "Print totals only?", the system will print a "Current" total page for each Business by source code category and a "Cumulative" total page for all Business by source code category. The system will then print a Current Grand totals page for all Business by source code categories and a Cumulative grand totals page for all Business by source code categories.

Work in Progress

Pressing [W] will allow you to print the Work In Progress report. The report shows the "Retail", "Cost" and "Profit" figures for the repair orders in C.A.R.S.-Repair orders pending. (Repair orders with status' of "Estimate", "Void/Erase" or "Void/File" are not included in the report.) This report should be run before doing "End-of-Month

processing". This report will tell your Accountant the total of the parts that are not included in the inventory totals and also have not yet been included in the sales totals.

When printing the Work In Progress report you will be asked: "Print totals only?". If you answer Ⓨes, the system will print a report showing the "Total Retail", "Total Cost" and "Total Gross Profit" for each sales department and a total for each line.

If you answer Ⓝo to the question: "Print totals only?", the system will print a report similar to the "Transfer paid repair orders-Abbreviated job cost copies" report. The report will show the job #, invoice #, customer and vehicle information, status of the repair order, retail, cost and profit for each sales department and a total for each line.

Exit Reports

Pressing Ⓔ will return you to the Utilities menu.

Manager's Assistant ™ invoice entry

Pressing Ⓜ at the Utilities menu will display The Manager's Assistant ™ invoice entry screen.

```
C.A.R.S. - Utilities - Manager's Assistant [M] Invoices - Menu
                    Tuesday, July 31, 2001




            <E> Enter Manager's Assistant invoices

            <P> Print list of entered invoices

            <*> Exit Manager's Assistant invoices

 >>> Your selection : ?
```
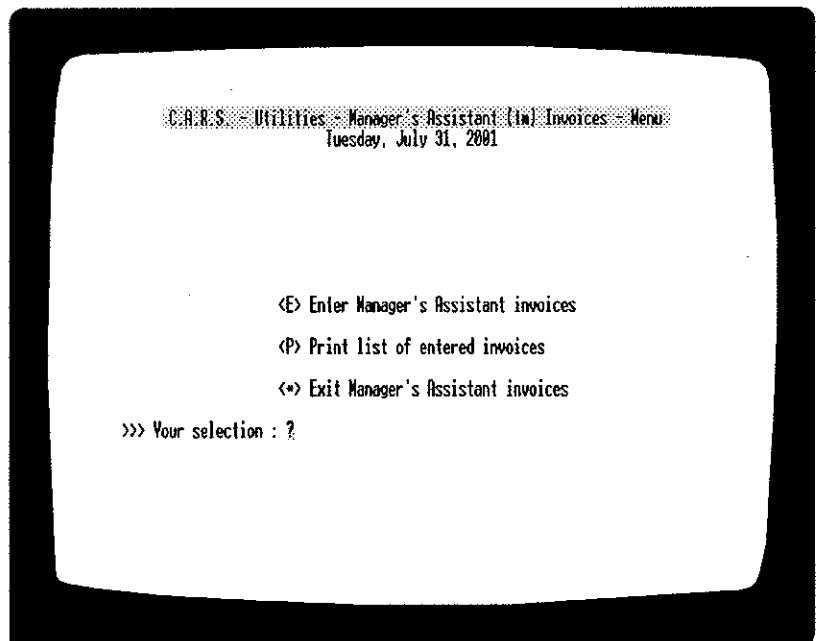
Manager's Assistant ™ Invoice entry will allow you to enter invoices into the very next Shift checkout without leaving the C.A.R.S. system.

Precision tip: If you enter Manager's Assistant ™ invoices when you are not current with your bookkeeping it will

___

cause the invoices to be put in the wrong shift. Your shift will NOT balance.

Types of invoices

You will be allowed to enter the following invoice types: Received on account, Paid out and Miscellaneous income. In addition, if you sell gasoline you will be allowed to enter Charge sales and Gasoline charge sales. Invoices are entered here exactly as they are entered in The Manager's Assistant TM-Shift checkout. (See The Manager's Assistant TM manual, Section 3.1 for more information.)

Precision tip: Charge sales which have been entered into C.A.R.S. MUST NOT be entered here.

Print list of entered invoices

Pressing Ⓟ at The Manager's Assistant TM invoice menu will print a listing of the invoices you have entered into the "C.A.R.S.- Utilities-Manager's Assistant invoice entry" which are waiting for your next "Shift check out". The report will list the "Received on account", "Paid out", "Charge sales", "Gasoline charge sales" and "Miscellaneous income" invoice entries.

Precision tip: The Charge sale and Gasoline charge sales only appear if you sell gasoline.

COMPANY SETUP

Company Setup

Any of the information entered into the system when setting up the C.A.R.S. system may be edited. This will allow you to modify the system if the need ever arises. The password (if used) is required to gain access to the Company Setup function. (see Section 2 - Setting up the system, starting on Page 3 for additional information.)

To enter the Company Setup function, press Ⓒ at the Utilities menu. (See Section 2, starting on Page 3, for a description of the sections and the information entered and for instructions on entering the information.)

SYSTEM EXPANSION

System expansion

C.A.R.S. can handle up to 512 repair orders (pending, paid, void and estimate). The system may be expanded at any time. Each time the system is expanded, the system capacity is increased by 9 repair orders.

___

Expanding the system

To expand the system, at the Utilities menu, press [S]. The following will be displayed:

```
        C.A.R.S. - Utilities - System expansion
                   Tuesday, July 31, 2001




System currently holds 36 repair orders.  Maximum capacity is 512.
Expanding the system will increase the capacity by 9 repair orders.

Do you wish to increase system capacity now ?  ( Y/N )




                    ( the <ESC> key to exit )
```
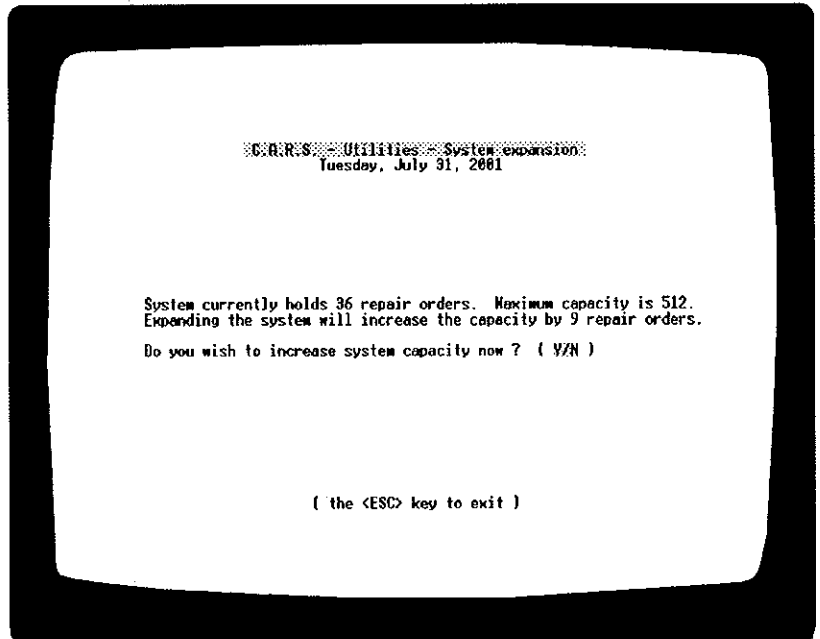
Precision tip: Only expand the system for the amount of repair orders you need at this time. Over-expanding the system can cause the backup1 to require more diskettes. Once expanded the system CAN NOT be made smaller.

If you would like to expand the system capacity by 9 repair orders, press [Y]. Pressing [N] or [Esc] will return you to the menu.

APPOINTMENT SCHEDULER MAINTENANCE

Appointment Scheduler
Maintenance

The Appointment Scheduler Maintenance function allows you to expand the number of appointments the system can handle and will delete all no-show appointments prior to a certain date. At the Utilities menu, press Ⓐ. The following will be displayed:

```
C.A.R.S.  Utilities - Appointment scheduler maintenance
                 Tuesday, July 31, 2001



            <E> Expand appointment scheduler

            <#> Delete no-show appointments

            <*> Exit Appointment scheduler maintenance

    >>> Your selection : ?
```
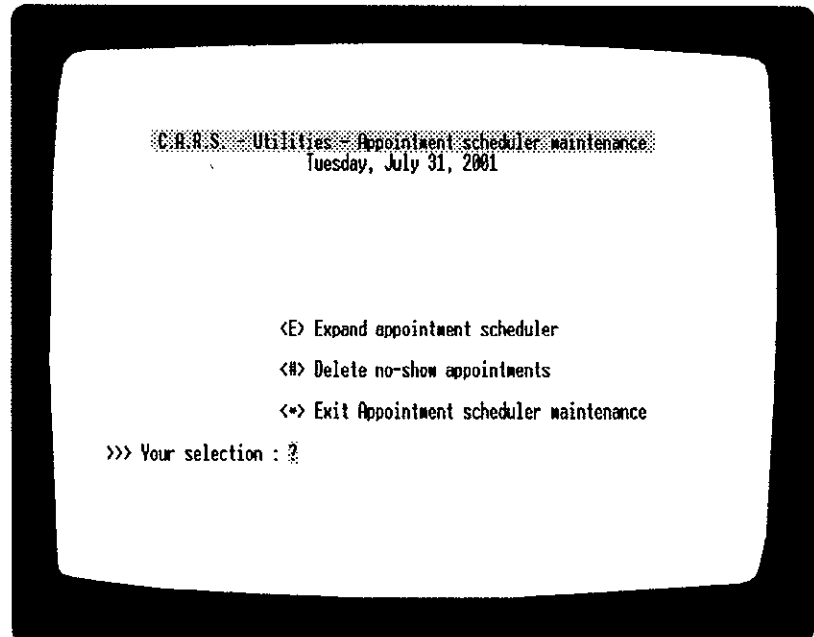
Expand appointment
scheduler

Expanding 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 Ⓘ-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.

Precision tip: If you are managing the Appointment scheduler properly, you should manually delete past no-show appointments one-by-one. That makes using this function unnecessary.

Exit Appointment scheduler
maintenance

Pressing Ⓧ will return you to the Utilities Menu.

YEAR/MAKE/MODEL MAINTENANCE

Year/Make/Model
maintenance menu

Pressing ⓨ, will display the Year/Make/Model maintenance menu:

```
                     Your Company Name
    C.A.R.S. - Utilities - Year/make/model maintenance menu
                   Tuesday, July 31, 2001




              <I> Inquire/edit
              <S> System status
              <P> Post Year/make/models
              <H> Force file compression
              <?> Check order
              <R> Re-sort
              <*>-Exit Year/make/model maintenance

    >>> Your selection : ?
```
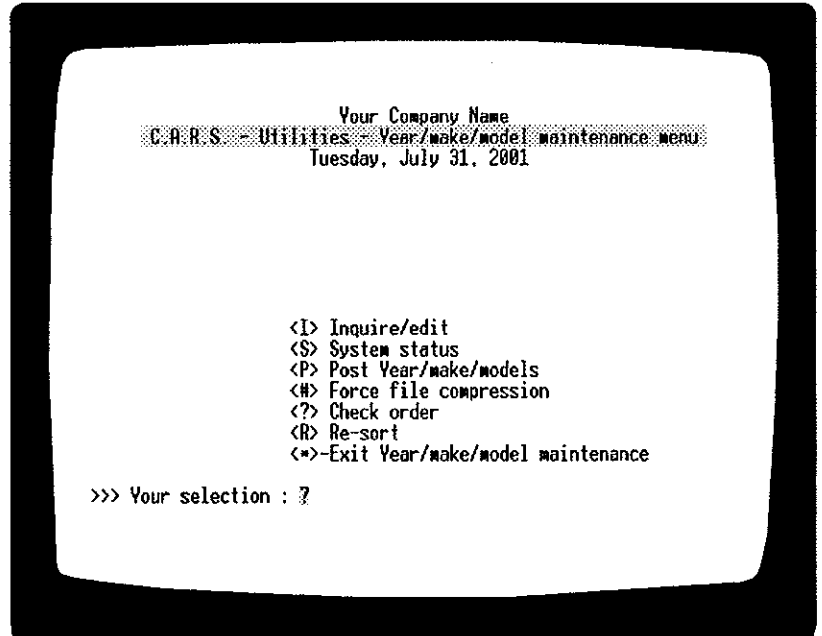
Inquire/edit
>   The Inquire/edit function allows you to look up any year,
>   make, model, and engine information and make changes
>   to the information. You can also add new year, make,
>   model, and engine information.
>
>   Inquire/edit also allows you to view, edit or add the stock
>   numbers and quantities stored for the Quick catalog
>   function.

System status
>   Will give you information on the number of active, deleted
>   and un-posted year, make, model, and engine entries.

Post Year/make/models
>   Posts the Year/Make/Model information that has been
>   added in the Inquire/Edit function.

Force file compression
>   Permanently erases year, make, and model information
>   which has been manually deleted in the Inquire/edit
>   function.

Check order
> Will check the file to determine if duplicate year/make/model/engine information exists and if the information is in the correct order.

Re-sort
> Will correct any out of order year/make/model information.

Exit Year/make/model maintenance
> Will return you to the C.A.R.S. Utilities menu.

Import
> The Import new year/make/model list allows you to update the year/make/model list on your system. Included with this upgrade is a list that will update the auto & light trucks from as early as 1974 to the present year. Run this function only if you wish to add these to your year/make/model list.

Pressing ⊡ will display the following:

```
                        Your Company Name
        C.A.R.S.   Utilities   Inquire/Edit Year-Make-Model-Engine   Page 1
                        Tuesday, July 31, 2001




        Year: 1983 Make: Alfa Romeo        Model: GTV-6
                        Engine:








        >>> Your selection : ?
        <N>ext    <P>revious    <S>earch    <E>dit    <A>dd    <N>-Delete    <•>-Exit
                  <1>   <2>    <T>urn page   <Page Up>           <Page Down>
```
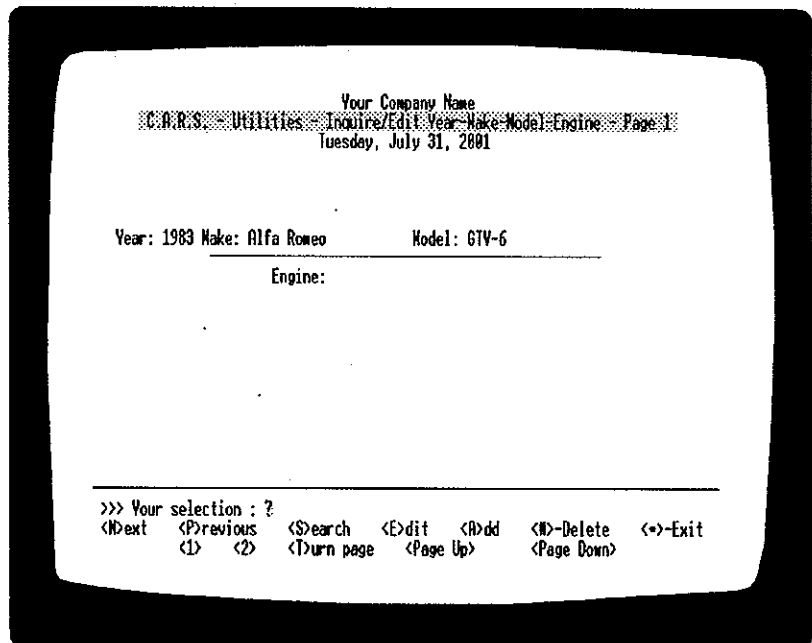
Inquire/edit mini-menu
> The mini-menu at the bottom of the screen displays the commands you will use to look up information and to make corrections.

Next and Previous

Pressing ⓝ will display the next year/make/model in the file. Pressing ⓟ will display the previous year/make/model in the file. While displaying page 1, pressing ② will display page 2, pressing ① will display page 1. Pressing ⓣurn page will display the other page.

Precision tip: You cannot edit page 2 on any year/make/model that does not have an engine, because Quick catalog requires that an engine be specified.

Search

Pressing Ⓢ will search for and display a particular year/make/model record. You will be prompted to enter the year, make and model.

Edit

Pressing Ⓔ will allow you to make changes and corrections to the information contained in the year/make/model record.

Add

Pressing Ⓐ will allow you to enter a new year/make/model and engine size. You MUST enter the year, the make, and the model information. The engine size is optional.

Delete

Pressing Ⓓ will delete the displayed information. If you delete an entry by mistake, pressing Ⓓ again will un-delete the information.

[1] [2]

Pressing ① displays the year/make/model and engine information. Pressing ② displays the Quick catalog stock numbers and quantities.

Precision tip: The Quick catalog function stores the stock number and quantity information for each year/make/model and engine combination. The system will not allow the edit of Page 2 information on any year/make/model record that does not contain an engine description.

Turn page

Pressing Ⓣ wile on Page 1 will display the Page 2 information. Pressing Ⓣ again will display the Page 1 information.

[Page Up] [Page Down]

> Using [Page Up] or [Page Down] will display a list of nineteen year, make and model records. The record displayed when [Page Up] or [Page Down] was pressed will be highlighted in the center of the screen. Pressing [Page Up] will display the previous nineteen records. Pressing [Page Down] will display the nineteen records preceding the highlighted record. Using this feature will aid in finding a year, make, and model record when you are unsure of the spelling of the information.

[Up Arrow] [Down Arrow]

> While the list is displayed you can use the [Up Arrow], [Down Arrow], [Page Up] and [Page Down] to move through the list. To display (or zoom in on) a particular year/make/model record, press [Enter], [Esc] or the ▣.

> *Precision tip: Use [Ctrl]-[R] to reverse the direction of the arrow and page keys.*

System status

Pressing Ⓢ will displayed the following:

```
                Your Company Name
      C.A.R.S.  -  Utilities  -  System status
              Tuesday, July 31, 2001




          Active items :   4,295

          Deleted items :      0

          Unposted items :     1




          >>> Press {ENTER} to continue <<<
```
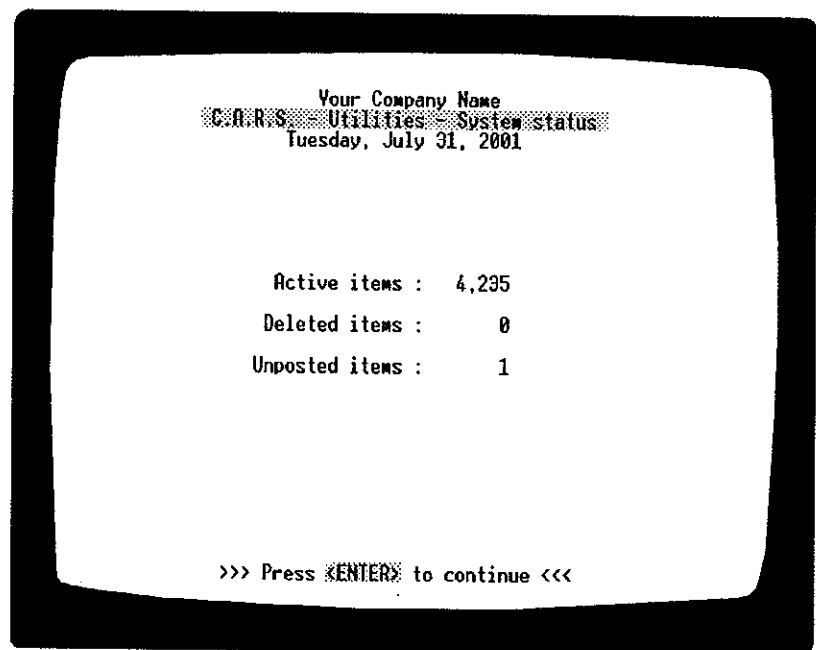
Active items

> Active items represents the number of year/make/models/engines currently on file.

Deleted Items

Deleted items are those year/make/model records that have been manually deleted from the system. They will be eliminated by the Force file compression option. The Post Year/make/model function will automatically erase the manually deleted records if the number of deleted is more than five percent of the total records.

Un-posted items

Un-posted items is the number of year/make/model records entered into the Inquire/edit function. They must be processed by the Post Year/make/model option.

Precision tip: Year/make/models added when creating or editing a repair order will automatically be posted when the repair order is transferred using the "Transfer paid repair orders" function.

Post Year/make/models

To select the posting function, press [SHIFT]-[P]. (That is, type a capital P.) The system will sort the manually added year/make/model/engine records. After the records have been sorted, the posting process will begin. After the posting process has ended you will be returned to the Year/make/model maintenance menu.

Force File Compression

The "Force file compression" function, will erase any manually deleted year/make/model records. This will eliminate "holes" in the data file caused by manual deletions and physically rearrange the year/make/model records on the disk. To select the Force file compression function, press [F].

Check order

Select the Check order function by pressing [?]. This will print a list of duplicates (if any).

```
                    Your Company Name
        C.A.R.S.    Utilities   Check order
                  Tuesday, July 31, 2001




              >>> Checking order <<<

                 0 duplicates
                 0 out of order




        >>> Press <ENTER> to continue <<<
```
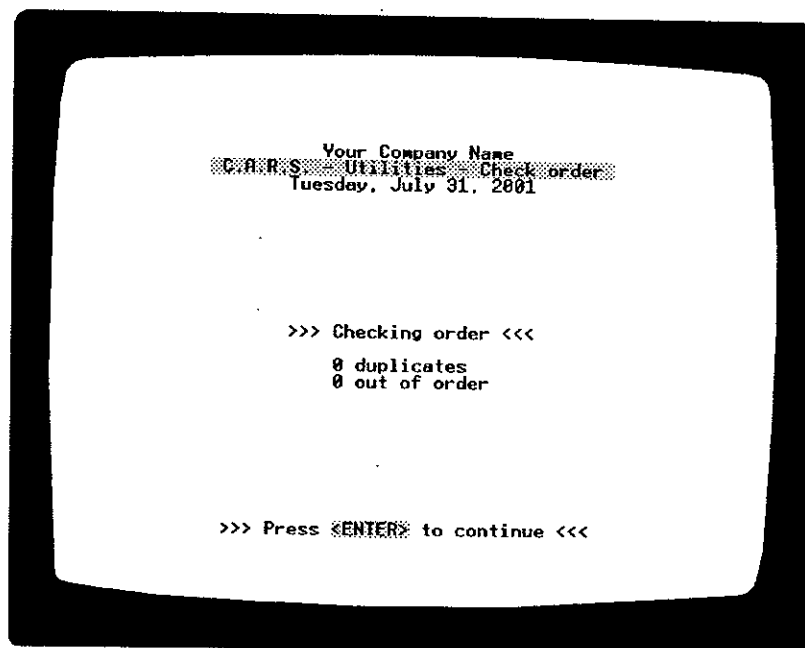
If the system prints a list of duplicates, go to Inquire/edit, Search for the duplicates and delete them by pressing ⬚.

NOTE: If the list shows an item once there is one duplicate to be deleted. If an items shows twice there are two duplicates to be deleted.

Re-sort

If the items in the system get out of order due to a malfunction, forcing a re-sort should correct the problem. The year/make/model records are out of order if any of the following symptoms appear:

1. The Inquire/edit Search function fails to find a year/make/model/engine that is known to be in the system.

2. The Inquire/edit Next and Previous functions fail to display the correct year/make/model.

3. Pressing [F3] fails to display a year, make, or model known to be in the system.

To start the Re-sort function, at the Year/make/model maintenance menu, press [Shift]-⬚. When the Re-sort function has completed you will be returned to the Year/make/model maintenance menu.

Exit Year/make/model
Maintenance

Design Repair Order

Pressing the ⊡ will return you to the C.A.R.S. Utilities menu.

DESIGN REPAIR ORDER

The code to have the "Other" phone print on repair orders is *120*. The "Other" phone fields requires space for 14 characters to print. The code to have the "Email" address field requires space for 54 characters to print.

This function <E> allows you to manually insert & delete codes in the repair order form. It also allows you to make the repair order wider, narrower, longer or shorter than the "classic" design.

> ***Precision tip: Your printer must be capable of supporting these larger sizes. The printer control file (POSPRN.DTA) may have to be changed to make the printer print using narrower letters.***

The following is a list of the codes that the system looks for in the repair order form. Also listed are the space the field requires and other information pertaining to the code.

Customer & Vehicle information (Screen Page 1)

Code	Information	Width	Notes & Comments
100	Ad line	131	Also allows Filedrawer to print **File copy** in place of the Ad Line
101	Customer name	30	Always Customer name
102	Address line 1	25	Contains Address2 if Address1 blank
103	Address line 2	39	Contains City, ST, Zip if Address1 blank
104	City, State, Zip	39	Contains 39 blank spaces if Add1 blank
105	Home phone	14	
106	Work phone	22	Includes ext. (if any)
107	Unit	30	
108	Engine	17	
109	License	17	
110	VIN	17	
111	Color	17	
112	Invoice Number	6	
113	PO#	16	Prints "PO#" followed by the PO#
114	Job#	8	Prints "Job#" followed by the job number
115	Arrived on (Started) date	8	
116	Completion date	8	
117	Time stamp	31	
118	Mileage in	6	
119	Mileage out	6	
120	Other phone	14	
121	Email	54	

Parts & Labor (Screen Page 2)

Code	Information	Width	Notes & Comments
200	Parts heading	82	76 if Parts Ticket - Tn & Sb not printed
201	1ˢᵗ Parts line Thru	82	76 if Parts Ticket - Tn & Sb not printed
231	31ˢᵗ Parts line	82	76 if Parts Ticket - Tn & Sb not printed

Description of Work (Screen Page 3)

Code	Information	Width	Notes & Comments
300	Description of work heading	82	78 if Parts Ticket
301	1ˢᵗ line of Description of work thru	78	
311	11ᵗʰ line of Description of work	78	

Service History (Screen Page 4)

Code	Information	Width	Notes & Comments
400	Not used		Reserved for future use
401	1ˢᵗ Service history category thru	43	
420	20ᵗʰ Service history category	43	

Totals Box (Shown on screen under Display by department)

500	Advanced deposit amount	11	Prints only if amount not zero
501	Department "A" total amount	11	
502	Department "B" total amount	11	
503	Department "C" total amount	11	
504	Department "D" total amount	11	
505	Department "E" total amount	11	
506	Department "F" total amount	11	
507	Department "G" total amount	11	
508	Department "H" total amount	11	
509	Department "I" total amount	11	
510	Department "J" total amount	11	
511	Not used		Reserved for future use
512	Sup-total of 500 thru 510	11	
513	Discount amount	11	Prints only if amount not zero
514	Sales Tax (Dept "K") total amount	11	
515	Not used		Reserved for future use
516	Total of 512 thru 514	11	
593	**Do not pay. This is not a bill!**	37	If password set MUST have 593 or 594. Not required on Parts ticket. If no password, prints 37 dashes
594	**Do not pay. This is not a bill!**	37	Same as 593 above, except if no password, prints 37 equal signs
595	Prints your company name	35	Required on all repair orders
596	Title "Advance deposit"	15	Prints only if #500 is not zero
597	Title "Discount"	11	Prints only if #513 is not zero
598	Prints "Credit memo" or "Balance Due" or "Total Due"	11	Whichever is appropriate
599	Repair order status	35	

Other information

600	Prints sequence #	8	Required except on Parts ticket
601	Precision Copyright	108	Required except on Parts ticket
602	Mitchell Copyright	121	Required if your system has Mitchell
603	Mitchell Copyright	121	Required if your system has Mitchell
604	Mitchell Copyright	121	Required if your system has Mitchell

Edit Repair Order

To edit a repair order design press ⒠. The "Edit current design" menu will appear. Pressing ① will allow you to edit the "Shop copy", pressing ② will allow you to edit the "Customer copy" & pressing ③ will allow you to edit the "Parts ticket".

When inserting or moving codes you must have an asterisk (*) in front of the codes & an asterisk (*) behind the code for the system to recognize that it is a code.

> *Precision tip: If the system is set to print your company name at the top of the repair orders do not remove the "**HEADING**". This is the code which prints & enters your company name.*

> *Precision tip: Please remember to check the above list of codes before adding, deleting or moving the codes. The system will not allow the printing of a repair order if a required code is missing. You must also check the required size of the field & allow the proper amount of space for the repair order to print correctly.*

The following shows a basic repair order form of the Shop copy (PosMask0.Dta) and the Customer copy (PosMask1.Dta) files as they appear in the "Edit current design".

> *Precision tip: There may be some slight differences due to the answers to the questions in the "Change settings" function. For example if you do not have an "Ad Line" it will not appear. If you are not printing the time stamp the code "*117*" will not appear.*

Section 3.7
Utilities

```
¶
**HEADING**¶
¶
              Hours Monday thru Friday 7:30a to 6:00pm    Saturday 7:30a to 3:00p  Sunday - closed
  ¶
-----------------------------------------------------------+---------------------------------------------¬
*101*                          Vehicle: *107*              |        Invoice number *112*                 ¬
*102*                          Engine: *108*               |  *113*                   *114*              ¬
*103*                          License: *109*              |  Started: *115*      Completed: *116*       ¬
*104*                          VIN: *110*                  |  *117*                                      ¬
Hm *105*          Wk *106*     Color: *111*                |        Mileage: *119*                       ¬
-----------------------------------------------------------+---------------------------------------------¬
  *300*                                                    | Service history           Date    Mileage  ¬
-----------------------------------------------------------+---------------------------------------------¬
  *301*                                                    | *401*                                       ¬
  *201*                                                    | *402*                                       ¬
                                                           | *403*                                       ¬
                                                           | *404*                                       ¬
                                                           | *405*                                       ¬
                                                           | *406*                                       ¬
                                                           | *407*                                       ¬
                                                           | *408*                                       ¬
                                                           | *409*                                       ¬
                                                           | *410*                                       ¬
                                                           | *411*                                       ¬
                                                           | *412*                                       ¬
                                                           | *413*                                       ¬
                                                           | *414*                                       ¬
                                                           | *415*                                       ¬
                                                           | *416*                                       ¬
                                                           | *417*                                       ¬
                                                           | *418*                                       ¬
                                                           | *419*                                       ¬
                                                           | *420*                                       ¬
                                                           |                                             ¬
                                                           +---------------------------------------------¬
                                                           |                           Totals           ¬
                                                           +---------------------------------------------¬
                                                           | *596*              :*500*                   ¬
                                                           |                    :                        ¬
                                                           |                    :*501*                   ¬
                                                           | Oil                :*502*                   ¬
                                                           | Labor              :*503*                   ¬
                                                           | Parts              :*504*                   ¬
                                                           | Sublet             :*505*                   ¬
                                                           |                    :*506*                   ¬
                                                           |                    :*507*                   ¬
                                                           |                    :*508*                   ¬
                                                           | Road Svc/Tow       :*509*                   ¬
                                                           | Shop Supplies      :*510*                   ¬
                                                           |                    ------------------------¬
                                                           |        Sub Total :*512*                     ¬
                                                           |        *597*      :*513*                     ¬
                                                           |        Sales Tax :*514*                     ¬
                                                           |        *593*                                ¬
                                                           |        *598*      :*516*                     ¬
                                                           |        *594*                                ¬
                                                           | Thanks!  *595*                              ¬
                                                           | Status : *599*                              ¬
-----------------------------------------------------------+---------------------------------------------¬
*600*      *601*¶
¶
¶
¶
```

Section 3.7
Utilities

When using the Top Line advertisement, entering Code *100* will print the top line ad on the mask. Allow 131 characters for the Top Line advertisement. This will also allow Filedrawer to print **File Copy** in place of the top line advertisement.

> *Precision tip: Even though you may not be using the Top Line advertisement make sure the mask contains the code *100*. If the *100* is removed from the mask, Filedrawer copies will NOT have **file copy** printed at the top.*

INSTALL MITCHELL CD

Install Mitchell CD

For information on installing a new Mitchell CD see the Mitchell Instruction Manual.

VIEW/PRINT MITCHELL SERVICE INFO.

View/Print Mitchell service info.

For information on viewing and printing the Mitchell service info. See the Mitchell Instruction Manual.

> *Precision tip: If you did not purchase the Mitchell Interface the Install Mitchell CD and View/print Mitchell service info. will not appear on the Utilities menu.*

Security Features

C.A.R.S. contains many features to encourage employee honesty. Some features function automatically, while other features must be selected and/or set up.

Automatic security features

Void protection

All voided repair orders are printed during the Transfer paid repair orders function. This will prevent an employee from collecting a cash ticket and then voiding it to dispose of the ticket. The Transfer recap report also reports the number of voided tickets included in that transfer. The Transfer recap reports are numbered. By watching the Transfer recap number you can insure that you see all reports. This will catch an employee who voids a cash ticket, pockets the money and transfers the voided ticket by itself.

Repair order print sequence number

The system will print a serial number on each hard copy printed. This serial number may be used to prevent employees from changing the repair order after the customer has paid and pocketing the difference.

To use this feature, you **MUST** use dual part paper in all printers used for printing repair orders. Examine the serial numbers to confirm that you have a copy of all repair orders printed. When the vehicle is picked up, have the customer sign the repair order with the carbon copy still in place. The signed carbon copy can then be compared to the Transfer copy or the Filedrawer copy. A discrepancy may indicate the need for an inquiry.

Preventing reuse of work orders

The system stores customer information by customer last name/company name, house/box number and vehicle description. If all of these critical areas are changed it is highly probable that someone is reusing a completed repair order after it has been paid for. To guard against this, the system monitors changes made to those critical areas and reports all changes. The report is printed after the Transfer recap Year-to-Date information.

> *Precision tip: If the system has not detected any changes to the critical areas the report says "THE SYSTEM HAS DETECTED NO EDIT(S) OF THE NAME, ADDRESS OR VEHICLE FIELDS OF REPAIR ORDERS SINCE THE LAST TRANSFER".*

Selectable security features

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".

When a password is used any repair order with a status other than "Completed" or "Paid" prints:

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

This line will print 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.

Password when doing a Transfer

To have the system ask for a password before doing a Transfer paid repair orders, go to The Manager's Assistant™ and set up a Level 1 password.

The system will ask for the Level 1 password before displaying the Transfer paid repair orders menu. You will also be asked for the Level 1 password before the system will go into the Shift checkout program.

Inventory posting report

The Inventory posting report will tell you when an item was sold at less than "standard". Standard is measured two ways. If the item is sold at a price less than that which is calculated by applying the gross margin percentage for that group, the system will report the amount of the discrepancy followed by the word "Group". If the item is sold at a price less than the retail price shown in Precision Parts Manager, the system will report the amount of the discrepancy followed by the word "Retail". In order for the system to show discrepancies, you must answer Y to the question "Should C.A.R.S. inventory transactions be included in the posting report ?", found on C.A.R.S. system setup information (3) screen.

The report will also show the Vendor & invoice number for each part received and, if the item was applied directly to a repair order, which repair order was it applied to.