

The Service Manager™

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Section 1 Introduction

Brief Description

The Service Manager™ by Precision Data Systems is designed to merchandise automotive service work by keeping vehicle service history records, sending customers service reminders and promoting additional service sales. The Service Manager™ also accumulates useful statistics and the services sold and the employees who performed those services. The Service Manager™ directly integrates with Precision Data System's Computerized Automotive Repair order System (C.A.R.S.) and Filedrawer. The information generated is consistent with and may be used to supplement the information generated by The Manager's Assistant™.

Information managed

The information is taken directly from your shop repair orders. For each vehicle that comes into your shop, the system will store the owner's name, address, city, state and zip code. The Service Manager™ will also store the home and work phone number, the number of times the vehicle was in for service and the current and cumulative sales dollars for this vehicle.

Precision Tip: The current and cumulative sales dollars must be manually maintained unless you have purchased the C.A.R.S. function.

The Service Manager™ will also keep track of when the customer was last sent a letter thanking him for his business, and whether the system has mailed any of twenty automatic reminder letters. Also the system will keep track of twenty categories of service, recording the date that service was performed, the number of miles on the odometer at the time that service was performed, and the employee who performed the service for each of the twenty categories.

The Service Manager™ will also accumulate the number of vehicles serviced by each employee and the number of service jobs performed by each employee according to the twenty categories. These statistics are accumulated for later analysis.

Purpose of this manual

The Service Manager™ system is designed to be used by owners and managers of service stations, vehicle repair shops and large fleets of vehicles. The system and manual assume no prior computer experience and the system requires none. The instruction manual will lead you through all the necessary steps needed to implement and use the system. The manual was written as a tutorial and reference manual. You will find the instructions organized in a step-by-step manner.

Organization of this manual

Sections 2.0 & 2.1 explain how to set up the system and the information required to do so. Sections 3.0 through 3.10 explain the day to day use of the system.

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Section 1

Introduction

Because you are probably unfamiliar with computers, it is recommended that you read through this manual prior to using the computer. This will provide an overview that will make the system easy to use.

System capacity

The Service Manager™ will initialize with a system capacity of 250 vehicles. The system may be expanded as needed until full capacity 999,999 vehicle is reached. This assumes sufficient space is available on the hard disk.

Disk space used

The Service Manager™ will automatically adjust itself to use the additional storage space available up to 999,999 vehicles. To calculate the number of vehicles that The Service Manager™ can handle, divide the available storage space on a disk (in bytes) by 1024. Regardless of the result of this calculation, system capacity is limited to 999,999 vehicles.

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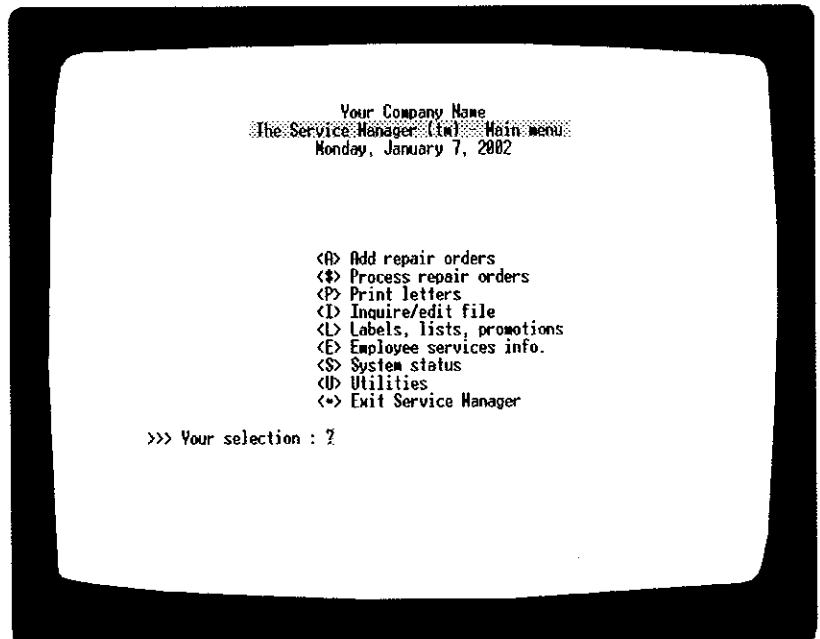
Setting Up The System

Starting the system

To start The Service Manager™, press **[S]** at the "Precision" Main Menu. The system will go to The Service Manager™.

Initial setup vs. revised setup

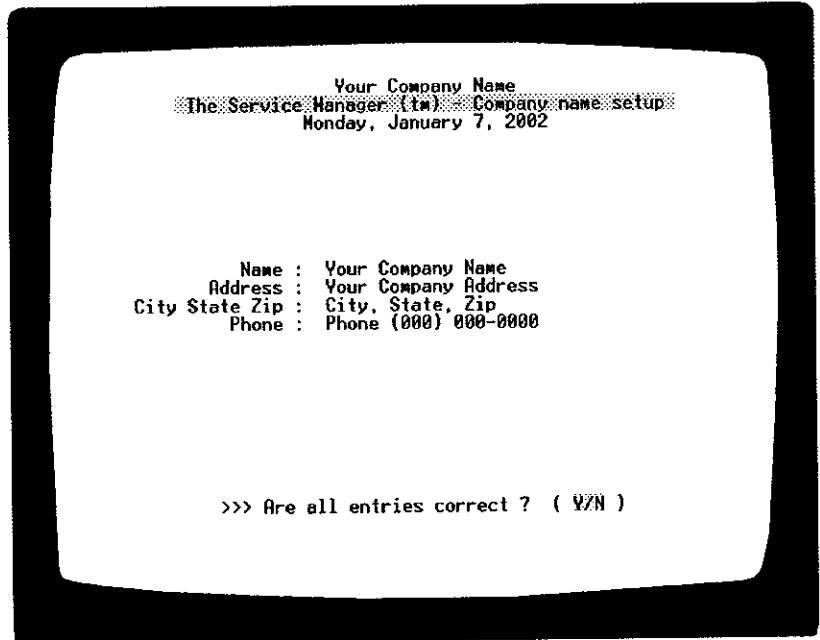
If the system has not been set up, you will be taken directly to the Company Setup function. If you have previously set up the system you will be taken to The Service Manager™ Main Menu (see figure below). To revise the setup, press **[U]** to select the Utilities menu, at the Utilities menu press **[C]** to select the Company Setup function. Recall that when answering a question that requires only a single key response, you need not press [Enter].



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Company Setup

After a few moments, the screen will show:



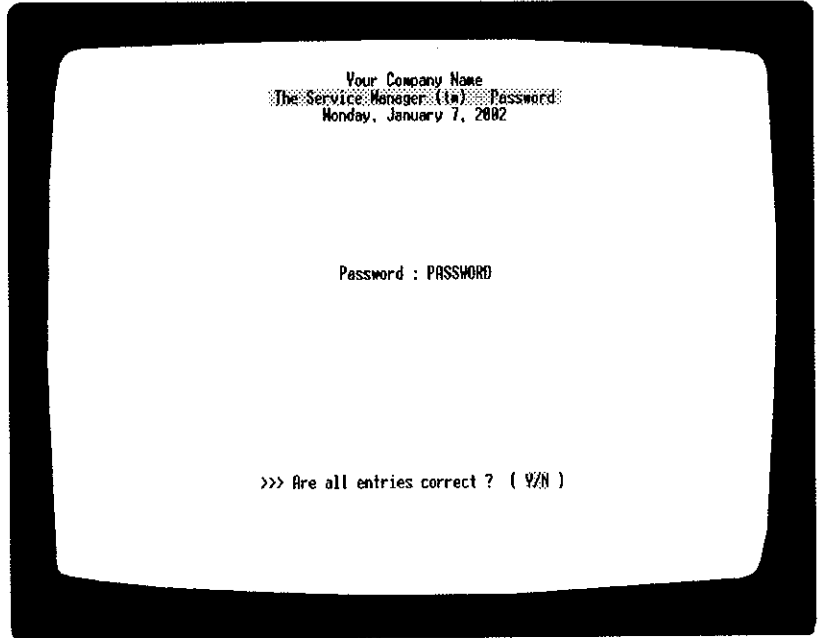
Password

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 entering the Company setup function and when going into the Labels, lists and promotional letters function.

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Re-enter password

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



Using a password

The word "PASSWORD" when used in the system as a password will prevent the system from asking for a password. This will allow anyone to access all information.

To enter a new password, press N (to answer "No") to the question "Are all entries correct?". Press [F5] to clear the word PASSWORD, type in your password and press [Enter]. After entering the password, you will be asked "Are all entries correct?". Press Yes to return to the Company name setup screen.

Precision tip: A password may contain letters, numbers, and punctuation marks.

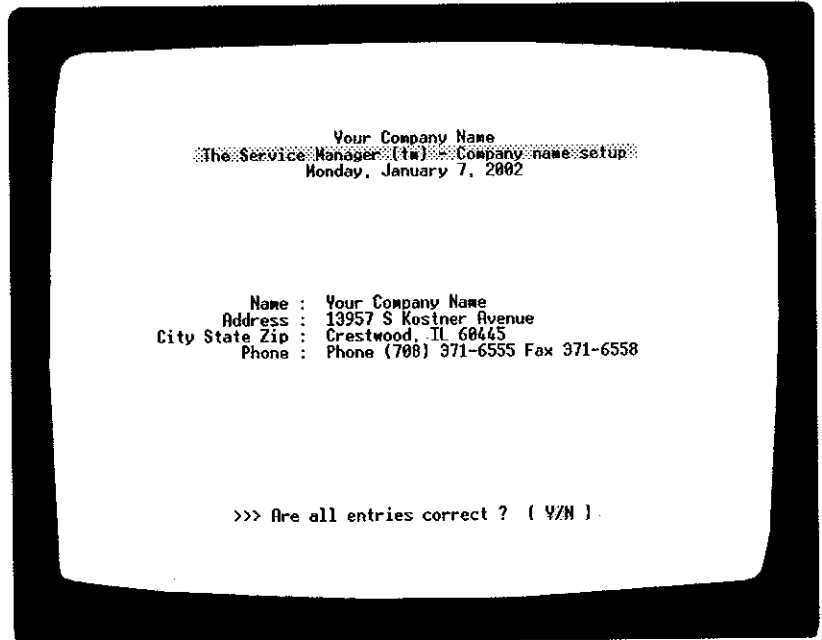
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Company name setup

After a moment, the screen will show:



Computer generated letterhead

The Service Manager™ is designed to produce thank you letters or post cards, service reminder letters or post cards and promotional letters or post cards. If you are going to print your letters on blank paper, you will ask the computer to print your company name, address, and phone number on the top of the paper, thereby printing the letterhead for you. The information displayed on this screen is the exact information that will be printed on the papers as your letterhead.

Your company name

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

Editing company information

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

Precision tip: The Address, City State Zip and Phone Fields will each hold 35 characters.

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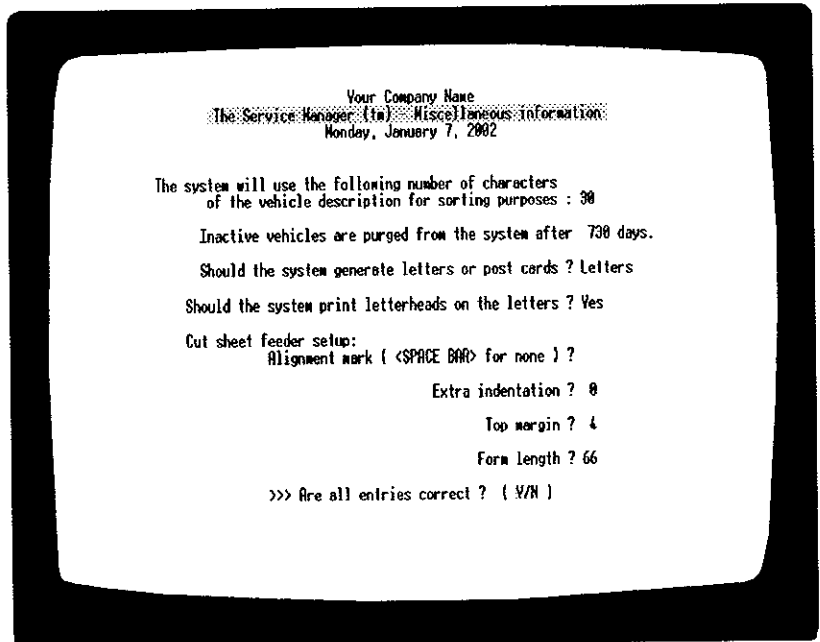
Precision tip: Remember, type it as you would like it printed on paper as your letterhead, including any spaces, commas, periods or other punctuation. When printing, the computer will adjust the information so that all lines will be centered on the paper. Do NOT attempt to center the information on the screen.

If you make an error

If, while entering information, you notice that you have made an error, use the editing functions described in Section 1 of the Precision Main Menu manual to correct the error.

Miscellaneous information

After the phone number question has been answered, the system will again ask, "Are all entries correct?". If the information has been correctly entered, press Y. The following appear:



Vehicle description
used in sorting

For sorting purposes, the system uses the customer's last name or company name, house numbers on address line 2 and the vehicle description. This will determine if the system should add the repairs to an already existing file or if a new file should be created.

Change the number
of characters

To change the number of characters in the vehicle description used for sorting, press N in answer to "Are all entries correct?", then enter the desired number of characters.

Precision tip: As supplied the system will use the entire 30 character vehicle description for sorting. The number of characters of the vehicle description used by the system,

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may be changed after the system has been used. After doing so, you must force the system, to re-sort. See Section 3.9-Utilities-Forcing a Re-sort, for additional information.

Delete inactive vehicle

At your option, you can have The Service Manager™ go through the service records and delete inactive vehicles. Inactive vehicles will only be deleted when the difference between the last service date and the system date exceeds the number of days shown in "Inactive vehicles are purged from the system after XXXX days."

Entering 9999 here will prevent the system from deleting inactive vehicles. 730 days (2 years) is a good starting point.

Print Letters or Post Cards

The system can print Thank you and reminder letters or post cards. The post card option will print on 4"X6" post cards. To print letters, press . To print post cards, press .

Precision tip: If you have chosen to print letters the system will only print letters. If you have chosen to print post cards the system will only print post cards. It is not possible to print both letters and post cards at the same time.

Print or not print the letterhead on letters

If you will be printing your letters on plain un-printed paper, you will want the computer to print your company name, address and phone number on the top of the paper thereby printing your letterhead for you.

If you will be using preprinted letterhead, you will not want the computer to print your company name, address and phone number on the top of the letterhead. If The Service Manager™ is not set to match the type of paper you will be using, press . Pressing [Esc] will allow you to enter your company address again. Press to go on to the next questions.

Print or not print return address on post cards

If you have the system set for printing post cards the system will ask:

"Should the system print the return address on post cards? (Y/N)"

If you would like the system to print your return address on your post cards, press . If you have purchased post cards preprinted with your return address, press , the system will skip printing the return address.

Cut sheet feeder

Manu cut sheet feeder attachments for dot matrix printers have difficulty maintaining vertical form alignment. The problem can be circumvented by printing a small character on the very first line at the top of each letter. If you have a cut sheet feeder that has this problem enter a (period) for the Cut sheet feeder alignment mark. Otherwise, enter a blank space (push the [Space Bar]).

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When using the Cut sheet feeder or a cut sheet fed printer if the text of the letters prints too far to the left edge of the paper you may provide extra indentation by entering a number. The values represent tenths of inches. For example, to indent the printing ½" you would enter 5.

Top Margin

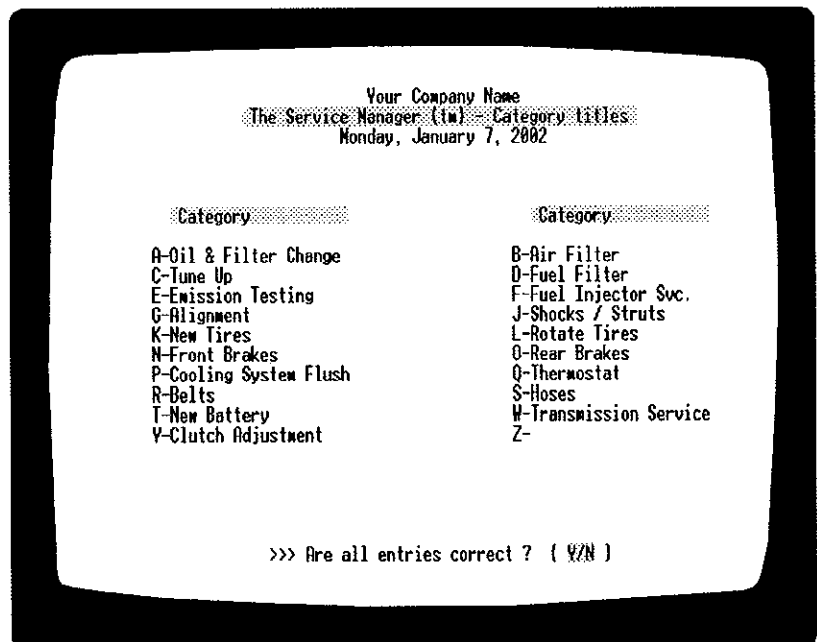
If the text of the letters prints too far towards the top of the paper you may create a larger top margin by entering a larger number for the top margin. The normal setting for the top margin is 4 (lines). Each line is one sixth of an inch. For example, if you need to print the text ½" lower on the page you would enter 7 (the normal 4 lines, plus 3 lines).

Form length

Normal paper is 66 lines long. Some printers can print on all 66 lines. Other printers print less than 66 lines. Some cut sheet feeders and cut sheet fed printers automatically add blank lines between sheets. In that case you would have the system print less than 66 lines. Other cut sheet feeders need extra lines between sheets. Consult the instruction manual supplied with your cut sheet feeder or cut sheet fed printer to determine the proper value to enter for form length. After entering the Form length, answer Yes to "Are all entries correct?".

Category titles (Service history)

The screen will again change and display the following:



Changing service history categories

For each vehicle that comes into your repair shop, the system will track the work performed in twenty service categories. Any service

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category may be redefined to be anything you wish. The system will allow you to enter a new title for any or all categories.

If you would like to change any or all of the Service history categories answer **N**o, to the question "Are all entries correct?". Press [Enter] to pass any categories you would like to remain the same. Press [F5] to clear a category and type in the category you would like to use. To leave a category blank, press [F5], then press the [Space Bar] and press [Enter].

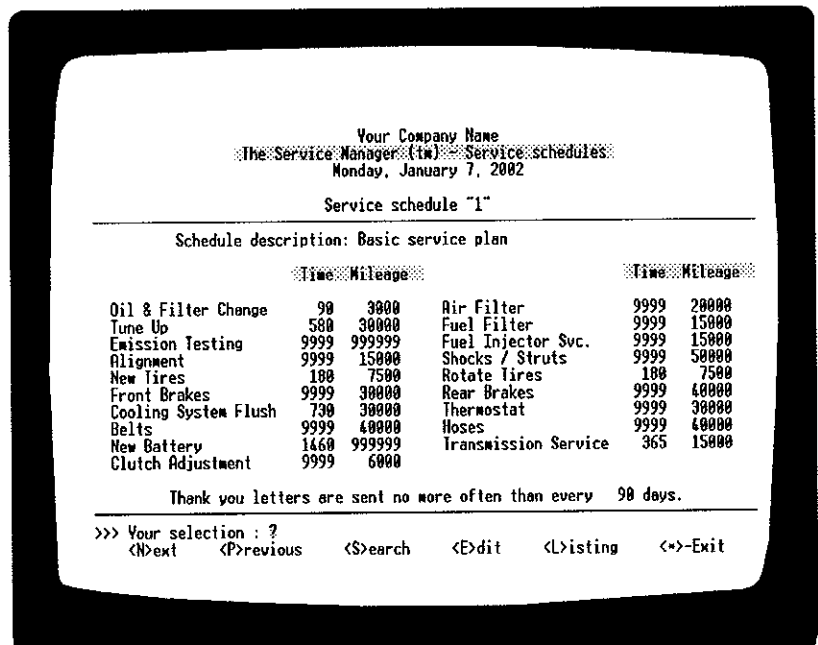
Precision tip: If you change the category titles at a later time there may be dates in the categories that will need to be moved or deleted.

Oil changes with synthetic oil

If you change oil using synthetic oil, it would be best to use a separate service category to track this service separately from regular oil change customers. That way, you can easily remind customers using synthetic oil by sending out their reminder letters (post cards) after a much longer period of time than customers who use regular oil.

Service schedules

The Service Manager™ decides when to send thank you and reminder letters (post cards) based upon time in number of days. The Service Manager™ can automatically send a reminder letter (post card) for any service tracked. The system will keep track of the date the service was performed.



Time (days) between services

The number of days that the system should wait before reminding the customer of the need for a repeat service is entered here. The

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number of days for that category should be set to agree with the service frequency you recommend to your customers for that service.

For example, if you are having the system send a particular reminder letter (post card) after 90 days, 3 months after that service was performed, the system will automatically send a reminder letter (post card) for that service has not been sent. No additional reminder letter (post card) for that service will ever be mailed to the vehicle's owner unless:

1. The customer returns the vehicle for a repeat of that service
2. The work order for that service is entered into the system
3. Another 90 days passes

Automatic service reminders

If by chance, a customer was to return for that service before the system mailed the reminder letter (post card), entering the repair order with the latest service in that category would automatically reset the date of that service in the service history. Thus, an automatic reminder letter (post card) for that previous service would be avoided.

Mileage factors

The Service Manager™ uses the mileage factors in deciding which categories to include when printing the Suggested Services Promotional Letters. This combination of time and mileage factors is called a Service schedule. There are 10 Service Schedules. They are numbered 0 through 9. As the system is supplied, schedules 0 and schedules 2 through 9 will not produce any letters or post cards. We suggest that you leave schedule 0 alone so it can be used on vehicles where you do not wish to send letters or postcards. Any of the Service schedules may be changed to suit your needs.

Edit Service schedules

To change an existing Service schedule or to begin using an unused Service schedule, press **F3** to search for the schedule you would like to change. Enter the Service schedule number and press [Enter]. The press **F4** to change the Time and Mileage factors.

Precision tip: The mileage factors are used by C.A.R.S. when creating a repair order to determine if a service is needed based upon mileage.

Setting the time for Thank you letters (post cards)

Setting the time for Thank you letters or postcards on any schedule to 0 will prevent a thank you letter (post card) from being sent, unless you have used the force letter option when adding repair orders in The Service Manager™ or completing repair orders in C.A.R.S..

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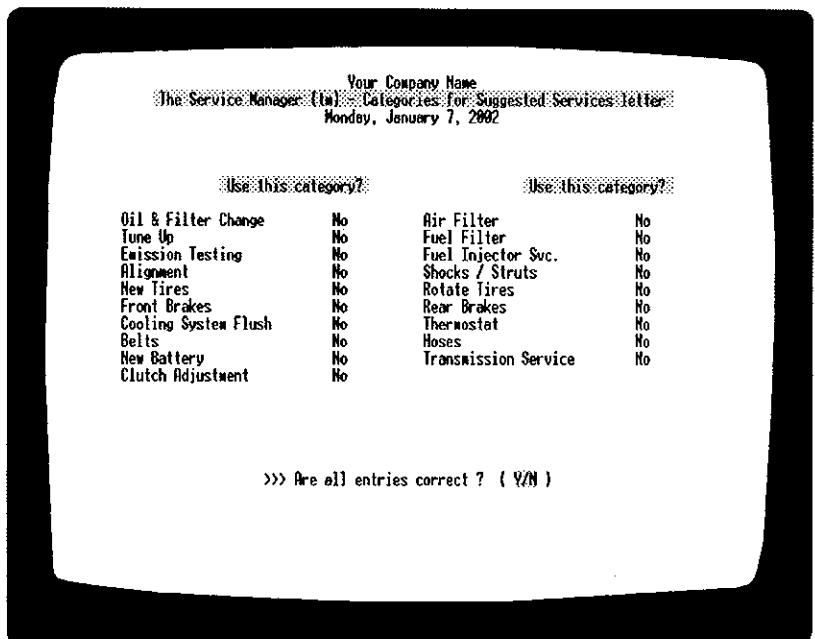
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Categories for suggested services letters

To prevent the system from automatically sending a particular follow up letter (post card), set the number of days to 9999.

A Promotional letter (post card) is used for mass mailings. A Suggested services promotional letter (post card) is a mass mailing letter (post card) that recommends services that may be needed. It checks the specified categories in the vehicle service history. If according to the Service schedule a specified service is needed it recommends the service. Services are recommended by printing the title of the category or categories of services suggested.



Edit categories for suggested services letters

When you are getting ready to use the Suggested services promotional letter (post card) you have to tell the system which categories it should consider suggesting. The system will only consider the categories that show "Yes" in the "Use this category?" column.

To edit the categories for Suggested services promotional letter or post card, press in answer to "Are all entries correct?". For each category, press to have the system consider the category or to prevent the system from considering the category.

Precision tip: It is important to add mileage factors to the service schedule before using the Suggested services promotional letter or post card.

Abbreviated entries

Most of your customers probably live in your immediate area. To ease the job of entering addresses, the system is able to store up to

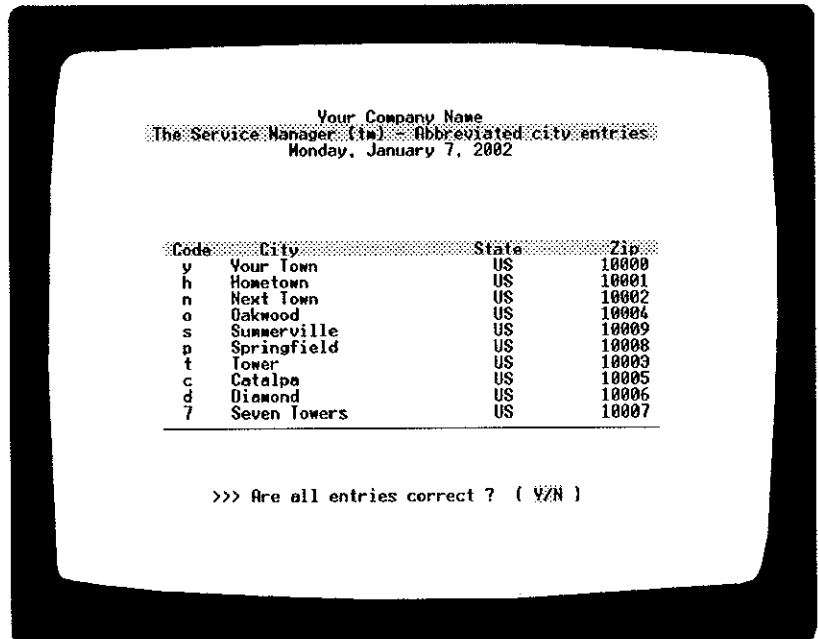
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ten city/state/zip code combinations that may be entered with a single coded keystroke.

For cities that have many zip codes, you may wish to establish an abbreviated city entry for that city without entering a zip code. Although a zip code would not be entered, it would eliminate the repetitive typing of the city and state.



Abbreviation code

As before, to change the information on the screen press **[N]**. You can now change the information. The first column consists of the code that the computer will recognize as the abbreviation for a particular city, state and zip code. The code must be a lower case letter or a number 0 through 9. Choose a letter or number that is easy for you to remember, like "s" for Springfield or "2" for Evanston, IL 60202. Press the letter or number you wish to use for the first abbreviated city entry. Since this field is only one character in length, you need not press [Enter].

City

The second column is the city for that particular city/state/zip code combination.

State

The third column is for the state. Use the standard Post Office abbreviations for state. (See Appendix B of the Precision Main Menu manual for Post Office abbreviations.) You may enter the state abbreviation in lower case letters. The system will capitalize the state abbreviation.

Zip Code

The last column us for the zip code. Space for a five digit zip code

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is provided. Remember that here, as in other places, if you don't change the information, the previous information in that field will be retained.

Precision tip: If you don't want a zip code, you can tell the system to forget the old contents of that field by entering a zero. After pressing [Enter] the zero will disappear. Using that abbreviated city entry will not enter a zip code.

Canadian users: You must answer the question "Do you wish Canadian postal codes in lieu of Zip codes?", before you can enter postal codes.

Canadian users: To erase the contents of the postal code field use [Backspace], [Atf]-[Delete] or [F5], then press [Space Bar].

Continue with the next abbreviation. **You can use a code letter or number only once.** If you were to use a code twice, only the first abbreviated city entry would work. You do not need to use all ten abbreviated city entries. Use only as many as you need.

Eliminate unwanted abbreviations

To eliminate an unwanted abbreviated city entry, press the [Space Bar] when in the code column. Repeat as necessary to complete the entering of ten abbreviated city entries.

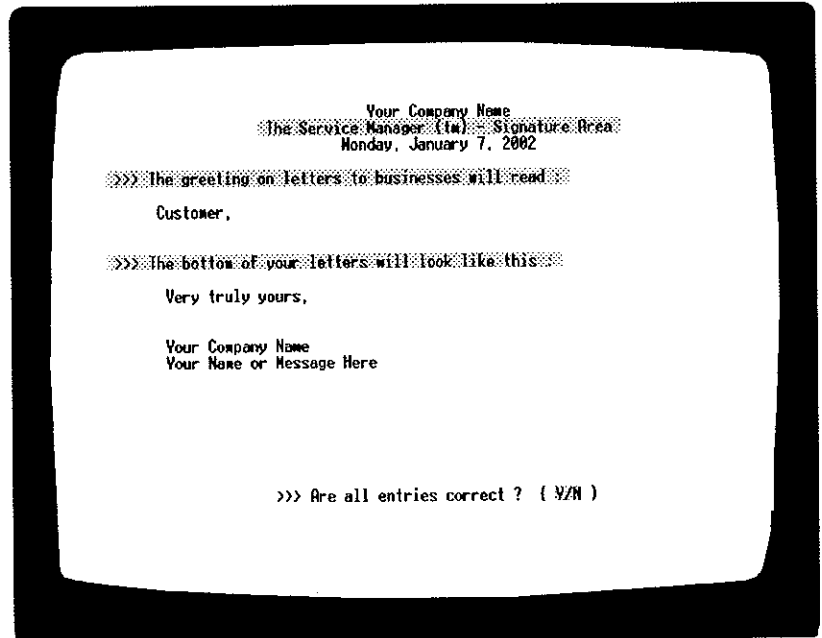
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The signature area of the letters

When asked "Are all entries correct?", press [Esc] to go back to previous questions, press to go to the next questions. The screen will change:



Letters addressed to companies

As supplied the system will open letters addressed to companies with "Customer". If you would like to have the letters open with something other than "Customer", press in answer to "Are all entries correct?". You will be allowed to change "Customer" to anything you would like.

Closing of the letter

Enter here the information to be printed in the signature area at the bottom of your letters. As supplied the system will close your letters with "Very truly yours,". Notice that the system will print your company name immediately under the signature area. This cannot be changed. There is space below the company name to have your name appear. Once the information is correct, Press .

Precision tip: If you have the system set to print post cards, this question will not appear.

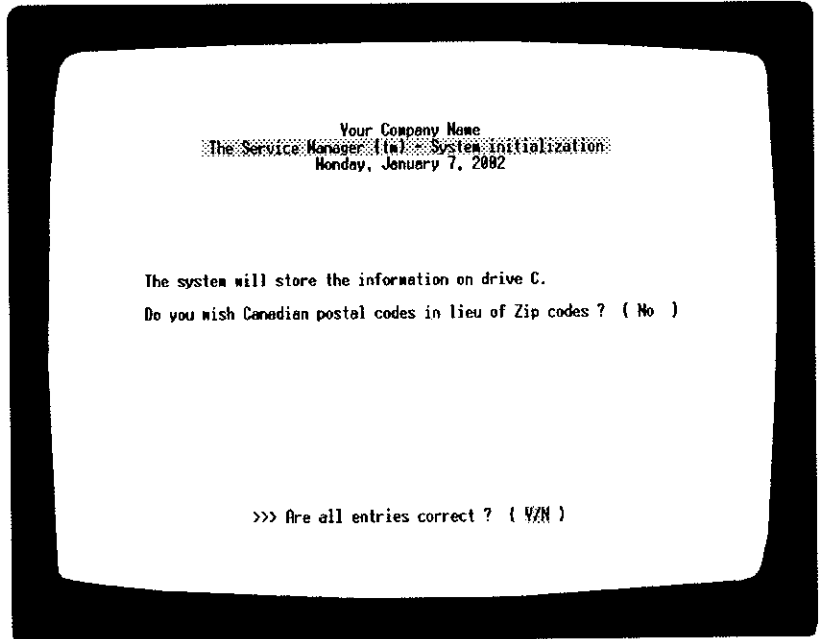
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System Initialization

All the required information has now been entered. If this is the initial system setup, the system will now show the following:



Storing the setup information

If you wish to store the information on a disk drive other than drive C, press **[N]** then select the disk drive you wish to use by pressing the appropriate drive letter.

Precision tip: Hard disk users should select drive "C".

Canadian users note: You should select the use of Postal codes instead of zip codes.

Canadian users note: After selecting the use of Canadian Postal Codes, you may wish to return to the abbreviated city entries (2 screens prior) by pressing [Esc] twice.

The system will record your setup information. When the process is completed, the system will display The Service Manager™ main menu. You have successfully tailored The Service Manager™ to your business.

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Write (Compose) Letters Or Post Cards

Compose the letters or post cards

Before printing any letters or post cards, you must compose the text of the letters or post cards and enter the text into the system.

Precision tip: *The Compose function uses all of the full-window text entry described in Section 1 of the Precision Main Menu manual.*

Precision tip: *If you have changed the company set up so the systems print letters this function will only allow you to compose letters. If you have changed the company set up so the system prints post cards this function will only allow you to compose post cards. It is not possible to print both letters and post cards at the same time.*

Line length, maximum line count for letters

The system will leave about 1 inch for the left margin. Your printer will print the letters ten characters to the inch. The system allows a maximum line width of 67 characters. Up to 25 lines of text to be included in the body of any one letter will be allowed.

Line length, maximum line count for post cards

Your printer will print the post cards ten characters to the inch. The system allows a maximum line width of 52 characters. Up to 17 lines of text to be included in the body of any one post card will be allowed.

Precision tip: *Post cards must be 4"X6" post cards.*

Precision tip: *If you have your return address pre-printed on the post card, have it printed in the upper left corner on the back of the post card. You must set up the system so it does not print the return address.*

Return address on post cards

The computer will print on the back of the post card. The return address will be printed in the upper left corner. The message will be printed below the return address. The customer's address will be printed on the right, much as you would write a "picture" post card.

Include make & model

The system can be made to insert the make and model of the vehicle in the text of the letter or post card. The computer will search the text of the letter or post card and substitute the make and model of the vehicle for the following distinct group of characters:

****VEHICLE****

Thus, to cause the make and model of the vehicle to appear in the letters or post cards, you need only type: **VEHICLE** wherever you want the make and model to appear within the letter or post card.

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Precision tip: **VEHICLE must be in all capital letters.**

Include Previous Service Information

The system can include a reference to the previous service date and mileage. To include the previous service date in the letter or post card, type: MM/DD/YY wherever you want the previous service date to appear within the letter or post card. To include the previous service mileage, type **MILES** wherever you want the previous service mileage to appear within the letter or post card. (Example: Your last oil change was on MM/DD/YY at MILES miles.)

Precision tip: Both MM/DD/YY and MILES must be in all capital letters.

Suggested Services Promotional letter or post card

When using the Suggested services promotional letter or post card, the services are recommended by printing the title of the category or categories of services suggested on the letter or post card. To make the system print the category or categories of suggested services, type **CATEGORIES** on a line all by itself in the text of the Promotional letter or post card.

Precision tip: The **CATEGORIES must be in all capital letters.**

Write (Compose) function to enter text

The Write (Compose) function is a utility program supplied with the system which will allow you to enter, review or edit the text of the letters or post cards.

Starting the Write (Compose) function

At The Service Manager™ main menu press **U** to select the Utilities menu, at the Utilities menu press **W** to select Write (Compose) letters or post cards.

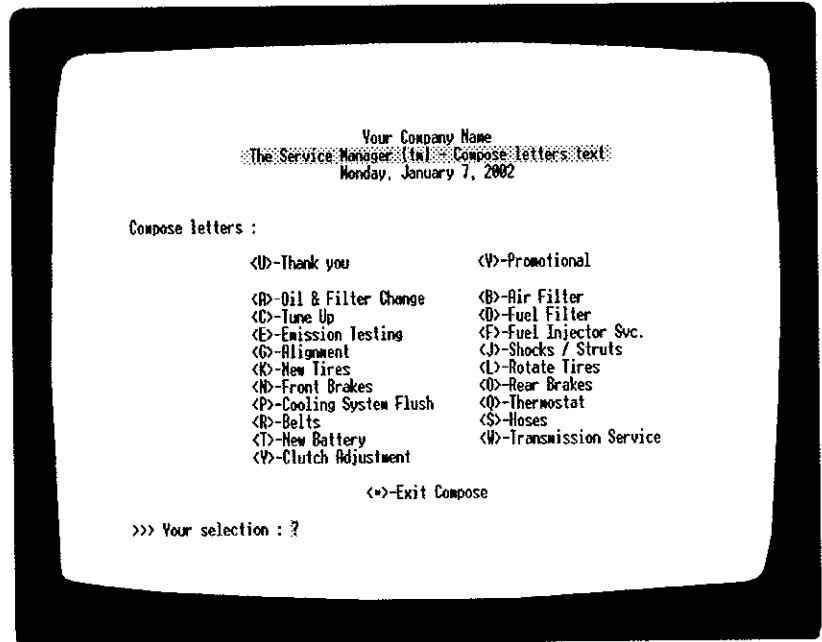
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Write(Compose) Letters or Post Cards

Using the Write (Compose) function

After a few moments, the screen will show:



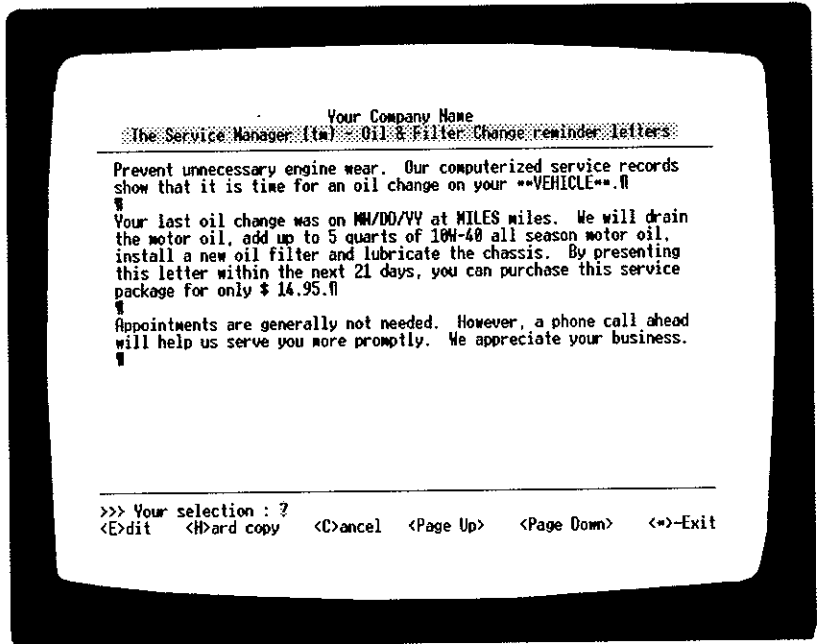
The Write (Compose) function may be used to review and edit an existing letter or post card, enter a new letter or post card or print a copy of any letter or post card as it is currently in the system. Select the letter or post card with which you wish to work by pressing the appropriate letter.

Precision tip: The system comes supplied with a short Thank you letter already entered. You can review or edit this letter.

Precision tip: The system is not supplied with the text for the reminder letters. The text for a reminder letter should be entered before the system reaches the time (days) set for that category. For example, when a customer has an oil change done, the system will flag the oil change category for a reminder letter to be sent in 90 days. If you have not yet entered the text for the Oil change reminder letter the system will print the following as the text of the letter: Service reminder for service code "A".

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The type of letter or post card you are working with will be displayed at the top of the screen.



Edit

Pressing **E** (edit) will allow you to enter the text for a new letter or post card or make changes and corrections to an existing letter or post card.

Precision tip: The Compose function uses all of the full-window text entry described in Section 1 of the Precision Main Menu manual.

Hard copy

To print a Hard copy of the letter or post card as it is currently stored in the system, press **H**. The computer will print one of the letter or post card.

Cancel

If you have made changes to an existing letter or post card and decide you would like to retain the original letter or post card, press **C**ancel. The system will warn you that you are about to erase the changes you have just made and ask:

You are about to erase the changes you have made to the letter.
>>>Are you sure that you want to do this? (Y/N)."

Exit the edit

When you have completed the edit, press [Esc]. Press **E** to return to the Write (Compose) Letter menu. The computer will write the

THE SERVICE MANAGER™
Section 2.1
Write(Compose) Letters or Post Cards

text of the letter or post card as shown on the screen to the disk and the new text will become permanent.

[Page Up] and [Page Down]

If all of the letter or post card does not fit on the screen at once, using the [Page Up] and [Page Down] will allow you to scroll the text up or down, so you can review the text on the screen.

Exit Write (Compose)

After entering the desired letters or post cards, press at the menu of letters or post cards to return to The Service Manager™ main menu.

Technical information for advanced users

The text of all letters or post cards are stored on the hard disk in areas called files. The text of the thank you letter or post card is stored in a file called "CfsTy.Dta". The special promotional letter or post card is stored in "CfsPromo.Dta". The text of the reminder letters or post cards are stored as per the following:

<u>Category</u>	<u>File Name</u>	<u>Category</u>	<u>File Name</u>
(A)	CfsRem1.DTA	(B)	CfsRrm2.DTA
(C)	CfsRem3.DTA	(D)	CfsRrm4.DTA
(E)	CfsRem5.DTA	(F)	CfsRrm6.DTA
(G)	CfsRem7.DTA	(J)	CfsRrm8.DTA
(K)	CfsRem9.DTA	(L)	CfsRrm10.DTA
(N)	CfsRem11.DTA	(O)	CfsRrm12.DTA
(P)	CfsRem13.DTA	(Q)	CfsRrm14.DTA
(R)	CfsRem15.DTA	(S)	CfsRrm16.DTA
(T)	CfsRem17.DTA	(W)	CfsRrm18.DTA
(Y)	CfsRem19.DTA	(Z)	CfsRrm20.DTA

By using MS-Dos™ to copy a file while simultaneously renaming it, it is possible to create a library of letters stored on a separate floppy disk.

Precision tip: A floppy disk should be used to store your library of letters for safe keeping.

This completes the setup process. The Service Manager™ is ready to use.

THE SERVICE MANAGER™
Section 2.1
Write(Compose) Letters or Post Cards

THE SERVICE MANAGER™
Section 3.0
Running The System

Information you must have

To use The Service Manager™, your repair orders must contain the following information:

Customer's full name
Customer's address
Customer's city
Customer's state
Description of vehicle (Year, make & model)
Date of Service
A description of the services performed

Other information the system uses

The system has fields for the following information about each vehicle:

Customer's Zip code
Customer's home phone number
Customer's work phone number and extension
Comment field-a place for your personal notes
Engine
License
VIN
Color
Service schedule
Discount code
Sales tax
Shop supplies
Account receivable account number
Mileage
Technician number

Assigning numbers to your employees

The system will accumulate the number of vehicles serviced by your employees and the number of service jobs each has done within each of the twenty service categories. You must assign a number to each employee. The numbers must be between 1 and 99.

Precision tip: If you have purchased The Manager's Assistant™ you can use the employee numbers assigned in Manager's Assistant™-Employee Inquire/edit.

Crediting the job to an employee

Since it is likely that one vehicle will have several service jobs billed on one repair order and that these jobs could be done by several employees, you will need to have your employees indicate on the repair order who performed which service. Each category of service may be credited to a different employee, however, only one employee can be credited with overall service of any one vehicle. When the repair order is entered into the computer, it is up to you to assign overall credit for the servicing of a vehicle to one individual; usually the one who did the work requiring the greatest skill.

THE SERVICE MANAGER™

Section 3.0

Running the System

Organizing the information

The Service Manager™ is designed for maximum convenience. You may enter the repair orders as often or as infrequently as you wish. The repair orders will remain in the system, unprocessed, until you have the time to let the computer system process the repair orders. The processing of repair orders will prepare a list of thank you letters or post cards and follow up letters or post cards. The list of un-printed letters or post cards will remain in the system until you have the time to let the computer print the letters or post cards.

Starting the system

To start The Service Manager™, press **[S]** at the "Precision" main menu. The system will go to The Service Manager™.

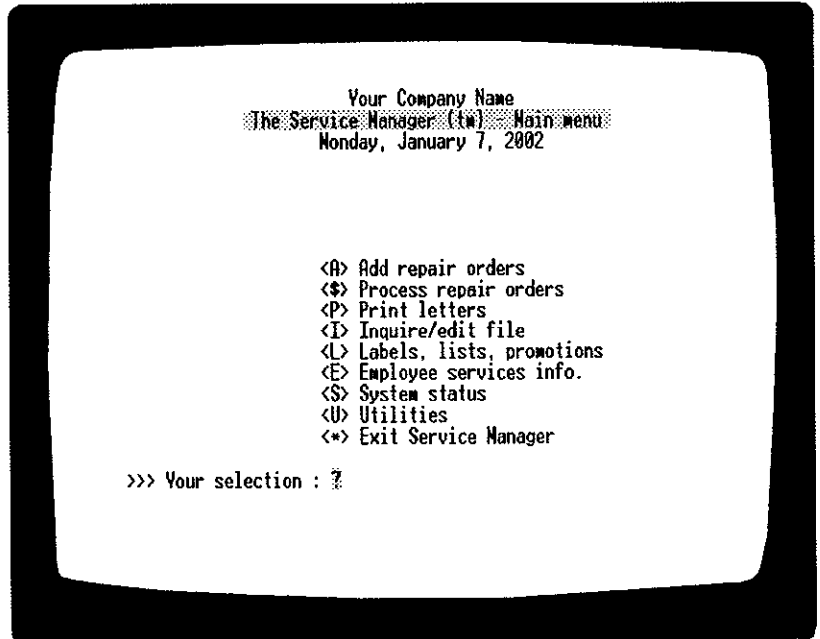
THE SERVICE MANAGER™

Section 3.1

The Main Menu

The Main Menu

You now see the main menu on the screen.



The system date

Near the top of the screen is your company name just as you typed it during the setup process. Also, notice the system date. If it is not correct, you will have to correct the date.

Correct the system date

Exit the program by pressing . If, for example, the correct date should have been typed in as 01/07/2002, at the Precision Main Menu, press Utilities, the press E, and then type in the correct date. If the time is not correct, enter the correct time. If the time is correct, press [Enter].

This will correct the system date. Then press S to go back to The Service Manager™.

Description of each function

The menu displayed on the screen is your access door to the customer follow up system. Briefly, here is what each choice will do:

Add Repair Orders

Allows you to enter your repair orders

Process repair orders

Posts service information and decides who receives letters or post cards.

Print letters (post cards)

THE SERVICE MANAGER™

Section 3.1

The Main Menu

Prints the letters or post cards that were selected.

Inquire/edit File

Allows you to look up a service record on any vehicle and make changes to the information. Allows you to print a single mailing label. Allows you to print a single thank you, promotional or reminder letter or post card.

Labels, lists, promotions

Allows you to print lists of the information in the service history file, print mailing labels from the information in the file, do a mass mailing of special promotional letters or post cards and export the data to a comma delimited ASCII text file.

Employee services info.

Reports, by category, the number of vehicles serviced by each employee. It also reports the number of letters or post cards mailed.

System status

Gives you vital information needed to control The Service Manager™.

Utilities

Allows access to the Company Setup, Delete Inactive Vehicles, Write (Compose) letters or post cards, the Analyze file function, the Re-sort function and the Expand system function.

Exit Service Manger™

Returns you to the Precision Main Menu.

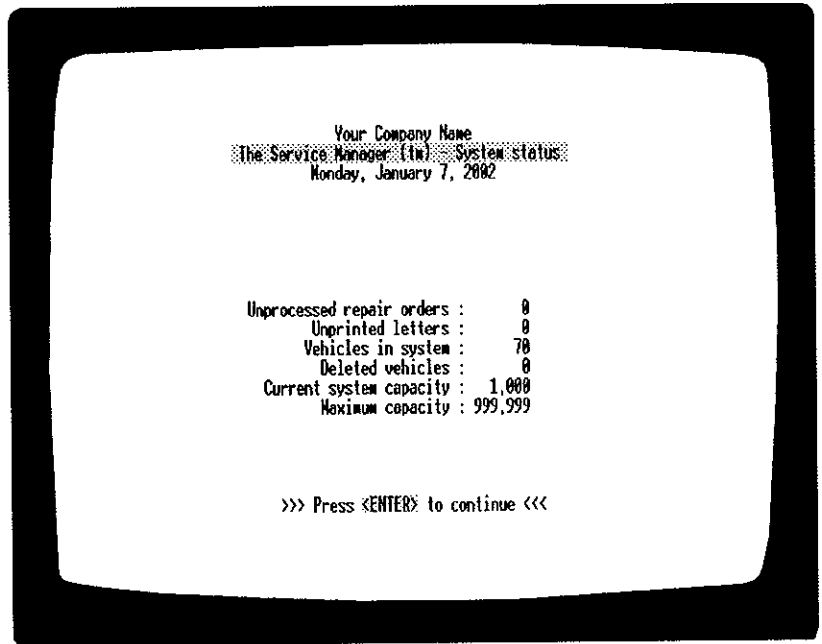
THE SERVICE MANAGER™

Section 3.2

System Status

System Status

To check the System Status, press **[S]**. The screen will show this:



Unprocessed repair orders represents the number of repair orders entered into the system. They must be processed by the Process repair orders option. The system will not allow you to accumulate more than 499 unprocessed repair orders.

Unprinted letters (post cards) represents the number of letters or post cards that are waiting to be printed. Unprinted letters or post cards are created by the Process repair orders option on the main menu. The number of unprinted letters or postcards cannot exceed 599.

Vehicles in System represents the number of vehicles currently on file regardless of the vehicle's last service date. Vehicles that have not been serviced recently will be removed by the Delete Inactive Vehicles option.

Deleted Vehicles are those vehicles that have been manually deleted from the system. They will be eliminated by the Delete Inactive Vehicles option. Vehicles manually deleted since last Process repair orders function will not be included in the system status. These vehicles will still be deleted by the Delete Inactive Vehicles option even though they do not show in the System Status.

When the system is delivered the current system capacity is set for 250 vehicles. It can be expanded by 250 vehicles at a time (See Section 3.9 Expanding the System for more information). The

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Section 3.2
System Status

number of vehicles in the system plus the number of deleted vehicles can never exceed this number.

Maximum System Capacity

The maximum capacity of The Service Manager™ system is 999,999 vehicles.

Return to The Service Manager™
Main Menu

Press [Enter] to display The Service Manager™ main menu.

THE SERVICE MANAGER™

Section 3.3

Adding Repair Orders

Capitalization and punctuation

You should enter all available customer and vehicle information into the system. This will keep the service records most complete. Certain information is required by the system. The system will not allow you to pass the required fields without entering information. Remember that the information you enter will be used in sending a personalized letter (post card). You must enter the information in correct form, using spaces and punctuation where required. You may enter all information in lower case letters. The system will provide the correct capitalization.

Correct information is vital

The service records are maintained in sorted order by last name or company name, house numbers on address line 2 and the first few characters of the vehicle description. Thus, it is very important that the repair orders have the name correctly spelled, the address correct and the make of the vehicle correct.

Precision tip: The number of characters of the vehicle description the system uses to sort corresponds to the number used in the company setup. (See page 7, for more information.)

Ways to Add Repair orders

A repair order may be added by using one of the three different methods.

Method #1

Type in the customer's name, address, phone numbers and vehicle description from scratch. This is the "Add new name" function. (Note if there are no customers in your files the system will automatically put you into the Add new name function.)

Method #2

Search for and display the customer's vehicle for which you wish to add the repair order, then use the "Initialize repair order using this name" function.

Method #3

Search for and display the correct customer, but with the wrong vehicle, then use the "Initialize repair order using this name" function and then correct the vehicle by editing it.

THE SERVICE MANAGER™

Section 3.3

Adding Repair Orders

Adding repair order for a new customer

If this is the first time you have used the system or you have pressed **A** to Add a new name, the following will be displayed:

```
The Service Manager (ta) Add repair orders
Name:
Home: Vehicle: Work:
Comment:
Engine:
License:
VIN:
Color:
Service schedule: 1
Discount code:
Tax table: A
Shop supplies: Yes
R/R Acct:
( the <ESC> key to cancel )
```

Add new name

When there are no customers or the customer you wish to enter is not in your customer follow up system, you must use the **A** Add new name function. Press **A**, you will be prompted to enter the customer's name, address and other information.

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

Entering new customers

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

Entering an individual

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

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Section 3.3

Adding Repair Orders

How the letter (post card) begins

The way you enter the names also effects the way the letter (post card) begins. If you entered `SMITH,JOHN`, the letter (post card) to this customer will start "Dear John,". If you entered `SMITH, MR. JOHN`, the letter (post card) will start "Dear Mr. Smith,". The "Mr." portion of a name is called a title. All commonly used titles are handled by The Service Manager™.

Recognized titles

Mr.	Mrs.	Miss
Ms.	Mr. & Mrs.	Mr. and Mrs.
	Dr.	

The first name

If the system does not find any of the above recognized titles, the first word after the comma is assumed to be a first name. The letter (post card) would open with the first name. Otherwise the letter (post card) will open with a title and last name.

Other titles that work

Other titles, although not actually recognized will also work. For example, if you enter the name `SMITH, REVEREND JOHN`, the letter (post card) will open "Dear Reverend,". If you enter the name Father John Jones as `JONES, FATHER JOHN` the letter (post card) will open "Dear Father,". Entering Brother John Johnson as `JOHNSON, BROTHER JOHN` will cause the letter (post card) to open as "Dear Brother,". Sister Mary should ve entered as `MARY, SISTER`. Her letter (post card) will start "Dear Sister,". Doctor John Smith would be entered `SMITH, DOCTOR JOHN`. His letter (post card) will start "Dear Doctor,".

Jr. & Sr.

Names that end with Jr. or Sr. will also be handled correctly. Because only one comma is allowed in a name, the comma just before "Jr." or "Sr." must not be entered. Thus, if Mr. Jon Jones, Sr. is entered into the system, he must be entered as `JONES SR., MR. JOHN`. His letter (post card) will open with "Dear Mr. Jones, Sr.,". If a name is entered as `SMITH JR., MR. BILL` letters (post cards) to that person will start "Dear Mr. Smith Jr.,". If his name was entered as `SMITH JR., BILL`, his letter (post card) would open with "Dear Bill,".

If unsure if name is male or female

"Pat Jones" could be male or female. If you are not sure, enter the name as `JONES, PAT`. Letters (post cards) to this person will open with "Dear Pat,".

Names without titles or first name

As you can see, it is very important to get a complete name on the repair order. A repair order written "`P.JONES`", can not be handled by the system. If you were to enter "P.Jones" as JONES,

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Section 3.3

Adding Repair Orders

P., the letter (post card) would start "Dear P.,". This is not acceptable. It would be best to know for sure if P.Jones was male or female. If you were not sure, you can only guess. You would have to enter the name `JONES, MR. P.`. The letter (post card) would open "Dear Mr. Jones,".

Entering a business name

A colon (:) is reserved to inform the system that the name of a business is being entered. The colon must be the last character typed. "A.B.C. Company" will be entered into the system as `A.B.C. COMPANY.` The colon, like the comma, will never actually appear on the letter (post card). A business name may include both a comma and a colon, the colon must be the last character typed. Therefore "ABC, Inc." must be entered `ABC, INC.`

Name not formatted correctly

Type the name in the correct format, then press [Enter]. The computer will check what you have typed. If rejected, the error message "Last, First OR Company Name:" will briefly flash in the field. Make sure the individual's name contains one comma. Make sure the company name ends with a colon.

Entering Address (lines) 1&2

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

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

Precision tip: If you do not have an address when entering the repair order type `GET ADDRESSES` on Address (line) 2.

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

Entering a city

An entry in the city field is required. The system will not let you skip the city field. If the city, state and zip code were entered as one of your abbreviated city entry codes, you can use the code. If during the setup process, you entered an abbreviated city entry code for Evanston, IL 60202 as "2", and the address you are entering is in Evanston, press `2` then press [Enter]. Evanston will appear in the

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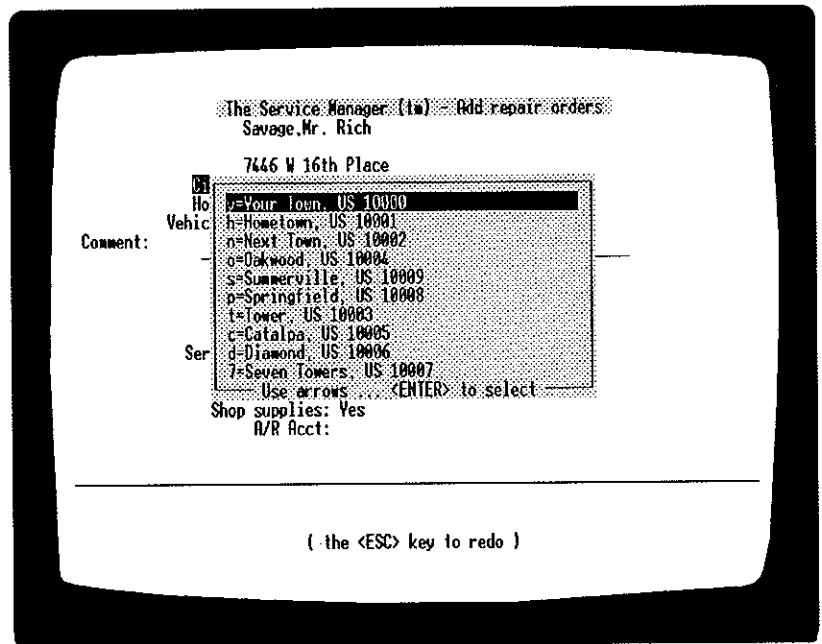
Section 3.3

Adding Repair Orders

City field, IL will appear in the State field, and 60202 will appear in the zip code field.

Press [F3] for list of cities

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



If you have not set up an abbreviated city entry code for this city, type it in and then press [Enter]. Do not type a comma after the city name. The system will insert the comma for you when it prints the address.

Enter the state

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

Enter the Zip code (Postal code)

The cursor will move to the zip code field. A zip code is optional. Press [Enter] to skip it. If you do enter the zip code, it must contain five or nine digits.

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Section 3.3

Adding Repair Orders

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

Going back to correct errors

During the entering of the information, if you notice a mistake on a prior line, use the [F1], [F2] or [Up Arrow] to move the cursor to that area, type in the correct information, and press [Enter], [F9], [F10] or [Down Arrow] to move the cursor back down to where you left off.

Erasing a zip code

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

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

Entering home phone number

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

Entering work phone number

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

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

Here you can also add the "other" phone number and "email" while entering repair orders in the "Add Repair Order" function.

Erasing a phone number

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

Entering a vehicle description

The cursor will move to the vehicle field (this field can not be skipped). Generally, the vehicle description is entered the model year followed by the make and model. (For example, 1995

THE SERVICE MANAGER™

Section 3.3

Adding Repair Orders

Chevrolet Caprice.) The system automatically keeps information for different vehicles in their own separate file folders. The system uses the first few characters of the vehicle description to decide whether to create a new folder or put the information into an existing file folder.

Precision tip: *The number of characters of the vehicle description the system uses depends on the way the first question in Company Setup-Miscellaneous information has been answered. The system is delivered set for 30 characters.*

Two of the same vehicle type

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

Commercial account vehicles

If the customer is a commercial account with multiple vehicles of the same year and make (for example, 17 different 1994 Ford E150 Vans) their vehicle information should be entered as the Unit number, the year, then the make and the model.

If the customer has not given the vehicles unit numbers, you will have to assign them. Using the last digits of the VIN works well for the unit number.

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

Comment field

The Comment field can be used to store private information about the customer or vehicle. Information entered into the Comment field will appear only on the screen.

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

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Section 3.3

Adding Repair Orders

C.A.R.S. users note: This information will never appear on any printed repair order.

Engine specs.

If you wish, you may enter information about the engine size, or to note any other piece or pertinent information you may wish to place there. If you wish to skip the Engine specs. just press [Enter].

License number

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

VIN number

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

Color field

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

Precision tip: The titles for the Vehicle, Mileage, License, Engine, VIN, and Color fields can be changed. Call Precision Data Systems for help if you would like to change them.

Service schedule

The system will automatically enter the Service schedule 1. If you would like to use a different Service schedule you must enter the number of that schedule you must enter the number of that schedule. Valid Service schedules are 0 through 9. (For more information on Service schedules see page 10.)

Press [F3] for list of Service schedules

When the cursor is in the "Service schedule" field the prompt "Press <F3> for list" will appear near the bottom of the screen. Pressing [F3] at this time will display a list showing the "Service schedules" as assigned in the Company setup. (See page 10, for more information on Service schedules.) To have the system insert the Service schedule entry, just press the letter of the entry you would like to use or use the arrow keys to highlight the entry and press [Enter]. If you do not wish to use an entry on the display and would like the display to disappear, press [Esc].

Discount code

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

1. A blank-no discount given.
2. "A" through "Z"-Discount plan A through Z. (See Section 2- of the C.A.R.S. manual for more information).
3. "1" through "64"-discounts of 1% through 64% of entire repair order.

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Section 3.3

Adding Repair Orders

C.A.R.S. users note: Discount codes are used in C.A.R.S. for the automatic discounting of repair orders.

Tax table

Enter the normal tax table code for this vehicle. (Valid codes are A through J.)

Press [F3] for list of Sales tax tables

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

Precision tip: The Tax table code is used by C.A.R.S. to tell the system which sales tax table to use when calculating sales tax. (See the C.A.R.S. instruction manual for more information.)

Shop supplies

The Shop supplies field will tell the system whether or not to add shop supplies charges to repair orders for this vehicle. The answer here should be the normal for this vehicle.

C.A.R.S. users note: The Shop supplies field is used in C.A.R.S. to tell the system whether or not to add shop supplies to the repair order.

Account receivable account number

If repair orders for this vehicle are normally charged on a house charge account enter The Manager's Assistant™-Accounts Receivable account number here.

The Accounts Receivable account number field is 5 numeric digits long. The maximum number of accounts receivable accounts is 9990 accounts.

C.A.R.S. users note: When changing the status on the repair order to paid by house charge (status code 2) the system will enter the account number for you.

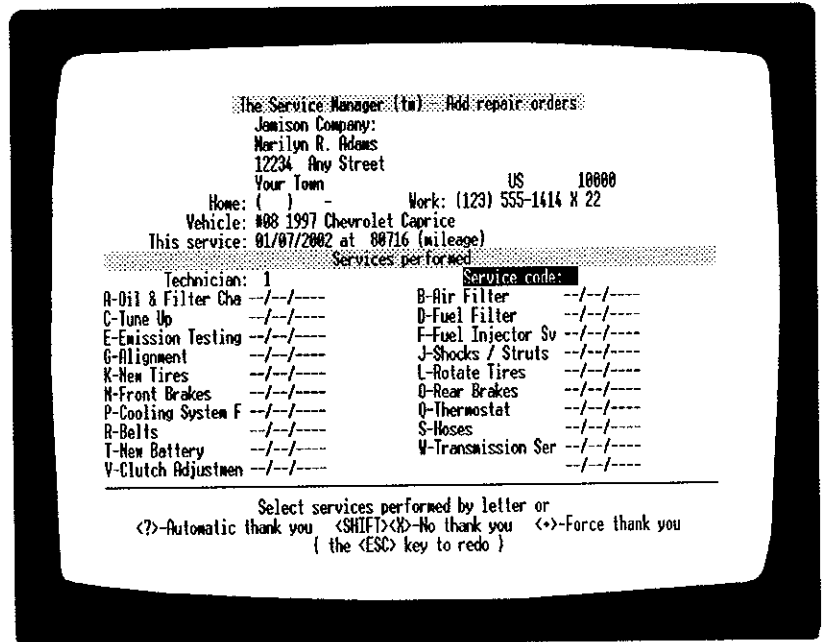
C.A.R.S. users note: C.A.R.S. will retrieve the engine specs, license number, VIN number, Color, Service schedule, Discount code, Tax table, Shop supplies and the A/R Account number from The Service Manager™, if they have previously been entered.

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Section 3.3

Adding Repair Orders

After entering the A/R account number the display will change to show the following:



Enter the service date

As you enter repair orders, you will be able to change the service date as often as you wish. If you are entering today's repair orders, press [Enter]. The system will supply today's date, the system date, as the service date. If you are entering repair orders for service done prior to today, enter the actual service date here in MM/DD/YYYY format just as you entered the system date. (Notice that The Service Manager™ will type the slashes between the month, day, and year for you. This is done throughout the program.) If you make a mistake typing the date, press [Backspace] to backspace to the point of the error, or press [Alt]-[Delete] or [F5] to erase the whole date. When satisfied with the date, press [Enter]. Note: that the system will not accept a date later than the system date.

Enter the mileage

If the repair order contains the mileage of the vehicle, enter the mileage and press [Enter]. Press [Enter] to skip the mileage.

Enter Technician number

The technician number is used to assign credit for the work to the employee who did the job. The technician number is optional. It must be a number from 1 to 99. You may press [Enter] to skip it. If you skip the technician field, the work will be assigned to

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Adding Repair Orders

employee number zero. Any work assigned to employee zero will show as unassigned work.

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

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

Recording service

When recording service, it is possible that more than one employee could work on the same vehicle. For example, one employee might do the oil change and tire rotation, another employee might do the tune up. A third employee may even do something else. When giving credit to the employee, the system will assign the credit for a particular service to one employee.

Splitting credit for service

Suppose that employee #3 did an oil change on this vehicle, while employee #11 relined the brakes. In the technician field, press ; then press [Enter]. The cursor will move to the Service code field. (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].) Since employee #3 did the oil change, press for oil change. The date, mileage and employee number will appear to the right of the Oil Change category. Employee #3 did not do the brakes. You must change the number in the technician field to employee #11. To return to the technician field, press [F1], [F2] or [Up Arrow], type into the technician field, then press [Enter]. The cursor will return to the service code field. Since employee #11 did the brakes, press . The date, mileage and his employee number will appear to the right of the Brakes category.

Resigning overall credit

One employee will be assigned overall credit for the service of each vehicle. The employee to receive overall credit for the vehicle should be the employee that did the most work on the vehicle, or the employee who did the repairs that required the most skill. The system will assign overall credit for the repair to the employee whose number last appears in the technician field. If you wish to assign overall credit to an employee other than the employee currently shown in the technician field, press [F1], [F2] or [Up Arrow] to return to the technician field, then enter the correct employee number.

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Section 3.3

Adding Repair Orders

Erasing Service

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 [A] was pressed to record an oil change, pressing [Shift]-[A] (typing a capital "A") will erase the oil change.

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

Service recall date

You may record in any service history category the date you wish a reminder letter (post card) 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.

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 (post card) 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 (post card) when this service is due again.

Forcing or preventing letters (post cards)

After you have selected all of the appropriate service codes you must decide whether or not you would like this customer to receive a Thank you for your business letter (post card). You must choose one of the following:

[Shift]-[?]

Using this option will allow the system decide whether or not to send a Thank you for your business letter (post card). The system will look to see when the last Thank you letter (post card) was sent and compare it to the amount of days between Thank you letters (post cards) you chose when setting up the system.

[Shift]-[X]

This option will not allow a Thank you letter (post card) to be sent for this customer.

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Adding Repair Orders

[Shift]-[+]

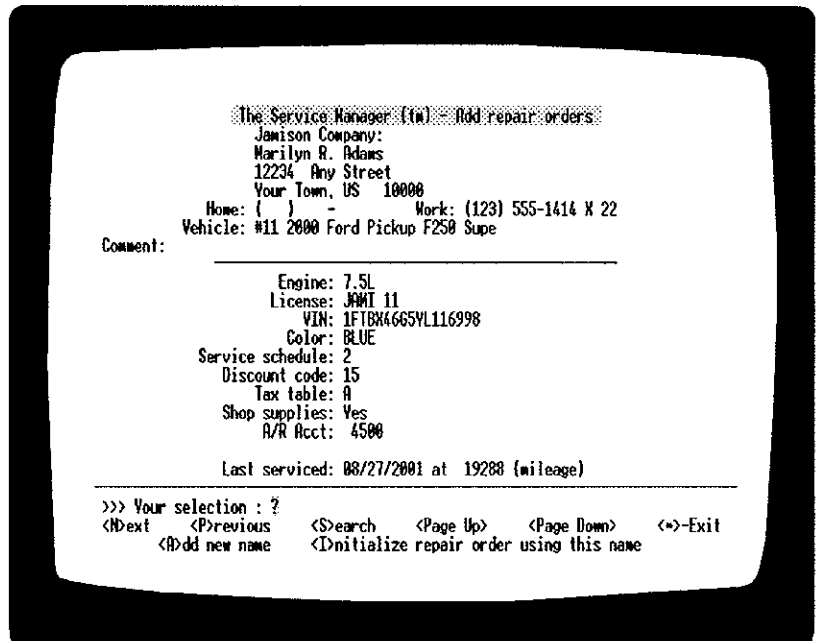
This option will allow you to send a Thank you letter (post card) regardless of when the last Thank you letter (post card) was sent.

After pressing [Shift]-[X], [Shift]-[?] or [Shift]-[+], the information you have entered will be recorded as an unprocessed repair order, the information will be erased from the screen and you will be allowed to enter another repair order.

ADDING REPAIR ORDERS METHOD #2

Adding repair orders

To add the first group of repair orders, press [A]. After a few moments, you will see:



Repair order for an existing customer

To add a repair order for a customer that is currently in your customer follow up system, Search for that customer. This will eliminate the need to type a customer's name and address into the customer.

The order of the data

The customer records are filed in alphabetical order by last name or company name. therefore, all of the customers with the same last name are filed consecutively. Next, those customers are sub-filed in order by the numeric portion of the address. For example, all the Burnside's who live at 301 Main will be filed before the ones living at 1027 W. Fifth. Last, all customers with the same last name

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Section 3.3

Adding Repair Orders

and the same numeric portion of their address will be filed in alphabetical order by vehicle. Recall that only the first characters of the vehicle type are used by the system, for filing purposes. (The number of characters the system uses depends upon how you have set up The Service Manager™. See Section 2.0 of this manual, starting on page 3, for additional information.)

Pressing **[S]**earch will allow you to search for and display a particular customer record. You will be prompted to identify the desired customer by last name or by company name. The records are stored by company name or last name only. **Do NOT** enter titles, initials or first name. You need not enter the whole name. Enter only enough letters to cause the computer to correctly identify the name. For example, if you wished to find the service information for Burnside, it probably would be adequate to type **[B][U][R][N][S][I]**. The system will display the first match found. If the customer record displayed is not the correct one, you can use **[N]**ext or **[P]**revious to display the correct customer record.

Sometimes when searching for a name, the computer will find a match that contains the name you are searching for, but not the exact name. For example, if you search for Ball the system may find Ballard or when searching for Johns the system may find Johnson. To display a customer with the exact last name, type the **WHOLE** last name followed by a comma. Then press **[Enter]**. If the customer record displayed is not the correct one, you can use **[N]**ext or **[P]**revious to display the correct customer record.

When searching for a customer, if the search fails to find the customer, the system will display the five names alphabetically preceding and the five names after the name requested, highlighting the name shown at the top of the screen.

Extended search

The search function can be used to find a customer who lives at a particular address. This will make it easier to find the information when the owner has a common last name. To do this, type in the **WHOLE** last name followed by a comma, followed by the numerical portion of the address. (Example: **[S][M][I][T][H],1227**)

The search function can also be used to find a particular vehicle in a fleet of vehicles belonging to a company. To do this, type all or part of the company name, followed by a colon (:), followed by at least one character of the vehicle description. (Example: **[S][M][I][T][H] [C][O][R][P][O][R][A][T][I][O][N]:B421**)

[Page Up] & [Page Down]

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

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Section 3.3

Adding Repair Orders

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

[Up Arrow] & [Down Arrow]

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

Precision tip: If you would like to reverse the direction the [Page up], [Page Down], [Up Arrow] and [Down Arrow] work, press [Ctrl]-[R].

Initialize the repair order

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

Precision tip: If you are adding a repair order for a customer who has moved, initialize the repair order using the old address, then edit the address accordingly.

ADDING REPAIR ORDERS METHOD#3

Existing customer, different vehicle

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

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

After entering the new vehicle description, press [Enter]. Enter the engine specs., license number, VIN number, color and any other information for the new vehicle. The system will create a record for the new vehicle when you run the "Process repair orders" function. (See Section 3.4, for more information on the "Process repair orders" function.)

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

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Section 3.3

Adding Repair Orders

Continue entering repair orders, changing the service date a necessary, until all repair orders are entered. After entering the last repair order, press to return back to The Service Manager™ main menu. The system will now add the credit for work done to the employee records. The system will return to The Service Manager™ main menu.

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Section 3.4

Process Repair Orders

Description

The repairs orders added to the system (unprocessed repair orders) are not actually part of the service file until you have used the Process repair orders function.

The System Status always shows the number of repair orders in the system which have been entered but are unprocessed, and therefore not yet included in the service file. To process repair orders and select letters, press **[F5]**. In a few moments the screen will show:



Current HdBackup

If you **DO NOT** have a current HdBackup, press **[N]**. You will be returned to The Service Manager™ –Main Menu. Exit the Precision Data Systems software and do an HdBackup. If you have done the HdBackup, press **[Y]**. The system will proceed with the Process repair orders function.

Precision tip: See the Precision Main Menu manual, Appendix A, for more information on HdBackup.

NEVER SELECT THIS FUNCTION UNLESS YOU HAVE A CURRENT HDBACKUP! In the event of a malfunction, failure to follow this rule will result in the loss of the unprocessed repair orders.

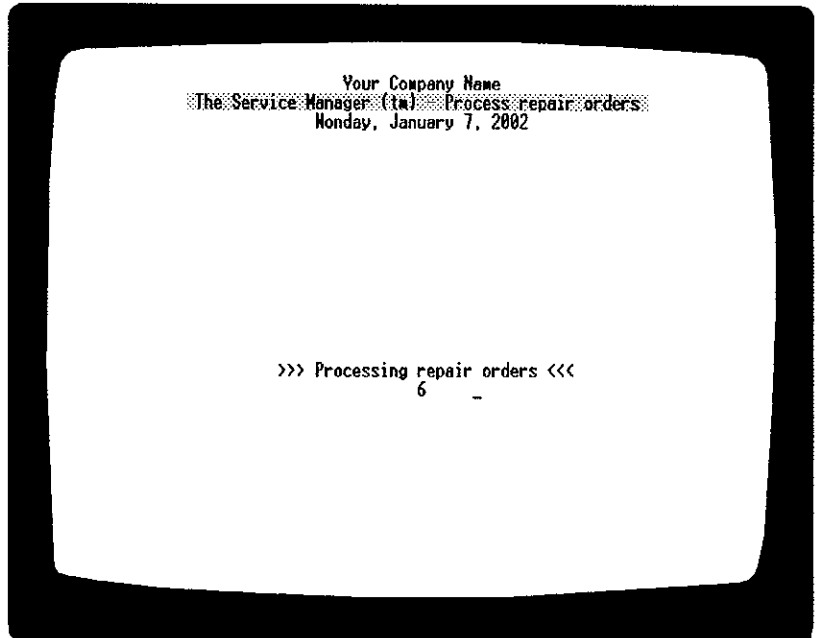
THE SERVICE MANAGER™

Section 3.4

Process Repair Orders

The numbers on the screen

While the Process repair orders function is occurring, you will see a number on the screen. This number will go up in value, then down. The number is displayed only to show you that the system is processing information. When processing is complete, the system will return to The Service Manager™ main menu.



When the Process repair orders function is completed you will be returned to The Service Manager™ -Main Menu.

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Section 3.5

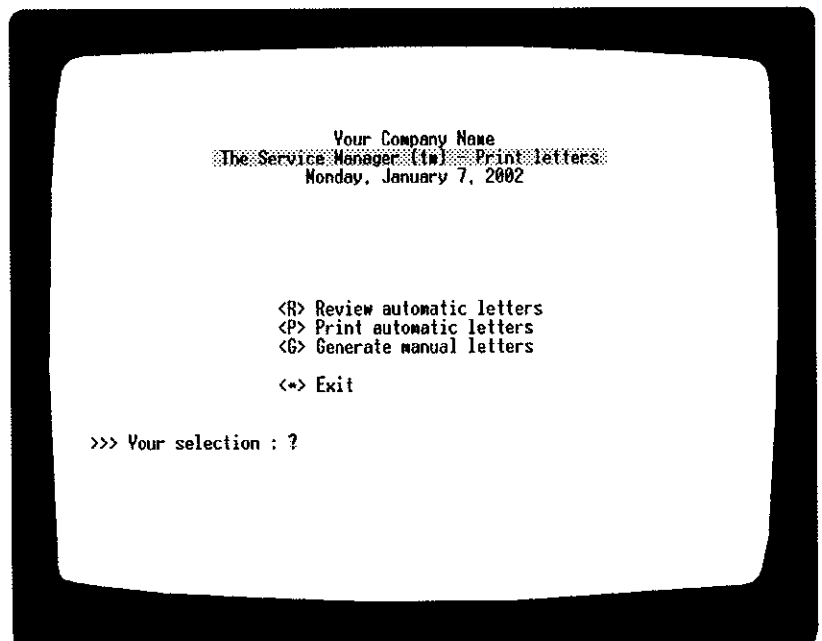
Print Letters (Post Cards)

Description

The Print Letters (post cards) function will print the thank you letters (post cards) and automatic follow up letters (post cards) selected by the Process repair orders function. The mailing address on letters will be printed in the correct location to show through the window of a standard #10 window envelope. Before printing the letters (post cards), you must have entered the text of the letters (post cards) into the system. If reminder letters (post cards) will not be sent at the time, only the thank you letter (post card) text must be in the system.

To Print letters (post cards)

To print the letters (post cards), press **P**. After a few moments, the screen will show:



Precision tip: If you have set the system to print letters all titles will show letters. If you have set the system to print post cards all titles will show post cards.

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Section 3.5

Print Letters (Post Cards)

Review automatic letters
(post cards)

Review automatic letters (post cards) allows you to see who will get which letters (post cards). You can see more names by using [Page Up], [Page Down], [Up Arrow] or [Down Arrow].

Name	Address	Unit	Category	Status
Home Products:	1000 East Avenue	#12 2000 Pontiac	Oil & Filt	Send
Adams, Mr. Jim	89 East Avenue	1997 Chevrolet C	Oil & Filt	Send
Adams, Mr. John	8243 E Elm Street	2000 GMC Envoy	Oil & Filt	Send
Adams, Mr. John	8243 E Elm Street	2000 GMC Envoy	Rotate Tir	Send
Bandish, Ms. Debbie	802 N Ash	1999 GMC Yukon D	Oil & Filt	Send
Bandish, Ms. Debbie	802 N Ash	1999 GMC Yukon D	Rotate Tir	Send
Beele, Mr. Jeff	1853 Perth	1990 Pontiac LeM	Oil & Filt	Send
Benson, Mr. Philip	208 N Main	2001 Cadillac Es	Rotate Tir	Send
Block, Dr. James	328 R Main	2000 Cadillac Ca	Oil & Filt	Send
Blumenthal, Dr. Becca	2931 Charlette	1996 Ford Thunde	Oil & Filt	Send
Braesch, Ms. Mary	214 Sycamore Lane	1999 Ford Crown	Thank you	Send
Davison, Ms. Nicole	1287 Diamond Circl	1999 Pontiac Gra	Thank you	Send
Doran, Ms. Heather	180 Ash Court	1997 Ford Probe	Thank you	Send
Fleckenstein, Mr. Jac	1934 Golden Age	1999 GMC Yukon D	Thank you	Send
Hawkins Jr., Mr. Robe	5150 Jeff Lane	1998 Ford Ranger	Thank you	Send
Hawkins Jr., Mr. Robe	5150 Jeff Lane	1998 Ford Ranger	Oil & Filt	Send
Jawison Company:	12234 Any Street	#08 1997 Chevrol	Oil & Filt	Send

Press <C>, <Space-Bar> or <ENTER> to Cancel or Reinstate letters
<Up Arrow> <Down Arrow> <Page Up> <Page Down> <*)-Exit

Cancel letter (post card)

If you do not wish to send a particular letter (post card), highlight that entry then press **C**, [Space Bar] or [Enter] to cancel that letter (post card). The word cancel will appear on the right-hand of the screen. If you have canceled a letter (post card) and would like to reinstate it, repeat the process.

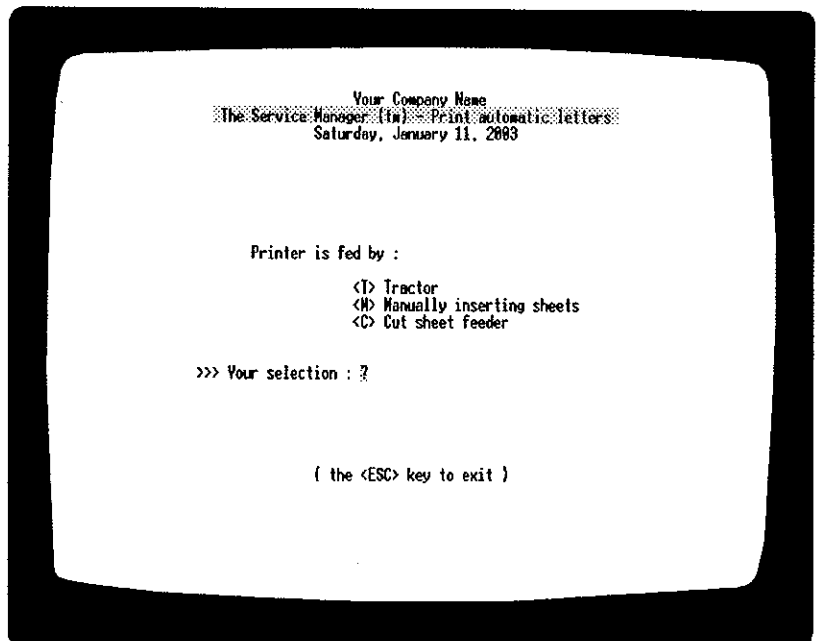
Precision tip: If you exit the Print letters (post cards) function with cancelled letters (post cards), the system will reinstate the cancelled letters (post cards).

Print Automatic letters
(post cards)

The letters (post cards) automatically selected for printing are called Automatic letters (post cards). The Generate manual letters (post cards) option will allow you to type in a name and address so you may print one letter (post card) to proofread, to reprint a letter (post card) for any reason or to send a letter (post card) to someone not entered into the system. At this time you wish to print automatic letters (post cards). Press **P** for print automatic.

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Section 3.5
Print Letters (Post Cards)

Now the screen shows:



Type of printer

A **T**ractor feed printer uses continuous paper that is pulled through the printer by punched holes along the edges. A **M**anual feed (friction feed) printer loads paper like a typewrite, one sheet of paper at a time. A **C**ut sheet feeder is a printer equipped with a bin that automatically feeds single sheets of paper. (See Section 2.0, starting on page ??, for more information on using a Cut sheet feeder.) Select the type of printer that is appropriate by pressing the corresponding letter.

Precision tip: If you have the system set to print post cards this message will not appear.

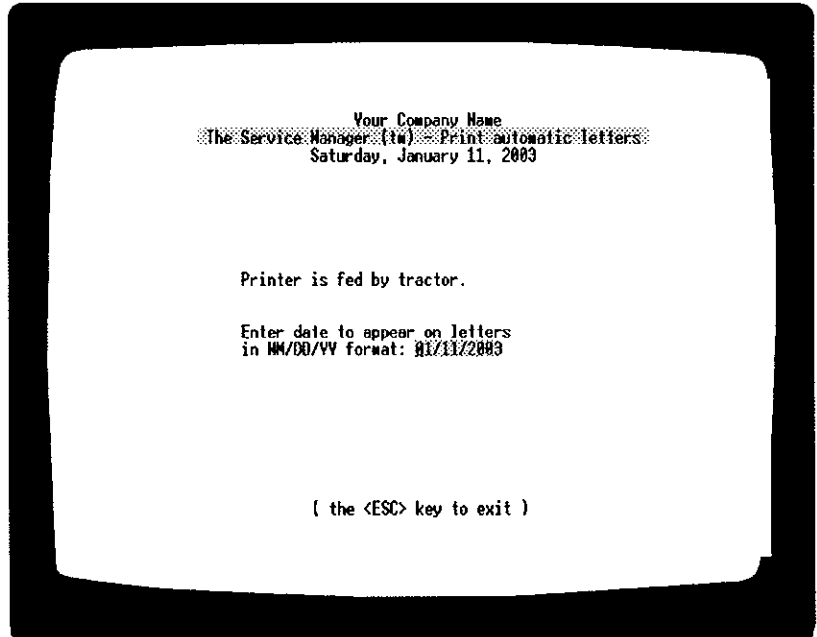
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Section 3.5

Print Letters (Post Cards)

Date on the letters
(post cards)

As indicated, enter the date you wish to appear on the letters (post cards). Use the MM/DD/YYYY format as before. If you wish today's date to appear on the letters (post cards), pressing [Enter] will cause the date to default to the system date. The screen will show:



Print in Name order
or Zip code order

If you would like the letters (post cards) printed in order by customer name, press **[N]**. If you would prefer the letters (post cards) printed in order by zip code, press **[Z]**.

Start printing with

You may specify the point at which letters (post cards) will start printing. This is useful when printing letters (post cards) after the printer has jammed. Press [Enter] to print all letters (post cards). If you wish to start the printing at some point other than with the first letter (post card) type in the name with which you wish the printing to begin, then press [Enter].

Adjust the paper

Load the paper into printer. If you are using single sheets of stationery (manual printer option), load the paper so the left edge of the paper lines up with the zero mark on the paper scale and the top edge of the paper is about 4 lines (2/3 of an inch) above the print head. If using tractor feed paper, make sure the left perforation is lined up just to the left of the zero mark on the paper scale and the top edge of the paper is positioned so that the print head will print on the very top line of the paper. If using a Cut sheet feeder consult the instructions supplied with the feeder for proper positioning the paper, press [Enter]. The letters (post cards) will print.

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Section 3.5

Print Letters (Post Cards)

Aborting the printing

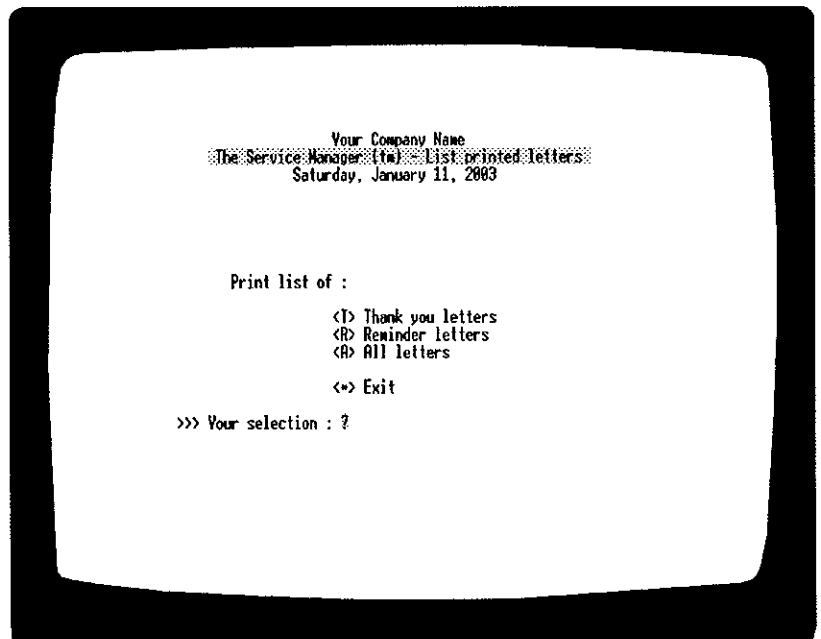
While printing letters (post cards) using a cut feeder or a tractor, if you need to abort the printing, press [Esc]. Printing will soon stop. You will be given the opportunity to reprint the letters (post cards).

After printing the letters (post cards), the system will ask:

Are letters (post cards) okay (Y/N) ?

If you need to reprint the letters (post cards)

Examine the letters (post cards). If you find something wrong with the letters (post cards), press N. You will be allowed to reprint them. If the letters (post cards) are okay, press Y. The screen will show:



A list of letters (post cards)

You may print a list of A All letters (post cards) sent. A list with just those who received T Thank you letters (post cards) or just those who received R Reminder letters (post cards). The list requires 8 ½ inch continuous paper. You should always print a list of the reminder letters (post cards) and save it. The list will include phone numbers. Keep track of those that respond to your reminder letters (post cards). Consider calling those that do not respond.

Printing multiple lists

If you wish, you could print one list of just thank you letters (post cards), another list of just reminder letters (post cards). Select the type of list you want. Load the paper into the printer so that the perforation is just to the left of the zero mark on the paper scale, printing will start at the very top edge of the paper. Press [Enter] and printing will start. To abort printing, press [Esc].

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Section 3.5

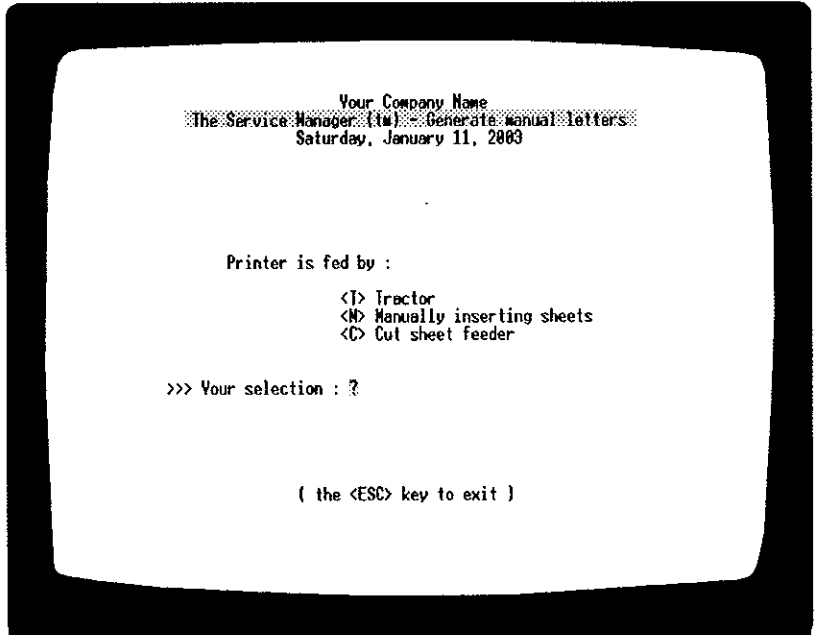
Print Letters (Post Cards)

To reprint the list

When the list is complete, the system will return to the screen above. If the list did not print correctly or if you wish a second list, you may reprint it. If no list is desired press to exit.

Generate manual letters
(post cards)

You could now print manual letters (post cards). To print a manual letter (post card) press . The following will appear:



Answer the question for the printer type as appropriate. Next, enter the date you wish to appear on the letters (post cards). Press in response to "Are all entries correct? (Y/N)".

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Print Letters (Post Cards)

You will now be allowed to enter the information for manual letters (post cards). You will be able to enter the date of last service and mileage information. The service files will not be updated and the manual letters (post cards) will not be reflected in the number of letters (post cards) mailed.

Your Company Name
The Service Manager (tm) Generate manual letters
Saturday, January 11, 2003

Name: Perez, Mr. Jesus
Address line 1:
Address line 2: 2045 N Jessup
City: Your Town State: US Zip: 11111
Vehicle: 1996 Pontiac Grand Am
Last serviced on: 01/09/2003 at 94521 (mileage)

Select letter:

U-Thank you	V-Promotional letter
A-Oil & Filter Change	B-Air Filter
C-Tune Up	D-Fuel Filter
E-Emission Testing	F-Fuel Injector Svc.
G-Alignment	J-Shocks / Struts
K-New Tires	L-Rotate Tires
N-Front Brakes	O-Rear Brakes
P-Cooling System Flush	Q-Thermostat
R-Belts	S-Hoses
T-New Battery	H-Transmission Service

(the <ESC> key to redo)

Information for manual
letters (post cards)

The information is entered exactly as in the Add Repair Orders function. The name, address, city, state, zip code and vehicle are all entered exactly the same. All information except the zip code is required. The abbreviated city entries also function. If the letter (post card) you are printing contains the reference to previous service information, (See page ?? for more information) enter the last service date and mileage. To complete the information, press to print a thank you letter (post card), to print a promotional letter (post card) or press the first letter of the appropriate category for the reminder letter (post card) desired. You will now be prompted to insert the paper. Press [Enter] when ready.

Exiting Generate manual
letters (post cards)

After the letter (post card) prints, you will be returned to the Generate manual letter (post card) entry screen. If you want to print another manual letter (post card) enter the information. To exit press [Esc], you will return to the Letter (post card) Printing Menu. Press to exit to The Service Manager™ main menu.

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Section 3.5
Print Letters (Post Cards)

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Section 3.6

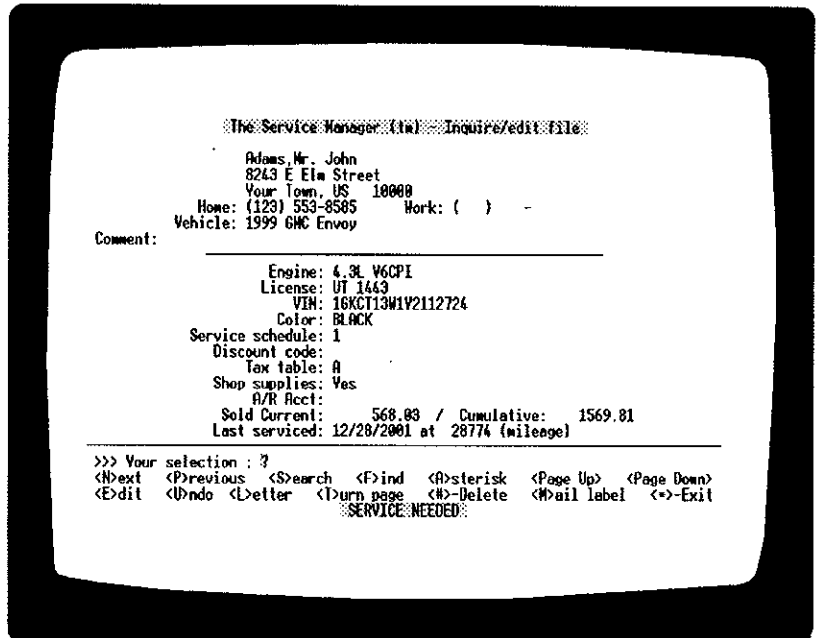
Inquire/Edit File

Description

The Inquire/edit function will allow you to display any service record, make corrections, print a letter (post card), print a single mailing label and print a hard copy of the information. At The Service Manager™ main menu, press **I**.

The first vehicle will be displayed

The system will display the information for the first vehicle in the file. It will look like this:



Two pages

The information is arranged in two "pages". The first page contains general information about this vehicle (owner's name, address and phone number, year, make and model, engine specs., license VIN, color, service schedule, discount code, tax table, shop supply charges, A/R account number, mileage on the vehicle at last service, and the date of the last service). The second page contains the specific service history information for the twenty service categories.

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Section 3.6

Inquire/Edit File

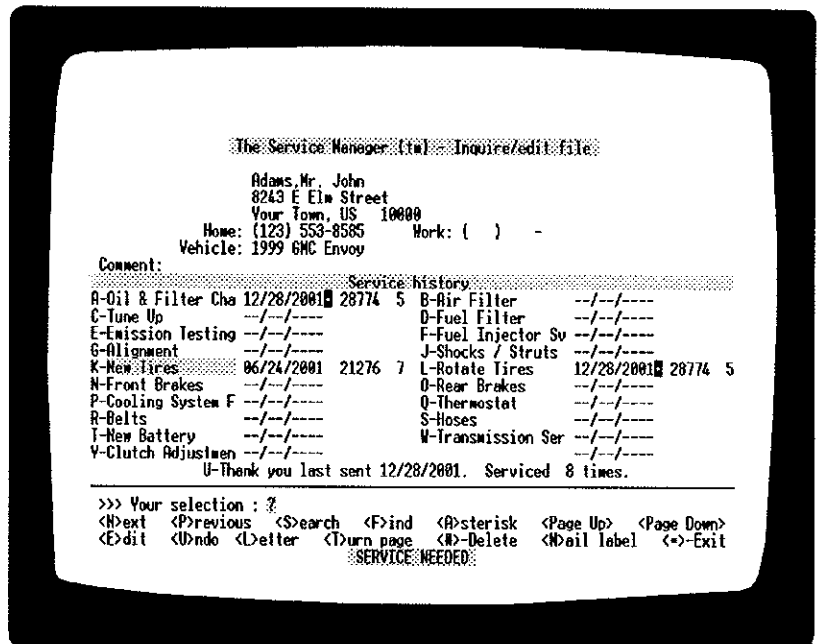
C.A.R.S. users note: When used with C.A.R.S., The Service Manager™-Inquire/edit file keeps track of how much each customer spends on each vehicle. The Sold Current field will track the amount spent during the current period. The Sold Cumulative field will track the amount spent during the cumulative period. The Current and Cumulative periods are controlled by having the system erase the information. This makes the system accumulate the information again starting at zero. The Current period may represent anything longer, like a year. Most people will allow the Current field to represent the current calendar or fiscal year and will let the Cumulative field represent how much has been spent on the vehicle since the system started accumulating the information. (See Section 3.9, Utilities-Analyze File for more information on Current and Cumulative periods.)

The 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.

Turn page

To look at the service history information, press **[T]**. The service history information will be shown.



The Service history

The service history information is organized into two groups of three columns, the date the service was performed, the mileage on the vehicle when that specific service was performed, and the number of the employee who performed the service. Notice that the last line of information contains the date that the system selected a thank you letter (post cards) to be sent to this vehicle's owner. The

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Inquire/Edit File

"Times Serviced" represents the number of repair orders that have been entered for this vehicle.

Next and Previous

Pressing **[N]** will display the next vehicle in the file alphabetically. Pressing **[P]** will display the previous vehicle in the file alphabetically.

The order of the data

When using Next and Previous, remember the system has filed the records in alphabetical order so all the Burnsides are together. Next, the Burnsides are in order by the numeric portion of the address. For example, all the Burnsides who live at 301 Main will be filed before the ones living at 1027 W Fifth. Last, all the Burnsides at 301 Main will be filed in alphabetical order by vehicle. Recall that only the first characters of the vehicle type are used by the system for filing purposes. (The number of characters the system uses depends upon how you have set up the system. See Section 2.0 for additional information.)

Using [Page Up], [Up Arrow], [F1] or [F2] will display the eleven names following the name shown on the top of screen. Using [Page Down], [Down Arrow], [F9] or [F10] will display the previous eleven names preceding the name shown at the top of the screen. Using this feature will aid in finding a name when you are unsure of the spelling.

Precision tip: If you would like to reverse the direction the [Page Up], [Page Down], [Up Arrow] and [Down Arrow] work, press [Ctrl]-[N].

[Up Arrow] & [Down Arrow]

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

Search

Pressing **[S]** will search for and display a particular service history record. You will be prompted to identify the desired service history record by the owner's last name. The records are stored by company name or last name only. Do **NOT** enter titles, initial or first names. You need not enter the whole name. Enter only enough letters to cause the computer to correctly identify the name. For example, if you wished to display the service information for Burnside, it probably would be adequate to type **BURNSTI**. The system will display the first match found. If the service record displayed is not the correct service record, you can use **[N]**ext or **[P]**revious to display the correct record.

Sometimes when searching for a name, the computer will find a match that contains the name you are searching for, but not the exact name. Such as the computer displaying Ballard, when you are looking for Ball or Johnson when you are searching for Johns.

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Section 3.6

Inquire/Edit File

To display a customer with the exact last name, type in the **WHOLE** last name followed by a comma. The press [Enter]. If the customer record displayed is not the correct one, you can use [N]ext or [P]revious to display the correct customer record.

When searching for a customer, if the search fails to find the customer, the system will display the five names alphabetically preceding and the five names after the names requested, highlighting the name shown at the top of the screen.

Extended search

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

(Example: `S M I T H , 1 2 2 7`)

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

(Example: `S M I T H C O R P O R A T I O N : B 4 2 1 .`)

Find

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

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

Mailing Label

Pressing [M] will allow you to print a single mailing label for the customer displayed on the screen.

Delete

Pressing [D] (delete) will allow you to erase the service history record currently displayed. The message "(Deletion pending)" will appear to the right of the customer's name. The information will not actually be erased until the Process repair orders option is selected. The information may be reviewed until it is actually erased. A deleted service history record may be reinstated by pressing [D] a second time. Deleted items will not be included in customer's lists, mailing labels or special promotional letters. (See Section 3.7).

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Section 3.6

Inquire/Edit File

Filedrawer users note: If a customer file is deleted in The Service Manager™, it will also be deleted in Filedrawer. See the Filedrawer instruction manual for information on how to find a repair order in Filedrawer once the customer has been deleted from The Service Manager™.

Edit

Pressing **[E]** will allow you to make changes and corrections to the information contained in the service history file. Pressing **[E]** without the service history information displayed will allow you to edit the owner's name, address, vehicle description and last service information. Pressing **[E]** with the service history information displayed will allow you to edit the service history information.

Changing a name

If you change the spelling of the last name of an individual or the spelling of the name of a company, the system will mark the service history record for deletion and make a copy of the information so that it appears as an unprocessed repair order. The next time that the Process repair orders function is used, the corrected service history record will become part of the system.

Precision tip: When editing a service history record if you change the customer's name, address or the vehicle description, after you have completed the edit the record will appear not to have been changed. The message "(Deletion pending)" will appear to the right of the customer's name and the system will record the new information as an unprocessed repair order. The next time the "Process repair order" function is run the new information will appear.

Precision tip: If there is not room in the system for one more unprocessed repair order, the system will not allow you to edit the company name or last name.

Changing an address

If you change the numerical portion of the address (house number) the system will mark the service history for deletion and make a copy of the information so that it appears as an unprocessed repair order. The next time that the Process repair orders function is used, the corrected service history will become part of the system.

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

Precision tip: If there is no room in the system for one more unprocessed repair order, the system will not allow you to edit the numeric portion of the address (house number).

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Inquire/Edit File

Changing the vehicle

If you change the first characters of the vehicle description, the system will mark the service history for deletion and make a copy of the information so that it appears as an unprocessed repair order. (The number of characters the system uses depends upon how you have set up the system. See Section 2.0 for additional information.) The next time that the Process repair orders function is used, the corrected service history will become part of the system.

Precision tip: If there is no room in the system for one more unprocessed repair order, the system will not allow you to edit the first characters of the vehicle description. (The number of characters the system uses depends upon how you have set up the system. See Section 2.0 for additional information.)

PLEASE NOTE: The changes listed below will only effect systems which have the C.A.R.S. function. If your system does not have the C.A.R.S. function you will notice nothing different on your system..

When editing a file folder the system will check what is in the Vehicle description field against the Year/Make/Model lists supplied with the C.A.R.S. system. If the system does not recognize something in the Vehicle description field the Year, Make and Model fields will temporarily appear in place of the Comment field. This can be caused by one of two things:

- The Vehicle description contains a misspelling (for example, Acura spelled Accura)
- The combination of year, make and model were not found in the lists.

Precision tip: If the vehicle description must include a unit number, the unit number MUST be the first thing in the vehicle description.

Precision tip: Sometimes unit numbers are not really numbers. If for example a customer has two 1997 Chevrolets the system would not know they are two different vehicles. If one is Green and the other is Blue you could use the color of the vehicle as a "Unit number", entering one as "Green 1997 Chevrolet Monte Carlo" and the other as "Blue 1997 Chevrolet Monte Carlo". To enter the vehicle description by picking from the lists you must first type Green or Blue in the Vehicle description field and press [Enter]. The Year, Make and Model fields will appear. After the Year, Make and Model fields are filled in, the system will assemble the description "Green 1997 Chevrolet Monte Carlo" and put it in the Vehicle description field.

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Inquire/Edit File

Year field	If the system stops on the "Year" field, you may type the year or press [F3] to display a list of years.
Press [F3] for list of years	If you press [F3], the list of available years will appear. You can use the arrow keys to highlight your choice. Pressing [Enter] will insert the highlighted year and move you to the "Make" field. If the year of the vehicle is not on the list, you must press [Esc] to exit the list of years and type in the year.
Make field	If the system stops on the "Make" field, you may type the make or press [F3] to display the list of makes.
Press [F3] for list of Makes	If you press [F3], the list of makes that the system knows were made in that year will display. You can use the arrow keys to highlight your choice. Pressing [Enter] will insert the highlighted make and move you to the "Model" field. If the make of the vehicle is not on the list, you must press [Esc] to exit the list of makes and type in the make. <i>Precision tip: The system will convert commonly used "Make" abbreviations. As supplied, the system recognizes Caddy, Chev, Chevy, Chry, Mercedes, Mit, Mits, Olds, Pont, Toy, VW and V.W.. This list can be customized. Call for assistance.</i>
Model field	While on the "Model" field, you may type the model or press [F3] to display a list of models.
Press [F3] for list of Models	If you press [F3], the list of models that the system knows were made in that make will display. You can use the arrow keys to highlight your choice. Pressing [Enter] will insert the highlighted model and move you to the "Comment" field. If the make of the vehicle is not on the list, you must press [Esc] to exit the list of models and type in the model.
Comment field	<p>If you have entered information into the Year field and into the Make field and into the Model field, the information in those fields will be added together to make a vehicle (unit) description and it will appear in the Vehicle (unit) description field. At the same time, the Year, Make and Model fields will disappear and the Comment field will reappear.</p> <p>The system allows you to highlight the Comment field on your customer files in red. The red highlight will appear in The Service Managers™ – Inquire/edit and the Add Repair Orders function. This red highlights alerts you to any special circumstances related to this customer. To use this feature place a carat [^] anywhere within the Comment field of the customer record.</p>

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Inquire/Edit File

Engine specs.

After entering the Comment, the cursor will move to the Engine field. Entering the engine is optional. While on the "Engine" field, you may type the engine or press [F3] to display a list of engines.

Press [F3] for list
of Engines

If you press [F3], the list of engines that the system knows were used on that make and model by remembering previously transferred repair orders, will display. You can use the arrow keys to highlight your choice. Pressing [Enter] will insert the highlighted engine and move you to the "License" field. If the engine of the vehicle is not on the list, you must press [Esc] to exit the list of engines and type the engine.

Precision tip: As supplied, there are no engine sizes on the list. They will be added to the list as C.A.R.S. repair orders with the Year, Make, Model and Engine fields filled in are transferred. It is important to be consistent. The system will interpret a 5.0 LITER, a 5.0 LITRE, a5.0 L., 5.0 TURBO and a 5.0 as six different engines! Because the Engine field is optional and may be left blank, the system contains a BLANK engine for each combination of year, make and model.

After entering the VIN, the cursor will move to the Color field. Entering the color is optional. While on the color field, you may type a color or press [F3] to display a generic list of colors. You can use the arrow keys to highlight your choice. Pressing [Enter] will insert the highlighted color and move you to the Service schedule field. If the color you want is not on the list, you must press [Esc] to exit the list of colors and type the color. All the common colors we could think are on the list. Keep your color descriptions simple. Don't use colors like Midnight Black. Black is sufficient.

Changing the
service history

When editing any of the service category information or when editing the thank you letter/ times serviced line, the information will be treated as successive fields. Recall that when filling successive fields, the [F1], [F2], [Up Arrow], [F9], [F10] and [Down Arrow] keys may be used.

Undo(Canceling the changes)

Changes made to a service history are "locked in" upon displaying another service history. If you have made changes to a service history and have not displayed another service history, you may undo the changes and restore the old information by pressing . Undo will also un-delete a deleted service history.

Letter (card)

The system will allow you to print a letter (post card) from within the Inquire/edit function. Pressing (or if you are set up for printing post cards) will allow you to print a Thank you, promotional or reminder letter (post card) for the customer displayed on the screen.

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Inquire/Edit File

Asterisk

When the system sends an automatic follow up letter, an asterisk is put in the file to indicate the letter (post card) was sent. This asterisk appears just to the left of the service date for the applicable category. Pressing will allow you to add an asterisk if one is not present or remove an asterisk that is present.

The asterisks will be handled automatically by the system. For example, if the system sends an oil change reminder letter (post card) to Mr. Jones, an asterisk will be put on the oil change date so the system knows not to send another oil change letter (post card). When Mr. Jones returns for his next oil change, entering the oil change information on the repair order will automatically remove the asterisk.

Exit

To exit and return to The Service Manager™ main menu, press .

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Section 3.6

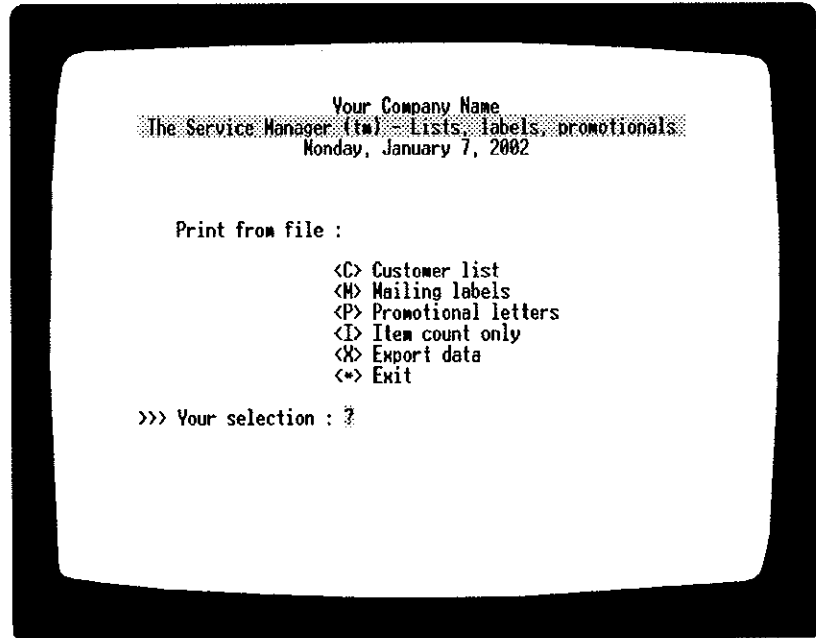
Inquire/Edit File

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Labels, Lists, Promotional Letters

Description

This function will allow you to print a list of your customers, (with or without the service information), print a set of mailing labels or print special promotional letters (to advertise a special product or service that is on sale or to send a special message to your customers). The printing may be done using all of your service history file or only portions of it. This will allow you to target specific customers.

At the menu, press **L**. After a few moments, the screen will show:



Paper size

Customer lists will be printed in 132 column format. Mailing labels will be printed on a standard 15/16"X3 1/2" one across, tractor feed post cards. At your option, letters may be printed on single sheets or tractor paper.

Select type of printing

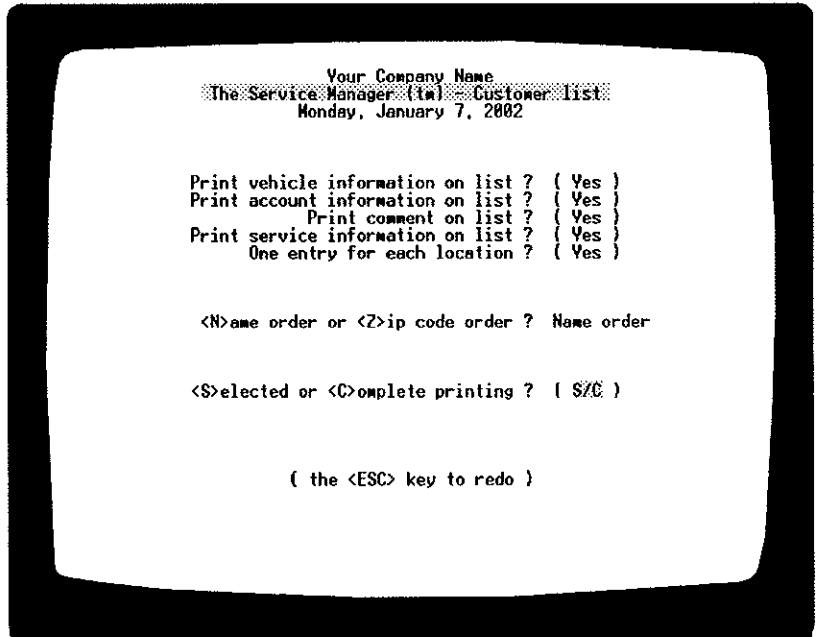
Select the type of printing to be done by pressing the appropriate letter. Note that if you intend to print **P**romotional Letters, the text of the letter must be stored on the hard disk under the name CFSPROMO.DTA. If you have not done this, exit the program and compose the letter.

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CUSTOMER LIST

Print Customer list

To print a Customer list, press , the system will show the following:



Precision tip: The questions on the above screen will appear one at a time as you answer each one.

Vehicle information

If you answer es to the question "Print vehicle information on list? (Y/N)" the system will print the Engine specs., License, VIN and Color fields on the report.

If you do not want this information on the report, press o.

Account information

Next, the system will ask:

"Print account information on list? (Y/N)"

If you answer es the system will print the Service schedule, Discount code, Tax table, Shop supplies and A/R account number.

If you do not want this information on the report, press o.

When printing a Customer list the system will now ask if you would like to print the comment and email on the list.

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Precision tip: When printing the comment line and the email on the report, due to the width of the paper, only 60 of the 69 character comment line will print.

Comment line

Next the system will ask:

"Print comment & email on list? (Y/N)"

Pressing will print whatever comment you have on file for vehicles included in the list.

If you do not want the comment printed on the report, press .

Using a service history list

Next the system will ask:

"Print service information on list? (Y/N)"

Pressing will cause the complete service history information about each vehicle to be printed. A copy of this list at your service desk can be useful for selling add-ons. The longer you use the system the more complete the information becomes, making it easier to find service needs. After a while, you may find that your customers will depend on this list to help maintain their vehicle.

If you do not want the Service information printed on the report, press .

Multi-vehicle customers

Next, the system will ask:

"One entry for each location? (Y/N)"

Many customers have more than one vehicle. If you are printing a Customer list, with or without service information, pressing will cause each customer to appear only once in the list.

When printing a complete customer list with the service information, you would want all vehicles from the customer to be printed on the list. In that case press N.

Name or zip code order

Next, the system will ask:

"<N>ame order or <Z>ip code order? (N/Z)"

If you would like the list printed in order by customer name, press N. If you would prefer the list in order by zip code, press .

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Selected or Complete printing

Next, the system will ask:

"<S>elect or <C>omplete printing? (S/C)"

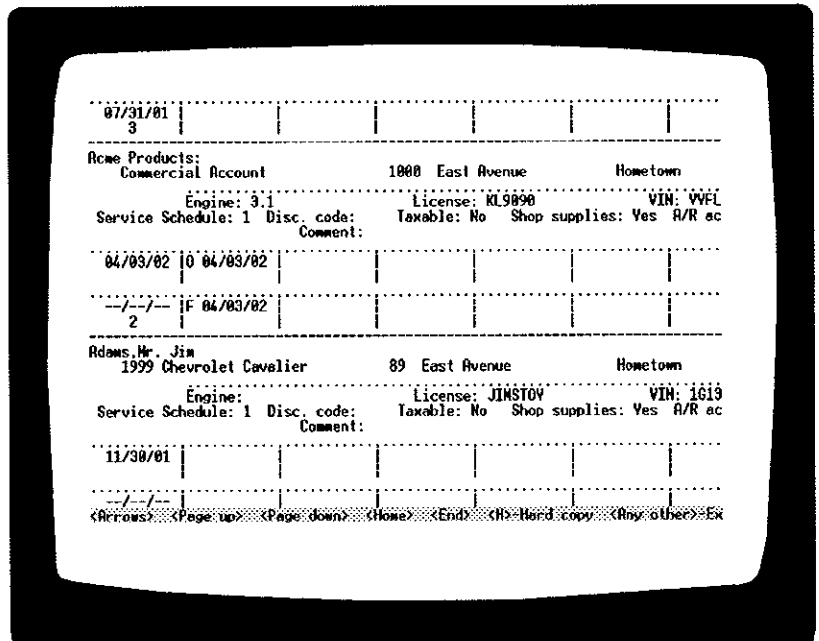
Pressing will print a report with all the vehicles in your system listed.

Print to Screen or Printer

Next, the system will ask:

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

Pressing will cause the report to print immediately. Pressing will display the report on the screen.



When the report appears in 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 [Home] will scroll to the left side of the report. Pressing [End] will scroll to the right side of the report. Pressing Hard copy will print the report to the printer and exit the report viewer. Pressing any other key will exit the reports viewer without printing the report.

Precision tip: Reports printed from the reports view by pressing Hard copy will print on the printer designated as the reports printer in the Precision Main Menu-Utilities-Printer port assignments.

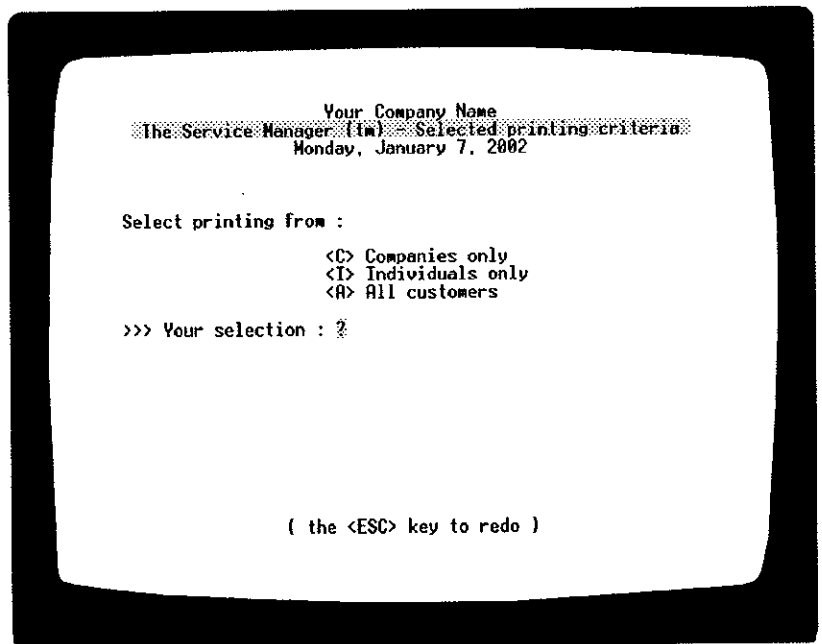
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Precision tip: To reverse the direction of the arrow and page keys, press [Ctrl]-[R].

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.

Selected printing

Selected printing will allow you to target specific customers and specific vehicles. If you have requested the Selected printing, the first Selected printing criteria screen will appear:

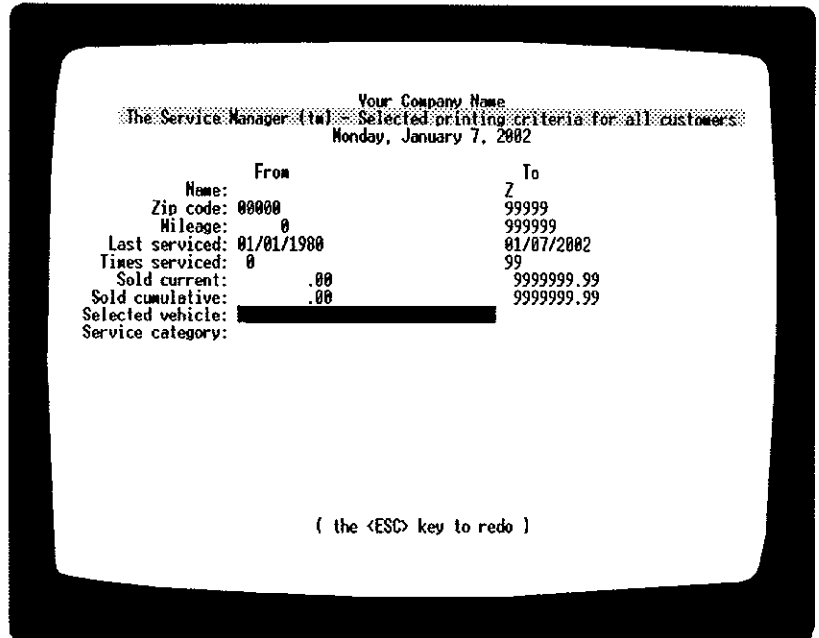


Targeting customers

Selected printing will allow you to choose Companies only, Individuals only or All customers in your service history file.

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After making your selection, the screen will change:



Further selections

Selected printing will allow you to target particular customers by name, by zip code, by mileage on the vehicle, by date of last service, by number of times serviced, by Current sales, by Cumulative sales, by make of vehicle and by a particular service category. You may use the criteria in any combination.

Selected printing defaults

The selected printing criteria will default to the broadest possible range thereby avoiding selection by that criteria. The defaults are:

Name	Start with the first name on file and end at the end of the Z's
Zip Code	Start at 00000 and end at 99999
Mileage	Start at 0 and end at 999,999
Last Serviced	Start at 01/01/80 and end at the current system date
Times Serviced	Start at 0 and end at 99
Sold Current	Starts at \$0.00 and end at \$9,999,999.00
Sold Cumulative	Starts at \$0.00 and end at \$9,999,999.00
Selected Vehicle	No special vehicle
Service Category	No service category

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An example

For example, if you were overstocked on Ford transmission fluid, you could target a Ford transmission service special by selecting only customers who own Fords with more than 24,000 miles, who have not had transmission service within the last 18 months:

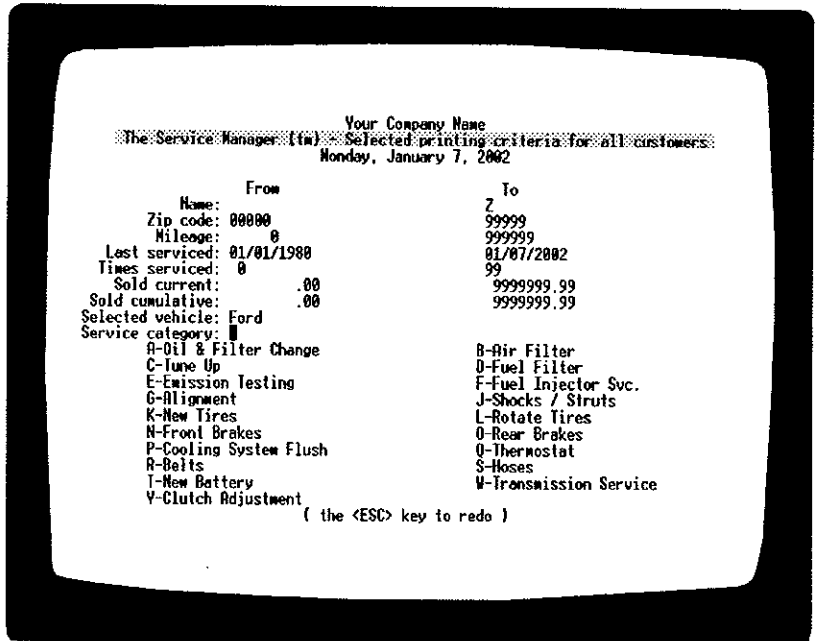
Name	Press [Enter] twice to use the defaults.
Zip Code	Press [Enter] twice to use the defaults.
Mileage	Type <input type="text" value="24000"/> and press [Enter]. Press [Enter] a second time to use default of 999,999 miles.
Last Serviced	Press [Enter] twice to use the defaults.
Times Serviced	Press [Enter] twice to use the defaults.
Sold Current	Press [Enter] twice to use the defaults.
Sold Cumulative	Press [Enter] twice to use the defaults.
Selected Vehicle	Type <input type="text" value="FORD"/> and press [Enter].

Precision tip: When a selected vehicle is entered ("Ford" in the above example) the selected vehicle may appear anywhere in the vehicle description line for a service history to be selected.

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The screen will now show:

Service category



Press Y to select Auto Trans Service.

Date of service

Let's say that you wish to exclude anyone that has had a transmission oil change within the last 18 months. If today is January 7, 2002, you would exclude any vehicle that had a transmission oil change between June 7, 2000 and today. Enter in the "From" column and press [Enter] to use today's date in the "To" column.

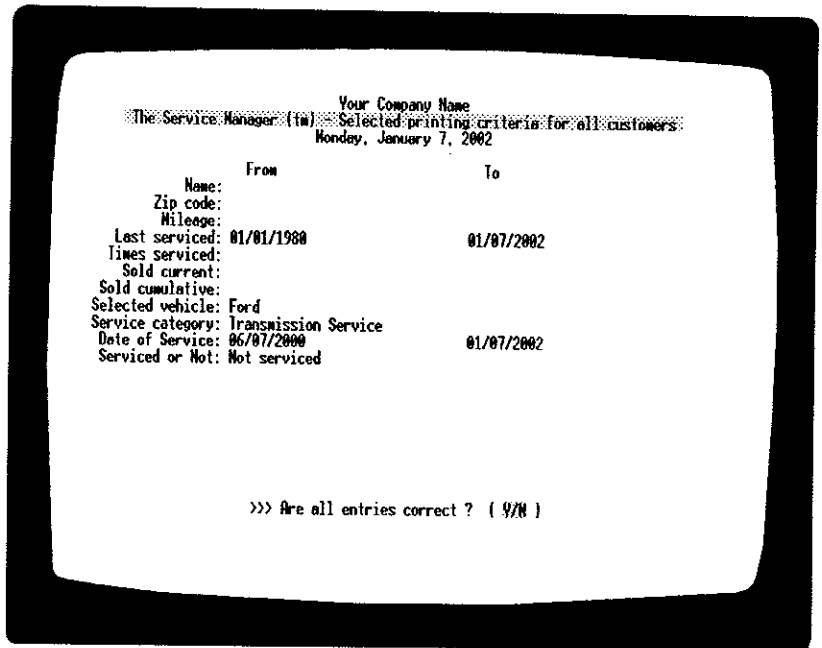
Serviced or not serviced

If you are interested only in vehicles that have **NOT** had a transmission oil change in the last 18 months, press N for Not serviced.

Correcting the selection criteria

If you make an error while entering the Selected Printing criteria, use the editing feature described in Section 1 of the Precision Main Menu Manual, to make necessary corrections. After filling the last field, the items which will not effect the selection (the defaulted items) will be erased from the screen.

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If you made an error

Check the selection criteria. If the criteria are correct as entered, press Y. Pressing N will take you back to the start of Selected Printing criteria.

Print to Screen or Printer

Next, the system will ask:

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

Pressing P will cause the report to print immediately. Pressing S will display the report on the screen.

MAILING LABELS

Print Mailing Labels

To print Mailing Labels, press M. The system will ask:

"One label for each location? (Y/N)"

Pressing Y causes only one label to be printed for each customer regardless of how many vehicles they own or how many times they are in the service file.

Name or Zip code order

Next, the system will ask:

"<N>ame order or <Z>ip code order? (N/Z)"

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Labels, Lists, Promotional Letters

If you would like the labels printed in order by customer name, press N. If you would prefer the labels in order by zip code, press Z.

Selected or Complete printing

Next the system will ask:

"<S>elected or <C>omplete printing? (S/C)"

At this point if you press S, follow the directions for selected printing, starting on page 70.

After entering criteria

After entering the selected print criteria you will be prompted to load your labels into the printer. Next, the system will ask if you wish to print an alignment mask. Printing an alignment mask will allow you to line up the labels correctly in the printer. Press Y. Three lines of stars will print on three labels. The lines of stars are printed exactly in the same area the name and address will print. Center the lines horizontally and vertically by adjusting the position of the labels in the printer. Repeat the process until the labels are positioned correctly. Press N (for no alignment mask) and the labels will begin printing.

PROMOTIONAL LETTERS (POST CARDS)

Printing Promotional Letters (post cards)

To print Promotional Letters (post cards) press P. The system will ask you to select your printer type, just as when printing selected letters. Respond as appropriate. Next, you will be asked to enter the date you wish to appear on the letters. Enter the date in MM/DD/YY format. Pressing [Enter] will supply the system date.

Precision tip: If the system is set up to print post cards you will not be asked about printer type or date.

The system will now ask:

"One letter for each location? (Y/N)"

Pressing Y will cause only one letter to be mailed to each customer.

When printing Promotional Letters (post cards) you may or may not want to eliminate duplicate mailings to the same customer. For example, if you were involved in a product recall campaign for defective transmission fluid, you could mention the vehicle in the letter and target the letters only to owners of vehicles that had their transmission oil changed with the faulty transmission fluid. If a customer owns two or three such vehicles, you would want to send one letter concerning each vehicle. On the other hand, if you were promoting transmission oil changes, you could target those vehicles that have more than 24,000 miles on the odometer and have not had transmission service within the last year. You would

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want only one letter sent to a particular customer regardless of how many vehicles they own that fit the above situation.

Name or Zip code order

Next, the system will ask:

"<N>ame order or <Z>ip code order? (N/Z)"

If you would like the labels printed in order by customer name, press N. If you would prefer the labels in order by zip code, press Z.

Selected or Complete printing

Next, the system will ask:

"<S>elected or <C>omplete printing? (S/C)"

At this point if you press S, follow the directions for selected printing, starting on page 70.

After entering criteria

Check the selection criteria. If the criteria are correct as entered, press Y. The system will ask you to load paper into the printer, then press [Enter], printing will begin. Pressing N will take you back to the start of Selected Printing criteria.

To abort printing

If you are printing lists, labels or letters press [Esc] to cancel printing. You will be returned to the Labels, Lists, Promotional Letters (post cards) screen.

ITEM COUNT ONLY

Item Count Only

The "Item count only" function counts items and displays the final count on the screen. This can be used to get a pre-count of the number of items that would print if you were printing using the same criteria. You can use this function to determine how many flyers or labels you will need to do a mailing. Or to experiment using different criteria to achieve a mailing of a desired size. To use the Item count only, press I.

The system will ask:

"One count for each location? (Y/N)"

Pressing Y will cause only one letter to be mailed to each customer.

Selected or Complete printing

Next, the system will ask:

"<S>elected or <C>omplete printing? (S/C)"

At this point if you press S, follow the directions for selected printing, starting on page 70.

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EXPORT DATA

Export data

The "Export data" function will create a standard comma-delimited data file. This file is suitable to give to a "Mass mailing service" to do a mailing for you.

The data file named "CFSXPORT.DTA" is found in the directory that contains Precision Data Systems programs. (Typically the PDS directory.) You will need to copy this file to a diskette.

To use Export data, press . The system will ask:

"One entry for each location? (Y/N)"

The "Export data" function, which creates a standard comma-delimited data file, has been expanded. Earlier versions of the Export data function provided the Customer's name, address lines 1 and 2, city, state, and zip code. The file will now also include the home and work phone numbers.

The data produced by the "Export data" function will now include the other phone number and the email address.

Pressing causes only one label to be printed for each customer regardless of how many vehicles they own or how many times they are in the service file.

Name or Zip code order

Next, the system will ask:

"<N>ame order or <Z>ip code order? (N/Z)"

If you would like the labels to be printed in order by customer name, press . If you would prefer the labels in order by zip code, press .

Selected or Complete printing

Next, the system will ask:

"<S>elected or <C>omplete printing? (S/C)"

At this point if you press , follow the directions for selected printing, starting on page 70.

After the system had gone back to the menu, exit Precision Data Systems to the "C" (C:\PDS>) prompt and type the following: COPY CFSXPORT.DTA A:[Enter].

Exit Labels, Lists, Promotions

Press to return to The Service Manger™ main menu.

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Section 3.8

Employee Service Info.

Description

The Employee Services info. function will print a report by employee showing the number of vehicles serviced by each employee and the number of service jobs each employee has done in each service category. You can also display and edit information of any employee. You also have access to the number of letters (post cards) printed.

Precision tip: End of Period Processing requires a printer.

Current Period

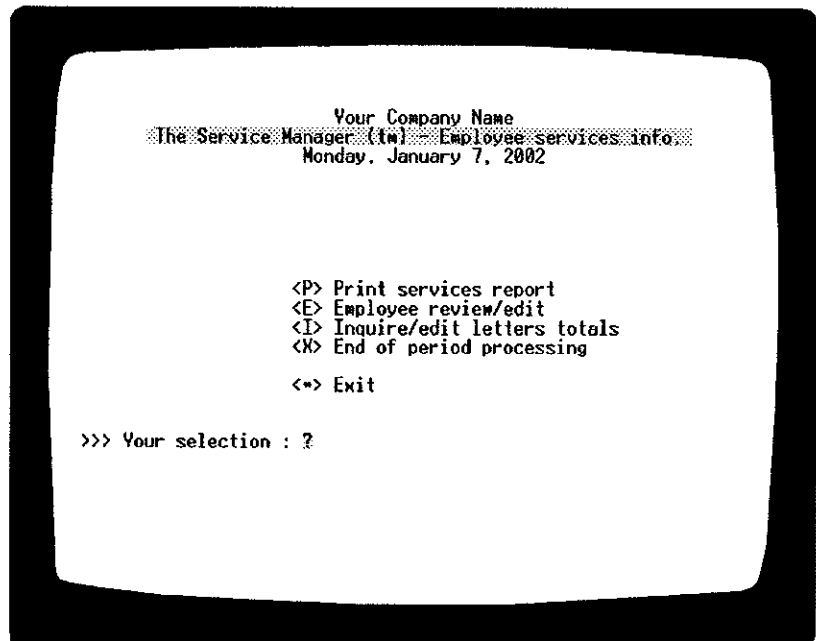
The statistics are totaled currently and cumulatively. The current totals may be erased at any time. Therefore, the current totals can represent the production for a week, a pay period, a month, a quarter of a year, a year or any other time period you wish. The End of Period Processing option available within the Employee Performance function will allow you to erase the current period total and start the numbers over. The cumulative totals will not be affected.

Cumulative totals

The cumulative totals may represent any time period longer than the current period totals. For example, if you erase the current period totals at the end of every month, you may wish to erase the cumulative at the end of every quarter. Then you will have the statistics on a monthly and quarterly basis. If you erase the cumulative numbers at the end of each year, you will have monthly and yearly totals.

Employee Service Info.

To enter the Employee Service info. function, press **[E]** at The Service Manager™ main menu. After a few moments, you will see the Employee Services info. Menu:



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Section 3.8

Employee Services Info.

The Services report

You may print a Service Report at any time. The report will print the total vehicles serviced and service jobs performed in each category by employee for both the current period and the cumulative period. Employees with no information in the system will not print. The report will total the number of vehicles serviced and the number of service jobs done by category both current and cumulative. Last, the system will report on the number of letters (post cards). The report will print in 132 column format.

Printing the report

To print the Services Report, press **F**. The system will ask:

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

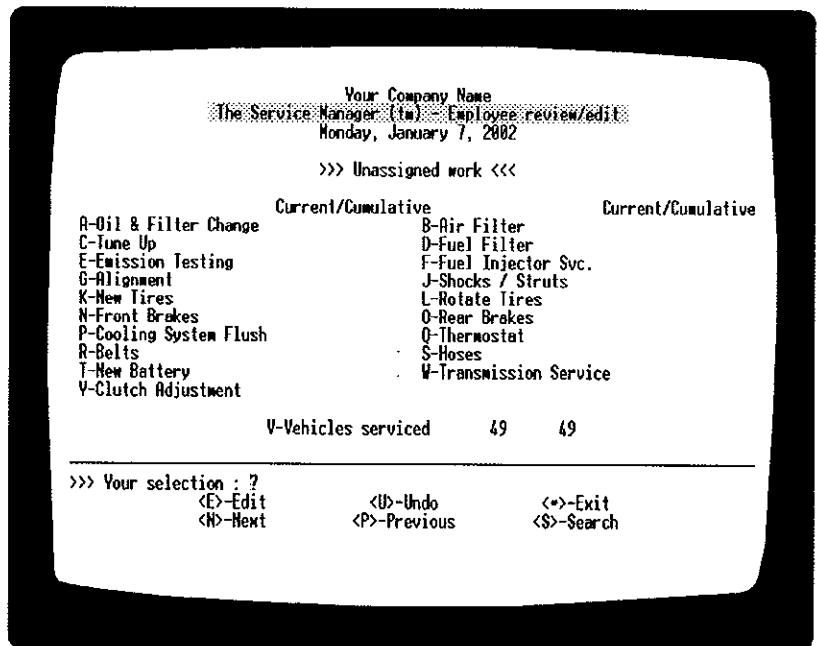
Pressing **F** will cause the report to print immediately. Pressing **S** will display the report on the screen.

You will be returned to the Employee Services Info. menu after the report has been viewed or printed.

Precision tip: Unassigned work represents the service jobs that were not credited to any particular employee.

Employee review/edit

The Employee review/edit will display the number of vehicles serviced by each employee and the number of service jobs each employee has done in each service category. Press **E**, the following will appear:



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Employee Services Info.

Editing employee information

Use **N**ext, **P**revious or **S**earch to display the employee number you would like to edit. To edit that employee's service record, press **E**. The system will ask you to "Select the item to change by letter". Enter the letter of the service category. The service category will appear at the bottom of the screen. Enter the number of current jobs for this category and press [Enter]. Then enter the number of cumulative jobs for this category and press [Enter], the mini menu will appear. Repeat for the categories which need to be changed.

Undo

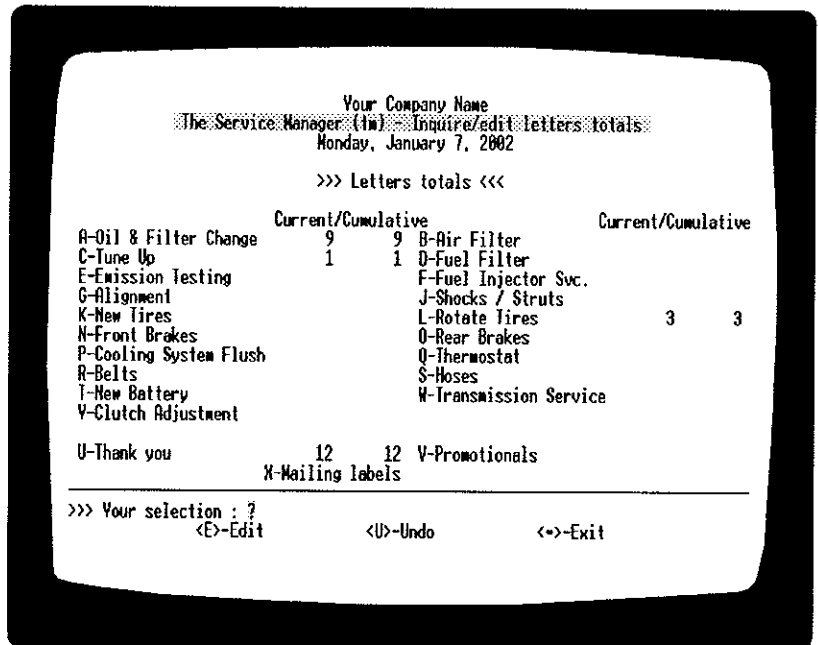
If you have made a mistake while editing the employee services, press **U**. This will cancel (undo) the changes you have made.

When you have finished editing the employee services, press ***** to return to the Employee Service info. menu.

Precision tip: When editing the employee totals, the system will reject a new figure if the current period total exceeds the cumulative period total.

Inquire/edit letter totals

The Inquire/edit letter totals displays the number of letters (post cards) which have been printed. Press **I**, to review, edit or print the totals. The screen will show:



This function similarly to the Employee review/edit as explained above.

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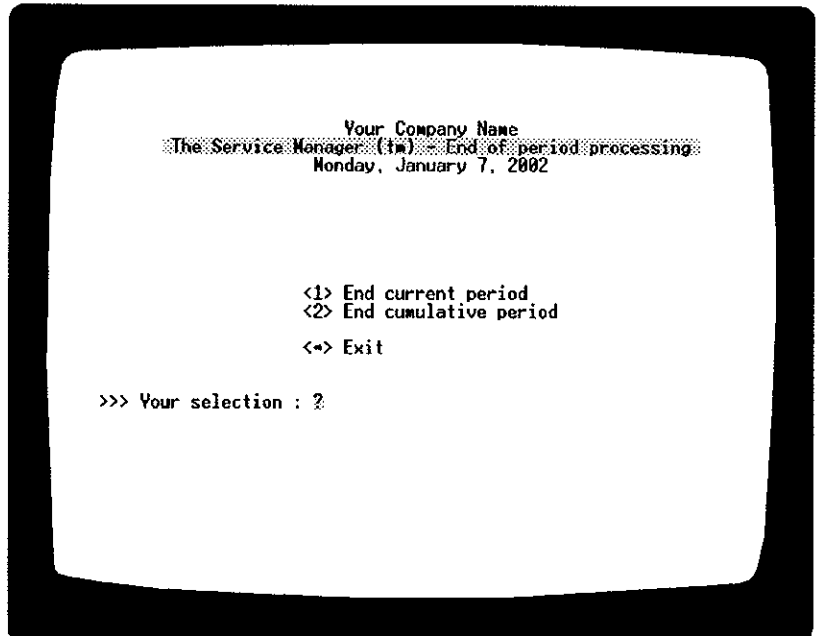
Employee Services Info.

End of period processing

End of Period Processing will allow you to erase the totals for the current period or for the current and cumulative period. You will be required to print a Service report. You will find it a valuable management tool. (For example, if you were to consider buying a brake lathe, the report would tell you the number of brake jobs you have done.)

Ending a period

To select End of Period Processing, press **[X]**. The following screen will appear:



End current period

If you would like to End Current Period only, press **[1]**. The system will erase the totals for only the current period. The cumulative totals will remain unchanged.

End cumulative period

If you select End Cumulative Period, by pressing **[2]**, the totals for the current period and the cumulative period will be erased.

You must print a report

After you select either option, you will be warned that they system will erase the totals. Press **[Y]** to continue or **[N]** to cancel.

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Employee Services Info.

Printing the report

After pressing to continue, the system will ask:]

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

Pressing will cause the report to print immediately. Pressing will display the report on the screen. The numbers will be erased after you have printed or viewed the report and you will be returned to the Employee Services info. menu.

C.A.R.S. users note: End of period processing is performed automatically when closing the month from within The Manager's Assistant™. (Those without The Manager's Assistant™, the End of period processing is performed here.)

Exit Employee Service Info.

Press to return to The Service Manager™ main menu.

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Employee Services Info.

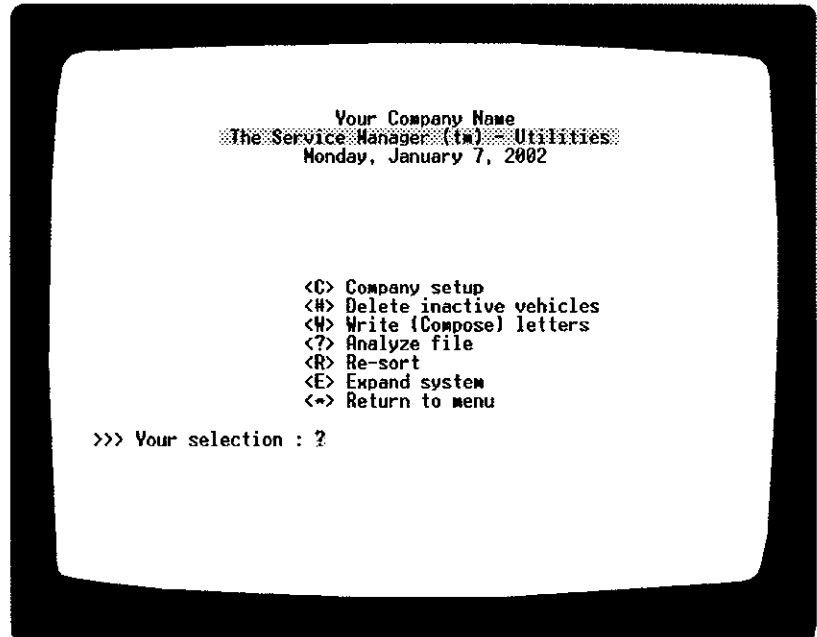
THE SERVICE MANAGER™

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Utilities

Utilities

Selecting the **U**tilities function will display the Utilities menu as shown below:



Briefly, this is what each choice will do:

Company setup

Will allow the changing of information entered into the company setup program.

Delete inactive vehicles

Automatically deletes vehicles that have not been serviced recently, eliminates "holes" in the file caused by manual deletions, and reorganizes the records efficiently.

Write (Compose) letters or post cards

Will allow you to write (compose) letters or post cards and edit existing letters or post cards.

Analyze file

Will check vehicle service information to determine if the information is in correct order and report if there are any duplicates. It also gives additional information about your customers and their vehicles.

Re-sort

Will correct the out of order vehicle service information.

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Expand System

Will allow you to expand the capacity of your system by 250 vehicles (up to a maximum of 999,999).

Return to menu

Will return you to The Service Manager™ main menu.

COMPANY SETUP

Company Setup

Any of the information entered into the system when setting up the customer follow-up system (company setup information discussed in Section 2.0) may be edited. This will allow you to modify the system if the need ever arises. (See Section 2.0 for additional information.)

To enter the Company Setup function, press at the Utilities menu. (See Section 2.0 for a description of the information entered and for instructions on entering the information>)

DELETE INACTIVE VEHICLES

Delete inactive vehicles

This function will do three things.

1. Eliminate "holes" in the data files caused by manual deletions.
2. Delete vehicles that have not been serviced within the number of days specified in the setup process.
3. Physically rearrange the service history records on the disk for efficiency.

YOU MUST HAVE BACKUPS

You must have a current backup copy, of all your information, before you select this function because a malfunction or power failure during this process will cause the loss of all data. If a problem does occur during this process DO NOT USE THE SYSTEM until you have copied the most current backups onto the hard disk.

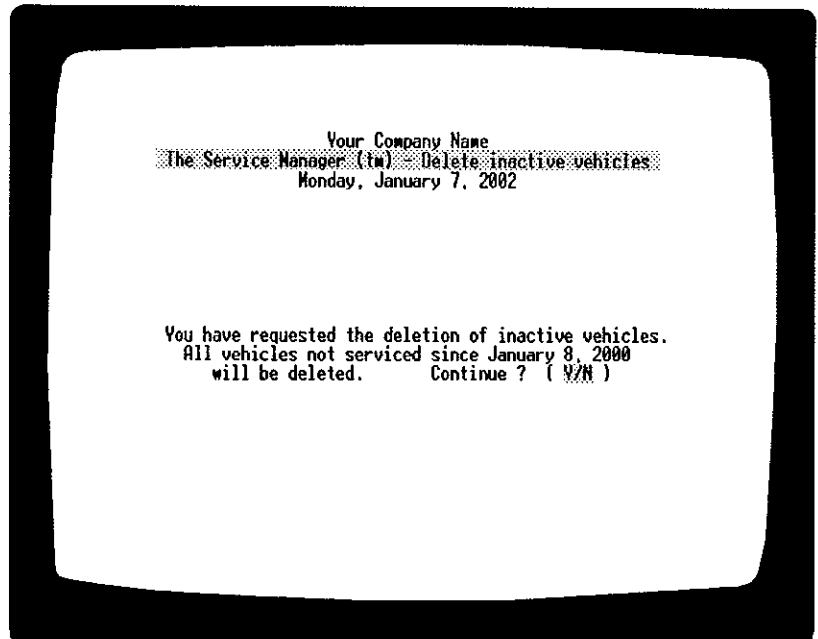
Precision tip: Do an HDBACKUP and a BACKUP1 before doing the Delete Inactive vehicles.

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Utilities

To select this option, press at the Utilities menu.



You will be asked to verify the selection. Press to continue. Now you will see a warning message about having current backup copies. **DO NOT CONTINUE UNLESS YOU HAVE CURRENT BACKUP COPIES.**

Press to continue. After a few moments you will see a number displayed on the screen similar to the number displayed during the Process Repair Orders function. The numbers will go up in value, then go back down. As the numbers go down, the system will appear to be "Stuck" on some numbers for a long time, while other numbers will appear to be skipped. This is normal. When the process is complete, the system will return to The Service Manager™ main menu.

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WRITE (COMPOSE) LETTERS OR POST CARDS

To enter the Write (Compose) letters function press **W** at the Utilities menu. (See Section 2.1 for a description of the information entered and for instructions on entering the information.)

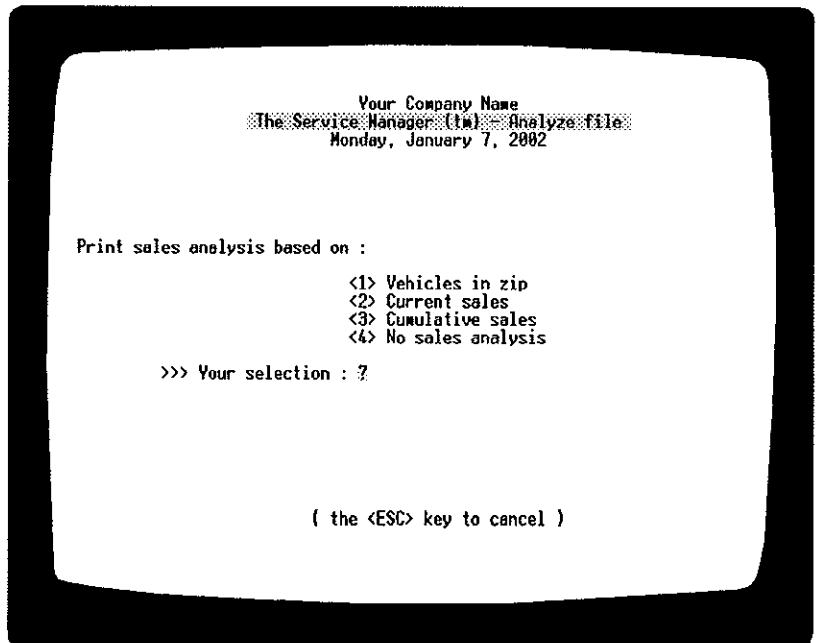
ANALYZE FILE

Analyze file

The Analyze file function will verify the information to determine that it is in the correct order, display information about the average number of days since each of the 20 service categories was repeated per vehicle, and print a sales analysis report. Printing of the Sales analysis report is optional.

Print sales analysis report

The Analyze file function will print a report of sales by zip code. The reports print the top fifty zip codes in descending order; by Vehicles in the zip code, by Current sales in the zip code or by Cumulative sales in the zip code. To start the Analyze file function, at The Service Manager™ -Utilities menu, press **[Shift]-?**. The following will be displayed:



Report based on

Selecting **1** Vehicles in zip, will print the report of sales sorted so that the zip code that contains the most vehicles is printed first. Selecting **2** Current sales, will print the report of sales sorted so that the zip code that contains the most current sales dollars will print first. Selecting **3** Cumulative sales will print the report of sales sorted so that the zip code that contains the most cumulative sales

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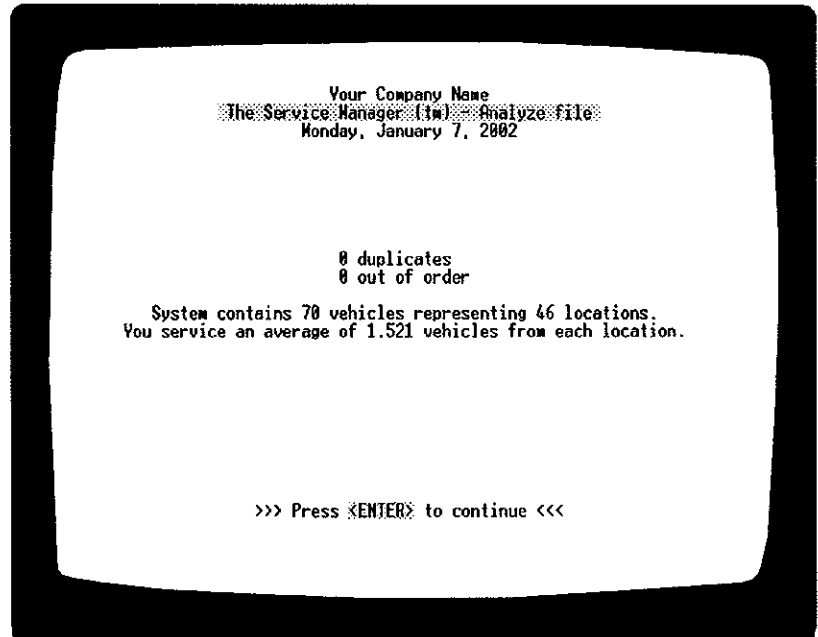
Section 3.9

Utilities

dollars will print first. Selecting No sales analysis will prevent the system from printing a sales report.

Service analysis screen

Press the number for the type of report you want. After the system analyzes the file, the Service analysis screen will appear.



The system will display the number of duplicate entries and the number of items out of sorted order.

Precision tip: Duplicate items and items out of sorted order may be corrected by forcing a re-sort. (Do NOT USE the Re-sort function unless you have read the ENTIRE section on Re-sort following.)

This function will also give you information about how many vehicles are in the system, the number of locations they represent and the average number of vehicles you service from each location.

It also gives information about the average number of days since each of the twenty service categories was repeated per vehicle.

Note: If you selected (No sales analysis), there will be no report to print or view.

Precision tip: If you do not have the C.A.R.S. function choosing Current sales or Cumulative sales will print the report but it will not be in any particular order.

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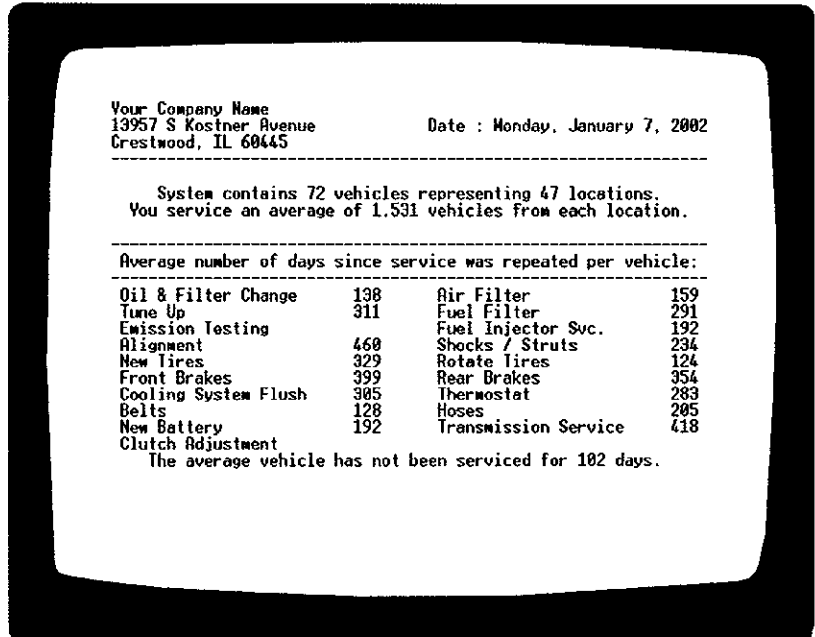
Print to screen or printer

After pressing [Enter], the system will ask:

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

Pressing [P] will cause the report to print immediately.

Pressing [S] will display the report on the screen.



The screenshot shows a service report on a screen. At the top left, it displays 'Your Company Name' followed by the address '13957 S Kostner Avenue, Crestwood, IL 60445'. To the right, the date is 'Monday, January 7, 2002'. Below this, a summary line states: 'System contains 72 vehicles representing 47 locations. You service an average of 1.531 vehicles from each location.' The main body of the report is a table titled 'Average number of days since service was repeated per vehicle:'. The table lists various services and their corresponding average number of days. At the bottom of the table, it notes 'The average vehicle has not been serviced for 102 days.'

Average number of days since service was repeated per vehicle:			
Oil & Filter Change	138	Air Filter	159
Tune Up	311	Fuel Filter	291
Emission Testing		Fuel Injector Svc.	192
Alignment	460	Shocks / Struts	234
New Tires	329	Rotate Tires	124
Front Brakes	399	Rear Brakes	354
Cooling System Flush	305	Thermostat	283
Belts	128	Hoses	205
New Battery	192	Transmission Service	418
Clutch Adjustment			

The average vehicle has not been serviced for 102 days.

When the report appears on the screen, you can press the arrow keys to scroll (move) the report around on the screen to see the different parts of the report. [Page Up] and [Page Down] will scroll the information up and down a screen-full at a time. Pressing [Home] will scroll to the left side of the report. Pressing [End] will scroll to the right side of the report. Pressing [Hard copy] will print the report to the printer and exit the report viewer. Pressing any other key will exit the reports viewer without printing the report.

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

Precision tip: To reverse the direction of the arrow and page keys, press [Ctrl]-[R].

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Utilities

Reset sales dollars

After printing the report, the system will go to the Reset sales dollars screen.

```

Your Company Name
The Service Manager (tm) Reset sales dollars
Monday, January 7, 2002

Reset Service Manager:
    Current sales dollars ? ( No )
    Cumulative sales dollars ? ( No )

Are all entries correct ? ( Y/N )

```

Current or Cumulative

The system will give you the option of resetting the Current sales dollars or the Cumulative sales dollars. The Reset sales dollars function will allow you to erase the amounts stored in the Sold current and Sold cumulative fields. If you would like to reset either field answer N to "Are all entries correct?". To reset the Current sales dollars answer Y to "Current sales dollars?". To reset the Cumulative sales dollars answer Y to "Cumulative sales dollars?".

C.A.R.S. users note: For those using C.A.R.S. and The Manager's Assistant™, End of period processing is performed automatically when closing the month from within The Manager's Assistant™. (For those without C.A.R.S. or The Manager's Assistant™, the End of period processing is performed in Employee Services Info.. See Section 3.8, for more information.)

FORCING A RE-SORT
DO NOT USE THIS FUNCTION UNTIL YOU HAVE READ THIS
ENTIRE SECTION!!

Resort

If the customers' vehicle service information gets out of order due to a malfunction, forcing a re-sort should correct the problem. The information is out of order if any of the following symptoms appears:

1. The Process repair orders function produces the message "Customer file is out of order. Use re-sort function."
2. The Inquire/Edit File search function fails to find a customer that is in the system.
3. The Inquire/Edit File Next and Previous functions fail to display the correct customer.
4. Customer lists are out of order.
5. A check of the order of the system shows duplicates or items out of sort.

Precision tip: A re-sort will reinstate all service histories manually deleted since last selecting the Delete Inactive Vehicle function. It is recommended that you do the Delete Inactive Vehicle function before running the Re-sort.

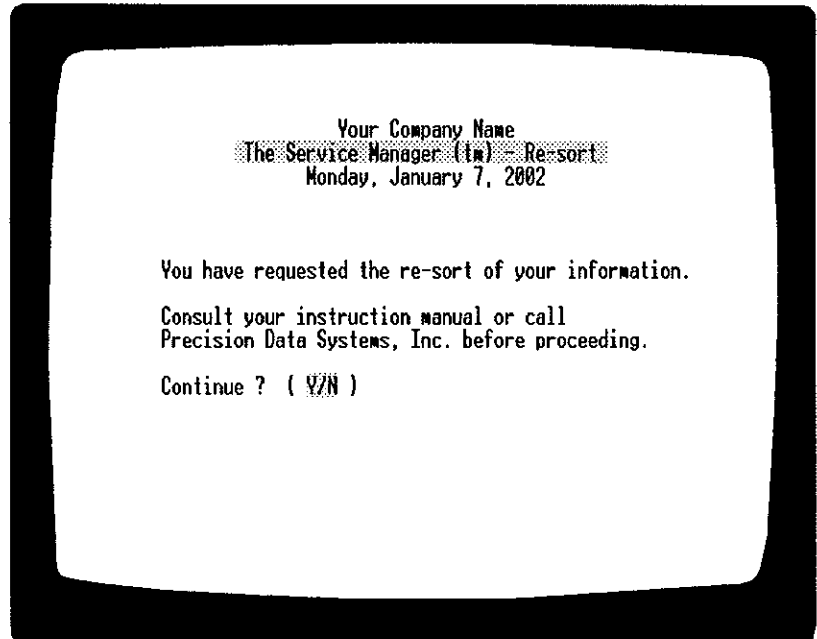
Preparation

Make a complete set of backups using HDBACKUP and BACKUP1. The re-sort function will erase any unprocessed repair orders. Having backup copies of the information will allow you to restore the unprocessed repair orders after the re-sort has completed.

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Forcing the resort

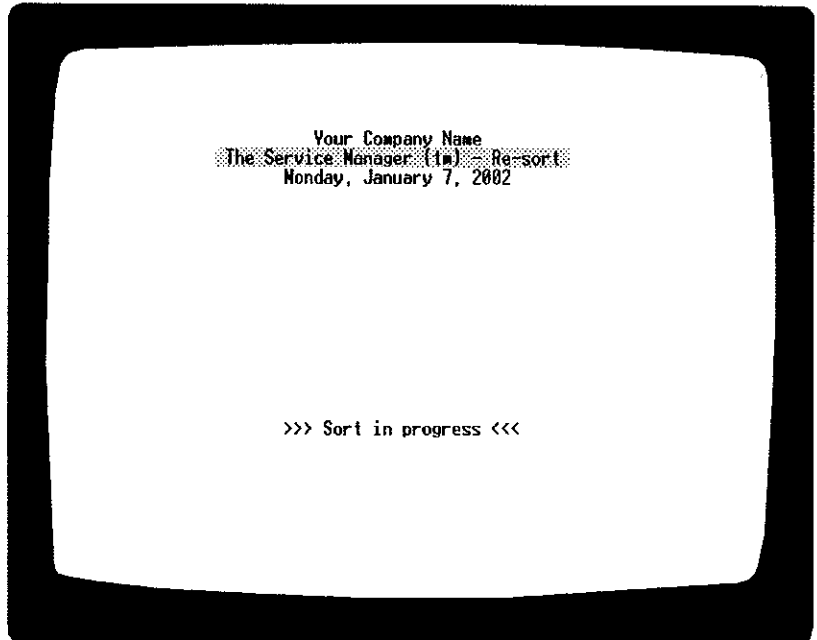
To start the Re-sort function, at the Utilities menu, press [Shift]-[R].
You will see the following message:



Press [Y] to continue. The system will warn you about having an
HDBACKUP, if you have made the backups, press [Y].

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The system will display the following:



Precision tip: The system will sort the records in increments of 499. This process can take from minutes to an hour depending on the speed of the computer and the size of the file.

After the Re-sort is complete, the system will return to The Service Manager™ main menu.

Restoring unprocessed
repair orders

During the Re-sort, the unprocessed repair orders which were contained in the file CFSIN.DTA were erased. They may be restored by doing the following, at the "C" prompt (C:\PDS>) type:

```
COPY \PDS\BACKUP\CFSIN.DTA [Enter]
```


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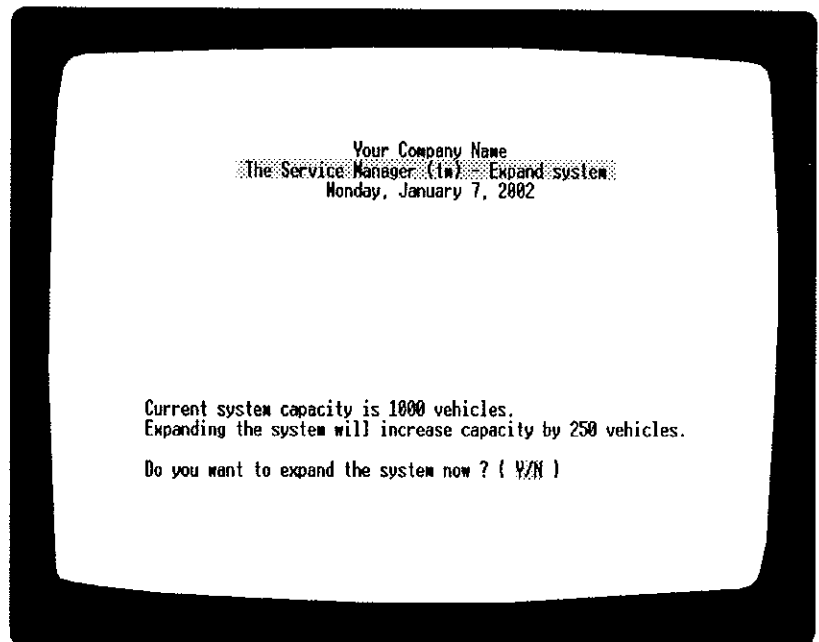
EXPAND SYSTEM

Expand system

The current system capacity can be expanded in steps of 250 items up to a maximum capacity of 999,999. The system will automatically request expansion when the total number of vehicles in the system plus the number of deleted vehicles exceeds the current system capacity. For convenience, you may force the system to expand at any time.

Forcing system expansion

To force the system to expand, press **[E]** at the Utilities menu.



You should not expand the system much beyond your immediate needs. Each time the system is expanded it uses additional space on the hard disk and requires additional space on backup disks. Once expanded the system cannot be made smaller.

C.A.R.S. users note: If C.A.R.S. runs out of space during Transfer Paid Repair orders function, you will have to force The Service Manager™ to expand as explained above.

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Section 3.10

Exit The System

Proper exit on Ms-Dos system

You must exit the system properly. NEVER press [RESET] or turn off the computer unless the DOS prompt (C:\PDS>) is displayed.

To exit the system, press at the Precision Parts Manager main menu. Press at the Precision Main Menu the computer will exit to the DOS prompt.

Proper exit on a Windows system

To exit the system, press at the Precision Parts Manager main menu. Press at the Precision Main Menu the computer will exit to the Windows Desktop. At the Windows Desktop, click on the "Start" button. Next, click on "Shut down", click "OK".

Make backup copies

Before turning off the computer for the day, make a backup copy using Backup1. (See the Precision Main Menu manual, Appendix A – Making Backups, for more information.) This can be done on 3 ½ or 5 ¼ inch floppy disks or zip disks.

Exit and make backup copies

To exit the system, press at the Service Manager™ main menu. After leaving the system, you should make a backup copy. (See the Precision Main Menu manual for instructions on making backups.)

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Section 3.10
Exit The System
