Vehicle Shop Service & Repair
Workbook

AutoPower
Flexible Software Solutions For The Truck Parts Industry

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TRAINING OBJECTIVE

The purpose of this workbook is to help the AutoPower end-user, master the basic elements of Vehicle Shop, Service & Repair. It is designed as a self-help tool, consisting of step-by-step explanations and examples. Fill-in-the-blank and multiple-choice exercises follow each topic. This will emphasize the knowledge that is needed to get your job done accurately and quickly.

You are encouraged to use this training book in combination with your AutoPower applications database, or by using the examples in this workbook. However, all the examples may not be hands-on. I will let you know what these examples are when we get to them. Please feel free to take notes in this workbook. It is yours to keep.

In combination with this workbook, you will need a PC to follow along with the exercises in this workbook.

When you have completed the exercises in this Vehicle Shop Service Repair Workbook you will be able to complete the tasks given below with 100% accuracy. You will be measured by short fill-in the blanks, multiple choice questions at the end of each lesson with the results.

- Locate the Vehicle Service Menu
- Define the preliminary items that must be completed before work orders are entered in the system
- Access the Vehicle Shop Service Program via Order Entry
- Create a Vehicle Shop work order
- Create & Edit vehicle maintenance records
- Create & Edit vehicle parts and labor records
- Adjust the status of a vehicle shop work order, including releasing, closing an operation, completing, and deleting. Print a vehicle Shop Work Order
- Record current identifying information and create future repair and inspection schedules for a specific vehicle
- Look up information for a specific work order

Note: Due to continuous software feature improvements, these features may not be included in this manual.

GETTING STARTED

Before we get started in the AutoPower system, there are only a few areas that you can use the Escape key, Backspace, Space Bar and the Delete key. When we get to these areas of the system, they will be pointed out to you. These keys cause control characters in some of the data records and should not be used except where noted.

LOGGING ON

Use your username and password to logon to the AutoPower System. This user name and password will be assigned to you by your manager. If you should forget your user name and password please see your manager so that it can be reset for you.
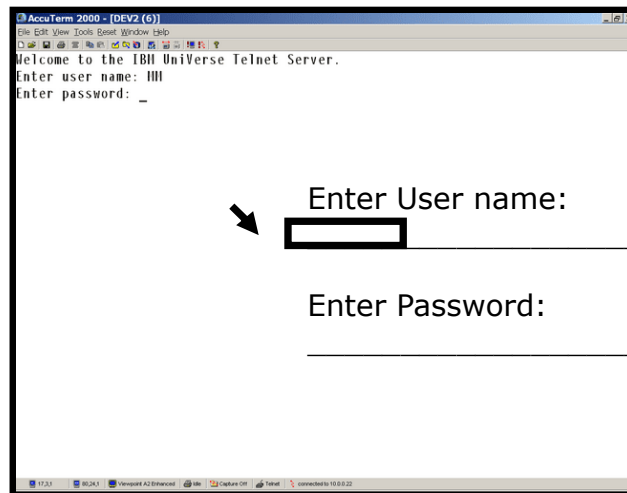
Vehicle Shop Order Entry

We will start with learning how to setup File Maintenance Records.

We will also learn how work orders are processed by creating quotes, releasing the work orders to the shop, adding parts and labor and invoicing.

Review how Business Reports are created to determine many things, including how well internal operations are working and where improvements might be made.

MAIN MENU

After logging in, you will be presented with the Main Menu. Your Main Menu may slightly vary from what you see here due to customizations done for your company. The cursor will be at Enter Selection prompt as shown in the display below.

To access the Vehicle Shop Menu from the Main Menu:

```
10/06/2015 (P99)          AUTOPOWER PARTS & SERVICE          10:34AM

                              MAIN MENU

                    1....Inventory MENU
                    2....Order Entry MENU
                    3....Work Order MENU
                    4....Sales Analysis MENU
                    5....Accounts Receivable MENU
                    6....Utility Programs MENU

            Enter Selection:



TC=Clock | S=Spooler |      | R=ACCESS | X=Log Off | N=NoteCards | A=AutoMail | V=VSI-Fax
```

Type in #3 and press *ENTER*.

```
10/06/2015 (P99)          AUTOPOWER PARTS & SERVICE          11:03AM

                       WORK ORDER MANAGEMENT MENU

                    1....Unit Rebuilding MENU
                    2....Vehicle Service MENU
                    3....Labor Scanning MENU

            Enter Selection:  █



TC=Clock | S=Spooler |      | R=ACCESS | X=Log Off | N=NoteCards | A=AutoMail | V=VSI-Fax
```

Type in #2 and press *ENTER*.

Vehicle Shop F/M Records

Let's get started with the File Maintenance records!

There are several file maintenance screens that must be completed before you can start using the Vehicle Shop Program. I will explain each file maintenance screen field-by-field. Your screens may be slightly different than those shown in this workbook, depending on your company's customizations, how you use the Vehicle Shop Software, and which functions your company has implemented. The basic system functions, however, will be the same.

There are 7 File Maintenance screens that must be setup before we can start entering work orders for the first time on the system.

From the Vehicle Service Menu:


```
AccuTerm 7 - [AUTOPOWER]                                                    —  ☐  ✕
File  Edit  View  Tools  MultiValue  Window  Help
AUTOPOWER                                                                              ∨
10/06/2015 (P99)            AUTOPOWER PARTS & SERVICE                11:06AM

                             VEHICLE SERVICE MENU

                1....Work Order: Entry
                2....Work Order: Status
                3....Work Order: Inquiry (Open)
                4....Work Order: Inquiry (Closed)

                5....Parts Inquiry
                6....Customer - Part Purchase History
                7....Reprint Invoice from History

                8....Vehicle Shop F/M MENU        ◄─────────
                9....Vehicle Shop Data Base MENU              Type in #8 and press
               10....Vehicle Shop Reports MENU                ENTER.

        Enter Selection:


  TC=Clock  S=Spooler          R=ACCESS  X=Log Off  N=NoteCards  A=AutoMail  V=VSI-Fax
```

Operator/MECHANIC/Salesperson F/M (Required Setup)

Operator/Mechanic Salesperson F/M must be completed for all personnel who will be recording time (labor) on work orders.

The Operator/Salesperson/Mechanic File Maintenance Screen will display.

Field Descriptions:

Operator/Salesperson/Mechanic Number - Enter the Operator/Salesperson/Mechanic number. The salesman/operator number can be the same as the employee number. If this is a new salesman/operator record, the cursor will advance to the next field. If this is an existing salesman record, the salesman operator information will display on the screen.

Name – Type in the name of the salesperson/operator and press **ENTER**. Type in the first name, middle initial, and the last name.

Status – Type in **A** if the employee is an Active employee or type in **I** if the employee has been terminated.

Branch Location - Type in the Location for this Salesperson and press **ENTER**. An entry is required in the Location field. The system will not advance further until an entry is made. (i.e.: W1 = Location 1)
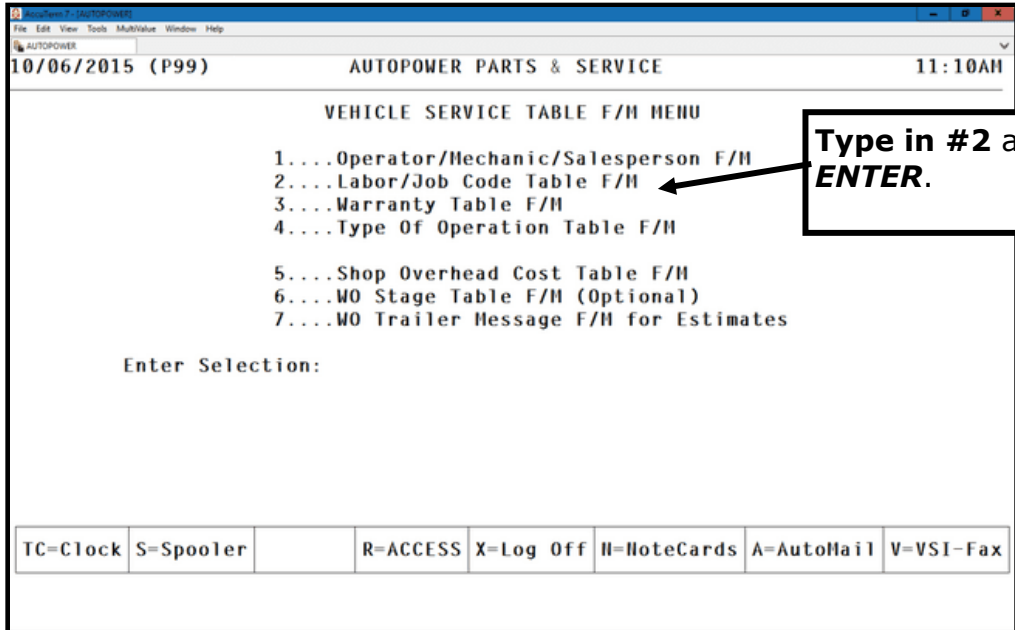
Shop Cost Per Hour – Type in the shop cost per hour for this salesperson and press **ENTER**. The decimal points need to be entered. (Example: Ten dollars per hour enter 10.00. Remember to include the cost of this employee's insurance and benefits along with hourly wage.) This field is not necessary for the Time Clock Operation module.

Shop Billing Rate Per Hour – Type in the shop-billing rate per hour for this salesperson and press **ENTER**. The decimal points need to be entered.

LABOR/JOB CODE TABLE FILE MAINTENANCE (Required)

The Vehicle Shop Service and Repair System uses a predefined set of labor/job codes to track time against a work order. The labor/job code will calculate the cost for time and material billing method. * You must have at least 1 labor code setup in the system.

From the Vehicle Service Menu**:**

The Labor/Job Code Table F/M screen will display as shown below.

Type in a Labor Code, or ? to see all existing Codes and press **ENTER**. This is an alphanumeric labor/job code.

Field Descriptions:

W.O. Description -Type in the description of the Labor/Job Code that will print on the work order for the operation and press **ENTER**.

Department - Type in the **Department** number that will perform this labor or job and press **ENTER**. The shop department number may automatically default if the department number has been setup in the department file maintenance option.

Billing Rate Per Hour -Type in the **Hourly Billing Rate** at which this work will be charged to the customer only if this is a Time & Materials Operation and press **ENTER**. (Do not type in a billing rate if the operation is a Flat Rate or Flat Rate Labor code.)

If this field is left blank the mechanic's rate will be used to bill the customer. If it is a FR or FRL job then the estimates will be used.

The next prompt will be **Update this Labor Code? (Y, N):** Type in **Y** for Yes and press **ENTER** to accept the labor code. Type in **N** for No to not update the labor code and then you can type in your new Labor/Job code.

The final prompt is "**Do you wish to print the Labor/Job Code Table**"? **N.** If you would like to print out all the Labor/Job Codes that you have in the system, Type in **Y** and press **ENTER**. The default is **N** to not print the report.

WARRANTY TABLE FILE MAINTENANCE (Not Required- Optional)

The Warranty Table File Maintenance program allows you to create many different types of warranties that your company may offer. If you use the warranty type field in an operation that is warranted, then you must change the operation that is being billed to the customer to be FR and 0.00 to zero out the estimate. This way the customer will not be charged for this particular operation. You can specify the Warranty text to print on the invoice.

From the Vehicle Service Menu**:**

The Type of Warranty Table F/M screen will display.

Let's add a new Warranty Code.

Field Descriptions:

Warranty Plan - Type in a code to represent the warranty plan that you would like to create.

Description - Type in a description that best describes the Warranty plan that you are creating.

Duration Days or Months - Type in the number of Days OR Months that this warranty will be in effect.

Duration Miles or Hours - Type in the number of Miles OR Hours that this warranty will cover.

Covers Parts & Labor or Both (P,L,B) - If Parts are covered under the warranty but the labor is not type in Click on Parts Only. If Labor is covered under this warranty type but not the parts Click on Labor Only. If both Labor and Parts are covered under the warranty Click on Both.

The Certificate Printing Options are modifications and are not available on a standard AutoPower system. They can be purchased. These options will not print a certificate. You can contact AutoPower Support in reference to a modification for a Warranty Certificate Form to print.

Warranty Plan Certificate and Print Option - If you have a Limited Warranty Certificate Form created on your system, Click on this field.

Use Optional Warranty Description (Y,N) - (This option is available on your system**)** If a warranty requires printing a special message on the invoice form, Click on this field.

This option allows you to type in the description of the warranty in the blank text box that you offer. This will print on your invoices.

Print Form – If you would like to print a copy of the Warranty Form click on Form. This is a modification that may not be on your system.

Copy – If you would like to copy this Warranty Plan to another Warranty Plan to that you can just make a few changes without rekeying the complete warranty plan, Click on Copy.

OK – After entering in the WO Warranty Plan Setup or making changes to an existing plan, Click **OK** to save your changes or entries.

Delete – If you would like to delete an existing Warranty Plan that is being displayed on your screen, Click on **Delete**.

Close – If you would like to close the WO Warranty Plan Setup screen without saving your changes, Click on **Close**.

TYPE OF OPERATION TABLE F/M (Not Required but Recommended)

The predefined operation template assigns a type of operation to the screens and invoices. If you do not use, all screens and invoices will show the description as operation 1, operation 2 and so forth.

This file maintenance option will define in detail the type of operation that is being added to the work order such as an Oil change or Axle repair as examples. If this is not setup as stated in the previous paragraph the words operation 1, operation 2 and so forth will print on the workorder and invoice with no description of the job that is being performed on the vehicle.

Our fourth file maintenance screen is the Type of Operation Table File Maintenance.

From the Vehicle Service Menu:

```
VecuTerm 7 - [AUTOPOWER]                                            _  □  ×
File  Edit  View  Tools  MultiValue  Window  Help
AUTOPOWER                                                              ∨
10/06/2015 (P99)          AUTOPOWER PARTS & SERVICE          11:10AM

                     VEHICLE SERVICE TABLE F/M MENU

             1....Operator/Mechanic/Salesperson F/M
             2....Labor/Job Code Table F/M
             3....Warranty Table F/M
             4....Type Of Operation Table F/M

             5....Shop Overhead Cost Table F/M
             6....WO Stage Table F/M (Optional)
             7....WO Trailer Message F/M for Estimates


        Enter Selection:




TC=Clock│S=Spooler│      │R=ACCESS│X=Log Off│N=NoteCards│A=AutoMail│V=VSI-Fax
```

Type in #4 and press **ENTER**.

The Type of Job Operation screen will display as shown below.

The Type of Operation Table File Maintenance Program allows you to record operations offered by your company including: the billing and estimates associated with those operations.

When you create a work order, you can specify services that your company offers, the billing method and estimate defaults recorded in the operations are automatically applied to the work order. You can change the default information on the work order if necessary. By setting up the type of operation it gives detail information of what work should be performed.

Let's take a look at the screen.

To display existing codes type in the specific Operation Code, click on the dropdown button to view other codes. When the code table is displayed you

will be prompted to highlight the desired Operation and press **ENTER** to select the type of operation or **Exit** to exit the listing.

Field Descriptions:

Job Operation code -Type in the Job operation code or click on the Job Operation code representing the operation you are creating and press **ENTER**. You can create a Job Code which can be numeric, alpha and seven characters in length.

If the code does not exist, complete the required fields and click on **OK** button.

Description -Type in the Description of the new operation code you are adding and press **ENTER**. The description should be specific to the operation code that is being created. The operation description will be used to define the job operation for a work order.

Examples of a Type of Operations could be, Transmission Rebuild, Transmission Repair, Rear End Rebuild, Engine Rebuild, Engine Repair, Engine Install or Vehicle Service. This is any type of service that your company offers.

Billing Method (Controls what will be billed) - Type in the Billing Method that should be used for this type of operation. There are three types of bill methods available.

> A.   Flat Rate (Includes Parts & Labor) - This billing method will use a set price for parts & labor. Example Oil Change $20.95.
>
> B.   Flat Rate Labor Only – This billing method will charge for the parts but the labor is a flat rate amount. Example would be an actual total price for all parts used in the job but the labor will be a set dollar amount.
>
> C.   Time & Materials - This billing method will charge the line items for the parts that you add to the work order and charge for the labor price multiplied by the time. Actual selling price for the parts and actual labor price.

Labor Job Code for Hourly Shop Rate (Not required) - Select the Labor Job Code for Hourly Shop Rate and press **ENTER**. Note: This code is setup in the Labor/Job Code File Maintenance.

If there is no bill rate in the labor job code F/M, the procedure screen or labor line screen will use the mechanics labor rate. If you input a labor job code everything on the operation template will be charged this labor job code, whether the work performed is painting, welding, etc. If you are in an operation and you leave this field blank, you will be prompted to enter the labor job code from the F1 parts & labor entry screen. This may be beneficial so you can use multiple job codes for different labor lines.

Estimated Labor Hours -Type in the **Estimated Labor Hours** that will be needed to complete this operation and press **ENTER**.

Estimated Labor Amount -Type in the **Estimated Cost of Labor** that will be needed to complete this operation and press **ENTER**. This option works in conjunction with the Labor Job Code for Hourly Shop Rate. It will take the hours and multiply them by the labor rate.

Estimated Parts Amounts -Type in the **Estimated Cost of Parts** that will be needed to complete this operation and press **ENTER**.

Calculate Shop Supplies for Parts Only, Labor Only or Both - Select Parts Only, Labor Only or Both if the Shop Supplies charge should be calculated based upon the Parts amount and Labor amount or both.

Percentage to Calculate Shop Supplies - Type in the **percentage to be used to calculate the Shop Supplies** and press **ENTER**. This revenue helps recapture the profit that normally is lost in miscellaneous supplies consumed on shop jobs.

(Example: Cleaners, Shop rags, Uniforms, lubricant, etc.) Example: If Parts and Labor total should be 100.00 then whatever percentage that is in this field will be multiplied by the 100.00 and added to the overall total of the invoice as shop supplies fee.

Maximum Shop Supply Charge - Type in the **Maximum Dollar Amount of the Shop Supplies to Charge** and press **ENTER**. This would be the maximum dollar amount that can be charged for shop supplies for this Job Operation Code.

Environmental Fee - Type in the **Environmental Fee** that will be charged for this Job Operation Code.

Warranty Plan - Select the **Warranty Code Plan for the work** that will be performed and press **ENTER**. Note: This warranty code is setup in the Type of Warranty Table F/M. If your system is setup to print a Warranty Plan for a particular Job Operation Code, the Warranty Plan will print on the Invoice.

Shop Work to be Performed - Type in an explanation of the **Work performed** for this type of operation in the text box and click OK. Prints on quotations and Invoices. This can be a time saver. This is just a template. Type in any kind of work that can be performed for this type of operation. Example, type in everything that can be done for rebuilding a transmission or to complete an oil change, then only minimal work will be needed to edit or remove what was not used for that particular operation. Saves time and key punches. You are creating a template for this type of job operation.

Internal Shop Message - Type in an **Internal Shop Message** for the mechanic, Click OK. This message will not print on the work order. Prints on ticket printed in shop. This message is helpful to the mechanic. This is helpful to the mechanic with the same idea as Shop Work to be performed. It is just a template that can be edited or removed on the workorder for this job operation.

COPY - The **Copy** button will allow you to copy one Job Operation to another. Then you can edit the fields that do not apply to the new Job Operation Code.

OK – Click on the **OK** button to save the new Job Operation Code that you created or click on OK to save your changes that you have made to an existing Job Code.

Delete – The **Delete** button will allow you to delete the Job Operation Code from the table.

Report – The **Report** button will allow you to print out a report of all Job Operation Codes.

Close – Click on **Close** to exit the WO Job Operation Setup screen without saving your changes.

Shop Overhead Cost Table F/M

Edit the Shop WO Overhead Cost table. This table is used by the Shop VSSR software to add an overhead cost to the shop jobs. This cost is applied to the total cost of the work order so that the computed GM% of the job is realistic with some amount of the shop's operational overhead included.

The "Show All Tables" button will sort and select the Overhead Tables in the WO-TABLES file and show them in the Form F3 grid. You can click on a grid row to display the Overhead Cost table for editing.

The "Copy" button lets you copy the currently displayed Overhead table to a different branch to WO Type.

Field Descriptions:

Branch Location - Click on the Drop Down button to view all Branch locations. Click on the Branch location.

Work Order Type - Presently there are three Work Order Types available, Warranty, Internal and Retail.

Show All Tables - After you have setup the W/O Overhead Cost Tables you can view ALL tables by clicking on the Show All Tables button.

Department - The Departments that are setup for this branch location will display.

Fixed Overhead Cost -Type in the Fixed Overhead Cost for this department.

% of Labor Cost - Enter the percent applied to the labor cost for this department.

Copy – This button will allow you copy this Overhead cost table to another branch location.

Print – This button will allow you to print one Overhead cost table or all tables.

Save- Click on Save after you have entered in your Overhead cost table.

Cancel – Click on Cancel to cancel your changes but remain in the window.

WO STAGE TABLE F/M (Not Required)

The Work Order Stage Table File Maintenance program will allow you to specify up to 15 work order stages that indicate the progress of shop operation. Work Order stages are typically not defined as one particular job. The stage of a work order operation needs to be periodically updated so that the user can provide his customer with the most accurate information possible regarding progress of work on a vehicle. This is especially useful for long-term jobs.

When you first access the Work Order Stage Table F/M screen your cursor will be in the Stage Name field. These are free form fields.

Click on the button **Add Row**.
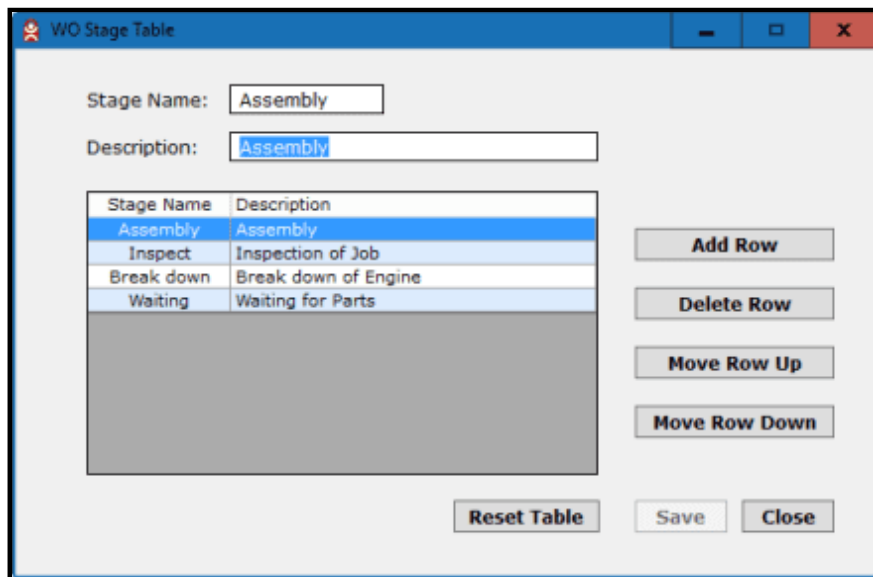
Type in the name of the operation stage.

Type in the description of the operation stage.

Click on **Save**.

If you decide to maintain staging in workorders, then the Service Writer must manually update the "stage" field in each operation on the workorder. Whatever is in stage 1 field will show initially on all operations as the current stage and will not change unless it is physically changed in the operation. The system does not automatically advance to the next stage in the operation. It has no way of knowing when one stage has been completed.

Click on the Save button to save the new stage names or the edits to the table. You can Add, Delete, Move a row up or move a row down by clicking on the buttons.
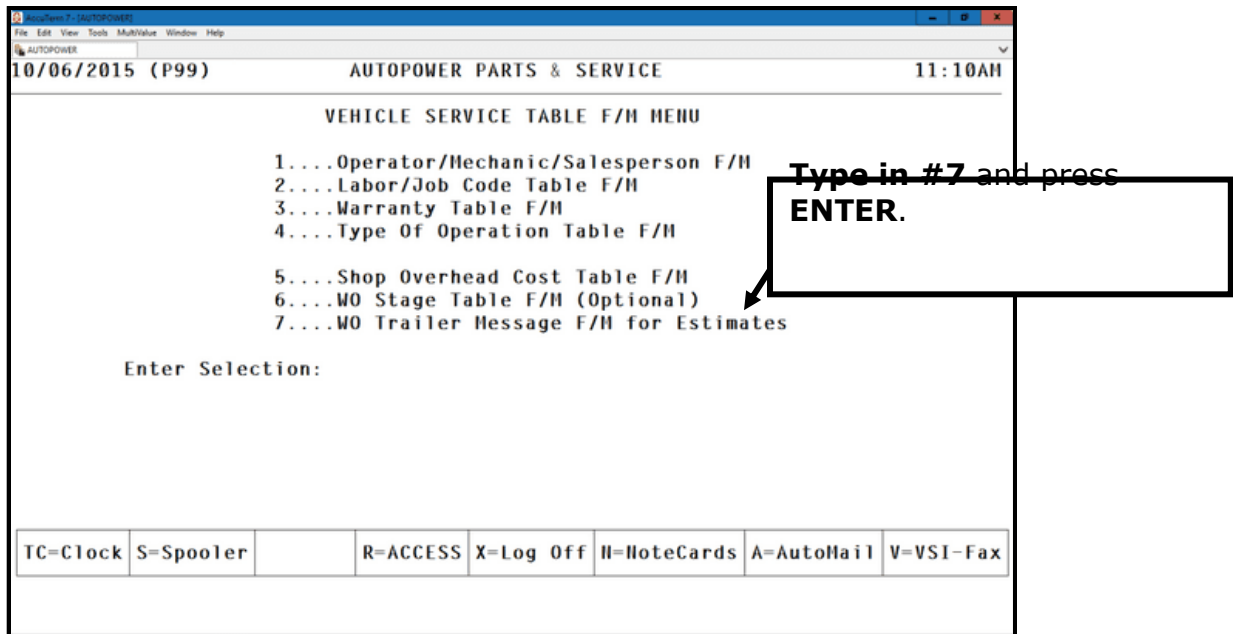
WO TRAILER MESSAGE FILE MAINTENANCE for Estimates

The Work Order **Quote** Trailer Message File Maintenance will allow you to type in a message that will print on quotes that are sent to customers. The Work Order Quote Trailer Message is specific to each branch location because individual state laws often mandate them.

From the Vehicle Service Menu:

Type in #7 and press **ENTER**.

Type in the Branch Location or select from the dropdown for the branch location that this Work Order Quote Trailer Message should print on the quote and press **ENTER**.

Field Descriptions:

Type in the Branch Location (ie: W1, W2 etc) or select the Branch Location from the dropdown list where this Work Order Quote Trailer Message will print on the work order quote and press **ENTER**.

In the text box type offer limitations, disclaimers or etc and then click on Save. .

Copy – This button will allow you copy this disclaimer to another branch location.

Save- Click on **Save** after you have entered in your disclaimer or edited the existing record.

Delete – Click on **Delete** to delete the complete record.

Cancel – Click on **Cancel** to cancel your changes but remain in the window.

Close – Click on **Close** to exit the window.

It's time for a Quiz!

1. Mechanic codes must be entered for all personnel who will be recording time (labor) on work orders.
True or False

2. Examples of a Work Order Stage could be, Inspect, Teardown, Rebuild or Engine.

True or False

3. Examples of a Type of Operation could be, Transmission Rebuild, Transmission Repair, Rear End Rebuild, and Engine Rebuild.

True or False

4. There are three types of billing methods available and they are:

   A.
   B.
   C.

5. Match the following Billing Methods with their definitions.

   TM   Flat Rate – Parts & Labor
   FRL   Time & Materials
   FR   Flat Rate Labor – Labor Only

6. The Warranty Description option in the Type of Warranty File Maintenance is where you would type in the warranty that your company offers. This warranty will not print on your invoices.

True or False

7. The Labor Code File Maintenance is where you would setup the Hourly Billing Rate for a Time & Material Operation.

True or False

8. The Work Order Quote Trailer Message File Maintenance will allow you to type in the message that will print on quotes that are sent to customers.

True or False

9. The Work Order Quote Trailer Message is specific to each branch location because individual state laws often mandate them.

   True or False
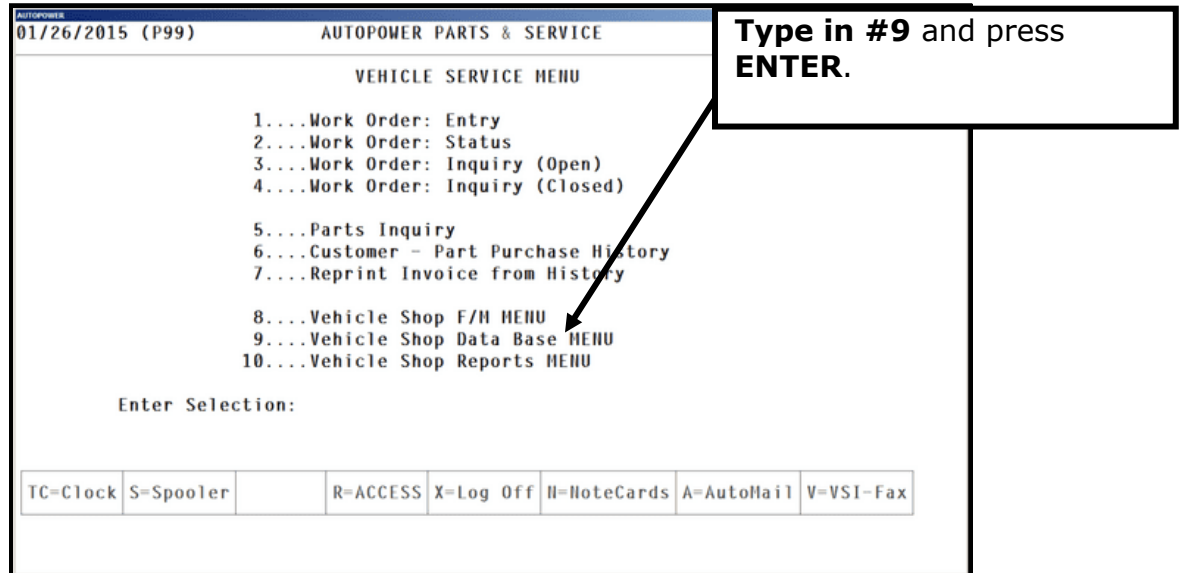
10. The Department File Maintenance is changed often because the General Ledger Postings will not be correct.

    True or False

Vehicle Data Base Menu

The Vehicle Data Base File Maintenance program will allow you to keep on-line files containing detailed vehicle records. You can record and maintain the history of future repairs and inspection needs for your fleet of vehicles or for your individual customers.

From the Vehicle Service Menu:

Type in #9 and press **ENTER**.

The Vehicle Data Base Menu will display as shown below.

Type in #1 and press **ENTER**.

Vehicle F/M Screen

The Vehicle File Maintenance Program stores specific information for each vehicle by customer and vehicle number. Having this information at hand can assist your company in providing a variety of services for individual and fleet customers. For your company this could mean more repeat business; it also gives you an opportunity to schedule shop personnel and parts purchasing more accurately.

```
AUTOPOWER
01/26/2015              Vehicle Maintenance              VM.VMAINT

  Customer.......:
  Truck Number...:

  1) Make........:              8) PM Frequency..:
  2) Model.......:              9) PM Mileage....:
  3) Year........:             10) Last PM Date..:
  4) VIN #.......:             11) Next PM Date..:
  5) Tag Number..:             12) Nxt PM Mileage:
  6) Mileage.....:             13) Last DOT Insp.:
  7) Mileage Date:             14) Next DOT Insp.:

 15) Assembly Detail.:
 16) Repair History..:
 17) Repairs Needed..:
 18) Notes...........:




            Enter the Customer Number or .NAME for search
              F1=Help   F2=FFwd   F3=Bkup   F4=Eras
```

Type in the customer's number and press ENTER. If you do not know the customer number, type in ▪ followed by part of the customer's name to do a search and press **ENTER** as shown in the display below.

```
AUTOPOWER
01/26/2015              Vehicle Maintenance              VM.VMAINT

  Customer.......: .AUTOPOWER
  Truck Number...:

  1) Make........:              8) PM Frequency..:
  2) Model.......:              9) PM Mileage....:
  3) Year........:             10) Last PM Date..:
  4) VIN #.......:             11) Next PM Date..:
  5) Tag Number..:             12) Nxt PM Mileage:
  6) Mileage.....:             13) Last DOT Insp.:
  7) Mileage Date:             14) Next DOT Insp.:

 15) Assembly Detail.:
 16) Repair History..:
 17) Repairs Needed..:
 18) Notes...........:




            Enter the Customer Number or .NAME for search
              F1=Help   F2=FFwd   F3=Bkup   F4=Eras
```

A list will display of the customers that match the words that you typed in. Select the correct one by typing in the line item number and pressing **ENTER**.

```
AUTOPOWER
                        Customer Name Search                        AR.NS

  CUST NO    C U S T O M E R            C I T Y               P H O N E

1.  1003      AUTOPOWER CUSTOMER        ORLANDO, FL 32801
2.  1001      AUTOPOWER CORP           LAKE MARY, FL 32746
3.  999999-1  AUTOPOWER CUSTOMER #2    LAKE MARY, FL 32746
4.  999999    AUTOPOWER CUSTOMER       LAKE MARY, FL 32746    407-695-7300




                          Item#, (Q)uit: █
```

```
AUTOPOWER
01/26/2015                 Vehicle Maintenance              VM.VMAINT

   Customer.......: 1001  –  AUTOPOWER CORP
   Truck Number...: █

   1) Make........:              8) PM Frequency..:
   2) Model.......:              9) PM Mileage....:
   3) Year........:             10) Last PM Date..:
   4) VIN #.......:             11) Next PM Date..:
   5) Tag Number..:             12) Nxt PM Mileage:
   6) Mileage.....:             13) Last DOT Insp.:
   7) Mileage Date:             14) Next DOT Insp.:

  15) Assembly Detail.:
  16) Repair History..:
  17) Repairs Needed..:
  18) Notes...........:




             Enter the Vehicle Number or ? for listing
              F1=Help   F2=FFwd   F3=Bkup   F4=Eras
```

Type in the Truck Number and press ENTER or type in a ? and press ENTER for a listing of all the vehicles for this customer.

The customer usually assigns the vehicle number. It may be alpha or numeric and the majority of the time is preprinted on fleet vehicles. The vehicle number will print on work orders and invoices for that vehicle; this helps the company and the customer to maintain a work history for each vehicle.

1. **Type in the Make of the vehicle** and press **ENTER**. Ex. Ford, Chevy, Dodge, Kenworth

2. **Type in the Model of the vehicle** and press **ENTER**. Ex. XR7, Blazer, Durango

3. **Type in the Year the vehicle was manufactured** and press **ENTER**. Ex. 2015

4. **Type in the VIN#** and press **ENTER**. Type in the entire vehicle identification number. Search features are included for the VIN #.

5. **Type in the Tag Number** and press **ENTER**.

6. **Type in the current mileage only for the first time the vehicle comes into the shop** and press **ENTER**.

   This mileage is used to schedule future preventative maintenance. **Do not update** the mileage here when the vehicle is returned to the shop. When the vehicle is returned to the shop after the first initial visit the mileage will be updated on the Vehicle Work Order in Work Order Entry.

7. **Type in the Mileage Date** and press **ENTER**. This is the date of the current mileage when the vehicle first comes into the shop for service. This date is used to schedule future preventative maintenance for the vehicle. Ie. Oil changes and Tire rotations. If you press **ENTER** thru this field it will default to today's date.

8. **Type in the PM Frequency** and press **ENTER**. This is the Preventative Maintenance Frequency **number of days until the next time** the vehicle should have preventative maintenance performed.

9. **Type in the PM Mileage** and press **ENTER**. This is the Preventative Maintenance Frequency **number of miles until the next time** the vehicle should have preventative maintenance performed.

10. **Type in the Date the Vehicle last had Preventative Maintenance** and press **ENTER**. If you press **ENTER** thru this field it will default to today's date.

11. **Next PM Date**. This is the next preventative maintenance date that the vehicle should return to the shop. When you access this field you will be prompted "**Update Next PM Date? (Y,N):**" **Type in a Y** for yes if you would like the system to automatically populate the Next PM Date field with the date of the next preventative maintenance work to be performed on this vehicle. The next PM date is calculated by the system based on the date entered in the Last PM Date field plus the number of days in the PM

Frequency field. If you do not want the system to calculate the date, **Type in N**, then enter the date manually.

12. **Type in the next preventative mileage** and **press ENTER.** This is the number of miles, which the next preventative maintenance should be performed on this vehicle.

13. **Type in the date of the Last Department of Transportation Inspection** (Last DOT Insp) and press **ENTER**.

14. **Next DOT Inspection.** This is the next Department of Transportation Inspection Date that the vehicle should be inspected. **Type in Y for yes and press ENTER** if you would like the system to automatically populate the Next DOT Inspection field with the date of the next DOT inspection should be performed. The date is automatically calculated by the system based on the date entered in the Last DOT inspection field.

     Type in N for No and **press ENTER** if you would like to type in the next DOT Inspection date.

The next prompt that will display is **Correct? (Y, N, E, D, #)**: If the vehicle information is correct, **Type in Y** and press **ENTER**. If the vehicle information is not correct, **Type in N** for No and press **ENTER**. If you would like to exit out the Vehicle Data Base File maintenance screen without saving any changes **Type in E** and press **ENTER**.

15.   **Assembly Detail (Optional- Not required)**

     The Assembly Detail program will allow you to attach an Assembly Detail Template to a particular vehicle number. The Assembly Detail Templates are created in Assembly Template File Maintenance located under the Vehicle Data Base Menu. If you perform a repetitive job on the same vehicle that uses the same parts over and over, you can create an assembly detail template. Then in the future the information will be available without searching in inventory inquiry for each part that is necessary to complete the task at hand. You can select the Assembly Detail for this vehicle.

     Note: To access Assembly detail information from a new work order you can type in a **V** at the Shop Operation File Maintenance. The Vehicle Maintenance screen will display. Select the correct vehicle for this customer. You can then go to the Assembly Detail and you will have the information for all parts that are particular to this task for this vehicle.

     From the Vehicle File Maintenance Screen type in your customer number and press **ENTER**. Type in your Truck Number and press **ENTER**. The information for this vehicle will display.

Type in #15 and press **ENTER**.

A dialogue box will display on the screen requesting that you Please Select An Assembly or choose NEW for new Assembly.

Highlight the first Assembly Detail template and press **ENTER**.

In our example that is #93. Our template will display showing the information that we requested. This is only for informational purposes only. In our example we know what part number the oil filter, alternator belt, compressor belt, air filter and fuel filters this vehicle requires without searching for what fits this vehicle. You have all that information at your fingertips.

```
AUTOPOWER                 Vehicle Assembly File Maintenance        VM.AMAINT

    Customer......:  506675 - ATKINSON TRUCK SERVICE
    Vehicle.......:  15  FORD  RANGER  1995
    VMRS Code.....:  93                  ENGINE-AUXILIARY (PRODUCT TRANSFER)
    Template Code.:  93                  Engine Components

    Filter-oil   :  FRAPH8A                        :
    Belt-alt     :  FRABI3E                        :
    Belt-comp    :  NCU9IE9                        :
    Filter-air   :  ID83U                          :
    Filter-fuel  :  9318FDD                        :
                 :                                 :
                 :                                 :
                 :                                 :
                 :                                 :
                 :                                 :
                 :                                 :

    Notes:

                    Correct? (Y,N,E,D,T):     █
            Update? (Y)es, (N)o, (E)xit, (D)elete, or change no(T)es
                    F1=Help   F2=FFwd   F3=Bkup   F4=Eras
```

16.   Repair History

The Repair History screen will display all historical repair information that is related to this customer or truck number. This is the same screen as the Work Order Inquiry from History Screen.

```
AUTOPOWER
01/26/2015              Vehicle Maintenance            VM.VMAINT

   Customer.......: 506675   -  ATKINSON TRUCK SERVICE
   Truck Number...: 15

   1) Make........: FORD           8) PM Frequency..: 60
   2) Model.......: RANGER         9) PM Mileage....: 3500
   3) Year........: 1995          10) Last PM Date..: 01/26/15
   4) VIN #.......: JHL65958545   11) Next PM Date..: 03/27/15
   5) Tag Number..: JHL659        12) Nxt PM Mileage: 253500
   6) Mileage.....: 250000        13) Last DOT Insp.: 01/26/15
   7) Mileage Date: 01/26/15      14) Next DOT Insp.: 01/26/16

  15) Assembly Detail.:   Present
  16) Repair History..:   Present
  17) Repairs Needed..:
  18) Notes...........:




                 Accept? (Y,N,E,D,#):  █

             F1=Help   F2=FFwd   F3=Bkup   F4=Eras
```

Type in #16 and press **ENTER**.

The screen to enter your branch location will display. The location will default Press **ENTER**.

The branch location default will display. Press **ENTER**. Type in **Y** for Correct? and press **ENTER**.

```
                        A  U  T  O  P  O  W  E  R




            ┌─────────────────────────────────────────────────────────────┐
            │ Enter Branch:   W1   APC CORP              Correct? (Y,N,E):  │
            └─────────────────────────────────────────────────────────────┘









                    F1=Help    F2=FFwd   F3=Bckup  F4=Erase
```

The Work Order Inquiry from History screen will display as shown below.

```
 AccuTerm 7                                                          _  □  ✕
File Edit View Tools MultiValue Window Help
10/08/2015              Work Order Inquiry From History        IN-WOINQ-HIST

Work Order:              Vehicle:              Operation.:
Customer..: 506675 - ATKINSO VIN....: JHL65958545   Start Date:
Contact...:

                                      Status.....:
             Est. Parts:              Bill Method:
             Est. Labor:              WO Type....:
             Est. Hours:              Inv Date...:

 ----------------------------------------------------------------------------
 1.  365756  506675 ATKINSON TRUCK SERVICE    1995 FORD RANGER JHL65958545 JHL6
         Change Oil and Replace Oil Filters. CHECK THE FOLLOWING AND TOP OFF







                 Enter Item Number above, or press <Enter>:  ▌
                   F1=Help   F2=FFwd    F3=Bkup    F4=Eras
```
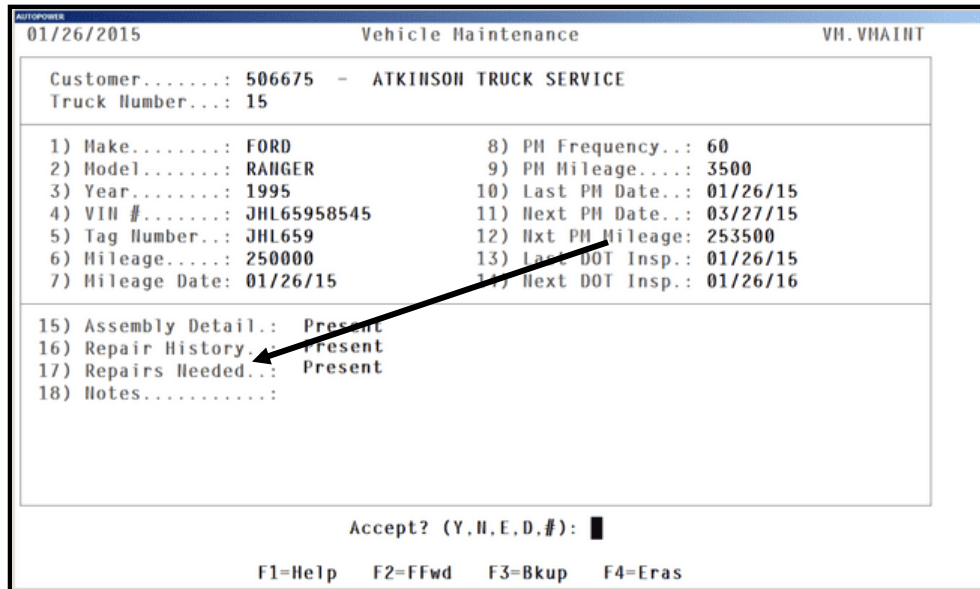
After pressing **ENTER** the Work Order Inquiry screen will display with a list of history records. Type in the line item number for the record you would like to view and press **ENTER**. The Work Order Record will display.

If there are no history records to display press **ENTER** and the cursor will move to the Work Order Number field. Type in the work order number that you would like to view. The option to view the work order by entering the customer number, vehicle number and work order operation is also available.

Enter Item Number above, RETURN for next page, or (Q)uit:

Type in **Q** and press **ENTER** to return to the Vehicle File Maintenance Screen.

17. **Repairs Needed**

The person in the shop can type in the repairs that are needed for this vehicle that may have been suggested to the customer and they will display here. Press **ENTER** to exit the text box.

18.   Notes

Type in #18 and press **ENTER** to access the Notes screen.

The Notes screen will display a text box (shown below) allowing you to type in free form information that may be necessary to keep about the vehicle. You must press **ENTER** when you have completed typing in your information in the text box. Then press **Y** to save your information. These notes do not print on any document.

It's time for another short Quiz!

1.   The Vehicle File Maintenance Program stores specific information to each vehicle by customer and vehicle number. Having this information at hand can assist your company in providing a variety of services for individual and fleet customers.

True or False

2.   The current mileage is used to schedule future preventative maintenance. You update the mileage here when the vehicle is returned to the shop.

True or False

3.   List 3 items that the Vehicle File Maintenance program will allow you to record for a particular vehicle.

      A.

      B.

      C.

4.   If you perform a repetitive job on the same vehicle that uses the same parts over and over, you can create an assembly detail template. Then in the future you will have all the information available without searching in inventory inquiry for each part that is necessary to complete the task at hand.

True or False

5.   The Repair History screen will display all historical repair information that is related to a customer or work order.

True or False

We have now completed the Vehicle File Maintenance screens.

Now let's start using some of this file maintenance that we have been setting up.

Processing Work Orders

Processing work orders is the key operation in the **VSSR** system. When work orders are created and processed, they rely on all of the information recorded in the file maintenance programs.

Work Order Process step-by-step

- Customer comes into the shop requesting work to be done on a particular vehicle.

- The shop accesses the job.

- A work order is entered into the system. ******Only one Vehicle can be added to a particular work order.**

- The work order begins with a status of "**Q**" for a quote.

- One or more operations are added to the work order. These are the jobs that need to be performed.

- Estimated parts and labor are added to the quote.

- The quote is then presented to the customer.

- The customer will accept or reject the quote. If the quote is rejected the work order quote needs to be cancelled.

- If the customer approves the quote, the work order is release to the shop.

- At this point the work order status has changed from a status of Q for Quote to a status of W for Work in Progress.

- After the work order has been released to the shop, more operations may be added along with parts and labor as the work is performed.

- As each job operation is completed the operation is closed.

- Once ALL operations have been closed the work order may be invoiced.

Work Order Flow Chart

Shop personnel create a quote or estimate that is printed or faxed to the customer, who may accept or reject it.

Rejected quotes are cancelled in the system.

Parts and labor are added to the work order as shop work is performed.

Customer and Vehicle History files updated.

The Vehicle Shop Work Order process begins when a customer requests a repair and it is entered in the system.

Work Order Screens Flow Chart

Remember: Only one Vehicle per order in Vehicle Shop.

```
Order Entry -        Order Entry -        Order Entry -        Order Entry -
Look Up      →       Part Entry    →      Totals        →      Options
```

```
                     F6 Vehicle
                     Shop
```

```
Operation 1          Operation 2          Operation 3
Oil Change           Tire Rotation        Engine Rebuild

FR                   FRL                  TM
Flat Rate            Flat Rate Labor      Time & Materials
```
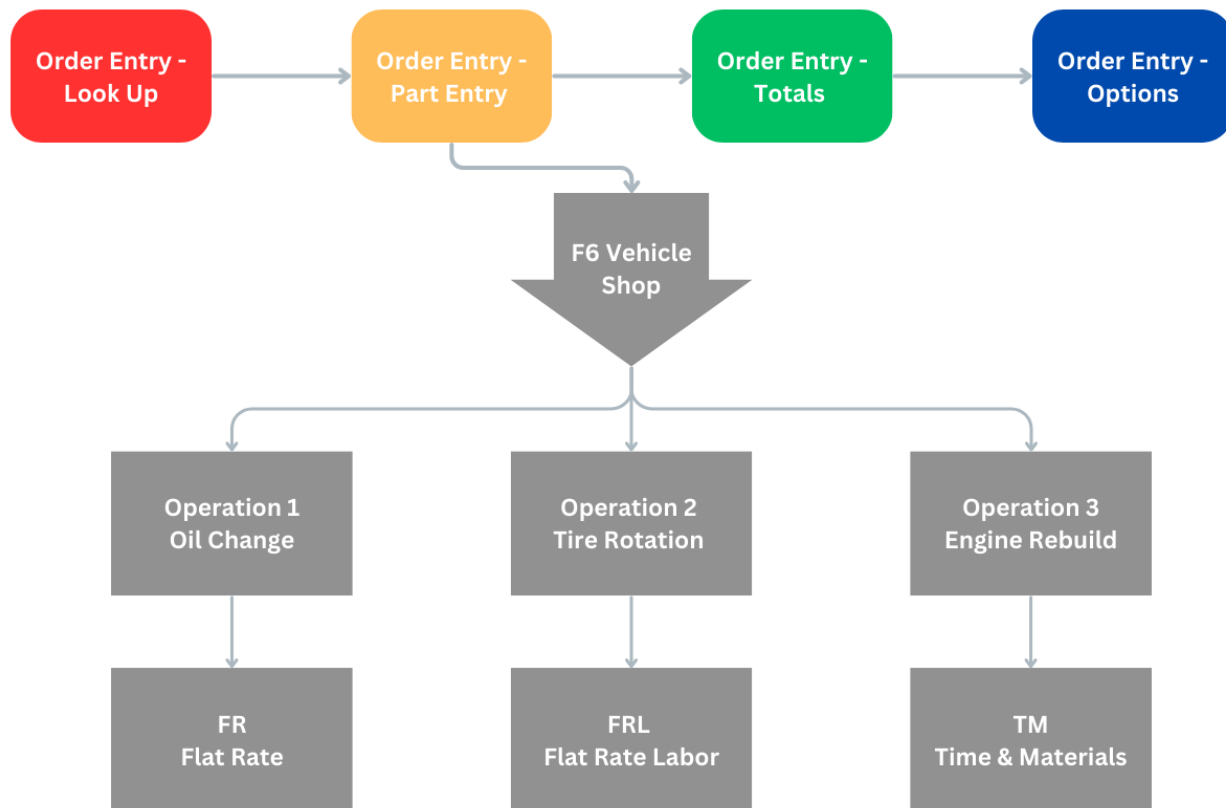
Notes:

As a General Rule.

Labor Line Entries must be associated with a specific mechanic(s). Labor on a Vehicle Shop Service & Repair Ticket must be entered into their corresponding operation.

<u>Do Not Enter Labor as a line item in the Order Entry Parts screen</u>. Entering Labor in the Order Entry Parts screen will result in several problems.

1. Labor will not be associated to a particular mechanic.
2. Labor will not calculate properly when invoicing the work order.

Accessing the Vehicle Shop Entry Program

From the Main Menu, **Type in #3** and press **ENTER**, to go to Work Order Management Menu.

From the Work Order Management Menu, **Type in #2** and press **ENTER**, to go to the Vehicle Service menu.

From the Vehicle Service Menu, **Type in #1** and press **ENTER**, to go to the Work Order Entry screen.
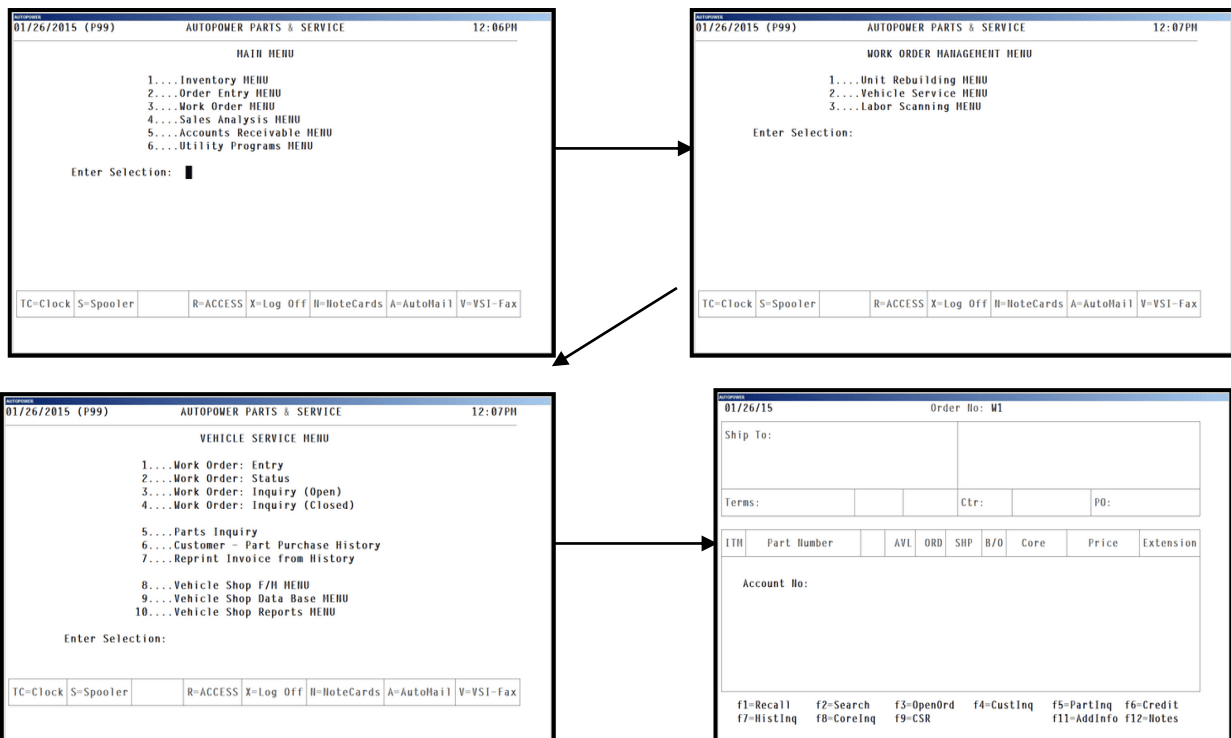
Order Entry Screen

```
AUTOPOWER
01/26/15                    Order No: W1

Ship To:



Terms:                          Ctr:              PO:


ITM    Part Number        AVL        Type in the Customer account number
                                     and press ENTER. Then type in your
     Account No: █                   operator number and press ENTER.



    f1=Recall    f2=Search   f3=OpenOrd   f4=CustInq   f5=PartInq  f6=Credit
    f7=HistInq   f8=CoreInq  f9=CSR                     f11=AddInfo f12=Notes
```

If you do not know the customer account number, you can also perform a
.search to select the customer from a listing as shown below.

```
01/26/15                    Order No: W1

Ship To:


         Customer Search                                            x

         Search String:  AUTOPOWER        5 Customers found.
         CUSTNO  LOC  NAME              CITY        ST   ZIP     PHONE
Terms:   1001    W1  AUTOPOWER CORP    LAKE MARY    FL   32746
         999999  W1  AUTOPOWER CUSTOMER LAKE MARY   FL   32746   407-695-7300
         1003    W1  AUTOPOWER CUSTOMER ORLANDO     FL   32801
         999999-2 W1 AUTOPOWER CUSTOMER LAKE MARY   FL   32746   407-695-7300
ITM  Part Number 999999-1 W1 AUTOPOWER CUSTOMER #2 LAKE MARY FL 32746        Extension


Enter Name:




                                            Select    Cancel

```

The Parts Entry screen will display.

The Vehicle Shop Service Repair Screen will display.

```
AUTOPOWER
W1*365657                    Shop Work Order                    IN-W40

 Customer: 1001 - AUTOPOWER CORP          Date Entered.....: 01/26/15
 1. Vehicle No....:  █       Mil'ge:   5. Date Promised....: 01/29/15
    Yr/Make/Model.:                    6. Date Scheduled...:
 2. Service Writer: 0 - JOHN SMITH      7. Date Released....:
 3. Contact Name..:                    8. Date Finished....:
 4. Contact Phone.:                    9. Date Shipped.....:



                  There are no operations on this work order




         Enter the vehicle number, "Vxxx" to search by VIN, or ?|F1
```

The Customer Account number and name will display in the **customer field**.

The **Date Entered** field will display the current date that you are entering this shop work order.

The cursor will advance to the Vehicle No. field.

Field Descriptions

Vehicle No.

1.   Type in the Vehicle Number that you will be servicing and press **ENTER**. If you do not know the Vehicle Number nor does your customer, you can type in a ? to list all of this customer's vehicles. Use the arrow key to select the vehicle you will be servicing and press **ENTER**. You can also search by VIN Number.

Service Writer (defaults from work order entry)

2.   Type in the Service Writer number and press **ENTER**. This is your operator number.

Contact Name

3.   Type in the name of the person who you can contact regarding service to this vehicle and press **ENTER**.

Contact Phone

4.   Type in the contact person's phone number and press **ENTER**.

Date Promised (optional)

5.   Type in the promise date that the vehicle will be repaired if it will be different than the date that will automatically displayed (This date is calculated three days after the order date) and press **ENTER**. This entry is optional.

Date Scheduled (optional)

6.   Type in the scheduled finish date for the work to be completed and press **ENTER**.

Date Released (optional)

7.   The date that the work order is released to the shop will automatically display.

Date Finished (optional)

8.   Type in the date that the work order is finished and press **ENTER**.

Date Shipped (optional)

9. Type in the date that the vehicle was shipped and press **ENTER**.

```
AUTOPOWER
W1*365657                    Shop Work Order                    IN-W40

Customer: 1001 - AUTOPOWER CORP              Date Entered.....: 01/26/15
1. Vehicle No....: 1          Mil'ge:        5. Date Promised....: 01/29/15
   Yr/Make/Model.: 95 FORD RANGER            6. Date Scheduled...:
2. Service Writer: 0 - JOHN SMITH            7. Date Released....:
3. Contact Name..: JOE MANN                  8. Date Finished....:
4. Contact Phone.: 407-555-6985              9. Date Shipped.....:




                There are no operations on this work order




        (N)ew Operation, Ship(T)o, (V)ehicle, (E)dit, (R)eports
        (C)omment, (I)nternal Note, (U)pdate, #: █
```

> Let's cover the options at the bottom of the Shop Work Order Screen.

E = **New Operation** – To add a new operation to the work order, type in **N** and press **ENTER.**

T = Shipto – To change the Shipto on this Shop work, type in **t** and press **ENTER**.

V = **Vehicle** – To add or change a Vehicle for this Shop Work Order , type in **V** and press **ENTER**.

E = Edit – To edit the operation, type in **E** and press **ENTER**. If there are more than one operation on the work order type in the **E** plus the line item number to be edited and press **ENTER**.

r = Reports – To print a work order or reports type in **r** and press **ENTER**.

C = Comment – To add or view comments, type in **C** and press **ENTER**. A text box will display so that you can type in your comments. **These comments will print on the work order.**

I = **Internal note** – To add, edit, or view **internal notes**, type in **I** and press **ENTER**.

U = Update – To update a work order type in **U** and press **ENTER. This update option is very important.** This will update the entries on the page.

Adding a New Operation to a Work Order

To add a new operation to the work order:

With the cursor at the bottom of the screen, type **N** for New Operation and press **ENTER**.

The Shop Operation Maintenance screen will display as shown below.

```
W1*365760              Shop Operation Maintenance           No:   1

Customer..: 1001 - AUTOPOWER CORP              Status...: Q
Make/Model: 95 FORD RANGER     M'ge: 25252   5. Prt Parts: Y     PL: N
1. Operation.....:                           6. PO Number:
2. Billing Method: FR                        7. WO Type..: R - Retail
3. Labor Code....:                           8. Dept.....: 1 - SALES
4. Est.Prts:        Labor:        Hrs:       9. Stage....: Assembly

    Billing Totals        Shop Cost     12. Complaint......:
   ------------------------- ----------  13. Cause..........:
    Parts.......:                        14. Work Performed.:
    Cores.......:                        15. Work Recommend.:
    Labor.......:                        16. Int Shop Msg...:
    Tax,Fees....:        5.00            17. Warranty Type..:

10. Freight In..:                        18. Environmental..: 5.00
11. Freight Out.:                        19. Shop Supplies..:
                    ---------- ----------
    Total.......:        5.00            Date Entered.......: 10/08/15
    GM= 100.00%                          Date Last Chg......: 10/08/15


         Enter Job Code, ?|F1-Lookup, or dot.search
```

Field Descriptions

The **Customer field** is automatically populated by the system and cannot be changed.

The **Status field** is automatically with the initial status of "Q" for Quote. (The status changes to "W" when the work order is released to the shop and "C" after the operation has been closed.)

The **Vehicle Make/Model field** is automatically populated by the system based on the vehicle number entered on the Shop Work Order Screen.

Operation

1.   Type the code representing the operation to be performed in the operation field.
You can also type in a "?" or F1-Lookup, or a dot-search to see the operation codes that were created in Type of Operation File Maintenance screen.

It is recommended that you create at least one general work operation code and at least one general labor code. The more operations and labor code that are created will determine how much detail will print on your mechanics and labor productivity reports. The description of the operation code will print on the estimate and the final invoice.

Billing Method (Required)

2. The Billing Method field is automatically populated by the Type of Operation record entered. The billing method may be changed for an individual operation. There are three possible Billing Methods: (Required). You may use different billing methods on each operation.

TM -= Time and Materials, **FR** = Flat Rate, and **FRL** = Flat Rate Labor

FR – Utilizes the estimated Parts & Labor fields – No exception. If the FR billing method is used, you must have parts and labor on the order. It is a preset price for a specific job. Fixed Rates are usually analyzed through research on past history of the same type of job. A FR means that the customer is charged a single fixed price rate for both the labor and parts purchased regardless of the actual hours or parts utilized for the job. This Fixed price is displayed as an ESTIMATE price on field 4.

FRL – Utilizes the estimated labor field only and charges for the actual parts. It is a set Labor Rate that is preset for the specific job. The labor code supercedes the mechanics labor rate always. The customer will be charged a fixed labor rate regardless of how much time is entered on the job and charged the actual price of the parts purchased.

TM – Utilizes the actual parts and labor fields and is calculated based on the labor code from F1 – Enter Labor. If Labor code is missing, the labor rate will be calculated based on the mechanics rate. The estimated fields are ignored with this billing method. The customer is charged for all hours of labor that was performed and the parts utilized for the particular operation. If the Labor code is present or entered manually, the system will use the labor rate and override the mechanics rate.

Labor Code

3. The Labor Code is automatically populated by the specified operation. It can be changed. The labor code may be changed for an individual operation. This labor code will override the labor code added in labor line item entry. This will effect how the customer is being billed. The Labor code will automatically populate if the Operation code has a Labor code attached to it. Type the Labor code in the labor code field or type in a "?", F1-Lookup or a dot.search to view the available labor codes.

Note: Labor Code Rates always Overrides the Mechanic Labor Rate.

Should there be operations that are on a Time and Material billing method, the Labor Code should have a 0.00 dollar amount as the rate or omit the labor code all together. This will then force the program to require a labor code per mechanic each time labor is entered. This is beneficial if the type of operation requires multiple labor rate values.

Est. Parts/ Estimated Labor

4. Type in the estimated cost of **parts, labor** and **hours** for this shop operation. Estimates may come from personal knowledge or from a parts/labor guide or what was originally setup in the labor code file maintenance. Estimate Parts and labor are present if the Operation is billed as a Flat Rate (FR) or a Flat Rate Labor (FRL). The estimated dollar amounts are setup in the operation codes. These rates are usually analyzed through research of past history of the type of Job and/or perhaps a mechanic automotive guide.

Prt Parts

5. Type in **Y** at **Prt Parts** if you would like the part details to print on the invoice. Type **N** if you want a summary of the parts to print. Default is **Y**.

PL = Print Labor Details

Type in **Y** if you want the labor details to print on the invoice. Type in **N** if only a summary of the labor is to print on the invoice. Default is **N**.

These flags work in conjunction with the billing method as to what specific detail will print on the invoice.

PO Number

6. Type in the Customer **PO Number** that has been assigned to this shop operation that is being performed. There is a limit of one PO number per operation.

WO Type

7. Type in the **Work Order** type. Type in **R** for Retail, **W** for Warranty or **I** for Internal. The letter **R** for Retail will default.

    Internal Service is considered internal work that is done on the company's vehicles. There is a specific setup required for the Internal Service type work. A separate customer file for Internal Shop should be created in the Customer Master File. Don't use W1, W2 or W3 so forth. This Internal Shop customer should have terms setup as "IS" for Internal Service. A terms code would also need to be created as "IS" in the terms code file maintenance. There is also a setup related to Internal Service shop work orders that will need to be handled through your accounting dept for general ledger purposes.

    Internal customers (I) will need to create a new account # to use. They cannot use W1, W2, etc. The A/R G/L Interface table will determine where these type of work orders will post the cost in the general ledger. The Internal Shop customer will have payment terms of "IS" so that these type of work orders will post to the general ledger with inventory changes but doesn't post to A/R.

Dept (Required)

8. The **Department #** that should receive the revenue and sales for the job will default. The department codes were created in the Department Table File Maintenance that we covered in previous section.

Stage (Optional)

9. **Type in #9 for the Work Operation Stage field.** Use the arrow keys to select the current stage of this job that you are entering. The stage options are setup in the Work Order Stage Table File Maintenance. If the Stage Table File Maintenance is not setup then field #9 will not be accessible to the service writer. This is not an automated feature. As the stage of the job changes, this field must

be updated manually to inform the customer about the progress that is being made to complete the job.

```
AUTOPOWER
W1*365657              Shop Operation Mai

Customer..: 1001 - AUTOPOWER CORP
Make/Model: 95 FORD RANGER      M'ge:
1. Operation.....: AIR - AIR CONDITIONING
2. Billing Method: FR
3. Labor Code....: AIR-AIR CONDITIONING 75.0
4. Est.Prts: 175.00   Labor: 225.00   Hrs: 3

   Billing Totals          Shop Cost    1
   ------------------------ ----------  13. Cause.........: Freon Level is
   Parts.......:   175.00               14. Work Performed.: Check Freon an
   Cores.......:                        15. Work Recommend.: Recommend repl
   Labor.......:   225.00               16. Int Shop Msg...:
   Tax.Fees....:    37.00               17. Warranty Type..:

10. Freight In..:                       18. Environmental..: 25.00
11. Freight Out.:                       19. Shop Supplies..: 3.00%  12.00
                    ========== =========
   Total.......:   437.00               Date Entered.......: 01/27/15
   GM= 100.00%                          Date Last Chg......: 01/27/15

        (V)ehicle, (P)arts & Labor, (U)pdate, (A)ppointments
             Release (W)O, (C)lose, (DELETE), #: █
```

The Billing Totals fields contain the total dollar amount to be billed to the customer. Determined by the Billing Method.

Billing Totals and Shop Cost (System Generated)

This is the information pertaining to how the customer will be billed and what will print on the invoice.

```
AUTOPOWER
W1*365657              Shop Operation Maintenance          No:  1

Customer..: 1001 - AUTOPOWER CORP              Status...: Q
Make/Model: 95 FORD RANGER      M'ge:       5. Prt Parts: Y     PL: N
1. Operation.....: AIR - AIR CONDITIONING   6. PO Number: 9535
2. Billing Method: FR                       7. WO Type..: R - Retail
3. Labor Code....: AIR-AIR CONDITIONING 75.00/hr  8. Dept.....: 1 - CTRSALES
4. Est.Prts: 175.00   Labor: 225.00   Hrs: 3.00   9. Stage....:

   Billing Totals          Shop Cost    12. Complaint.....  A
   ------------------------ ----------  13. Cause.........: Fr
   Parts.......:   175.00               14. Work Performed.: Ch
   Cores.......:                        15. Work Recommend  Re
   Labor.......:   225.00               16. Int Shop Msg...:
   Tax.Fees....:    37.00               17. Warranty Type..:

10. Freight In..:                       18. Environmental..: 25
11. Freight Out.:                       19. Shop Supplies..: 3.
                    ========== =========
   Total.......:   437.00               Date Entered.......: 01
   GM= 100.00%                          Date Last Chg......: 01

        (V)ehicle, (P)arts & Labor, (U)pdate, (A)ppointments
             Release (W)O, (C)lose, (DELETE), #:
```

These items will print on the customers documentation such as quotes and invoices.

```
AUTOPOWER
W1*365657              Shop Operation Maintenance              No:  1

Customer..: 1001 - AUTOPOWER CORP              Status...: Q
Make/Model: 95 FORD RANGER       M'ge:      5. Prt Parts: Y      PL: N
1. Operation.....: AIR - AIR CONDITIONING     6. PO Number: 9535
2. Billing Method: FR                         7. WO Type..: R - Retail
3. Labor Code....: AIR-AIR CONDITIONING 75.00/hr  8. Dept.....: 1 - CTRSALES
4. Est.Prts: 175.00    Labor: 225.00   Hrs: 3.00  9. Stage....:

    Billing Totals          Shop Cost    12. Complaint.......: AIR NOT COLD
    ------------------------ ---------    13. Cause..........: Freon Level is
    Parts.......:     175.00              14. Work Performed.: Check Freon an
    Cores.......:                         15. Work Recommend.: Recommend repl
    Labor.......:     225.00              16. Int Shop Msg...:
    Tax.Fees....:      37.00              17. Warranty Type..:

10. Freight In..:                         18. Environmental..: 25.00
11. Freight Out.:                         19. Shop Supplies..: 3.00%   12.00
                     ========== =========
    Total.......:     437.00              Date Entered.......: 01/27/15
    GM= 100.00%                           Date Last Chg......: 01/27/15

        (V)ehicle, (P)arts & Labor, (U)pdate, (A)ppointments
              Release (W)O, (C)lose, (DELETE), #:
```

General Ledger gets updated with these sales dollar figures.

Parts: The total amount for the parts being billed and the total cost of actual parts added to the operation.

Cores: The total selling price and cost of cores attached to parts on the operation.

Labor: The total amount of the labor being billed and the total cost of actual labor added to the operation.

10. Type in the **Freight In field** the amount of incoming freight related to the operation being billed.

11. Type in the **Freight Out field** the amount of outgoing freight related to the operation being billed.

If you have an operation on the work order you must enter freight within the operations and not in the Totals Screen in Order Entry.

Total   The total for Billing Totals and Shop Cost calculated by the system.
GM   This is the Gross Margin Percent for the job that is being performed is also calculated by the system.

12. **Customers Complaint:**

    Type in #12 and press **ENTER**. The Complaint text window will display. Type in the complaint the customer provides about the problem. This will print on the work order. After typing in the information Click OK.
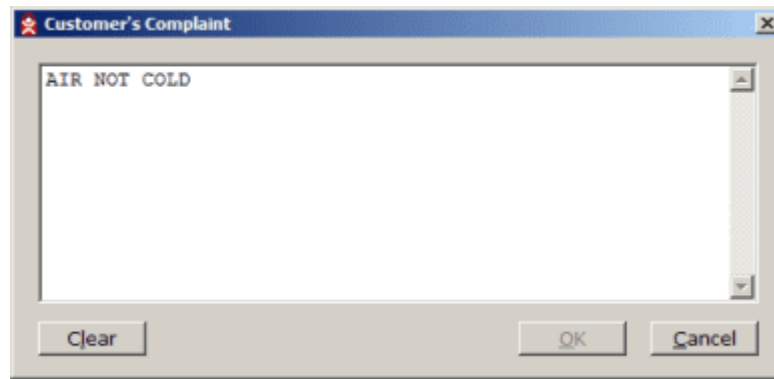
13. **Problem Diagnosis or Cause:**

> **Type in #13** and press **ENTER**. The Cause text window will display. Type in the Cause of the problem. This will print on the work order and invoice. When you have finished entering the information Click OK.
> The Internal Technician Notes does not print on any Work Order document.
> The Problem Diagnosis or Cause does print on the Work Order documents.
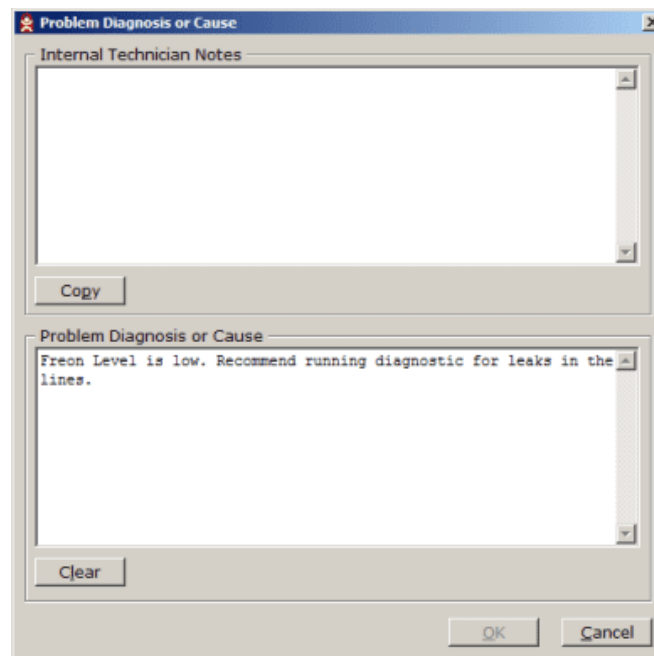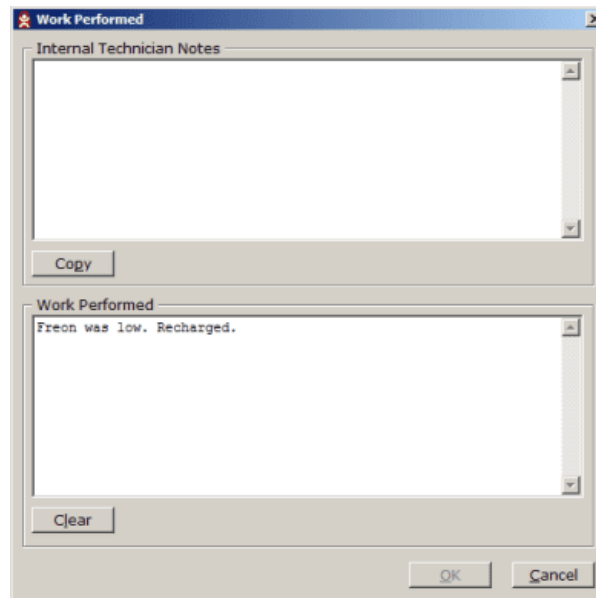
14. **Work Performed:**

> **Type in #14** and press **ENTER**. The Correction text windows will display. Type in the correction for the complaint/problem. This will
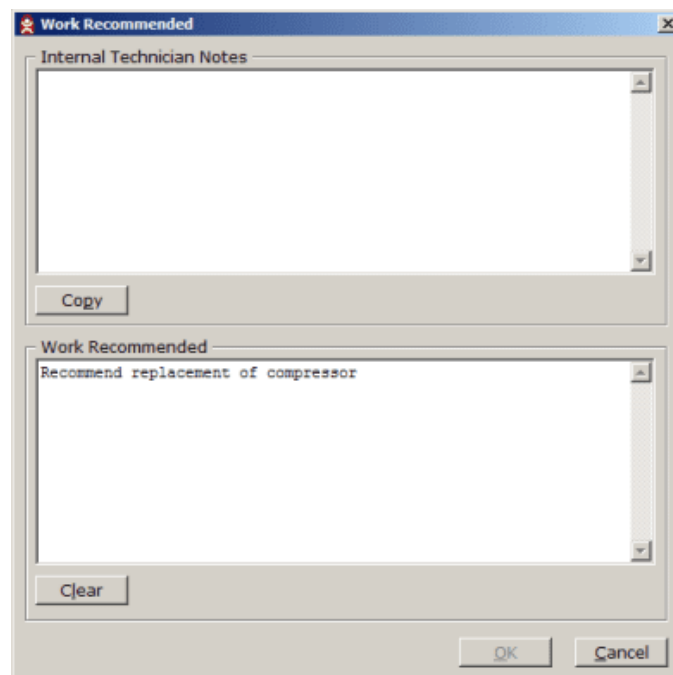
print on the work order and invoice. When you have finished entering the information Click on the **Ok** button.

15. **Work Recommended:**

   Type in #15 and press **ENTER**. The Work Recommended window will display. Type in the work that is recommended to be performed on the vehicle. This information will print on the work order and can be mailed or faxed to the customer. When you have finished entering the information Click the **OK** button.

> **The Complaint, Cause, Correction and Work Recommended that are typed in by you in #12 - #15 will PRINT on the INVOICE.**

16. **Internal Mechanic/Shop Notes**

   Type in #16 and press **ENTER**. The Internal Notes text window will display. The information about the work that is to be performed. **This will not print on the work order or invoice. These are Internal Mechanic Notes.**

17. **Warranty Job:**

   Type in #17 and press **ENTER** if this is a warranty job. Type a "?" the warranty type window will display listing the warranty types that are available for this operation. Use the arrow keys to scroll to the warranty type that you would like to assign to this job and press **ENTER**. Based on the Warranty Code the warranty paragraph will be printed on the invoice. The Warranty type file maintenance

has to be setup for this feature to correctly display. The Warranty Info field will display the detailed information pertaining to the warranty that is being extended for this job.

18. **Environmental Fees:**

Type in the dollar amount for any **Environmental Fees** charged for this Operation and press **ENTER**.

19. **Shop Supplies:**

Type in the Percentage amount to be charged for **Shop Supplies**. This percentage can also be established with an Operation code.

The **Date Entered** and **Date Changed** will be automatically updated by the system.

If you see an "Alert Message" pointing to an operation, this is to let you know your current selling amount is greater than the estimate amount.

It's time for another Quiz!

1. When a customer comes in the door requesting that work be done you:

    A. Run
    B. Access the Order Entry Screen in Vehicle shop. Ask the customer his account number, or you search for his account and then you type in your Operator number. Press the F6 function key and start at the Vehicle Number field to start a new work order.
    C. You wait for your co-worker to help out the customer.

2. At the Vehicle Number field if you do not know the vehicle number that you will be servicing nor does the customer how do you find it?

    A. Ask the Customer if the number is located on the vehicle.
    B. Type in a ? and use the arrow key to select the vehicle from the list of this customer's vehicles that maybe recorded in the system.
    C. If you cannot locate the vehicle number in the system by doing a search, you can add it from this point.
    D. All of the Above

3. To add a new operation to this work order you must type in:

    A. You must type in the letter **N** and press **ENTER**.
    B. You must exit the Shop Operation Maintenance screen and go into Order Entry.
    C. Type in the letter **S** for start a new operation.

4. The initial status of a work order is **Q** for Quote.

True or False

5. The status of a work order when it has been released to the shop is a **W** for Work in Process.

True or False

6. More than one operation cannot be added to a single work order.

True or False

7. If you would like to print the parts detail on the invoice you must answer **N** in the Prt Parts field.

True or False

8. On the Shop Operation Maintenance screen when you are adding a new operation you can type in a Complaint, Cause and a Correction and these will not print on the invoice.

True or False

9. Any additional repairs that may be needed to your customer's vehicle can be typed in a text box and will print on the invoice.

True or False

Notes:

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

Options at the bottom of the Shop Operation Maintenance Screen

```
AUTOPOWER
W1*365657               Shop Operation Maintenance                No:  1
Customer..: 1001 - AUTOPOWER CORP              Status...: Q
Make/Model: 95 FORD RANGER       M'ge:      5. Prt Parts: Y      PL: N
1. Operation.....: AIR - AIR CONDITIONING     6. PO Number: 9535
2. Billing Method: FR                          7. WO Type..: R - Retail
3. Labor Code....: AIR-AIR CONDITIONING 75.00/hr 8. Dept.....: 1 - CTRSALES
4. Est.Prts: 175.00   Labor: 225.00   Hrs: 3.00  9. Stage....:

   Billing Totals          Shop Cost      12. Complaint......: AIR NOT COLD
   --------------------    ---------      13. Cause..........: Freon Level is
   Parts.......:    175.00                14. Work Performed.: Freon was low.
   Cores.......:                          15. Work Recommend.: Recommend repl
   Labor.......:    225.00                16. Int Shop Msg...: May need a new
   Tax,Fees....:     37.00                17. Warranty Type  :
10. Freight In..:                         18. E
11. Freight Out.:                         19. S
                   ========== =========   Date
   Total.......:    437.00                Date Last   ng......: 01/27/15
   GM= 100.00%

        (V)ehicle, (P)arts & Labor, (U)pdate, (A)ppointments
              Release (W)O, (C)lose, (DELETE), #: ▮
```

Shop Operation Maintenance Options

Let's discuss these options briefly and then we will discuss them one by one.

V =   Vehicle
Type in **V** and **press ENTER** to access the Vehicle File Maintenance program. This is where you would update the vehicle mileage for warranty tracking purposes and any other detailed information related to the vehicle.

P =   Parts & Labor
Type in **P** and press **ENTER** to access the Parts & Labor screen. Type in the Parts & Labor on this Operation.

U =   **Update**
Type in **U** and press **ENTER** to update and save the current information and to exit the program. Very Important.

A =   **Appointments**
Type in **A** and press **ENTER** to setup a new/shop appointment on the calendar.

W =   **Release W/O**
Type in **W** and press **ENTER** to release the work order to the shop. Work orders maintain a Quote status until they are released. When the work order is released, the status changes to Work In Progress and the inventory will be reduced committed to this workorder.

C =   Close
Type in **C** and press **ENTER** to close the work order.

Note: You cannot close an operation if any of the following conditions apply:

The work order is in a Quote status.
The work order has labor scanned in that has not been scanned out.
The work order has labor clocked in that has not been clocked out.

Delete
Type the word "**DELETE**" to delete the work order.

Vehicle

```
AUTOPOWER
W1*365657                    Shop Operation Maintenance                    No:  1

Customer..: 1001 - AUTOPOWER CORP              Status...: Q
Make/Model: 95 FORD RANGER        M'ge:      5. Prt Parts: Y    Pl: N
1. Operation.....: AIR - AIR CONDITIONING     6. PO Number
2. Billing Method: FR                         7. WO Type..
3. Labor Code....: AIR-AIR CONDITIONING 75.00/hr  8. Dept.....
4. Est.Prts: 175.00    Labor: 225.00   Hrs: 3.00  9. Stage....

   Billing Totals           Shop Cost      12. Complaint......
   --------------------------  ---------   13. Cause.........
   Parts.......:      175.00               14. Work Performed.
   Cores.......:                           15. Work Recommend.
   Labor.......:      225.00               16. Int Shop Msg
   Tax,Fees....:       37.00               17. Warranty Type..:

10. Freight In..:                          18. Environmental..: 25.00
11. Freight Out.:                          19. Shop Supplies..: 3.00%  12.00
                    ==========  ========
   Total.......:      437.00               Date Entered.......: 01/27/15
   GM= 100.00%                             Date Last Chg......: 01/27/15

          (V)ehicle, (P)arts & Labor, (U)pdate, (A)ppointments
              Release (W)O, (C)lose, (DELETE), #: █
```

> Type in the letter **V** and press **ENTER** to access the Vehicle Maintenance Screen.

The screen below will display.

> How to use this screen has been previously discussed.

```
AUTOPOWER
01/27/2015                     Vehicle Maintenance

   Customer.......: 1001  -  AUTOPOWER CORP
   Truck Number...: 1

   1) Make........: FORD          8) PM Frequency..: 60
   2) Model.......: RANGER        9) PM Mileage....: 3500
   3) Year........: 95           10) Last PM Date..: 01/26/15
   4) VIN #.......: JHL65958545  11) Next PM Date..: 01/26/15
   5) Tag Number..: JHL525       12) Nxt PM Mileage: 253500
   6) Mileage.....: 250000       13) Last DOT Insp.: 01/26/15
   7) Mileage Date: 01/26/15     14) Next DOT Insp.: 01/26/16

   15) Assembly Detail.:
   16) Repair History..:
   17) Repairs Needed..:
   18) Notes...........:



                    Accept? (Y,N,E,D,#): █

        F1=Help    F2=FFwd    F3=Bkup    F4=Eras
```

Parts & Labor

```
AUTOPOWER
W1*365657                 Shop Operation Maintenance              No:   1

Customer..: 1001 - AUTOPOWER CORP              Status...: Q
Make/Model: 95 FORD RANGER      M'ge: 250000   5. Prt Parts: Y    PL: N
1. Operation.....: AIR - AIR CONDITIONING      6. PO Number: 9535
2. Billing Method: FR                          7. WO Type..:
3. Labor Code....: AIR-AIR CONDITIONING 75.00/hr  8. Dept.....:
4. Est.Prts: 175.00   Labor: 225.00  Hrs: 3.00    9. Stage....:

   Billing Totals          Shop Cost    12. Complaint......:
   ---------------------   ---------    13. Cause.........:
   Parts.......:    175.00              14. Work Performed.
   Cores.......:                        15. Work Recommen
   Labor.......:    225.00              16. Int Shop Msg...: May need a new
   Tax.Fees....:     37.00              17. Warrant Type...:

10. Freight In..:                       18. Environmental..: 25.00
11. Freight Out.:                       19. Shop Supplies..: 3.00%   12.00
                         ========== =========
   Total.......:    437.00             Date Entered.......: 01/27/15
   GM= 100.00%                          Date Last Chg......: 01/27/15

        (V)ehicle, (P)arts & Labor, (U)pdate, (A)ppointments
            Release (W)O, (C)lose, (DELETE), #: P█
```

Type in **P** and press **ENTER** to access the Parts & Labor screen.

```
AUTOPOWER
W1*365657                 AIR CONDITIONING              Quote #1 (FR)

100  - AUTOPOWER CORP    E.Parts:    175.00 E.Labor:    225.00 E.Hrs:    3.00
1 - FORD RANGER 95       A.Parts:           A.Labor:

                                        B/O   Core



f1=EnterLabor f2=ListAll f3=List% f4=ListLabor f5=List
```

Location # and Work Order Number.

Quote Status for Operation #1

E. Parts = Estimated Parts
E. Labor = Estimated Labor
E. Hrs = Estimated Hours

A.Parts = Actual Parts
A.Labor = Actual Labor
A.Hrs = Actual Hours

```
AUTOPOWER
W1*365657                        AIR CONDITIONING                Quote #1 (TM)

1001 - AUTOPOWER CORP      E.Parts:    175.00 E.Labor:    225.00  E.Hrs:    3.00
1 - FORD RANGER 95         A.Parts:     75.90 A.Labor:    225.00  A.Hrs:    3.00

Itm    Part Number     DPT  AVL  ORD  SHP  B/O    Core       Price    Extension

1     MIS R-134A                   2    2    0     0.00      25.00       50.00
2     AIR-AIR CONDITIO/JOHN SMITH 1.00                       75.00       75.00
3     AIR-AIR CONDITIO/JOHN SMITH 2.00                       75.00      150.00
4     ▮




f1=EnterLabor f2=ListAll f3=List% f4=ListLabor f5=ListCost f6=Catalog f7=TfrLI
```

Let's take a look at the Parts & Labor Entry.

- In the left hand corner we see the location W1 and this work order # 365657.

- The Work order is now in a Quote status on operation #1. TM

- This customer is customer #1001.

- The estimated parts dollar amount for the operation we selected is $175.00.

- The estimated labor dollar amount for the operation is $225.00 for estimated 3 hours.

- When parts and labor are added to the work order the actual parts and actual labor amounts will fill in.

```
AUTOPOWER
 W1*365657                    AIR CONDITIONING              Quote #1 (TM)

 1001 - AUTOPOWER CORP      E.Parts:    175.00 E.Labor:   225.00  E.Hrs:    3.00
 1 - FORD RANGER 95         A.Parts:     75.90 A.Labor:   225.00  A.Hrs:    3.00

 Itm       Part Number     DPT  AVL  ORD  SHP  B/O   Core        Price     Extension

 1    MIS R-134A                 2    2    0     0.00           25.00       50.00
 2    AIR-AIR CONDITIO/JOHN SMITH      1.00                     75.00       75.00
 3    AIR-AIR CONDITIO/JOHN SMITH      2.00                     75.00      150.00
 4    █




 f1=EnterLabor f2=ListAll f3=List% f4=ListLabor f5=ListCost f6=Catalog f7=TfrLI
```

All Labor must be entered in the Parts & Labor Entry by pressing the F1 =
Enter Labor function key.

F1 = EnterLabor This function key is used to Enter Labor on this Operation
#1. When pressed the labor entry screen will display as shown below.

```
─────────────Labor Entry──────
 Mechanic No: █
 Hours......:

 Labor Code.:
 Date.......: 04/07/15
          Post? (Y,N,E): Y
```

Labor Entry Screen

Type in your Mechanic's #
and press **ENTER**.

Type in the # of hours the
mechanic has worked on
this operation.

Type in the Labor Code for
the type of labor
performed and press
ENTER.

Once a work order is invoiced with an operation, you cannot make changes
to the operations.

Post Y, N, E

Type in **Y** for Yes if you would like to post the hours on this quote.

Type in **N** for No so that you may make a correction to the information that
you keyed.

Type in **E** to exit completely out of the labor entry screen.

The following screen elements are shown:

```
AUTOPOWER
W1*365657                    AIR CONDITIONING                Quote #1 (TM)

1001 - AUTOPOWER CORP      E.Parts:    175.00 E.Labor:   225.00  E.Hrs:    3.00
1 - FORD RANGER 95         A.Parts:     75.90 A.Labor:   225.00  A.Hrs:    3.00

Itm     Part Number      DPT  AVL  ORD  SHP  B/O   Core      Price     Extension

1     MIS R-134A                   2    2    0      0.00       25.00      50.00
2     AIR-AIR CONDITIO/JOHN SMITH       1.00                   75.00      75.00
3     AIR-AIR CONDITIO/JOHN SMITH       2.00                   75.00     150.00
4

                         ─Labor Entry─
              Mechanic No: 0 - JOHN SMITH
              Hours......: 1.00

              Labor Code.: AIR
                   Post? (Y,N,E): Y


              Enter Labor Code, (C)ancel or ?|F1
```

Labor appears as a line item.

```
AUTOPOWER
W1*365657                    AIR CONDITIONING                Quote #1 (TM)

1001 - AUTOPOWER CORP      E.Parts:    175.00 E.Labor:   225.00  E.Hrs:    3.00
1 - FORD RANGER 95         A.Parts:     75.90 A.Labor:   300.00  A.Hrs:    4.00

Itm     Part Number      DPT  AVL  ORD  SHP  B/O   Core      Price     Extension

1     MIS R-134A                   2    2    0      0.00       25.00      50.00
2     AIR-AIR CONDITIO/JOHN SMITH       1.00                   75.00      75.00
3     AIR-AIR CONDITIO/JOHN SMITH       2.00                   75.00     150.00
      LAB AIR - JOHN SMITH              1.00                   75.00      75.00

                         ─Labor Entry─
              Mechanic No: ▮
              Hours......

              Labor Code.:
                   Post? (Y,N,E): Y


              Enter Mechanic# o
```

The Actual Labor and Actual Hours now reflect the labor we just entered in the F1 Enter Labor option.

The Labor Code is required.

F2 – ListAll – The **F2** function key will refresh the screen.

F4 = ListLabor The F4 function key will list only the labor lines items entered on a particular operation. Each Operation will have its own recorded labor.

F5 = ListCost The F5 function key will list the cost of each line item, not including the labor.

F6 = Catalog To access the AutoCat Catalog press the F6 Function Key. **(This option is only available if the AutoCat module has been purchased.)**

F7 = TfrLI Transfer a line item to another Job Operation. If you should add the wrong part number to an operation and want to transfer it to another operation on this work order press the Function key F7 and the screen below will display.

```
AUTOPOWER
W1*365657                          AIR CONDITIONING

1001 - AUTOPOWER CORP       E.Parts:    175.00 E.Labor:   225
1 - FORD RANGER 95          A.Parts:     75.90 A.Labor:   300

Itm      Part Number     DPT  AVL  ORD  SHP  B/O    Core

1    MIS R-134A                    2    2    0     0.00
2    AIR-AIR CONDITIO/JOHN SMITH        1.00
3    AIR-AIR CONDITIO/JOHN SMITH        2.00
4    AIR-AIR CONDITIO/JOHN SMITH        1.00
5

                ──Transfer Line Item to Another WO or Job Ope

      Line Item # to Transfer: or (A)ll......: █
      Branch to Receive Line Item............:
      Work Order # to Receive Line Item......:
      Job Operation # to Receive Line Item...:

                  OK to Transfer? (Y,N):

      Enter the Line Item# to Transfer: or A for all the
```

Type in the line item number OR type in **A** to transfer ALL line items from this job operation to another WO or Operation# and press **ENTER**.

Type in the Branch to Receive the Line Item and press **ENTER**.

Type in the WO # to receive the Line Item and press **ENTER**.

Type in the job operation # that should receive this Line item and press **ENTER**.

Update

After adding Parts & Labor to the operation you must update that operation to the work order. Very Important.

```
AUTOPOWER
W1*365657                 Shop Operation Maintenance

Customer..: 1001 - AUTOPOWER CORP              Status
Make/Model: 95 FORD RANGER      M'ge: 250000   5. Prt Pa
1. Operation.....: AIR - AIR CONDITIONING      6. PO Number: 9535
2. Billing Method: TM                          7. WO Type..: R - Retail
3. Labor Code....: AIR-AIR CONDITIONING 75.00/hr  8. Dept.....: 1 - CTRSALES
4. Est.Prts: 175.00   Labor: 225.00  Hrs: 3.00 9. Stage....:

   Billing Totals          Shop Cost   12. Complain.......: AIR NOT COLD
   ──────────────────────  ─────────   13. Cause.........: Freon Level is
   Parts.......:    50.00       19.42  14. Work Performed.: Freon was low.
   Cores.......:                       15. Work Recommend.: Recommend repl
   Labor.......:   300.00      100.00  16. Int Shop Msg...: May need a new
   Tax,Fees....:    35.50               17. Warranty Type..:

10. Freight In..:                       18. Environmental..: 25.00
11. Freight Out.:                       19. Shop Supplies..: 3.00%  10.50

                  ========== =========
   Total.......:   385.50      119.42  Date Entered.......: 01/27/15
   GM= 69.02%                          Date Last Chg......: 01/27/15

      (V)ehicle, (P)arts & Labor, (U)pdate, (A)ppointments
         Release (W)O, (C)lose, (DELETE), #: U█
```

Type in **U** and press **ENTER** to update the operation.

Type in **U** again and press **ENTER** to update the Operation to the Work Order.

```
AUTOPOWER
 W1*365657                    Shop Work Order                    IN-W40

  Customer: 1001 - AUTOPOWER CORP        Date Entered.....: 01/26/15
  1. Vehicle No....: 1      Mil'ge: 250000  5. Date Promised...: 01/29/15
     Yr/Make/Model.: 95 FORD RANGER      6. Date Scheduled...:
  2. Service Writer: 0 - JOHN SMITH      7. Date Released....:
  3. Contact Name..: JOE MANN            8. Date Finished....:
  4. Contact Phone.: 407-555-6985        9. Date Shipped.....:

    Operations           ST    Estimated  Selling Amt  Total Cost
  1. AIR CONDITIONING     Q        0.00      385.50       119.42




                                   ------------------------------------
  Summary Totals:                      0.00      385.50       119.42

           (N)ew Operation, Ship(T)o, (V)ehicle, (E)dit, (R)eports
              (C)omment, (I)nternal Note, (U)pdate, #: U
```

Appointments

From the Shop Operation Maintenance screen:

You cannot set appointments from this prompt inside of the Shop Operation Maintenance screen. This must be done by typing W from any menu.

```
AUTOPOWER
W1*365657                    Shop Operation Maintenance
Customer..: 1001 - AUTOPOWER CORP                    Status...:
Make/Model: 95 FORD RANGER          M'ge: 250000   5. Prt Parts:
1. Operation.....: AIR - AIR CONDITIONING           6. PO Number:
2. Billing Method: TM                               7. WO Type..:
3. Labor Code....: AIR-AIR CONDITIONING 75.00/hr    8. Dept.....:   CTRSALES
4. Est.Prts: 175.00   Labor: 225.00   Hrs: 3.00     9. Stage....:

   Billing Totals              Shop Cost      12. Complaint.....: AIR NOT COLD
   -----------------------     ---------      13. Cause.........: Freon Level is
   Parts.......:      50.00       19.42       14. Work Performed.: Freon was low.
   Cores.......:                              15. Work Recommend.: Recommend repl
   Labor.......:     300.00      100.00       16. Int Shop Msg...: May need a new
   Tax,Fees....:      35.50                   17. Warranty Type..:

10. Freight In..:                             18. Environmental..: 25.00
11. Freight Out.:                             19. Shop Supplies..: 3.00%   10.50
                    ==========  =========
   Total.......:     385.50      119.42       Date Entered.......: 01/27/15
   GM= 69.02%                                 Date Last Chg......: 01/27/15

          (V)ehicle, (P)arts & Labor, (U)pdate, (A)ppointments
                  Release (W)O, (C)lose, (DELETE). #: █
```

> Type in **A** and press **ENTER** to access the appointment screen.

Type in **A** again and press **ENTER** to view appointment scheduler. If you would like to set appointments, this must be done from the main menu by typing in the letter **A** and pressing **ENTER**.

```
AccuTerm 7 - [New Session]
File Edit View Tools MultiValue Window Help
            OCTOBER 2015                        W1: SHOP - Wednesday 10-14-15
 Mon  Tue  Wed  Thu  Fri  Sat  Sun
                     1    2    3    4

   5    6    7    8    9   10   11

  12   13   14   15   16   17   18

  19   20   21   22   23   24   25

  26   27   28   29   30   31


   (A)dd, (C)al, (P)rt, (Q)uit: █
```

From any Menu type in the letter **W** and press **ENTER** to schedule an appointment for a vehicle. Appointments are not scheduled inside the Shop Operation Maintenance screen.

The screen below will display. You can schedule an operation for a work order using this screen.

Type in the letter **A** and press **ENTER** to add a new vehicle shop appointment.

Field Descriptions:

Date: The date will default to the current date. If the appointment that you are scheduling is different from the date that is displaying, type in the new date and press **ENTER**.

Time: Type in the Hours and Minutes for the scheduled appointment and press **ENTER**.

Dept: The default department for the shop will display, press **ENTER**.

SvcAdvsr: Type in the service advisor's operator number and press **ENTER**.

Status: Type in **P** if the job is Pending or type in **W** if the work is in process and press **ENTER**.

Customer: Type in the customer number or customer name and press **ENTER**.

Phone: Type in the customer phone number and press **ENTER.**

Type in the Vehicle Year, Make and Model Information and press **Y**. Type in **E** to Edit the information in this screen. Type **C** to Clear all information in this screen. Type in **Q** to Quit and not save any information that has been entered in this screen.

After entering in the above information, the following screen will display.

When the service tech is assigned to the job and the vehicle is placed in a bay to be repaired then this information will be completed.

Bay: Type in the Bay number where the vehicle is being repaired.

Tech: Type in the Tech number who has been assigned to make this repair.

DIS: Type in the days that the vehicle will be in the shop.

HIS: This field will be updated automatically. This is the number of hours that the vehicle has been in the shop.

WO# A Work Order will automatically assigned for this appointment that is being created.

Service Request: Type in the service to the vehicle that is being requested. The work order # above will be updated with these notes.

Comment: Type in any comments related to this repair.

Priority: Type in **Y** if this is a Priority job or Type in **N** and press **ENTER.**

Save, Quit: Type in **S** to save the appointment or type in **Q** to quit and not save the appointment to the calendar.
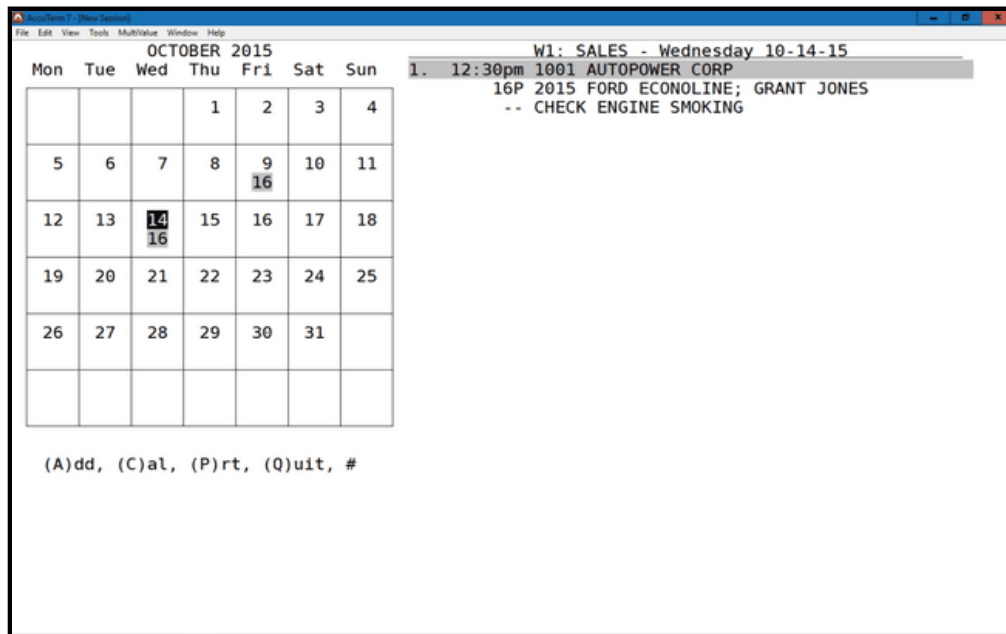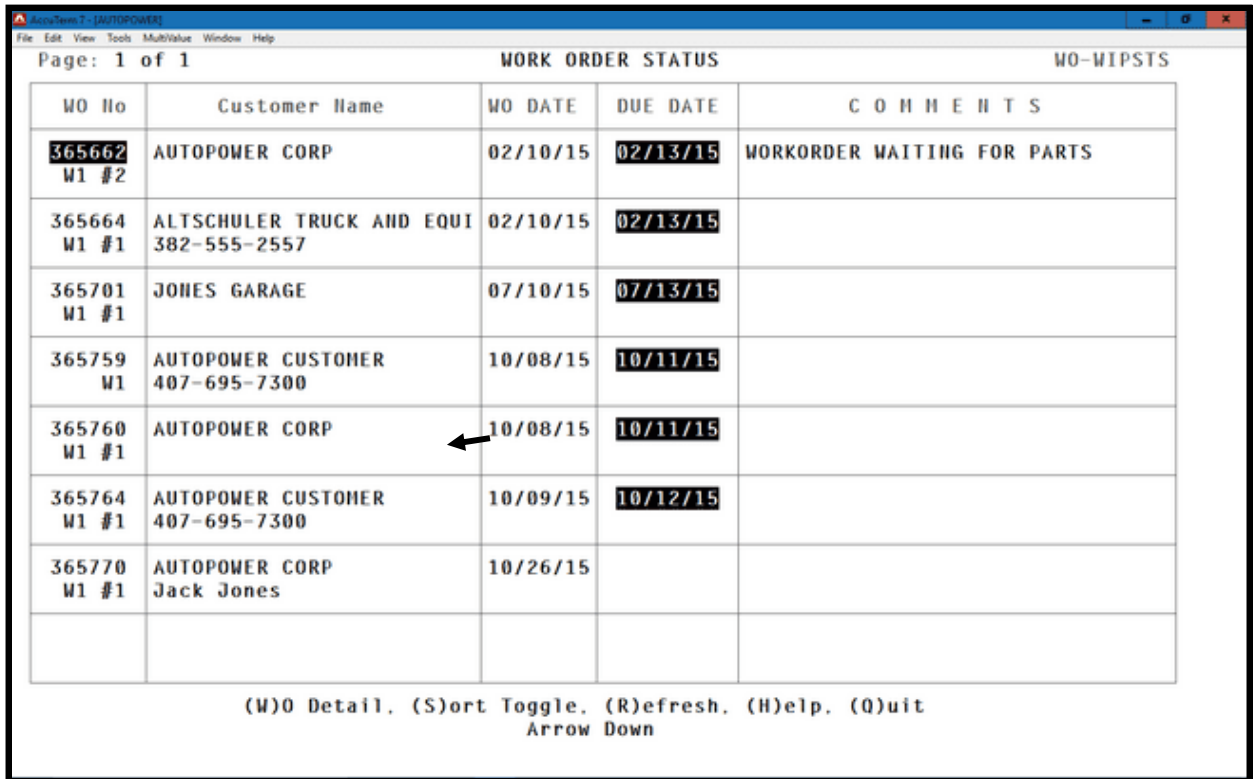
If you notice the information that was typed in the previous screens will display to the right of the calendar. The appointment has been set at 12:30 to check the engine for customer #1001.

If you should need to make changes to the appointment select the line item for the appointment. You can **E**dit , **s**ave the appointment, view the Workorder, **Y**MM Edit the Year, Make and Model of the Vehicle. Edit the Service **R**equest, Edit the **c**omments, **d**elete the appointment or type in **Q** to quit.
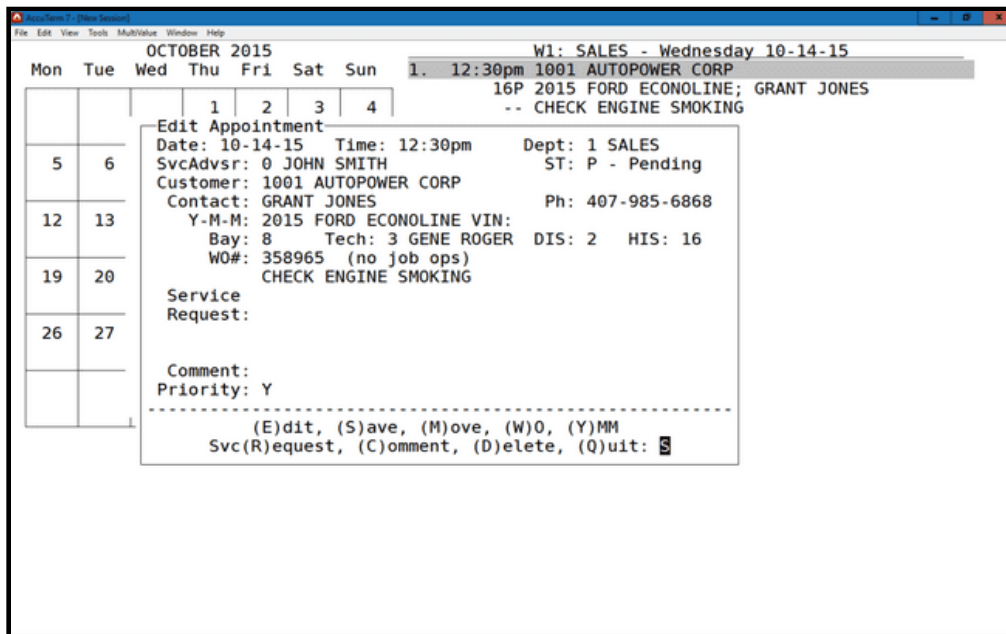
The Work Order Status screen will also be updated with the new work order that was created in the Appointment Scheduler screen.

<u>R</u>elease Work Order

From the Shop Operation Maintenance scr[...]

> Type in **W** and press **ENTER** to release the operation to the shop.

```
AUTOPOWER
 W1*365657              Shop Operation Maintenance            No:   1

 Customer..: 1001 - AUTOPOWER CORP                 Status...: Q
 Make/Model: 95 FORD RANGER       M'ge: 250000   5. Prt Parts: Y      PL: N
 1. Operation.....: AIR - AIR CONDITIONING        6. PO Number: 9535
 2. Billing Method: TM                            7. WO Type..: R - Retail
 3. Labor Code....: AIR-AIR CONDITIONING 75.00/hr 8. Dept.....: 1  CTRSALES
 4. Est.Prts: 175.00   Labor: 225.00   Hrs: 3.00  9. Stage....:

    Billing Totals           Shop Cost      12. Complaint.......: AIR NOT COLD
    ----------------------   ---------      13. Cause..........: Freon Level is
    Parts.......:    50.00      19.42       14. Work Performed.: Freon was low.
    Cores.......:                           15. Work Recommend.: Recommend repl
    Labor.......:   300.00     100.00       16. Int Shop Msg...: May need a new
    Tax,Fees....:    35.50                  17. Warranty Type..:

 10. Freight In..:                          18. Environmental..: 25.00
 11. Freight Out.:                          19. Shop Supplies..: 3.00%   10.50
                     ========== =========
    Total.......:   385.50     119.42       Date Entered.......: 01/27/15
    GM= 69.02%                              Date Last Chg......: 01/27/15

            (V)ehicle, (P)arts & Labor, (U)pdate, (A)ppointments
               Release (W)O, (C)lose, (DELETE). #: █
```

After typing in **R** to Release the work order to the shop you will be prompted:

1.   Print/Fax/Email WO Estimate

To print/fax a WO Estimate type in #1 and press **ENTER**. Type in the Printer # where the Quotation should print.

2.   Print Work Order Docs to Shop

To print theWork Order to the Shop, Type in #2 and press **ENTER**. Type in the printer # where the Work Order should print.

3.   Print Hard Card for: Customer Approval
4.   Print Hard Card for: Service Shop WO
5.   Print Hard Card for: Parts Used
6.   Print Hard Card for: Mechanic's Notes
7.   Print Hard Card for: Mechanic's Labor Time
8.   Print Parts & Labor Detail – No Cost

To print a Work Order Detail report, Type in #3 and press **ENTER**. Type in the printer # where the Work Order Detail Report should print.

9.   Print Parts & Labor Detail – With Cost (**Print Prior to invoicing order to verify totals**.)

To print a Work Order Detail report with cost printing on the report, Type in #4 and press **ENTER**. Type in the printer # where the Work Order Detail Report should print.

AUTOPOWER
W1*365657   Shop Operation Maintenance   No: 1

Customer..: 1001 - AUTOPOWER CORP   Status...: W
Make/Model: 95 FORD RANGER   M'ge: 250000   5. Prt Parts: Y   PL: N
1. Operation.....: AIR - AIR CONDITIONING   6. PO Number: 9535
2. Billing Method: TM   7. WO Type..: R - Retail
3. Labor Code....: AIR-AIR CONDITIONING 75.00/hr 8. Dept.....: 1 - CTRSALES
4. Est.Prts: 175.00   Labor: 225.00   Hrs: 3.00   9. Stage....:

                    Work Order Print Options

        1. Print/Fax WO Estimate
        2. Print Work Order Docs to Shop
        3. Print Hard Card for: Customer A
        4.   '' Hard Card for: Service Shop WO
        5.   '' Hard Card for: Parts Used
        6.   '' Hard Card for: Mechanic's Notes
        7.   '' Hard Card for: Mechanic's Labor Time
        8.   '' Parts & Labor Detail - No Cost
        9.   '' Parts & Labor Detail - With Cost

           Enter report selection above: ▮

> Type in #2 and press *ENTER.*

AUTOPOWER
W1*365657   Shop Operation Maintenance   No: 1

Customer..: 1001 - AUTOPOWER CORP   Status.
Make/Model: 95 FORD RANGER   M'ge: 250000   5. Prt Par
1. Operation.....: AIR - AIR CONDITIONING   6. PO Numb
2. Billing Method: TM   7. WO Type
3. Labor Code....: AIR-AIR CONDITIONING 75.00/hr 8. Dept...
4. Est.Prts: 175.00   Labor: 225.00   Hrs: 3.00   9. Stage..

              Printer   Ptr#
        ----------------   ----
        LASERJET9000   22
        OBLIVION   99

        Ptr#. C. or +: 99

> Select the printer to print the Shop work order and press *ENTER*.

Close Operation

From the Shop Operation Maintenance:

```
AUTOPOWER
W1*365657              Shop Operation Maintenance

Customer..: 1001 - AUTOPOWER CORP              Status...
Make/Model: 95 FORD RANGER        M'ge: 250000   5. Prt Part
1. Operation.....: AIR - AIR CONDITIONING        6. PO Numbe
2. Billing Method: TM                            7. WO Type.
3. Labor Code....: AIR-AIR CONDITIONING 75.00/hr 8. Dept....
4. Est.Prts: 175.00    Labor: 225.00   Hrs: 3.00 9. Stage...

   Billing Totals          Shop Cost   12. Complaint....
   --------------------------- ---------  13. Cause.........
   Parts.......:     50.00      19.42    14. Work Performed
   Cores.......:                         15. Work Recommend
   Labor.......:    300.00     100.00    16. Int Shop Msg.
   Tax,Fees....:     35.50               17. Warranty Typ...:

10. Freight In..:                        18. Environmental..: 25.00
11. Freight Out.:                        19. Shop Supplies..: 3.00%  10.50
                   ========== =========
   Total.......:    385.50     119.42   Date Entered........: 01/27/15
   GM= 69.02%                           Date Last Chg.......: 01/27/15

      (V)ehicle, (P)arts & Labor, (U)pdate, (A)ppointments
             Release (W)O, (C)lose, (DELETE), #:
```

> After the operation has been completed you will need to close the operation.
>
> Type in **C** and press **ENTER** to Close the Operation.

```
AUTOPOWER
W1*365657              Shop Operation Maintenance

Customer..: 1001 - AUTOPOWER CORP              Status.
Make/Model: 95 FORD RANGER        M'ge: 250000   5. Prt Part
1. Operation.....: AIR - AIR CONDITIONING        6. PO Numbe
2. Billing Method: TM                            7. WO Type.
3. Labor Code....: AIR-AIR CONDITIONING 75.00/hr 8. Dept....
4. Est.Prts: 175.00    Labor: 225.00   Hrs: 3.00 9. Stage...




                  All Line Items checked OK
                     Press any key...
```

> The words Scanning Line items will appear briefly on the screen.
>
> Then "All Line Items checked OK Press any Key" will display.
>
> This procedure is checking for any special orders or back order status parts.

Press **ENTER** to return to the Shop Operation Maintenance screen.

```
AUTOPOWER
W1*365657              Shop Operation Maintenance              No:  1

Customer..: 1001 - AUTOPOWER CORP              Status...: W
Make/Model: 95 FORD RANGER      M'ge: 250000   5. Prt Parts: Y    PL: N
1. Operation.....: AIR - AIR CONDITIONING      6. PO Number: 9535
2. Billing Method: TM                          7. WO Type..: R - Retail
3. Labor Code....: AIR-AIR CONDITIONING 75.00/hr 8. Dept.....: 1 - CTRSALES
4. Est.Prts: 175.00   Labor: 225.00  Hrs: 3.00 9. Stage....:

   Billing Totals          Shop Cost   12. Complaint......: AIR NOT COLD
   ------------------------ ---------   13. Cause..........: Freon Level is
   Parts.......:     50.00    19.42     14. Work Performed.: Freon was low.
   Cores.......:                        15. Work Recommend.: Recommend repl
   Labor.......:    300.00   100.00     16. Int Shop Msg...: May need a new
   Tax,Fees....:     35.50              17. Warranty Type..:

10. Freight In..:                       18. Environmental..: 25.00
11. Freight Out.:                       19. Shop Supplies..: 3.00%   10.50
                 ========== =========
   Total.......:    385.50   119.42     Date Entered.......: 01/27/15
   GM= 69.02%                           Date Last Chg......: 01/27/15

     (V)ehicle, (P)arts & Labor, (U)pdate, (A)ppointments
         Release (W)O, (C)lose, (DELETE), #:
```

DELETE

To Delete an operation from the work order type in the word **DELETE**.

Are you sure you wish to delete **Y/N** ? will display.

Type in **Y** to delete the operation from the order.

Type in **N** to not delete the operation from the order.

If you select **Y** to delete another prompt will display.

1. Delete the operation off the Work Order
2. Delete & Transfer Unit to Core Inventory

   Enter Selection (1,2):

Type in #1 and press **ENTER** to delete the operation off of the work order.

Type in #2 and press **ENTER** to delete the operation off of the work order and transfer any cores to the Core Inventory.

Close Work Order

*****In order to invoice the work order all operations must be closed.
*****

```
AUTOPOWER
W1*365657                    Shop Work Order        This operation is shown as
                                                    a status of Closed.
  Customer: 1001 - AUTOPOWER CORP
  1. Vehicle No....: 1         Mil'ge: 250000  5
     Yr/Make/Model.: 95 FORD RANGER
  2. Service Writer: 0 - JOHN SMITH             7. Date Released....: 01/27/15
  3. Contact Name..: JOE MANN                   8. Date Finished....:
  4. Contact Phone.: 407-555-6985               9. Date Shipped.....:

     Operations          ST   Estimated  Selling Amt  Total Cost
  1. AIR CONDITIONING      C        0.00      385.50       119.42




  Summary Totals:                   0.00      385.50       119.42

          (N)ew Operation, Ship(T)o, (V)ehicle, (E)dit, (R)eports
          (C)omment, (I)nternal Note, (U)pdate, #: █
```

Press **ENTER** again and you will be at the Options Page in Order Entry.

```
AUTOPOWER
01/26/15                  Order No: W1*365657          WO PICK TICKET

Ship To: AUTOPOWER CORP              Bill To: AUTOPOWER CORP
         400 TECHNOLOGY PARK                  400 TECHNOLOGY PARK
1001                                 1001
         LAKE MARY, FL 32746                  LAKE MARY, FL 32746

Terms: A-NET 30 DAYS  TAXABLE  B/O OK  Ctr:0                 PO:

  1. Salesman.: 0 - JOHN SMITH            Option: █
  2. Ship Via.: OT - OUR TRUCK
  3. Spcl Inst:                        Y = Invoice      K = Ack'ment
                                       P = Pick Ticket  V = View Notes
  4. Check Nbr:                        A = Add Parts    TN= PkgTrack#
     Drv. Licn:              $410.88   H = Hold         D = Del'Driver
     Phone Nbr:                        T = Totals
  5. Release #:                        W = Work Order
                                       X = Cancel Order
  Attn:                      Truck No. B = Backorder
                                  1    I = Issue PO

   F5=Payment  F6=ShipTo  F7=BillTo  F8=Terms  F9=PO#  F10=Attn  F11=Trk#
```

Prior to invoicing a WO we recommend that the shop Supervisor should print the WO Cost Detail Report.

This will print a detailed list of the parts and labor charged to the job.

Review the report to identify any labor or parts that may be missing or that may have an incorrect cost or billing amount.

Type in **Y** and press **ENTER** to Invoice the Shop Work Order.

Once the Work Order has been invoiced, the operations will have been updated to inventory and cannot be edited or removed.

It's time for another Quiz!!!

1. To add parts or labor to an operation in the Shop Operation Maintenance screen you must type in the letter "**P**".

True or False

2. To add labor you must press the F1- Function key for Enter Labor. Then you type in the Mechanic's number, the number of hours and the labor code and post it.

True or False

3. To exit from an Operation on a work order you must type in **U** to update.

True or False

4. In the Shop Work Order screen you can print and fax a customer the quote or you can Print & Release the Work Order to the Shop.

True or False

5. If the Work Order is in a Quote status you can recall it and type in a W to release the Work Order to the Shop.

True or False

6. You cannot close a work order if:

    a. The work order is in a quote status.
    b. The work order has labor scanned in that has not been scanned out.
    c. The work order has labor clocked in that has not been clocked out.
    d. If there are any open operations that have not been closed.
    e. Any of the above.

7. Before closing an operation it is not a good idea to print out one of the Parts & Labor Detail reports to identify any labor or parts that may be missing or to check for incorrect cost or billing amounts.

True or False

8. To close an operation you must type in the letter _____ for close.

Notes:

VEHICLE SERVICE SHOP WORK ORDER ENTRY

Customer Entry Screen

Enter Customer #
Customer Acct Search

Parts Entry Screen

Enter Parts

Totals Screen

Add Sales Tax
Freight

Options Screen

Ship Via Terms
Pick Ticket
Packing Slip
Invoices

Y Print Invoice
P Print Pick Ticket
S Print Packing List
A Add More Line Items
H Place Order on Hold
T Go Back to Totals
Q Quotation
X Cancel Order
B BackOrder

Type in F6 to go to
Vehicle Shop

Shop Work Order
Screen
1st Screen
What Kind of Vehicle
Who is the contact
Phone #
Type in   for 2nd
Screen

Second Screen
Create an Operation
Type
Air Conditioning

Shop Operation Choices
U Update Operation (Save)
W Release Operation to
Shop
C Close Operation, Relieve
Inventory

Close ALL operations go
to Invoice

Operation #1

Third Screen
Type in P to enter Parts
Type in F1 to add Labor

Second Screen
Create an Operation
Type
Oil Change

Shop Operation Choices
U Update Operation (Save)
W Release Operation to
Shop
C Close Operation, Relieve
Inventory

CloseALLoprations go
to Invoice.

Operation #2

Third Screen
Type in P to enter Parts
Type in F1 to add Labor

Work Order (Status)

From the Vehicle Service Menu:

```
10/09/2015 (P99)          AUTOPOWER PARTS & SERVICE

Mail                        VEHICLE SERVICE MENU
Waiting
                    1....Work Order: Entry
                    2....Work Order: Status
                    3....Work Order: Inquiry (Open)
                    4....Work Order: Inquiry (Closed)

                    5....Parts Inquiry
                    6....Customer - Part Purchase History
                    7....Reprint Invoice from History

                    8....Vehicle Shop F/M MENU
                    9....Vehicle Shop Data Base MENU
                   10....Vehicle Shop Reports MENU

          Enter Selection:   *


TC=Clock | S=Spooler |        | R=ACCESS | X=Log Off | N=NoteCards | A=AutoMail | V=VSI-Fax
```

Type in #2 and press *ENTER*.

The Work Order Status screen will provide you with detailed information related to a work order such as when the work order was created and the due date for the work order.

```
Page: 1 of 1                   WORK ORDER STATUS                      WO-WIPSTS

  WO No    Customer Name        WO DATE    DUE DATE        C O M M E N T S

 365662   AUTOPOWER CORP        02/10/15   02/13/15
 W1 #1

 365663   ALTSCHULER TRUCK AND EQUI 02/10/15 02/13/15
 W1 #1    382-555-2557






          (W)O Detail, (S)ort Toggle, (R)efresh, (H)elp, (Q)uit
                         Arrow Down
```

Screen Options:

(W)O Detail

Type in **W** and **press ENTER** to view all the information on this work order including the operations.

(S)ort Toggle

Type in **S** and **press ENTER** to sort from ascending to descending work orders by name**.**

(R)efresh

Type in **R** and **press ENTER** to refresh the screen**.**

(H)elp

Type in **H** and **press ENTER** to view the options that are available in this screen.

```
AUTOPOWER
 Page: 1 of 1                    WORK ORDER STATUS                      WO-WIPSTS

  WO No      Customer Name      WO DATE  DUE DATE       C O M M E N T S

  365662  AUTOPOWER CORP        02/10/15 02/13/15
  W1 #1

  365663  ALTSCHULER TRUCK AND EQUI 02/10/15 02/13/15
  W1 #1   382-555-2557

                    Key Command Options:

                    Use Up/Down Arrows to highlight a specific WO#
                    Use Page-Up/Down keys to goto next/previous page
                    Use Left/Right Arrows to enter comments
                    Use Enter-key or W to see the details of a WO
                    Use Q, E, or Esc-key to Exit back to the Menu
                    Use R to reselect Work Orders & refresh display
                    Use S to toggle the sort sequence of the work
                        orders by: WO Date or by Customer Name

              (W)O Detail, (S)ort To  Press ENTER  sh, (H)elp, (Q)uit
```

(Q)uit

Type in **Q** and **press ENTER** to exit the work order status screen.

Work Order Inquiry (Open)

From the Vehicle Service Menu:

```
AUTOPOWER
01/27/2015 (P99)          AUTOPOWER PARTS & SERVICE

                            VEHICLE SERVICE MENU

               1....Work Order: Entry
               2....Work Order: Status
               3....Work Order: Inquiry (Open)
               4....Work Order: Inquiry (Closed)

               5....Parts Inquiry
               6....Customer - Part Purchase History
               7....Reprint Invoice from History

               8....Vehicle Shop F/M MENU
               9....Vehicle Shop Data Base MENU
              10....Vehicle Shop Reports MENU

          Enter Selection:  █


 TC=Clock | S=Spooler |        | R=ACCESS | X=Log Off | N=NoteCards | A=AutoMail | V=VSI-Fax
```

> **Type in #3** and press *ENTER*.

The screen below will display prompting you to enter the correct location code.

Your location will default. If it is correct press **ENTER** and then type in **Y** and press **ENTER** that the entry is correct.

```
                    A U T O P O W E R




        Enter Branch:   W1   APC CORP           Correct? (Y,N,E):
```

The Work Order Inquiry screen will display and individual order by typing in a specific order number or all open work orders by typing in the word "ALL.

```
AUTOPOWER
 01/27/2015                    Work Order Inquiry                  IN-WOINQ

Work Order No:                      Vehicle:                   Z#:
Customer No..:                      Part No:                   BT#:

           Actual-Amt   Cost-Amt    Estimate  Status.....:
  Parts:                                      Bill Method:
  Cores:                                      WO Type....:
  Labor:                                      Due Date...:




                   Enter the Work Order Number, Z#, B#, O#, or ALL
```

Enter the Work Order Number, Z#, B#, O# or ALL.

Z# =   Unit Rebuilding
B# =   Brass Tag (Unit Rebuilding) this is the brass tag number that is attached to a part itself.
O# =   OEM Number
ALL =   ALL Work orders

```
AUTOPOWER
 01/27/2015                    Work Order Inquiry                  IN-WOINQ

Work Order No: ALL                  Vehicle:                   Z#:
Customer No..:                      Part No:                   BT#:

           Actual-Amt   Cost-Amt    Estimate  Status.....:
  Parts:                                      Bill Method:
  Cores:                                      WO Type....:
  Labor:                                      Due Date...:

Itm WO.Nbr  CustNo    CustomerName              Vehicle          ST  WO
1.  365657  1001      AUTOPOWER CORP         95 FORD RANGER       C   Y




                   Enter Item Number above, or press ENTER:
```

You can also press **ENTER** and move to the Customer Number field. Type in the customer number and press **ENTER** to view all work orders for this particular customer. You can initiate a search for a customer number if you do not know it.

```
                      Work Order Inquiry
 Work Order No:                       Vehicle:
 Customer No..:  .AUTOPOWER_           Part No:

           Actual-Amt   Cost-Amt   Estimate  Status....
   Parts:                                    Bill Method:
   Cores:                                    WO Type....:
   Labor:                                    Due Date...:










           Enter customer number, or .xxxxxx to search
```

You can search for a customer number if you type in a period followed by a part of the customer name as shown.

A list of all customers' having that name will display to the screen.

Type in the customer number to view their open work orders.

As shown in the display below there is 4 work orders for customer #1 that are in a status of open or on hold status.

Status
H = Hold
O = Work Order Open
Q = Quote
C = Closed

```
                      WORK ORDER INQUIRY
 Work Order No:                       Vehicle:                  Z
 Customer No..:  1 - AUTOPOWER QA CUSTO Part No:                 B

           Actual-Amt   Cost-Amt   Estimate  Status......:
   Parts:                                    Bill Method:
   Cores:                                    WO Type....:
   Labor:                                    Due Date...:

 Itm WO.Nbr  CustNumber   Customer Name          Vehicle          ST  WO
 -------------------------------------------------------------------------
 1.  321    1            AUTOPOWER QA CUSTOMER                     H   Y
 2.  322    1            AUTOPOWER QA CUSTOMER   2005 CADILLAC ELDORA  O   Y
 3.  323    1            AUTOPOWER QA CUSTOMER                     H   Y
 4.  326    1            AUTOPOWER QA CUSTOMER                     H   Y




           Enter Item Number above, or press RETURN: _
```

To view item #2, which is work order #322, type in the #2 and press **ENTER**. If the work order that you are looking for is not displayed on the screen press **ENTER** to return back to the customer number prompt so that you may perform another search.

Type in #2 and press **ENTER**. The screen below will display.

The open work order inquiry screen will display detailed information about the operations assigned to a particular open work order.

```
                         WORK ORDER INQUIRY                    IN-WOINQ
 Work Order No:   322                Vehicle: 20-2005 CADILLA Z#:
 Customer No..:   1-AUTOPOWER QA CUSTOME Part No:R             BT#:

          Actual-Amt    Cost-Amt     Estimate  Status.....:  0
  Parts:        25.00       65.16        50.00  Bill Method:
  Cores:         0.00        0.00         0.00  WO Type....:
  Labor:       124.50      100.00       184.50  Due Date...:  12-16-2004

 Itm  Operation             E.Parts  E.Labor  E.Hrs   A.Parts  A.Labor  A.Hrs
 ----------------------------------------------------------------------------
 1.   GENERAL A/C REPAIRS     50.00   180.00   3.00     25.00   120.00   2.00
 2.   BRAKE SHOE               0.00     4.50   1.00      0.00     4.50   0.00




              Enter Item Number above, or press RETURN: _
```

Press **ENTER** to exit this screen.

Work Order Inquiry (Closed)

The Work Order Inquiry (Closed) screen will give detailed information on all closed shop work orders.

From the Vehicle Service Menu:

```
AUTOPOWER
01/27/2015 (P99)          AUTOPOWER PARTS & SERVICE              01:46PM
                           VEHICLE SERVICE MENU
                                                    ┌─────────────────────┐
                     1....Work Order: Entry         │ Type in #4 and press│
                     2....Work Order: Status        │ ENTER.              │
                     3....Work Order: Inquiry (Open) │                     │
                     4....Work Order: Inquiry (Closed)└───────────────────┘
                     5....Parts Inquiry
                     6....Customer - Part Purchase History
                     7....Reprint Invoice from History

                     8....Vehicle Shop F/M MENU
                     9....Vehicle Shop Data Base MENU
                    10....Vehicle Shop Reports MENU

            Enter Selection:


 TC=Clock S=Spooler        R=ACCESS X=Log Off N=NoteCards A=AutoMail V=VSI-Fax
```

When you first access the screen you are prompted to enter a work order number if you do not know the work order number press **ENTER**.

```
AUTOPOWER
01/27/2015            Work Order Inquiry From History      IN-WOINQ-HIST

Work Order:              Vehicle:                  Operation.:
Customer..:              VIN....:                  Start Date:

                                        Status.....:
 Est. Parts:                            Bill Method:
 Est. Labor:                            WO Type....:
 Est. Hours:                            Inv Date...:

                    Enter the Work Order Number, or (S)earch
```

You will then be prompted to enter a customer number. If you do not know the customer number you can do a search for the customer name as shown in the display below.

Type in a period followed by part of the customer name to search for the customer number.

```
AUTOPOWER
01/27/2015            Work Order Inquiry From History          IN-WOINQ-HIST

  Work Order:              Vehicle:                  Operation.:
  Customer..:  .AUTOPOWER▮  VIN....:                  Start Date:

                                         Status.....:
  Est. Parts:                            Bill Method:
  Est. Labor:                            WO Type....:
  Est. Hours:                            Inv Date...:

                  Enter customer number, or .name to search
```

After you have typed in your customer number, a listing so all customers that have the name entered will display.

```
AUTOPOWER
                      Customer Name Search                     AR.NS

   CUST NO    C U S T O M E R         C I T Y            P H O N E

1.  1003      AUTOPOWER CUSTOMER      ORLANDO, FL 32801
2.  999999-1  AUTOPOWER CUSTOMER #2   LAKE MARY, FL 32746
3.  999999    AUTOPOWER CUSTOMER      LAKE MARY, FL 32746   407-695-7300
4.  1001      AUTOPOWER CORP          LAKE MARY, FL 32746

                      Item#, (Q)uit: ▮
```

Select the customer by typing in the line-item number.

You will then be prompted to enter a vehicle number.

Type in the **Vehicle Number or a "?"** to view all vehicles for this customer**.**
You can also **press F10** to select from a list of vehicles **and press ENTER.**

```
AUTOPOWER
01/27/2015              Work Order Inquiry From History        IN-WOINQ-HIST

 Work Order:                    Vehicle: █            Operation.:
 Customer..: 1003 - AUTOPOWER VIN....:               Start Date:

                                             Status.....:
  Est. Parts:                                Bill Method:
  Est. Labor:                                WO Type....:
  Est. Hours:                                Inv Date...:




                     Enter vehicle number, or ?|F10 to search
```

```
                  Work Order Inquiry From History        IN-WOINQ-HIST

 Work Order:                Vehicle: F10             Operation.:
 Customer..: 1 - AUTOPOWER QA VIN....:              Start Date:

                                          Status.....:
  Est. Parts:                             Bill Method:
  Est. Labor:            ──── PLEASE CHOOSE A VEHICLE ────
  Est. Hours:            │  15   FORD        RANGER    1995  │
                         │  25   FORD        RANGER    1996  │
                         │  17   TOYOTA      COROLLA   2004  │
                         │  20   CADILLAC    ELDORADO  2005  │
                         │                                   │
                         │                                   │
                         │                                   │
                         │                                   │
                         └───────────────────────────────────┘


                     Enter vehicle number, or F10 to search
```

Type in the **VIN number** to select a vehicle with that Vehicle Identification
number and press **ENTER**.

Type in the Operation code or press **F10** to search from the list of Operation codes and press **ENTER**. There are many ways to search for a closed work order.

Vehicle Shop Reports Menu

From the Vehicle Service Menu:

Type in **#10** and press *ENTER*.

```
AUTOPOWER
01/27/2015 (P99)          AUTOPOWER PARTS & SERVICE

                          VEHICLE SERVICE MENU

                 1....Work Order: Entry
                 2....Work Order: Status
                 3....Work Order: Inquiry (Open)
                 4....Work Order: Inquiry (Closed)

                 5....Parts Inquiry
                 6....Customer - Part Purchase History
                 7....Reprint Invoice from History

                 8....Vehicle Shop F/M MENU
                 9....Vehicle Shop Data Base MENU
                 10....Vehicle Shop Reports MENU

          Enter Selection:  █


TC=Clock  S=Spooler        R=ACCESS  X=Log Off  N=NoteCards  A=AutoMail  V=VSI-Fax
```

Vehicle Shop Reports Menu

From the Vehicle Service Menu. **Type in #10 to access the Vehicle Shop Reports Menu.** In this menu we will take a look at the Vehicle Shop Reports to learn what type of information these reports contain.

The Vehicle Service Reports Menu will display. We will discuss each report.

```
AUTOPOWER
02/10/2015 (P99)          AUTOPOWER PARTS & SERVICE              11:18AM

Mail                      VEHICLE SERVICE REPORTS
Waiting
                  1....WO Reports
                  2....Mechanic Labor Report by WO#
                  3....Mechanic Labor Display
                  4....Mechanic Productivity Inquiry
                  5....Mechanic Productivity Report
                  6....Shop Revenue by Make of Vehicle
                  7....Shop Analysis by Job Operation
                  8....Shop Analysis by Mechanic & Job
                  9....WO Labor Detail Report - WIP
                 10....WO Labor Detail Report - History
                 11....WO Labor Summary Report
                 12....Mechanic Hours Worked vs Billed

         Enter Selection:


 TC=Clock S=Spooler        R=ACCESS X=Log Off N=NoteCards A=AutoMail V=VSI-Fax
```

WO REPORTS

The Workorder Reports menu will allow you to view five different types of reports.

```
AUTOPOWER
02-10-2015                SHOP WORK ORDER REPORTS                IN-WSR


     1. Work Order Status Report - All Work Orders
     2. Work Order Status Report - W.I.P.
     3. Work Order Status Report - Quotes
     4. Work Orders Over Estimate
     5. Work Orders Past Promise Date

        Enter Selection:



     Branch Location, or (A)ll...............:
     Department Number, or (A)ll.............:

     OK to produce the report? (Y,N).........:

```

Work Order Status Report – All Work Orders

Type in the Branch Location or the **A** for All and press **ENTER**.

Type in the Department Number, or the letter **A** for all and press **ENTER**.

Type in **Y** and press **ENTER** to print the report. To exit the screen type in **N** and press **ENTER.**

```
09 Oct 2015          WORK ORDER STATUS REPORT - ALL Work Orders        Page:   1

                                              DATE   BILL                    PRTS+LAB   PRTS+LAB   PRTS+LAB   EST VS ACT ESTIMATE
LOC DEPT  WONO   DATE    ST    CUSTOMER NAME   REQUIRED METH  PROCEDURE DESCRIPTION   COST      SALES      ESTIMATE    VARIANCE   ALERT!
---- ---- ------ -------- --  --------------- -------- ----  -------------------    --------  --------   --------   -------- -------

W1  1  365710 09-29-15 Q  TEST ACCOUNT        09-29-15 TM   AIR BRAKE SYSTEM        201.97    640.95      0.00       640.95 <-alert-
                      **                                                            -------   -------     -------    -------
                       *                                                            201.97    640.95      0.00       640.95

W1  1  365427 04-11-15 W  ALBEMARLE SCHOOL DISTRICT    FR   TEST OPERATION            0.00    170.00    170.00         0.00
                      **                                                            -------   -------     -------    -------
                       *                                                              0.00    170.00    170.00         0.00

       ***                                                                          -------   -------     -------    -------
                                                                                    201.97    810.95    170.00       640.95

W1  2  365451 04-15-15 C  CASH                04-15-15 TM   TIRES                   497.66  1,338.77     37.50     1,301.27 <-alert-
W1  2  365492 04-23-15 C  CASH                         TM   BRAKES                    2.50      3.75      0.00         3.75 <-alert-
                      **                                                            -------   -------     -------    -------
                       *                                                            500.16  1,342.52     37.50     1,305.02

W1  2  365596 07-28-15 Q  ALBEMARLE SCHOOL DISTRICT    TM   BELTS                     1.00      7.50      0.00         7.50 <-alert-
W1  2  365669 09-09-15 Q  AUTOPOWER TEST CUSTOMER      FR   2006 INT'L PREVENTATIVE MAINT  1.10   580.00   580.00        0.00
W1  2  365669 09-09-15 Q  AUTOPOWER TEST CUSTOMER      TM   BELTS                     0.00      0.00      0.00         0.00
W1  2  365669 09-09-15 Q  AUTOPOWER TEST CUSTOMER      TM   BRAKES                   10.00    101.40      0.00       101.40 <-alert-
W1  2  365706 09-22-15 Q  AUTOPOWER TEST CUSTOMER      TM   CLUTCH                    0.00    330.00    330.00         0.00
W1  2  365706 09-22-15 Q  AUTOPOWER TEST CUSTOMER      TM   AIR BRAKE SYSTEM          0.00    170.00    170.00         0.00
W1  2  365710 09-29-15 Q  TEST ACCOUNT        09-29-15 TM   CLUTCH                  152.79    402.85      0.00       402.85 <-alert-
W1  2  365725 10-06-15 Q  JLV TRUCK PARTS              TM   EXHAUST SYSTEM            0.00      0.00      0.00         0.00
W1  2  365727 10-08-15 Q  AUTOPOWER TEST CUSTOMER      TM   SERVICE CALL W1           0.00     88.00     88.00         0.00
                      **                                                            -------   -------     -------    -------
                       *                                                            173.69  1,479.75    960.00       511.75

W1  2  365427 04-11-15 W  ALBEMARLE SCHOOL DISTRICT    FRL  TEST 2 OPERATION          0.00     40.00     40.00         0.00
W1  2  365427 04-14-15 W  ALBEMARLE SCHOOL DISTRICT    FR   2006 INT'L PREVENTATIVE MAINT  7.16   380.00   380.00        0.00

                 Options: Page (F)orward, (L)ast, (S)earchText, (Q)uit:
```

```
                                              DATE   BILL                    PRTS+LAB   PRTS+LAB   PRTS+LAB   EST VS ACT ESTIMATE
LOC DEPT  WONO   DATE    ST    CUSTOMER NAME   REQUIRED METH  PROCEDURE DESCRIPTION   COST      SALES      ESTIMATE    VARIANCE   ALERT!
---- ---- ------ -------- --  --------------- -------- ----  -------------------    --------  --------   --------   -------- -------

                      **                                                              7.16    420.00    420.00         0.00
                       *                                                            -------   -------     -------    -------
       ***                                                                          601.01  3,242.27  1,425.50     1,816.77
***                                                                                 802.98  4,053.22  1,595.50     2,457.72
                                                                                    802.98  4,053.22  1,595.50     2,457.72

15 records listed.

                 Last Page Options: Page (B)ackward, (R)eset, (S)earchText, (Q)uit: █
```

Work Order Status Report – W.I.P

The Work In Process Work Order Status Report will allow you to display, print or export W.I.P. work orders based upon the Branch and Department entered.

```
AUTOPOWER
02-10-2015              SHOP WORK ORDER REPORTS              IN-WSR


    1. Work Order Status Report - All Work Orders
    2. Work Order Status Report - W.I.P.
    3. Work Order Status Report - Quotes
    4. Work Orders Over Estimate
    5. Work Orders Past Promise Date

       Enter Selection: █



    Branch Location, or (A)ll...............:
    Department Number, or (A)ll.............:

    OK to produce the report? (Y,N).........:
```

```
AUTOPOWER
02-10-2015              SHOP WORK ORDER REPORTS              IN-WSR


    1. Work Order Status Report - All Work Orders
    2. Work Order Status Report - W.I.P.
    3. Work Order Status Report - Quotes
    4. Work Orders Over Estimate
    5. Work Orders Past Promise Date

       Enter Selection: 2


                   ┌─ Document Options ─┐
                   │                    │
    Branch Location, or (A)1│   (D)isplay     │
    Department Number, or (A│   (P)rint       │
                   │   (X)port       │
    OK to produce the report│ Output Choice:  D█ │
                   └────────────────────┘



            Select Document Output Choice, or (C)ancel
```

Work Order Status Report – Quotes

The Quote Work Order Status Report will allow you to display, print or export quote. work orders based upon the Branch and Department entered.

```
AccuTerm 7                                                          _  □  x
File  Edit  View  Tools  MultiValue  Window  Help
10-09-2015                 SHOP WORK ORDER REPORTS              IN-WSR

       1. Work Order Status Report - All Work Orders
       2. Work Order Status Report - W.I.P.
       3. Work Order Status Report - Quotes
       4. Work Orders Over Estimate
       5. Work Orders Past Promise Date

          Enter Selection: 3



       Branch Location, or (A)ll.................:  W1
       Department Number, or (A)ll..............:  A

       OK to produce the report? (Y,N).........:  Y
```

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AccuTerm 7

File Edit View Tools MultiValue Window Help

```
10-09-2015              SHOP WORK ORDER REPORTS                 IN-WSR


      1. Work Order Status Report - All Work Orders
      2. Work Order Status Report - W.I.P.
      3. Work Order Status Report - Quotes
      4. Work Orders Over Estimate
      5. Work Orders Past Promise Date

         Enter Selection: 3


                           ┌─ Document Options ─┐
                           │                    │
      Branch Location, or (A)l │   (D)isplay     │
      Department Number, or (A  │   (P)rint       │
                               │   (X)port       │
      OK to produce the report │ Output Choice:  │
                           └────────────────────┘



          ▌Select Document Output Choice, or (C)ancel▐
```

AccuTerm 7

File Edit View Tools MultiValue Window Help

```
        09 Oct 2015          WORK ORDER STATUS REPORT - QUOTATIONS       Page:  1

                                       DATE    BILL                 PRTS+LAB PRTS+LAB PRTS+LAB  EST VS ACT ESTIMATE
LOC DEPT WO#  DATE    ST    CUSTOMER NAME   REQUIRED METH   PROCEDURE DESCRIPTION   COST    SALES   ESTIMATE  VARIANCE  ALERT!
--- ---- ----- -------- --  -------------------- -------- ---- ------------------------- -------- -------- -------- -------- --------

W1 1  365718 09-29-15 Q  TEST ACCOUNT      09-29-15 TM  AIR BRAKE SYSTEM        201.97   640.95    0.00   640.95 <-alert-
                                                                            -------- -------- -------- --------
    ***                                                                         201.97   640.95    0.00   640.95

W1 2  365596 07-28-15 Q  ALBEMARLE SCHOOL DISTRICT      TM  BELTS              1.00     7.50    0.00     7.50 <-alert-
W1 2  365669 09-09-15 Q  AUTOPOWER TEST CUSTOMER        FR  2006 INT'L PREVENTATIVE MAINT  1.10   500.00  500.00    0.00
W1 2  365669 09-09-15 Q  AUTOPOWER TEST CUSTOMER        TM  BELTS              0.00     0.00    0.00     0.00
W1 2  365669 09-09-15 Q  AUTOPOWER TEST CUSTOMER        TM  BRAKES            18.00   101.40    0.00   101.40 <-alert-
W1 2  365706 09-22-15 Q  AUTOPOWER TEST CUSTOMER        TM  CLUTCH             0.00   350.00  350.00    0.00
W1 2  365706 09-22-15 Q  AUTOPOWER TEST CUSTOMER        TM  AIR BRAKE SYSTEM   0.00   170.00  170.00    0.00
W1 2  365718 09-29-15 Q  TEST ACCOUNT      09-29-15 TM  CLUTCH             152.79   402.85    0.00   402.85 <-alert-
W1 2  365725 10-05-15 Q  JUV TRUCK PARTS                TM  EXHAUST SYSTEM     0.00     0.00    0.00     0.00
W1 2  365727 10-08-15 Q  AUTOPOWER TEST CUSTOMER        TM  SERVICE CALL W1    0.00    88.00   88.00    0.00
                                                                            -------- -------- -------- --------
    ***                                                                         173.69  1,479.75  988.00   511.75
                                                                            -------- -------- -------- --------
***                                                                             375.66  2,120.70  988.00  1,152.70

                                                                                375.66  2,120.70  988.00  1,152.70


10 records listed.
                                       Last Page... Press ENTER
```

Work Order Status Report – Over Estimate

The Over Estimate Work Order Status Report will allow you to display, print or export work orders that have a variance between the estimated pricing and the actual invoice based upon the Branch and Department entered.

Work Order Status Report – Past Promise Date

The Past Promise Date Work Order Status Report will allow you to display, print or export work orders Over Due Work Orders based on their promise date to the customer.

Mechanic Labor Report by WO

This report will print for each mechanic, the workorder #, date, department job operation number, labor code, billing method, actual labor hours, labor cost per hour and the extended labor cost amount. Also will print the estimated labor hours and its costs extension.

```
AUTOPOWER
02/10/2015 (P99)          AUTOPOWER PARTS & SERVICE               12:30PM

Mail                     VEHICLE SERVICE REPORTS
Waiting
                 1....WO Reports
                 2....Mechanic Labor Report by WO#
                 3....Mechanic Labor Display
                 4....Mechanic Productivity Inquiry
                 5....Mechanic Productivity Report
                 6....Shop Revenue by Make of Vehicle
                 7....Shop Analysis by Job Operation
                 8....Shop Analysis by Mechanic & Job
                 9....WO Labor Detail Report - WIP
                10....WO Labor Detail Report - History
                11....WO Labor Summary Report
                12....Mechanic Hours Worked vs Billed

        Enter Selection:  █


TC=Clock  S=Spooler         R=ACCESS  X=Log Off  N=NoteCards  A=AutoMail  V=VSI-Fax
```

Type in #2 and press *ENTER*.

```
AUTOPOWER
02/10/2015                SHOP MECHANIC LABOR REPORT               WO-MLR


    Branch, or (A)ll..............:  █
    Department, or (A)ll.........:
    Mechanic No, or (A)ll........:
    Page break between Mechanics?:
    Starting Date.................:
    Ending Date...................:
    Do you wish to proceed? (Y,N):








        Enter Branch Location: or (A)ll to select all branches
```

```
AUTOPOWER
02/10/2015                    SHOP MECHANIC LABOR REPORT                    WO-MLR


         Branch, or (A)ll..............: ALL - All Branches
         Department, or (A)ll.........: ALL - All Departments
         Mechanic No, or (A)ll........: ALL - All Mechanics
         Page break between Mechanics?: N
         Starting Date................: 01/01/14
         Ending Date..................: 02/10/15
         Do you wish to proceed? (Y,N): Y

                         ┌─ Document Options ─┐
                         │                    │
                         │    (D)isplay       │
                         │    (P)rint         │
                         │    (X)port         │
                         │  Output Choice:  █ │
                         │                    │
                         └────────────────────┘



              ▌Select Document Output Choice, or (C)ancel▐
```

Below is an example of the Shop Mechanic Labor Report.

```
AUTOPOWER                              AUTOPOWER PARTS & SERVICE
                     02/10/2015        SHOP MECHANIC LABOR REPORT          Page:   1
                                 For the Period from 01/01/14 to 02/10/15
                                  All Branches, All Departments, All Mechanics
-------------------------------------------------------------------------------------
LOC DEPT    DATE    WONO  OPNO LABORCODE   BM  CLK/IN  CLK/OUT   HOURS  COST/HR  ACT.EXT  EST HRS  COST/HR  EST.EXT
-------------------------------------------------------------------------------------

0 - JOHN SMITH
W1  1     01/27/15 365657 1    AIR         TM  Manual Entry     1.00   25.00    25.00    3.00     25.00    75.00
W1  1     01/27/15 365657 1    AIR         TM  Manual Entry     2.00   25.00    50.00    0.00     25.00     0.00
W1  1     01/27/15 365657 1    AIR         TM  Manual Entry     1.00   25.00    25.00    0.00     25.00     0.00
W1  1     01/29/15 365659 1    BSR-001     FRL Manual Entry     2.00   25.00    50.00    2.00     25.00    50.00
W1  1     01/29/15 365660 1    AIR-00      TM  Manual Entry     3.00   25.00    75.00    3.00     25.00    75.00
Sub-totals for 0 - JOHN SMITH                                --------          ---------  --------          ---------
                                                               9.00            225.00    8.00              200.00

                              Last Page... Press ENTER█
```

Mechanic Labor Display

From the Vehicle Service Menu**:**

The Mechanic Labor History Display will list the mechanics by number; the number of jobs that a mechanic has completed today and the hours that he spent on the jobs. Listing an overall percentage of time that it took to complete the job. This display shows an average by Today, Week and Month-To-Date.

```
AUTOPOWER
01/27/2015 (P99)            AUTOPOWER PARTS & SERVICE

                              VEHICLE SERVICE REPORTS
                     1....WO Reports
                     2....Mechanic Labor Report by WO#
                     3....Mechanic Labor Display
                     4....Mechanic Productivity Inquiry
                     5....Mechanic Productivity Report
                     6....Shop Revenue by Make of Vehicle
                     7....Shop Analysis by Job Operation
                     8....Shop Analysis by Mechanic & Job
                     9....WO Labor Detail Report - WIP
                    10....WO Labor Detail Report - History
                    11....WO Labor Summary Report
                    12....Mechanic Hours Worked vs Billed

          Enter Selection:  █

 TC=Clock  S=Spooler          R=ACCESS  X=Log Off  N=NoteCards  A=AutoMail  V=VSI-Fax
```

Type in **#3** and press *ENTER*.

```
AUTOPOWER
02-10-2015              Mechanic Labor History Display          IN-LABH

                _____Today_____   _____Week_____   _____M-T-D_____
Itm  Mechanic        Jobs  Hours   Pct  Jobs  Hours   Pct  Jobs  Hours   Pct

1.   0 - JOHN SMITH    1   3.00 100.0%   1   3.00 100.0%   1   3.00 100.0
                     ==================================================================
                       1   3.00 100.0%   1   3.00 100.0%   1   3.00 100.0

                           Press <Enter>, or (R)eset
```

Mechanic Productivity Inquiry

From the Vehicle Service Menu**:**

> **Type in #4** and press *ENTER*.

```
AUTOPOWER
01/27/2015 (P99)         AUTOPOWER PARTS & SERVICE

                        VEHICLE SERVICE REPORTS

                1....WO Reports
                2....Mechanic Labor Report by WO#
                3....Mechanic Labor Display
                4....Mechanic Productivity Inquiry
                5....Mechanic Productivity Report
                6....Shop Revenue by Make of Vehicle
                7....Shop Analysis by Job Operation
                8....Shop Analysis by Mechanic & Job
                9....WO Labor Detail Report - WIP
               10....WO Labor Detail Report - History
               11....WO Labor Summary Report
               12....Mechanic Hours Worked vs Billed

         Enter Selection:  █


 TC=Clock  S=Spooler  |        | R=ACCESS | X=Log Off | N=NoteCards | A=AutoMail | V=VSI-Fax
```

The Mechanic Productivity Analysis will allow you to summarize mechanics productivity for a period of time. It will allow you to view the actual total amount of labor sells and the labor cost.

```
New Session
 01/29/2015          Mechanic Productivity Analysis          IN-EPAINQ

 Mechanic No:                                              Dept:
 Start Date.:            Labor Sell:
 Ending Date:            Labor Cost:

 Itm    Date      TC.Hrs   WO.Hrs   %-WO    Msc.Hrs  %-Msc   Unk-Hrs  %-Unk








 SubTotal:
```

This program will also allow you to see the total hours this mechanic was on the time clock comparing to the number of hours this mechanic was clocked onto a work order. This analysis will summarize the percentage of time between this mechanic being clocked in and how much time was actually spent on a work order. You can also view unknown hours and miscellaneous hours.

```
03/29/2007              Mechanic Productivity Analysis              IN-EPAIR

Mechanic No:  0    MIKE MALLORY                                  Dept:
Start Date.:  03/01/2007      Labor Sell: 480.00
Ending Date:  03/28/2007      Labor Cost: 200.00              1 record found.

Itm    Date         TC.Hrs    WO.Hrs    %-WO    Msc.Hrs  %-Msc   Unk-Hrs  %-Unk
-----------------------------------------------------------------------------
1.   03/28/2007                8.00      %                  %                %
              ───────────Mechanic Shop Labor Activities───────────
    WO No.    Date    ShopHrs  Lab.Sell  Lab.Cost  Part Number        Z-Number
    -------------------------------------------------------------------------
    1253    03-28-07    1.00     60.00     25.00  AIR CONDITIONING
    1253    03-28-07    6.00    360.00    150.00  AIR CONDITIONING
    1253    03-28-07    1.00     60.00     25.00  AIR CONDITIONING




SubTotal:                       8.00      %       0.00   0.00%    0.00   0.00%

                        Press any key... _
```

This Analysis will list the total Hours that a mechanic was clocked in on the time clock and the actual hours spent on a work order. It will also list the percentage of time the mechanic spent working on work orders, miscellaneous hours and unknown hours giving you an overall total for each

You can also type in the letter "R" and display each operation that this Mechanic is working or has worked on for this date range that you entered.

Mechanic Productivity Report

The Mechanic Productivity Report will allow you to analyze the productivity levels of your shop mechanics. You can print this report with detailed or summarized information

From the Vehicle Service Reports Menu:

```
AUTOPOWER
02/10/2015 (P99)        AUTOPOWER PARTS & SERVICE           01:00PM

Mail                  VEHICLE SERVICE REPORTS
Waiting
                 1....WO Reports
                 2....Mechanic Labor Report by WO#
                 3....Mechanic Labor Display
                 4....Mechanic Productivity Inquiry
                 5....Mechanic Productivity Report
                 6....Shop Revenue by Make of Vehicle
                 7....Shop Analysis by Job Operation
                 8....Shop Analysis by Mechanic & Job
                 9....WO Labor Detail Report - WIP
                10....WO Labor Detail Report - History
                11....WO Labor Summary Report
                12....Mechanic Hours Worked vs Billed

         Enter Selection:  █


 TC=Clock S=Spooler          R=ACCESS X=Log Off N=NoteCards A=AutoMail V=VSI-Fax
```

Type in #5 and press **ENTER**.
◄

The Mechanic Productivity Report screen will display as shown below.

```
AUTOPOWER
02/10/2015            MECHANIC PRODUCTIVITY REPORT          IN-EPAR

    This procedure will produce a report allowing you to analyze the
 productivity levels of your shop mechanics.  The Detail option for
 this report will show the specific work orders associated with the
 mechanic's shop time.


    Branch Location, or ALL.....: █
    Department Code or ALL......:
    Mechanic No., or ALL........:
    Start Date..................:
    End Date....................:
    (S)ummary, or (D)etail......:






         Enter the Branch Location, or ALL for all Branches
```

Type in the **Branch Location** or the word "**ALL**" and press **ENTER**.

Type in the **Department Code** or the word "**ALL**" and press **ENTER**.

Type in the **Mechanic Number** or the word "**ALL**" and press **ENTER**.

Type in the **Start Date** and press **ENTER**.

Type in the **End Date** and press **ENTER**.

Type in the **S** for Summary or **D** for Detail and press **ENTER**.

Type in **P** for Print or **D** for Display and press **ENTER**.

Select the printer number to print to.

An example of the report is shown below.

This report will list the Mechanic's number, date of the job, time clock hours, work order hours, percentage of work order hours, miscellaneous hours, miscellaneous work hours%, Unknown hours, Unknown hours percentage.

```
                                    QUALITY ASSURANCE
29 Mar 2007                  MECHANIC EFFICIENCY ANALYSIS REPORT                    PAGE:   1

            Shop Efficiency from 01/01/06 to 03/29/07 for All Departments for All Mechanics
=================================================================================================

Mechanic                Date      TClockHrs    WOHours  WOHrs-%   MiscHours  MscHrs-%   UnkHours  UnkHrs-%
=================================================================================================


9 - MIKE MALLORY        05-25-2006             5.00        %                 %                    %
                        06-02-2006             6.00        %                 %                    %
                        06-05-2006             9.00        %                 %                    %
                        06-09-2006             4.00        %                 %                    %
                        06-12-2006            28.20        %                 %                    %
                        06-13-2006             3.00        %                 %                    %
                        06-14-2006             4.00        %                 %                    %
                        06-16-2006             0.02        %                 %                    %
                        06-20-2006             1.00        %                 %                    %
                        03-28-2007             8.00        %                 %                    %
                                         -----------------------------------------------------------
Subtotals for: MIKE MALLORY            0.00    68.22       %                 %                    %
```

SHOP REVENUE BY MAKE OF VEHICLE

This report is an Analysis of what shop revenue is collected on a per vehicle basis.

```
AUTOPOWER
02/10/2015 (P99)        AUTOPOWER PARTS & SERVICE           01:00PM

Mail                    VEHICLE SERVICE REPORTS
Waiting
              1....WO Reports
              2....Mechanic Labor Report by WO#
              3....Mechanic Labor Display
              4....Mechanic Productivity Inquiry
              5....Mechanic Productivity Report
              6....Shop Revenue by Make of Vehicle
              7....Shop Analysis by Job Operation
              8....Shop Analysis by Mechanic & Job
              9....WO Labor Detail Report - WIP
             10....WO Labor Detail Report - History
             11....WO Labor Summary Report
             12....Mechanic Hours Worked vs Billed

         Enter Selection:  █


TC=Clock S=Spooler     R=ACCESS X=Log Off N=NoteCards A=AutoMail V=VSI-Fax
```

Type in #6 and press *ENTER*.

◄

Type in the **Customer #** or the **ALL** and press **ENTER.**

Type in the location and press **ENTER**.

Type in the Range of dates that you would like to view shop revenue per vehicle and press **ENTER.**

```
AccuTerm 7                                                          _  □  x
File  Edit  View  Tools  MultiValue  Window  Help
                         SHOP REVENUE BY VEHICLE

   Customer#, or ALL:    All customers              Starting Date: 01-01-12
   Branch Loc, or ALL:   All Branch Locations       Ending Date:   12-01-15

      Vehicle Make      #-WO   #JobOps Parts-Amt Labor-Amt Total-Amt   GM%    %-TTL
   ----------------   -------  ------- --------- --------- --------- ------  ------
1. CHEVY                  3        6       354       605       959   74.0%   87.7%
2. FORD                   1        2        21       113       134   94.0%   12.2%
                       =======  ======= ========= ========= ========= ======  ======
All Vehicles:            4        8       375       718     1,093   76.5%  100.0%




                       Press ENTER or (P)rint █
```

This report will select the service work orders and summarize the parts and labor revenue by the type of vehicle make. Display the table of vehicle makes (eg. Mack, Navistar, Ford, etc.) showing the number of work orders, parts sales, labor sales, gross margin, and the percent of total.

Shop Analysis by Job Operation

```
AUTOPOWER
02/10/2015 (P99)        AUTOPOWER PARTS & SERVICE            01:00PM

Mail                    VEHICLE SERVICE REPORTS
Waiting
            1....WO Reports
            2....Mechanic Labor Report by WO#
            3....Mechanic Labor Display
            4....Mechanic Productivity Inquiry
            5....Mechanic Productivity Report
            6....Shop Revenue by Make of Vehicle
            7....Shop Analysis by Job Operation
            8....Shop Analysis by Mechanic & Job
            9....WO Labor Detail Report - WIP
           10....WO Labor Detail Report - History
           11....WO Labor Summary Report
           12....Mechanic Hours Worked vs Billed

        Enter Selection:  █



TC=Clock S=Spooler        R=ACCESS X=Log Off N=NoteCards A=AutoMail V=VSI-Fax

```

> **Type in #7** and press *ENTER*.

This report will print the Shop Operations and their billable hours revenue to be compared with the actual hours worked.

For **FRL** and **FR** work orders, determines the ratio of hours the mechanic worked of all the hours on the job. Use this ratio to calculate the hours billed and the efficiency percentage. This ratio will be applied only when there is more than one mechanic working on the same job.

```
AUTOPOWER
02/16/2015       SHOP ANALYSIS REPORT BY JOB OPERATION        IN-SOAR


    Mechanic Number, or ALL.........:

    Type of Operation Code, or ALL..:

    Starting Work Order Date........:

    Ending Work Order Date..........:









         Enter the Mechanic Number, or ALL for all Mechanics

```

Type in the **Mechanic Number** or the word **ALL** and press **ENTER**.

Type in the type of **Operation Code** or the word **ALL** and press **ENTER**.

Type in the **Starting Work Order Date** and press **ENTER**.

Type in the **Ending Work Order Date** and press **ENTER**.

Type in **P** to print the report, type in **D** to display the report the screen or type in **X** to Export to your hard drive and press **ENTER**.

```
AUTOPOWER
                                    AUTOPOWER PARTS & SERVICE
                                    Shop Analysis by Job Operation
                                 For 01-01-15 to 03-15-15 for All Mechanics
            02-16-2015                   All Shop Operations                        Page:    1
-------------------------------------------------------------------------------------------------
Shop Operation              BM   HrsWorked  HrsBilled  %-Effic  LaborBilled   InvDate   WO#     Mechanic
-------------------------------------------------------------------------------------------------

AIR-AIR CONDITIONING        TM    4.00       4.00      100.00%     300.00    01-27-15  365657  0-JOHN SMITH
        Operation Total:        ----------  ---------  ---------  ----------
                                  4.00       4.00      100.00%     300.00

AIR-000-GENERAL A/C REPAIRS TM    3.00       3.00      100.00%     255.00    01-29-15  365660  0-JOHN SMITH
        Operation Total:        ----------  ---------  ---------  ----------
                                  3.00       3.00      100.00%     255.00

BSR-001-BRAKE SHOE          FRL   2.00       2.00      100.00%     190.00    01-29-15  365659  0-JOHN SMITH
        Operation Total:        ----------  ---------  ---------  ----------
                                  2.00       2.00      100.00%     190.00

        REPORT TOTAL:           ==========  =========  =========  ==========
                                  9.00       9.00      100.00%     745.00
                                       Last Page... Press ENTER
```

Shop Analysis by Mechanic & by Job Operation

The Shop Analysis by Mechanic or by Job Operation procedure will print all work order operations that the mechanic does between ranges of dates. This report is sorted by the Mechanics number and by work order number.

```
AccuTerm 7                                               _   □   X
File  Edit  View  Tools  MultiValue  Window  Help
10/09/2015 (P22)              ICE TRUCK PARTS              11:40AM

                        VEHICLE SERVICE REPORTS

                 1....WO Reports
                 2....Mechanic Labor Report by WO#
                 3....Mechanic Labor Display
                 4....Mechanic Productivity Inquiry
                 5....Mechanic Productivity Report
                 6....Shop Revenue by Make of Vehicle
                 7....Shop Analysis by Job Operation
                 8....Shop Analysis by Mechanic & Job
                 9....WO Labor Detail Report – WIP
                10....WO Labor Detail Report – History
                11....WO Labor Summary Report
                12....Mechanic Hours Worked vs Billed

         Enter Selection:  █


TC=Clock│S=Spooler│      │R=ACCESS│X=Log Off│N=NoteCards│A=AutoMail│V=VSI-Fax
```
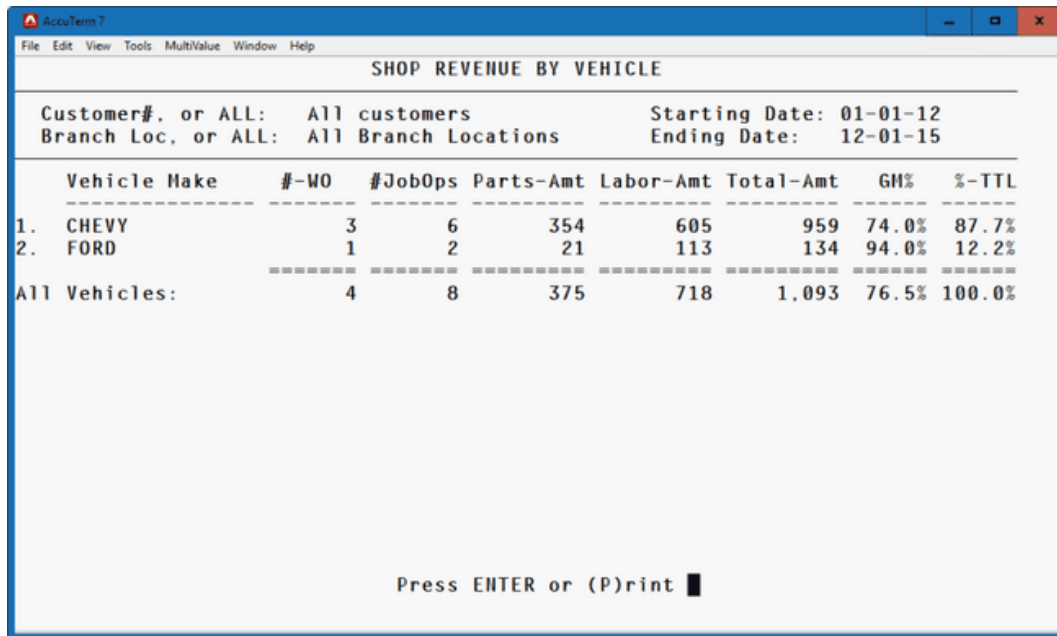
> **Type in #8** and press ▶*ENTER*.

```
AUTOPOWER
02/16/2015    SHOP ANALYSIS REPORT BY MECHANIC & JOB OPERATION    IN-SOARM


     Mechanic Number, or ALL.........:

     Type of Operation Code, or ALL..:

     Starting Work Order Date........:

     Ending Work Order Date..........:












          Enter the Mechanic Number, or ALL for all Mechanics
```

Type in the **Mechanic Number** or the word **ALL** and press **ENTER**.

Type in the **Type of Operation Code** or the word **ALL** and press **ENTER**.

Type in the **Starting Work Order Date** and press **ENTER**.

Type in the **Ending Work Order Date** and press **ENTER**.

Type in **P** to print the report, type in **D** to display the report the screen or type in **X** to Export to your hard drive and press **ENTER**.

WO Labor Detail Report - WIP

This procedure will produce a report of the Work Order labor transactions. Various data selection options provide flexibility in printing the report for specific work orders, mechanics, and by date.

Type in **#9** and press ◄**ENTER**.

Type in the **Location** press **ENTER**.

Type in the **Work Order No,** or **ALL** press **ENTER**.

Type in the **Mechanic** or the word **ALL** and press **ENTER**.

Type in the **Starting Date** and press **ENTER**.

Type in the **Ending Date** and press **ENTER**.

Sort by (W)orkorder, or (M)echanic. Type in W to sort the report by workorder or type in M to sort the report by mechanic and press **ENTER**

Ok to produce this report? **(Y,N)**

Type in **D** to print the report, type in **D** to display the report the screen or type in **X** to Export to your hard drive and press **ENTER**.

```
AUTOPOWER
17 Feb 2015                    WORK ORDER LABOR DETAIL REPORT - WIP                    Page:   1

MECHNO   MECHANIC NAME        DATE    CUSTOMER NAME     WONO   OPNO   TOP Description    LNO STRT-TM STOP-TM ELAP-TM
------   ------------------   -------  ----------------  ------  ----  -------------------  ---  -------  -------  -------

    0 JOHN SMITH              02-10-15 ALTSCHULER TRUCK 365663    1 GENERAL A/C REPAIRS   2                        3.00
                                                                                                        --------
                                                        ***                                               3.00

    0 JOHN SMITH              02-16-15 ALTSCHULER TRUCK 365665    1 BRAKE SHOE            2                        1.00
    0 JOHN SMITH              02-16-15 ALTSCHULER TRUCK 365665    1 BRAKE SHOE            3                        2.00
                                                                                                        --------
                                                        ***                                               3.00

    0 JOHN SMITH              02-16-15 AUTOPOWER CORP    365666    1 AIR CONDITIONING      2                        2.00
    0 JOHN SMITH              02-16-15 AUTOPOWER CORP    365666    1 AIR CONDITIONING      3                        1.00
    0 JOHN SMITH              02-16-15 AUTOPOWER CORP    365666    1 AIR CONDITIONING      4                        1.00
                                                                                                        --------
                                                        ***                                               4.00

                                                                                                         10.00

6 records listed.
                              Last Page... Press ENTER
```

WO Labor Detail Report – History

This procedure will produce a report of the Work Order labor transactions. Various data selection options provide flexibility in printing the report for specific work orders, mechanics, and by date of work orders from the History file.

```
AccuTerm 7                                                    _  □  X
File  Edit  View  Tools  MultiValue  Window  Help
10/09/2015 (P22)              ICE TRUCK PARTS              11:40AM

                        VEHICLE SERVICE REPORTS

                1....WO Reports
                2....Mechanic Labor Report by WO#
                3....Mechanic Labor Display
                4....Mechanic Productivity Inquiry
                5....Mechanic Productivity Report
                6....Shop Revenue by Make of Vehicle
                7....Shop Analysis by Job Operation
                8....Shop Analysis by Mechanic & Job
                9....WO Labor Detail Report - WIP
               10....WO Labor Detail Report - History
               11....WO Labor Summary Report
               12....Mechanic Hours Worked vs Billed

        Enter Selection:  █


TC=Clock  S=Spooler        R=ACCESS  X=Log Off  N=NoteCards  A=AutoMail  V=VSI-Fax
```

Type in #10 and press *ENTER*.

```
AUTOPOWER
02/17/2015        WORK ORDER LABOR DETAIL REPORT - HISTORY        IN-WOLRH


        This procedure will produce a report of the Work Order labor
     transactions.  Various data selection options provide flexibility
     in printing the report for specific work orders, mechanics, and
     by date of work orders from the History file.


        Enter Location......................:  █
        Enter Work Order No, or ALL.........:
        Enter Mechanic No, or ALL...........:
        Enter Starting Date or ALL..........:
        Enter Ending Date...................:
        Sort by (W)ork Order, or (M)echanic:
        OK to produce this report? (Y,N)...:
```

Type in the **Location** press **ENTER**.

Type in the **Work Order No,** or **ALL** press **ENTER**.

Type in the **Mechanic** or the word **ALL** and press **ENTER**.

Type in the **Starting Date** and press **ENTER**.

Type in the **Ending Date** and press **ENTER**.

Sort by (W)orkorder, or (M)echanic. Type in W to sort the report by workorder or type in M to sort the report by mechanic and press **ENTER**

Ok to produce this report? **(Y,N)**

Type in **P** to print the report, type in **D** to display the report the screen or type in **X** to Export to your hard drive and press **ENTER**.

```
AUTOPOWER
17 Feb 2015              WORK ORDER LABOR DETAIL REPORT - HISTORY                Page:    1

MECHNO    MECHANIC NAME      DATE     CUSTOMER NAME     WONO  OPNO   TOP Description      LNO STRT-TM STOP-TM ELAP-TM
------    ------------       -----    -------------     ----  ----   ---------------      --- ------- ------- -------

     0 JOHN SMITH         01-27-15 AUTOPOWER CORP    365657   1 AIR CONDITIONING      2                   1.00
     0 JOHN SMITH         01-27-15 AUTOPOWER CORP    365657   1 AIR CONDITIONING      3                   2.00
     0 JOHN SMITH         01-27-15 AUTOPOWER CORP    365657   1 AIR CONDITIONING      4                   1.00
                                                                                                       -------
                                                             ***                                         4.00

     0 JOHN SMITH         01-29-15 AUTOPOWER CORP    365659   1 BRAKE SHOE            1                   2.00
                                                                                                       -------
                                                             ***                                         2.00

     0 JOHN SMITH         01-29-15 AUTOPOWER CORP    365660   1 GENERAL A/C REPAIRS   1                   3.00
                                                                                                       -------
                                                             ***                                         3.00

                                                                                                         9.00

5 records listed.
                                 Last Page... Press ENTER
```

WO Labor Summary Report

This procedure will produce a summary report of the mechanic labor transactions for the work orders. Selection options will produce a report for a specific work order or mechanic for a range of dates.

```
AccuTerm 7                                                    _  □  X
File  Edit  View  Tools  MultiValue  Window  Help
10/09/2015 (P22)              ICE TRUCK PARTS            11:40AM

                        VEHICLE SERVICE REPORTS
                    1....WO Reports
                    2....Mechanic Labor Report by WO#
                    3....Mechanic Labor Display
                    4....Mechanic Productivity Inquiry
                    5....Mechanic Productivity Report
                    6....Shop Revenue by Make of Vehicle
                    7....Shop Analysis by Job Operation      ┌──────────────────────┐
                    8....Shop Analysis by Mechanic & Job     │ Type in #11 and press │
                    9....WO Labor Detail Report - WIP         │ ◄ENTER.              │
                   10....WO Labor Detail Report - History    └──────────────────────┘
                   11....WO Labor Summary Report
                   12....Mechanic Hours Worked vs Billed

         Enter Selection:  █



TC=Clock │ S=Spooler │         │ R=ACCESS │ X=Log Off │ N=NoteCards │ A=AutoMail │ V=VSI-Fax
```

```
AUTOPOWER
02/17/2015           WORK ORDER LABOR SUMMARY REPORT           IN-WOLS


       ┌──────────────────────────────────────────────────────────┐
       │    This procedure will produce a summary report of the   │
       │ labor transactions for the work orders.  Selection options will │
       │ produce a report for a specific work order or mechanic for a │
       │ range of dates.                                          │
       └──────────────────────────────────────────────────────────┘


         Enter Work Order No, or ALL........:    █
         Enter Mechanic No, or ALL..........:
         Enter Starting Date or ALL.........:
         Enter Ending Date..................:
```

Type in the **Work Order No,** or **ALL** press **ENTER**.

Type in the **Mechanic** or the word **ALL** and press **ENTER**.

Type in the **Starting Date** and press **ENTER**.

Type in the **Ending Date** and press **ENTER**.

```
AUTOPOWER
17 Feb 2015          WORK ORDER LABOR SUMMARY REPORT                Page:   1
                  For the dates from  ALL  to  03/15/15

   MECHANIC NAME        DATE    ELAP-TM OVER TIME        COMMENT
-------------------- --------- ------- ---------  --------------------------
                     01-27-15    4.00 _____
                     01-29-15    5.00 _____
                     02-10-15    3.00 _____
                     02-16-15    7.00 _____
                                -------
JOHN SMITH                      19.00 _____

                                19.00

11 records listed.
                         Last Page... Press ENTER
```

Mechanic Hours Worked vs Billed

The Mechanic labor hours report displays hours worked versus hours billed. This report can be printed, displayed to the screen or exported.

```
AccuTerm 7                                                          _  □  x
File  Edit  View  Tools  MultiValue  Window  Help
10/09/2015 (P22)                ICE TRUCK PARTS                    11:40AM

                        VEHICLE SERVICE REPORTS

                    1....WO Reports
                    2....Mechanic Labor Report by WO#
                    3....Mechanic Labor Display
                    4....Mechanic Productivity Inquiry
                    5....Mechanic Productivity Report
                    6....Shop Revenue by Make of Vehicle
                    7....Shop Analysis by Job Operation
                    8....Shop Analysis by Mechanic & Job
                    9....WO Labor Detail Report - WIP
                   10....WO Labor Detail Report - History
                   11....WO Labor Summary Report
                   12....Mechanic Hours Worked vs Billed

           Enter Selection: █


 TC=Clock│S=Spooler │         │R=ACCESS│X=Log Off│N=NoteCards│A=AutoMail│V=VSI-Fax
```

> **Type in #12** and press *ENTER*.

```
Mechanic Labor Hours Worked vs Billed                              _ □ x
                              ┌ Date Range of Closed WO ─┐
Branch:  ALL-All Branches  ▼  Start Date: [        ]
         ☐ Include Internal Work Orders  End Date: [        ]      Select

 Br  WoNo   Date   Int BM  Labor Code Mechanic      Cost/Hr  Rate/Hr Est.Hours Act.Hours  Ext.Cost Amount Billed   Profit  % Pd




                                                           Export   Print   Close
```

Select the Branch or All branches

Click if this report should Include Internal Work Orders

Type in the Date Range of Closed WO that you would like to print.

Type in the Start Date

Type in the End Date

Click on the Select to start the query.

The columns that will print or display will be Br (Branch), WoNo (Workorder Number), Date (Date of the transaction), Int (Internal), BM (Billing method), Labor Code (Labor Code used for the job, (Mechanic) The mechanic who performed the work, (Cost/Hr) The mechanic's cost per hour to perform the work, (Rate/Hr) The mechanics rate that is charged to perform the work, (Est. Hours) Estimated hours given at the time of the quote. (Act Hours) Actual Hours worked on the job. (Est Cost) Rate hours multiplied by actual hours, TM. (Amount Billed) The amount billed to the customer for the job. (Profit) Parts sales, labor sales minus cost.(%PD) Profit divied by sales = percentage profit.

VEHICLE DATA BASE MENU

From the Vehicle Service Menu select the Vehicle Data Base Menu.

Type in #9 and press ENTER to access the Vehicle Data Base Menu

Customer Vehicle Listing

The Customer Vehicle Listing screen will display.

This report will print, display or export a listing of all vehicles on file for a particular customer.

Enter Customer Number

Type in the **Customer Number** that you would like to print a vehicle listing for and press **ENTER**.

Print or Display

Type in a **P** and press **ENTER** to print this report.
Type in a **D** and press **ENTER** to print this report.
Type in a **X** and press **ENTER** to export the report to your PC.
Type in a **C** and press **ENTER** to exit the screen and not generate the report.

The report below will display as shown below listing the customer number, customer name, vehicle number, make, model, year, next pm date, next dot date, last mileage reading and the date the mileage was read.

```
AUTOPOWER
17 Feb 2015                    CUSTOMER VEHICLE LISTING          PAGE:   1


                      VEHICLE                              NEXT PM  NEXT DOT  LAST   MILEAGE
CUSTOMER    CUSTOMER NAME     NUMBER     MAKE        MODEL       YEAR  DATE     DATE    MILEAGE   DATE
--------  -----------------  --------  ----------------  ----------------  ----  --------  --------  -------  --------

1001     AUTOPOWER CORP     1        FORD            RANGER         95 01/26/15 01/26/16  334000 01/26/15

1 records listed.
                                Last Page... Press ENTER
```

Vehicle Listing By Make, Model or Year

This report will allow you to print or display a list of all customer vehicles by make, model or year.

```
02/17/2015 (P99)        AUTOPOWER PARTS & SERVICE            01:36PM

Mail                    VEHICLE DATA BASE MENU
Waiting
                 1....Vehicle F/M
                 2....Assembly Template F/M

                 3....Customer Vehicle Listing
                 4....Vehicle Listing By Make, Model Or Year
                 5....Overdue PM Report
                 6....Overdue DOT Inspections Report
                 7....Scheduled PM Report
                 8....Scheduled DOT Inspections Report
                 9....Repairs Needed By Vehicle Report

                10....(Rebuild Vehicle WO Xref)

         Enter Selection: ▊


TC=Clock│S=Spooler│    │R=ACCESS│X=Log Off│N=NoteCards│A=AutoMail│V=VSI-Fax
```

Type in #4 and press *ENTER*.

The Vehicle Listing By Make, Model and Year screen will display as shown below.

```
AUTOPOWER
                 Vehicle Listing By Make, Model, Year         VM-VL


      This procedure will generate a listing of all vehicles with a
      specific Make, Model or Year.


      Vehicle Make or ALL..........:  ALL
      Vehicle Model or ALL.........:  ALL
      Vehicle Year or ALL..........:  ALL
      Do you wish to proceed ┌─ Document Options ─┐
                             │                    │
                             │     (D)isplay      │
                             │     (P)rint        │
                             │     (X)port        │
                             │  Output Choice: ▊  │
                             └────────────────────┘



            ▐ Select Document Output Choice, or (C)ancel ▌
```

Type in the **Vehicle Make** or the word **ALL** and press **ENTER**.

Type in the **Vehicle Model** or the word **ALL** and press **ENTER**.

Type in the **Year of the Vehicle** or the word **ALL** and press **ENTER**.

Type in **P** to Print this report and press **ENTER.**

Type in **D** to Display this report and press **ENTER**.

Type in **X** and press **ENTER** to Export this report to your PC.

Type in **C** and press **ENTER** to exit the screen and not generate the report.

The report will display as shown on the next page listing the customer, customer name, vehicle number, make, model, last year mileage and mileage date.

```
AUTOPOWER
17 Feb 2015                    VEHICLE LISTING BY MAKE, MODEL, YEAR                    PAGE:   1

                       VEHICLE                                            LAST    MILEAGE
CUSTOMER    CUSTOMER NAME    NUMBER        MAKE              MODEL    YEAR MILEAGE    DATE
--------    ----------------  --------    ----------------  ----------------  ----  -------  --------

1001        AUTOPOWER CORP    1           FORD              RANGER       95  334000 01/26/15
506675      ATKINSON TRUCK SERVI 15       FORD              RANGER     1995  250000 01/26/15
            CE
305580      ALTSCHULER TRUCK AND R22      GMC                          2015   35200 02/10/15
            EQUIPMENT

3 records listed.
                              Last Page... Press ENTER
```

Overdue PM Report

The Overdue PM Report will print a listing of all vehicles that are overdue for the Preventative Maintenance**.**

From the Vehicle Data Base Menu:

```
AUTOPOWER
02/17/2015 (P99)          AUTOPOWER PARTS & SERVICE              01:44PM

Mail                      VEHICLE DATA BASE MENU
Waiting
                  1....Vehicle F/M                    ┌─────────────────────────┐
                  2....Assembly Template F/M          │ Type in #5 and press    │
                                                      │ ENTER.                  │
                  3....Customer Vehicle Listing       └─────────────────────────┘
                  4....Vehicle Listing By Make, Model Or Year
                  5....Overdue PM Report
                  6....Overdue DOT Inspections Report
                  7....Scheduled PM Report
                  8....Scheduled DOT Inspections Report
                  9....Repairs Needed By Vehicle Report

                  10....(Rebuild Vehicle WO Xref)

          Enter Selection: █


 TC=Clock S=Spooler      R=ACCESS X=Log Off N=NoteCards A=AutoMail V=VSI-Fax
```

The Overdue PM Report Screen will display as shown below.

```
AUTOPOWER
                       Overdue PM Report                      VM-ODPMRPT
───────────────────────────────────────────────────────────────────────

     ┌──────────────────────────────────────────────────────────┐
     │ This procedure will generate a listing of vehicles overdue for │
     │ Preventive Maintenance (PM).                               │
     └──────────────────────────────────────────────────────────┘


      Customer Number or ALL....................:  ALL

      Do you wish to proceed? (Y,N).............:  Y
                            ┌─ Document Options ─┐
                            │   (D)isplay        │
                            │   (P)rint          │
                            │   (X)port          │
                            │ Output Choice:  █  │
                            └────────────────────┘



            ▌Select Document Output Choice, or (C)ancel▐
```

The Overdue PM Report will print, display or Export a listing of vehicles that are overdue for the Preventative Maintenance date.

Customer Number or All

Type in the Customer Number or the word ALL and press **ENTER**.

(P)rint, (D)isplay or Export Report to PC

Type in the letter **P** and press **ENTER** to print the listing.

Type in the letter **D** and press **ENTER** to display the listing.

Type in the letter **X** and press **ENTER** to export the listing to the PC.

Type in **C** and press **ENTER** to exit the screen and not generate the report.

The listing below will display or print. The report will display the customer number, customer name, vehicle number, make, model, year, last preventative maintenance date, next preventative maintenance date, days past the preventative maintenance date, the last mileage, next preventative mileage and the miles that are past the next preventative mileage.

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Overdue DOT Inspection Report

This report will list vehicles that are overdue for DOT Inspections.

To access the Overdue DOT Inspection report go to the Vehicle Data Base Menu:

The screen below will display.

Type in the customer number or the word ALL and press **ENTER**.

Type in the letter **P** and press **ENTER** to print the listing.

Type in the letter **D** and press **ENTER** to display the listing.

Type in the letter **X** and press **ENTER** to export the listing to the PC.

Type in **C** and press **ENTER** to exit the screen and not generate the report.

```
AUTOPOWER
 18 Feb 2015                    OVERDUE DOT INSPECTIONS REPORT BY CUSTOMER                 PAGE:   1

                       VEHICLE                                    LAST DOT NEXT DOT DAYS PAST  LAST
CUSTOMER    CUSTOMER NAME   NUMBER       MAKE           MODEL      YEAR  DATE     DATE   NEXT DOT  MILEAGE
--------   --------------------- --------  -----------------  ------------------ ----  -------- -------- ---------- -------

1001     AUTOPOWER CORP    1       FORD          RANGER       95 01/26/14 01/26/15      23  334000

          ***

1 records listed.
                                     Last Page... Press ENTER
```

Scheduled PM Appointment

The scheduled PM Appointment Report will list all vehicles that are scheduled for preventative maintenance.

From the Vehicle Data Base Menu:

```
AUTOPOWER
02/18/2015 (P99)          AUTOPOWER PARTS & SERVICE              12:06PM

Mail                      VEHICLE DATA BASE MENU
Waiting
                 1....Vehicle F/M                    ┌─────────────────────────┐
                 2....Assembly Template F/M          │ Type in #7 and press    │
                                                     │ ENTER                   │
                 3....Customer Vehicle Listing       └─────────────────────────┘
                 4....Vehicle Listing By Make, Model or Year
                 5....Overdue PM Report
                 6....Overdue DOT Inspections Report
                 7....Scheduled PM Report
                 8....Scheduled DOT Inspections Report
                 9....Repairs Needed By Vehicle Report

                10....(Rebuild Vehicle WO Xref)

            Enter Selection:


  TC=Clock │S=Spooler │        │ R=ACCESS │X=Log Off │N=NoteCards │A=AutoMail │V=VSI-Fax
```

The Scheduled PM Report screen will display as shown below.

```
AUTOPOWER
                         Scheduled PM Report              VM-PMRPT
_____

     ┌──────────────────────────────────────────────────────────┐
     │ This procedure will generate a listing of vehicles scheduled│
     │ for Preventive Maintenance (PM).                           │
     └──────────────────────────────────────────────────────────┘



     Customer Number or ALL....................:

     Enter Ending Date.........................:

     Do you wish to proceed? (Y,N).............:
```

Type in the customer number or the word all and press **ENTER**.

Type in the Ending Date and press **ENTER**.

Type in the letter **P** and press **ENTER** to print the listing.

Type in the letter **D** and press **ENTER** to display the listing.

Type in the letter **X** and press **ENTER** to export the listing to the PC.

Type in **C** and press **ENTER** to exit the screen and not generate the report.

.

The Scheduled PM Report by Customer will list customer number, customer name, vehicle number, vehicle make and model, year of vehicle, the date of the last preventative maintenance, the scheduled next preventative maintenance date, how many days are past the preventative maintenance date, the last mileage reading, the next preventative maintenance mileage and how many miles are past the next preventative maintenance mileage.

Scheduled DOT Inspections Report

From the Vehicle Data Base Menu:

```
AUTOPOWER
02/18/2015 (P99)          AUTOPOWER PARTS & SERVICE              12:10PM

Mail                      VEHICLE DATA BASE MENU
Waiting
                   1....Vehicle F/M
                   2....Assembly Template F/M

                   3....Customer Vehicle Listing
                   4....Vehicle Listing By Make, Model Or
                   5....Overdue PM Report
                   6....Overdue DOT Inspections Report
                   7....Scheduled PM Report
                   8....Scheduled DOT Inspections Report
                   9....Repairs Needed By Vehicle Report

                  10....(Rebuild Vehicle WO Xref)

          Enter Selection:  █


TC=Clock S=Spooler        R=ACCESS X=Log Off N=NoteCards A=AutoMail V=VSI-Fax
```

> **Type in #8** and press *ENTER*.

The Scheduled PM Report screen will display as shown below.

This procedure will allow you to print, display or export a listing of vehicles scheduled for Preventative Maintenance.

```
AUTOPOWER
                  Scheduled DOT Inspections Report          VM-DOTRPT


     This procedure will generate a listing of vehicles scheduled
     for DOT inspections.


      Customer Number or ALL...................:  █

      Enter Ending Date........................:

      Do you wish to proceed? (Y,N)............:
```

Customer Number or ALL

Type in the **Customer Number or ALL** and press **ENTER**.

Enter Ending Date:

Type in the **Ending Date** and press **ENTER**.

(**P**)rint, (**D**)isplay, or (**X**)port to customer

Type in **P** and press **ENTER** to print the Scheduled PM Report

Type in **D** and press **ENTER** to display the report to the screen.

Type in **x** and press **ENTER** to EXPORT the report.

Type in **C** and press **ENTER** to exit the screen and not generate the report.

```
AUTOPOWER
 18 Feb 2015                    OVERDUE DOT INSPECTIONS REPORT BY CUSTOMER                    PAGE:    1

                             VEHICLE                                   LAST DOT NEXT DOT DAYS PAST  LAST
CUSTOMER    CUSTOMER NAME     NUMBER      MAKE            MODEL    YEAR   DATE     DATE   NEXT DOT MILEAGE
--------  -------------------- -------  --------------- ---------------- ---- -------- -------- --------- -------

305580    ALTSCHULER TRUCK AND R22     GMC                          2015 02/10/15 02/10/16     -357   35200
          EQUIPMENT

          ***

506675    ATKINSON TRUCK SERVI 15      FORD           RANGER        1995 01/26/15 01/26/16     -342  250000
          CE

          ***

1001      AUTOPOWER CORP       1       FORD           RANGER          95 01/26/14 01/26/15       23  334000

          ***

504500    VISALIA TRUCKING INC 256     DODGE          RAM           2015 03/16/14 02/07/14      376   15000
          .

          ***

4 records listed.
                                        Last Page... Press ENTER
```

The report will list the customer number, customer name, vehicle number, make, model, year, last DOT date, Next DOT date, Days Past the NEXT DOT date, Last mileage.

Repairs Needed by Vehicle Report

This report will list the customer number, customer name, vehicle number, make of vehicle, model of vehicle, year of vehicle and the work order number where the repairs were recommended that the vehicle needed.

From the Vehicle Data Base Menu:

```
AUTOPOWER
02/18/2015 (P99)          AUTOPOWER PARTS & SERVICE              12:16PM

Mail                      VEHICLE DATA BASE MENU
Waiting
                    1....Vehicle F/M
                    2....Assembly Template F/M

                    3....Customer Vehicle Listing
                    4....Vehicle Listing By Make, Model Or Ye
                    5....Overdue PM Report
                    6....Overdue DOT Inspections Report
                    7....Scheduled PM Report
                    8....Scheduled DOT Inspections Report
                    9....Repairs Needed By Vehicle Report

                   10....(Rebuild Vehicle WO Xref)

              Enter Selection:  █



  TC=Clock S=Spooler        R=ACCESS X=Log Off N=NoteCards A=AutoMail V=VSI-Fax
```

Type in #9 and press *ENTER*.

The Repairs Needed by Vehicle screen will display.

```
AUTOPOWER
                        Repairs Needed By Vehicle              VM-RNBV
  _____

    This procedure will generate a listing of repairs needed
    on customers vehicles.



       Customer Number or ALL...............:  █
       Vehicle Number or ALL................:
       Do you wish to proceed? (Y,N)............:
```

Type in the customer number or the word "**ALL**" and press **ENTER**.

Type in the Vehicle Number or the word "**ALL**" and press **ENTER**.

(**P**)rint, (**D**)isplay, or (**X**)port to customer

Type in **P** and press **ENTER** to print the Scheduled PM Report

Type in **D** and press **ENTER** to display the report to the screen.

Type in **x** and press **ENTER** to EXPORT the report.

Type in **C** and press **ENTER** to exit the screen and not generate the report.

The report below will display.

Rebuild Vehicle Work Order Cross-Reference

Occasionally, you may need to rebuild the work order cross-reference files. The Rebuild Vehicle Cross Reference program will delete all vehicle work order cross-references and rebuild them.

This program is used under the direction of AutoPower Support department.

To access the program, go to the Vehicle Shop Work Order Menu, Vehicle Service Menu, Vehicle Data Base Menu, and Rebuild Vehicle WO Xref menu option.

```
AUTOPOWER
02/18/2015 (P99)          AUTOPOWER PARTS & SERVICE            12:26PM

Mail                    VEHICLE DATA BASE MENU
Waiting
                  1....Vehicle F/M
                  2....Assembly Template F/M

                  3....Customer Vehicle Listing
                  4....Vehicle Listing By Make, Model Or Year
                  5....Overdue PM Report
                  6....Overdue DOT Inspections Report
                  7....Scheduled PM Report
                  8....Scheduled DOT Inspections Report
                  9....Repairs Needed By Vehicle Report

                 10....(Rebuild Vehicle WO Xref)

         Enter Selection:


 TC=Clock  S=Spooler         R=ACCESS  X=Log Off  N=NoteCards  A=AutoMail  V=VSI-Fax
```

The screen below will display.

```
AUTOPOWER
                    Rebuild Vehicle Data Base with Work Orders      IN-RBVMX


       This procedure will reset and rebuild the Work Order Cr
    in each of the Customer Vehicle data base records.


    Do you wish to proceed with this Xref rebuild? (Y,N): ■
```

> **Type in #10** and press
> *ENTER*.

Do you wish to proceed with this Xref rebuild? Y, N. Type in **Y** for **Yes** if you would like to rebuild the Xref files.

Type in **N** for **No** if you would like not to rebuild the Xref files.

If you answer **Y** for **Yes** the screen below will display listing the phases of the Xref as it is processing.

When the Xref has completed you will see Vehicle/Work order Cross Reference Rebuild Complete.

```
AUTOPOWER
                    Rebuild Vehicle Data Base with Work Orders      IN-RBVMX


       This procedure will reset and rebuild the Work Order Cross Reference
    in each of the Customer Vehicle data base records.


    Do you wish to proceed with this Xref rebuild? (Y,N): Y

            Phase 1 of 3 in progress...
            Phase 2 of 3 in progress...
            Phase 3 of 3 in progress...


    Vehicle/WorkOrder Cross Reference Rebuild Complete■
```

KEY TERMS

Brass Tag Number

A unique number stamped on a unit for identification purposes; the re-builder assigns the number. (Unit Rebuilding)

DOT

Department of Transportation

Flat Rate Labor (FRL)

A billing method in which the customer is charged a standard price for the work, plus an additional cost for the labor involved in a job. When flat rate labor is used, different customers may pay slightly different rates for the same job, based on the amount of labor needed to complete it.

Flat Rate (FR)

A billing method in which the customer is charged a standard price for work, regardless of the time and materials involved in completing the job. Typically, when flat rate labor is used, all customers are charged the same rate for this type of work.

Operation

A procedure (job) performed in the shop.

PM

Preventative Maintenance

Retail

The selling of merchandise and certain services to the consumer.

Time and Materials (TM)

A billing method in which the customer is charged based on the amount of time and the amount of materials needed to complete a job.

VIN

Vehicle Identification Number

VMRS

Vehicle Maintenance Reporting Standards

Warranty

A written guarantee of the integrity of a product and of the maker's responsibility for repairing or replacing defective parts.