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Service Module

Release Version 4.20



**Service Module Manual,
Version 4.20**

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Using COMPTRON s Service Program

At the login screen prompt, type `comptron` (lower-case letters) and press *Enter*. After displaying the copyright screen, the program will ask for your password. Operators must be assigned Service access levels and passwords by the manager/owner (this is done using **Option 3, Management**, from the main **Comptron Menu**).

Type your password, and the following **Comptron Menu** will appear. The options that you see in this menu will depend on your assigned level of access.

Comptron Menu

```
Comptron Menu                                     Version 4.20

Select █

1. Parts
2. Service
3. Sales
4. Management
' Exit
```

Most of the major COMPTRON[®] menus operate through single “hot key” commands, which means that they take effect immediately after you type the number or letter corresponding to the desired option, without your having to press the *Enter* key to execute the selection. From the **Comptron Menu**, choose **Option 2**, and you will see this **Service Menu**.

Service Menu

```
Service Menu                                     Version 4.20

SMITH ACTION SPORTS
22 BROADWAY
RIVERSIDE, CA 92500

Select █

1. Appointments
2. Schedule
3. Repair Order
4. Service Reports
5. File Maintenance
' Exit
```

Commonly Used Command Options and Messages

The following basic commands are used in many of the screens of COMPTRON's **Service** program. They are displayed as a horizontal menu of options across the top of the screen, as follows:

<N> Next <S> Search <A> Add <'> Exit < >
<P> Prev <C> Change <d> Delete

Explanation of Basic Screen Command Options:

- < N> **Next** - Allows you to advance to the next record.
- < S> **Search** - Lets you search for an existing record.
- < A> **Add** - Lets you create a new record and add it to your file.
- < '> **Exit** - Leaves this screen.
- < P> **Prev** - Allows you to go back to the previous record.
- < C> **Change** - Lets you modify a record.
- < d> **Delete** - Lets you delete a record from your file.

Data Entry Field Commands

As you are entering data in fields on the various screens, you will see a horizontal menu bar on the top line of your screen, similar to the following example. These are the field command options available to you, in addition to the valid data for a particular field.

<'> Prev <.> Erase < ;> Skip

Explanation of Data Entry Field Command Options:

- < '> **Prev** - The apostrophe < '> key, located immediately to the left of the *Enter* or *Return* key on most terminal keyboards, allows movement of the cursor to the previous field. If this is the first field, < '> **Exit** takes the place of < '> **Prev**.
- < .> **Erase** - The period < .> key allows you to erase data on a particular field. This option is not allowed on fields which contain mandatory (required) entries.
- < ;> **Skip** - The semicolon < ;> key, which is immediately to the left of the apostrophe key on most terminal keyboards, is the character used to skip certain groups of data so that you don't have to press *Enter* on each field to advance the cursor through the screen.

The Scrolling Search Command

In addition to the basic field command options discussed above for data entry screens, there is a more general kind of search command, the forward slash key < /> **Search** option, that can be used to speed input of parts information in certain fields on tickets created in Parts **Counter Operations** and on the **RO Parts** screen. This differs from the < S> command, which finds for you a record showing a particular string of characters in a field.

Instead, the < /> command, when entered in the **Vendor**, **Code**, or **Part Number** field, brings up a window containing a list of all the possible vendors, parts, etc. in the data base. The list is displayed according to the sequence and range selected, and you can scroll down through it to pick the line number representing the code or part that you need. When you enter the line number, the window disappears, and COMPTRON® displays the information you picked in your Parts ticket or Repair Order. This command is explained briefly on the screens at the fields where it applies, and later in this manual.

Screen Verification Commands

After you have completed entering data for a particular screen, you will see another horizontal menu at the bottom of your screen, similar to the following, which allows you to verify the data you have entered:

< > Accept < ' > Correct < U > Undo

Explanation of Screen Verification Command Options:

- < > **Accept** - Press *Enter* to accept all the data as entered. The record will then be updated in the file.
- < ' > **Correct** - The apostrophe < ' > allows you to correct one or more fields on the screen prior to updating the record.
- < U > **Undo** - This will undo (disregard) all the field changes you may have made, and redisplay the screen as it was prior to entering any data.

Screen Messages

When you have completed modification of the data on the screen, but some of the required information is not present, the following message will appear at the bottom of the screen:

*** Incomplete Record *** < ' > Correct < U > Undo

- < ' > **Correct** - This lets you supply the missing information; for example, filling in the **Vehicle Make** or **Customer Name** field.
- < U > **Undo** - This will undo or disregard all entries and redisplay the original data.

When you have entered the < S> **Search** command option, but there is no matching key on the file, the following message is displayed. Press *Enter* or *Return* to continue.

*** Record Not Found ***

Many of the fields will display a “Help” message, a plain-language description at the bottom of the screen, to assist new users.

Example:

Engine Serial Number —

Format: Maximum of Twenty Alpha/Numeric Characters

Getting Started

Build Your Service Default Options

To use your COMPTRON® Service Module properly, it will be necessary to set up the program defaults for your Service department. These include the data field names that you will use for maintaining vehicle information, the levels of access assigned to the operators who will use COMPTRON® from your Service department, the calendar that you will use to schedule service appointments, and the work codes and default rates that COMPTRON® will use in calculating labor charges.

From the **Comptron Menu**, select **Option 3** (for **Management**), then **3** (to **Change Defaults**), then **3** again (for **Service**). The **Service Defaults Menu** appears as follows:

Service Defaults Menu

Service Defaults Menu

Select █

1. Repair Order Number
2. Hourly Labor Rates
3. Service Access Levels
4. Name Vehicle Fields
5. Type Repair Order Form
6. Number Months History
7. Repair Order Disclaimer

' Exit

Explanation of Menu Options:

< 1> **Repair Order Number** - Use this option to set the starting number of your Repair Orders.

< 2> **Hourly Labor Rates** - This option will allow you to set three different labor rates: Retail, Internal, and Warranty.

< 3> **Service Access Levels** - This option brings up the following screen:

Service Access Levels Screen

<C> Change <'> Exit < >

Service Access Levels

Repair Order Payments	1
Repair Order Parts	3
Schedule & Repairs	5
Reports & Maintenance	7
Service Management	10

Explanation of Screen Options:

Repair Order Payments - This is the minimum access level to end a Repair Order and collect payment.

Repair Order Parts - This is the minimum access level to sell or edit parts on a Repair Order, in addition to handling payments.

Schedule & Repairs - This is the minimum level to access the **Appointments, Schedule, and Repair Order** functions.

Reports & Maintenance - This is the minimum level to access the **Service Reports and File Maintenance** functions.

Service Management - This is the minimum access level to print Service management reports and modify the Technician, Calendar, and Holiday files.

Explanation of Remaining Menu Options:

These are the other three options that appear on the **Service Defaults Menu**:

< 4> **Name Vehicle Fields** - This option first brings up a message explaining that seven of the fields in the Vehicle file have changeable names (meaning that you can rename them to suit your needs). Next a screen similar to the following appears:

Vehicle Field Names Screen

```
<C> Change <'> Exit < >
Vehicle Field Names

Type                               Name
Searchable Fields                  COLOR
                                     INVOICE #
                                     LOCATION
Non-Search Fields                  TIRES
                                     COMMENT
Amount (Money) Fields              COST
                                     RETAIL
```

Three of the seven changeable data fields are “searchable,” two are “nonsearchable,” and two are for money amounts. This gives you more flexibility in maintaining vehicle information. The screen above shows an example of how these fields might be named.

< 5> **Type Repair Order Form** - This option brings up the following screen:

Type of Repair Order Form Screen

```

                                <C> Change  <'> Exit  < >
Type of Repair Order Form

                                Print Repair Order on  <P> (Plain Paper)

The type of form to be used when printing Repair Orders
<F> Preprinted Disclaimer  <D> Changeable Disclaimer  <P> Plain Paper

```

You may choose from three RO form options: **Preprinted Disclaimer**, **Changeable Disclaimer** and **Plain Paper**.

< 6> **Number Months History** - This option brings up the following screen:

Service Defaults Screen

```

                                <C> Change  <'> Exit  < >
Service Defaults

                                Months of RO History  12

The number of months of Repair Order History to keep on file
Format:  nn  Example:  12

```

When you run the **End of Month** program, ended Repair Orders older than the number of months specified in this option are removed from the system, and COMPTRON® prints a report indicating which Repair Orders were deleted.



CAUTION:

Because some of the information contained in the service reports is obtained from the Repair Order History file, you should keep as many months of history as needed.

< 7> **Repair Order Disclaimer** - Use this option to design your own disclaimer statement, which will print on your Repair Orders in the lower left-hand corner. The option brings up the following screen with text that you can change to fit your situation:

Edit Repair Order Disclaimer Screen

```
                                <C> Change <'> Exit < >
Edit Repair Order Disclaimer

=====
I hereby authorize the repair work to be done, along with the necessary ]
material, and hereby grant you and/or your employees permission to operate the ]
vehicle herein described on streets, highways or elsewhere for the purpose of ]
testing and/or inspection. An express mechanic's lien is hereby acknowledged ]
on vehicle to secure the amount of repairs thereto. Dealer not responsible ]
for unavailability of parts or delays in parts shipments beyond dealers ]
control. NOT RESPONSIBLE FOR LOSS OR DAMAGE TO VEHICLES OR ARTICLES LEFT ON ]
OR IN VEHICLE IN CASE OF FIRE, THEFT OR ANY OTHER CAUSE BEYOND OUR CONTROL. ]
                                                                                   ]
=====
```



NOTE: Be sure to check the **SYSTEM DEFAULTS** as well, through **Option 3** of the **Management Menu**. The **Sales Tax Rate** and **Sales Tax on Labor?** default fields use the same tax rates as the **Parts** system defaults.

Set Up Your Service Schedule Calendar 5-6

To properly automate your Service department, you need to set up a calendar. This calendar is used by COMPTRON® to automate appointment scheduling.

From the **Service Menu**, select **Option 5, File Maintenance**, and the following **Service Files** menu appears:

Service Files Menu

```
Service Files

                                Select 

1. Customer
2. Vehicle
3. Work Code
4. History
5. Technician
6. Calendar
7. Holiday

' Exit
```

Select **Option 6, Calendar**, and a screen similar to the following displays the default schedule settings:

**Schedule Calendar
Screen**

```

                                <N> Next  <S> Search  <A> Add  <'> Exit  < >
                                <P> Prev  <C> Change  <d> Delete

Schedule Calendar

Starting Date  1/01/2006  Ending Date  12/31/2006

First Day of Week      # Days      # Hours      # Techs      % to Sched
  Monday                6          8.0          3            70.0

Day      Hours      # Techs      Manhours      % to Sched      Avail Hrs
Monday   8.0        3           24.0          70.0            16.8
Tuesday  8.0        3           24.0          70.0            16.8
Wednesday 8.0        3           24.0          70.0            16.8
Thursday  8.0        3           24.0          70.0            16.8
Friday   8.0        3           24.0          70.0            16.8
Saturday 6.0        3           18.0          70.0            12.6

```

These default settings are used for scheduling appointments and preparing Repair Orders. The default values should be changed to suit your Service department.

Design a Calendar record for the period in which you wish to schedule appointments.

Example: 1/01/2006 through 12/31/2006

This includes the number of hours that your Service department will be open each day, how many technicians will be available, and the percent to schedule. The percent to schedule is the percentage of the day that the technicians will work on time that is billed (*actual time*). You can change individual days.

Example: Six hours on Saturdays

Define Your Service Holidays 5-7

Service holidays are the days when your Service department will be **CLOSED**. You can choose to modify the values in these fields to suit your needs. Use these also for scheduling appointments.

From the **Service Menu**, select **Option 5**, then **7**, and a screen like the following appears with the default Service holiday settings for the year 2006:

Service Holiday
Schedule Screen

```

                                <N> Next  <S> Search  <A> Add  <'> Exit  < >
                                <P> Prev  <C> Change  <d> Delete

Service Holiday Schedule

Starting Date  1/01/2006  Ending Date  12/31/2006

                                Line   Date       Day of Week
                                ----   -
                                1     1/02/2006  Monday
                                2     2/20/2006  Monday
                                3     5/29/2006  Monday
                                4     7/04/2006  Tuesday
                                5     9/04/2006  Monday
                                6     11/23/2006 Thursday
                                7     12/25/2006 Monday
    
```

The service holiday schedule is designed so that you won't accidentally schedule work or make appointments on days when your department will be closed.

The range (starting and ending dates) should be the same as the range of your schedule calendar.

Build Your Work Code File 5-3

Work codes are not required for COMPTRON[®] to function, but they provide a handy shortcut to help you maximize your efficiency with the system by making it easier to schedule appointments and create Repair Orders. You can design work codes for your commonly performed jobs, such as installing accessories and repairing or mounting tires, so that you won't have to type out the work description and labor rate each time. You may enter work code data referencing the flat rate labor manual, or you can use your own work codes, description of work to be performed, and flat rate hours.

From the **Service Menu**, select **Option 5**, then **3**, and a **Work Code File** screen like this appears:

Work Code File
Screen

```

                                <N> Next  <S> Search  <A> Add  <M> Memo  <'> Exit  < >
                                <P> Prev  <C> Change  <d> Delete  <D> Duplicate

Work Code File

                                Model      * (All Models)

                                Work Code   CFT

                                Description  CHANGE FRT/TIRE

                                Hours       .80

                                Special Rate? <N>
    
```

Work codes are accessed by Model AND Work Code. An asterisk (*) in the **Model** field means that the work code applies to all models. When **Special Rate** is set to < Y> , the labor cost is entered. This is used instead of the default labor rate.

Occasionally you may have to send a job out to another company; for example, if the unit needs fiberglass repair or frame welding. In that case, you should **Add < A>** a new work code for this kind of job—something that you can relate to easily, such as “W” for welding, “FR” for fiberglass repair, or “BC” for boring a cylinder—and be sure to use an asterisk (*) in the **Model** field. Show a “1” in the **Hours** field if you charge by the hour, or the approximate amount of time if by a flat rate (followed by < Y> for **Special Rate** and the amount you charge for this service). You will also need to add a new **Tech-ID** (technician) code for the outside company. (See page S-19.)

Explanation of Screen Command Options:

- < N> **Next** - Displays the next work code in sequence.
- < P> **Prev** - Displays the previous record in order.
- < S> **Search** - Searches for a particular work code. A code has to be **ADDED** to the Work Code file before **Search** can find it.
- < C> **Change** - Changes the information on a record.
- < A> **Add** - Adds a new code to your Work Code file.
- < d> **Delete** - d (lower-case) deletes this record from your Work Code file after confirming the deletion.
- < M> **Memo** - Lets you add a comment (Memo page) to the work code record, such as a description of what work is included, what parts are needed for the job, etc. If a Memo page exists for a Work Code file record, the < M> option on the menu bar at the top of the screen will flash, alerting you to check the Memo for notes. You can also edit the Memo page. You can access a **Help** screen by pressing the F2 key.



NOTE: A Memo page will stay with the record to which it is attached, as long as that record is in the system. Deleting a record will also delete the Memo attached to it.

- < D> **Duplicate** - Use this command option to duplicate (copy) the work code description to another record.

Build Your Customer File 5-1

If you have been using COMPTRON[®], you will already have a Customer file. If you have Service customers whom you have not yet added, you can add them at this time. You will be familiar with this function from using your COMPTRON[®] system. The customer information is required to schedule appointments or create Repair Orders. You can add customers (or change their information) from the **Appointment** screen or the **Repair Order** screen.

Always try to get complete customer information, and put it in the proper fields (**DON T** use address or phone number fields for vehicle data, which belongs in the **Vehicles, Model, Yr, Make, and Remark** fields)—once entered into the system, customer data is available to all departments and functions.

From the **Service Menu**, select **Option 5**, then **1**, and you will see a screen similar to this:

Customer File Screen

```

      <N> Next  <P> Prev  <A> Add  <V> Vehicle  <'> Exit  <>
Customer File  <S> Search  <C> Change  <d> Delete  <L> Label  <M> Memo

L-Name  WALDEN                      Customer #          2976
F-Name  TIMOTHY                      Initial D          Tax ID #
SSN     525-75-8637                  DOB  7/17/69      Age  29            Tax Code
Dr Lic  W197311                      Lic State AZ      Discount Type <R>  Retail
Spouse                                     Discount %
Attn                                         Account Type <A>  Account
Addr   2212 VIA CERRITO              Credit Limit       $2500.00
City   SIERRA VISTA                  Amount Charged     $257.82
County COCHISE                       Amount Paid        $100.00
State  AZ                            Zip Code 85635-3216 Balance            $157.82
Hm Phone 520-452-7379                Fax #              Credit Avail       $2343.18
Wk Phone 520-459-1633                Wk Ext            Last Charged       5/11/2004
Cellular                               Pager #            Last Credited      5/11/2004
E-Mail                                     Date Added         10/20/2001
Remark  WILL PROBABLY BUY A 99 IN APRIL Last Sale          5/11/2004
Alert

      1  2  3  4  5  6  7  8  9 10  Vehicles  Model      Yr  Make
Category  S                                1      XV750     01  YAM
    
```

Each customer **MUST** have a unique number. If you don't assign a number, COMPTRON® automatically assigns one for you. You will not be allowed to charge to Warranty or Internal accounts until such accounts have been established on the Customer file with a credit limit. (For field descriptions, refer to the Customer File section of Chapter 10, System Maintenance.)

Build Your Vehicle File 5-2

The Vehicle file information is required to schedule appointments or create Repair Orders. You can choose to enter vehicle information at this time, or later when scheduling appointments or creating Repair Orders. Always try to get as much vehicle information as possible, including vehicle identification number (VIN), key number, and mileage. This will help greatly when you need to track what was done to which vehicle and when.

From the **Service Menu**, select **Option 5**, then **2**, and a screen like the following is displayed:

Vehicle File Screen

```

          <N> Next  <S> Search  <A> Add    <M> Memo    <'> Exit    < >
Vehicle File <P> Prev  <C> Change  <d> Delete  <U> Customer

Model          Year      Make          Date Added
Model          CMX250CH  Year  02      Make  HONDA    Date Added  2/04/2004
VIN            JH2MC1302HK205613
Engine #
Lic/ID #       LC2-AB          Key #      721      Date Read   4/14/2004
Stock #        2028B          UserDef4
Color          RED            UserDef5    Odometer   16000
Invoice#       172774         Amount1     Date       5/12/2004
Location       SERVICE/STORAGE Amount2     Weekly Usage
Warrant Exp
Ext War Exp

Last Name      LIPPERT
First Name     LINDA          Initial    M

Remark         WILL PROBABLY WANT WINDSHIELD NEXT TRIP IN

Recommended Service  CHAIN IS WORN
                    NEW BATTERY

```

Explanation of Screen Command Options:

- < N> **Next** - Displays the next vehicle number in model-year-make identifier (ID) sequence. If you have done a search by vehicle and selected **N**, the next record is in vehicle number sequence.
- < P> **Prev** - Displays the previous record in vehicle ID order.
- < S> **Search** - Searches for a particular vehicle. A vehicle has to be **ADDED** to the Vehicle file before **Search** can find it.
- < C> **Change** - Changes the information on a vehicle record.
- < A> **Add** - Adds a new vehicle to your Vehicle file. As in the case of Customer file data, vehicle information can be added from the **Appointment** screen or the **Repair Order** screen.
- < d> **Delete** - d (lower-case) deletes this record from your Vehicle file after confirming the deletion.
- < M> **Memo** - Lets you add a note (Memo page) to the vehicle record, such as extra vehicle description details, history, warranty information, notes on abuse, etc. If a Memo page exists for a Vehicle file record, the < M> option on the menu bar will flash at the top of the screen, alerting the user to check the Memo for special notes. You can also edit the Memo page. To access a **Help** screen, press the *F2* key.



NOTE: A Memo page will stay with the record to which it is attached, as long as that record is in the system. Deleting a record will also delete the Memo attached to it.

- < U> **Customer** - Lets you access the Customer file related to this vehicle record, so you can update the customer information as needed.

Vehicle File Screen Field Descriptions:

Model - The model name/number of this vehicle.

Year - The official model year of this vehicle. This is another key field that must be completed before you can perform a search for a vehicle.

Make - The make (manufacturer) of this vehicle.

VIN - The vehicle identification number of this unit.

Engine # - The engine number for this vehicle.

Lic/ID # - The state license plate number or other identification number for this vehicle.

Key # - The ignition key number, if any, for this unit.

Stock # - This unit's stock number.

UserDef1 – UserDef5 - These are user-defined fields whose names you can change to better fit your store's needs. The first three are "searchable" fields (see the *Service Defaults* section of Chapter 11, *Management*).

Amount1/Amount2 - These are user-defined money fields whose names you can change to fit your needs.

Last Name/First Name/Initial - The customer's (vehicle owner's) name—these are the key customer data fields used by COMPTRON® to search the Customer file.

Remark - Enter any information about this vehicle that you wish (up to 30 characters in length).

Recommended Service - Any service recommended by a technician on the last Repair Order will appear here; it will be updated automatically whenever a Repair Order that includes recommended service comments is ended.

Date Added - The date the vehicle was added to your data base.

Last Serv - The date of last service on the vehicle. The entry will be updated automatically when a Repair Order is ended.

Odometer - The odometer reading last recorded. It will be updated automatically when a Repair Order is ended, when entered on the **Repair Order** screen.

Date Read - The date when the odometer was last read. It will be updated automatically when a Repair Order is ended, when the odometer reading is entered on the **Repair Order** screen.

Service Due: Odometer - The scheduled/anticipated odometer reading when the next service should be performed on the vehicle.

Service Due: Date - The date when the next service should be performed on the vehicle (computed from the **Service Due: Odometer** entry).

Weekly Usage - The vehicle's average weekly use in miles.

Warrant Exp - The date when the manufacturer's warranty will expire.

Ext War Exp - The date when the extended warranty, if any, expires.

The History File 5-4

COMPTRON® maintains two types of history files on Service department activity: one on Repair Orders and one on Service Orders. The Repair Order History file contains an exact copy of all Repair Orders that have been "completed" or "canceled." It will not be pertinent until after Repair Orders have been ended, at which time the information is stored in the History file. This is a "read only" file, which means that the data cannot be changed.

The Repair Order History file keeps track of the tax rate and the name given to the first user-defined field which were in effect at the time each Repair Order was ended. This ensures accuracy of future reprints in the event that these attributes change in the interim.

The Service Orders History file contains historical information on parts ordered to complete a Repair Order.

From the **Service Menu**, select **Option 5**, then **4**, and you will see the following menu:

History File Menu

History File

Select

1. Repair Order History
2. Service Orders History
- ' Exit

Explanation of Menu Options:

- < 1> **Repair Order History** - This option brings up the **Repair Order History** screen, an example of which is illustrated and explained on the next page.
- < 2> **Service Orders History** - This option invokes a screen that allows you to locate the parts history for a particular Repair Order, by RO number, purchase order number, or vendor/part number. Examples of the resulting screens are shown on succeeding pages after the Repair Order History screen sample.

If you select **Option 1** from the **History File** menu, you will see a **Repair Order History** screen similar to this:

Repair Order History Screen

```

                                <N> Next <S> Search <T> Print <'> Exit < >
Repair Order History <P> Prev <R> Repairs <M> Payments

RO #      000718 Operator OPERATOR 4          Dt/Tm Sched  5/21/2004  7:46A
Status    FINALIZED                          Completed    5/21/2004  12:53P
Type Svc  RETAIL                              Picked Up   5/21/2004  1:42P

Last Name  WHITTON                               Model  FXLR           Year  97
First Name SAM                               Initial Make        HD
Address    584 MOONDALE                         VIN     1HD1EBL19MY132881
City       EL PASO                               Engine #
State      TX   Zip Code  89912                   Lic/ID #           Odom.  7845
Home Phone 915-584-8938                         Stock #
Work Phone                               Ext.              Userdef1  RED
=====
Parts      $30.00                               Tax           $1.95
Labor      $15.00                               $46.95
Misc                               Paid           $46.95
Sub        $45.00                               Balance
    
```

Explanation of Screen Command Options:

< S> Search Allows you to search your Repair Order history by RO number, date/time scheduled, date/time completed, date/time ended, customer, model/year/make, VIN (vehicle identification number), stock number, or user-defined field 1. If you search by VIN and then use the **< P> Prev** command, you will see the previous RO with that same VIN.

< T> Print Makes a printed copy of the completed Repair Order, with the word "REPRINT" displayed above the store header. The RO's status must be "Completed" and **AT LEAST ONE** of the following must apply: it must have (a) one or more "Sold" or "Ordered" parts lines, (b) one or more labor lines, or (c) one or more "Miscellaneous" lines.

If a deleted Repair Order is reprinted from the History file, the upper right portion of the printout will show the word "Deleted" below the type and date of service, with the date when deleted; it will also have the word "DELETED" centered just above the disclaimer.



NOTE: Management level access is required to **REPRINT** a Repair Order.

< R> Repairs Lets you view the repair information (Parts, Labor, Miscellaneous, and Recommended).

< M> Payments Allows you to look at the RO Payments (Date, Amount, Type).

If you select **Option 2** from the **History File** menu, you will have an opportunity to enter an RO number or to find a Repair Order by using the search command **< S>** , which displays the following menu:

Searching for Service Orders History Menu

Searching for Service Orders History

Select

1. Repair Order Number
2. Purchase Order Number
3. Vendor/Part Number
- ' Exit

Explanation of Menu Options:

- < 1> **Repair Order Number** - This option prompts you to enter the RO number, and locates the parts history related to that.
- < 2> **Purchase Order Number** - This selection asks you for a purchase order number, and brings up a screen listing all the RO numbers and part numbers related to that purchase order. Then you can type the line number of the Repair Order for which you want to see the history on parts ordered to complete it.
- < 3> **Vendor/Part Number** - This option prompts you to enter a vendor and/or part number, then displays a screen listing all the related RO numbers, from which you can choose a line number (as in **Option 2**).

When you select **Option 1** from the **Searching for Service Orders History** menu and type a PO number or press *Enter*, you will see a **Service Orders** screen similar to this, starting with the most recent RO first and working back:

Service Orders Screen

Service Orders						
Ln	RO #	PO #	Ven	Part Number	Description	Qty
1	000058	7731	000	16013-822-004	FLOAT SET	1
2	000058	7731	000	16011-816-004	VALVE SET FLOAT	1
3	000057	7729	002	12052	OIL SEAL @2	1
4	000057	7729	002	12050	OIL SEAL	1
5	000054	7720	000	91303-MM5-000	O-RING, 25.5X2.5	1
6	000054	7720	000	19510-MM5-000	HOSE A, WATER CONNEC	1
7	000054	7720	000	19226-MM5-003	GASKET, WATER PUMP C	1
8	000054	7720	000	12391-MM5-000	GASKET, HEAD COVER	1
9	000023	7698	000	91305-426-003	O RING	1
10	000023	7698	000	91301-MG9-003	O RING 35.5X2.6	4
11	000023	7698	000	91201-ML8-003	OIL SEAL, 25X54X12	1
12	000023	7698	000	31120-ML8-305	STATOR COMP	1
13	000023	7698	000	18392-ML8-600	PACKING, MUFFLER	2
14	000023	7698	000	18291-286-000	GASKET EX PIPE	4
15	000023	7698	000	11394-ML8-003	GASKET, RR. CASE	1
16	000023	7698	000	11393-MG9-680	GASKET CLUTCH COVER	1
17	000010	7681	000	17510-MN9-870ZA	TANK COMP., FUEL *B1	1
18	000010	7681	000	16950-MN9-005	COCK ASSY., FUEL	1
19	000010	7681	000	16155-MN9-004	VALVE COMP., FLOAT	1

Enter Line Number or <N> Next or <'> Exit

If you then type 17 (for line 17 of the **Service Orders** screen), the parts orders for RO # 10 will be displayed, as in the following example:

RO (Parts) Orders History Screen

```

                                <N> Next  <'> Exit  <M> Memo  < >
RO # 000010 Orders History
=====
Ven Part Number      Description                Qty Action   PO #   Date   Op
000 16155-MN9-004    VALVE COMP., FLOAT        1 Ordered   7681 11/12/2003 13
                                1 Received   7681 11/17/2003 13
                                1 Picked Up  7681 11/18/2003 04

000 16950-MN9-005    COCK ASSY., FUEL          1 Ordered   7681 11/12/2003 13
                                1 Received   7681 11/17/2003 13
                                1 Picked Up  7681 11/18/2003 04

000 17510-MN9-870ZA  TANK COMP., FUEL *B1      1 Ordered   7681 11/12/2003 13
                                1 Received   7681 11/17/2003 13
                                1 Picked Up  7681 11/18/2003 04
    
```

Explanation of Screen Command Options:

- < N> **Next** This command displays the next Repair Order Parts Orders History record in sequence.
- < '> **Exit** Use this command to leave the **RO (Parts) Orders History** screen.
- < M> **Memo** This command lets you add a comment (Memo page) to the Service Orders History file record, such as technical information about ordered parts, other related items needed, arrival date notes, backorder status, special shipping information, authorization numbers, etc. If a Service Orders Memo page exists for a record, the < M> option on the menu bar will flash at the top of the screen, alerting you to check the Memo for special notes. You can also edit the Memo page. Pressing the F2 key will access a **Help** screen.



NOTE: A Memo page will stay with the record to which it is attached, as long as that record is in the system. Deleting a record will also delete the Memo attached to it.

Build Your Technician (Mechanic) File 5-5

You can choose to enter the information about your technicians (mechanics) at this time or later. This information is used for billing labor charges on Repair Orders and for preparing management reports. The Technician File screen is illustrated on the following page.

Technician File Screen

```

                                <N> Next  <S> Search  <A> Add    <'> Exit  < >
                                <P> Prev  <C> Change  <d> Delete  <M> Memo

Technician File

                                Tech-ID      1
                                Name          BERRY MCDONALD
                                Bay/Stall     2
                                Commission %  50.00
                                Cost/Hour     12.50

```

Screen command options are essentially the same for the Technician file as for the Work Code file, including the Memo page feature. If a Memo page exists for a technician record, the **Memo < M>** option on the menu bar at the top of the screen will flash, alerting you to check the Memo for special notes.

If you use an outside shop for some jobs (*as discussed on page 11*), you will need to **Add < A>** a new Tech-ID for that company—something descriptive, such as “BS” for body shop for “MS” for machine shop. You can use that shop’s initials in the **Bay/Stall** field, and for the **Commission** or **Cost/Hour** show the rate you pay that company for their services. Then whenever you want to sell these services on a Repair Order, all you have to do is type the related work code in the **Labor** section with the outside company’s technician code, and the correct profit will be calculated for the job. You can change the amount charged for that job by changing either the number of hours taken or the rate.

Now that you have become familiar with COMPTRON’s data base structure, you can begin scheduling appointments and creating Repair Orders.

Appointments (Service Menu Option 1)

Once you have set up your service defaults and built your Work Code, Technician, Customer, and Vehicle files, you are ready to start scheduling appointments. Select **Option 1** from the **Service Menu**, and an **Appointment** screen similar to the following will appear:

Appointment Screen

```

                <N> Next  <S> Search  <A> Add    <'> Exit  < >
Appointment    <P> Prev  <C> Change  <d> Delete  <R> Repair Order

Last Name      ALDREDGE                      Model      ATC125M      Year      2001
First Name     BERRY                      Initial    B            Make      HONDA
Address        4345 BOULDER HWY              VIN        A125M60345
City           LAS VEGAS                      Lic/ID #   N/A
State          NV      Zip Code  90124-4927      Color      RED
Home Phone     702-458-1300
Work Phone     702-459-5825  Ext.      3            Type Svc   RETAIL
Appt Remark

=====
W-Code  Description                      Tech      Est Hrs  Est Labor
112210  RECOIL STARTER REBUILD           GA              .50      $14.00

Hours    .50  Sub      $14.00  Tax      $.91    Labor    $14.91

Dt/Tm Sched  10/05/2004 10:00A  Dt/Tm Prom  10/05/2004  5:00P
    
```

Enter the customer name, if known. If not, type as much of the name as you know. COMPTRON® will search the Customer file with as many characters as you type. Or if you wish, you may skip the name and search by typing the vehicle information. If a match is found, a customer/vehicle record is displayed. If it is not the correct record, select **Next**, **Search**, or **Add**. When adding, COMPTRON® displays what you have typed for the search.

If the customer owns fewer than five vehicles, the model, year, and make of each are displayed on the customer screen. If the customer owns five or more, the number (count) is displayed. If multiple vehicles are involved, you can select the correct vehicle. If none of the vehicles listed applies, you can enter the correct model, year, and make, and the vehicle is added. You can also change data on the vehicle, such as the license number or serial number. You must have customer data AND vehicle data to schedule an appointment.



NOTE: Be sure to watch the upper left corner of the screen to be aware of which file screen you are on, i.e., **Appointment**, **Customer**, or **Vehicle**.

If a customer name is present, you can add a vehicle; otherwise, select an existing customer or add a customer before adding the vehicle. You cannot add a vehicle without a customer's name. Always try to get **COMPLETE** customer AND vehicle information, in the proper fields—once it is entered into the system, it will be available to all departments and COMPTRON® functions.

Appointment Screen Field Descriptions:

Type Svc

Three options are available for the **Type Svc** field:

< R> Retail (default) < I> Internal < W> Warranty

- W-Code** Type the work code for the model selected. If the work code has been included in the Work Code file, the **Description** and **Est Hrs** fields will be completed automatically for the appointment. If you don't have a work code, go to the **Description** field and type in a description of your work.
- Tech** Identify the technician if a specific technician is needed for this job.
- Est Hrs** Type a time estimate for the job, and the labor charge estimate will be calculated from the labor rate in the service default file. You can change the default labor rate for a particular work line if you need to.
- Dt/Tm Sched** Enter the date and time for which you want to schedule this appointment. Three options are available for the **Dt/Tm Sched** field:
 < T> Today's date < A> Anytime < S> Search
- Today s date** Uses the current date.
- Anytime** Will not schedule a date/time.
- Search** Will allow you to search for available man-hours.
- Dt/Tm Prom** The date and time promised are optional. You can enter a date only, but not a time without a date. When you enter the date scheduled, the date promised will default to the same date. If you print out an estimate for your customer, the date/time promised will appear just above the customer's name.

If you try to schedule more repair time for an appointment than remains available for the date chosen, you will see the following warning message:

Adding an Appointment Screen

```

        </> Search <S> Schedule <'> Prev < ;> Skip
Adding an Appointment
Last Name  ENGELE           Model    FLSTF           Year  2001
First Name LARRY             Initial  R             Make    HARLEY
Address    1650 JAMES ST         VIN      H347D59687ST
City       N. LAS VEGAS         Lic/ID #  N/A
State      NV      Zi
Home Phone 702-641
Work Phone 702-467
Appt Remark
=====
W-Code  Descriptio
112210  5000 CHECK
=====
        W A R N I N G !
        You are over-scheduled by 1.30 hours
        on 01/18/2006 ( )
        Continue < >
=====
Hours    3.80  Sub    $106.17  Tax    $6.90  Labor  $113.07
Dt/Tm Sched  1/18/2006           Dt/Tm Prom
    
```

If you select < **R**> for **Repair Order**, COMPTRON® will ask: Create repair order? (Y or N) If you answer yes, the system will show the RO number assigned, and delete the appointment. You can access the Repair Order using **Option 3, Service Menu**.

The Service Schedule (Service Menu Option 2)

You can view the Service Schedule, to determine when to schedule an appointment, using **Option 2** of the **Service Menu**. A screen like this appears:

Service Schedule
Screen

<T> Toggle <N> Next <S> Search <R> Scroll <'> Exit < > Back <A> Anytime <P> Print									
Schedule for Wednesday,		1/18/2006	Avl M-Hrs	Hrs Sched	Hrs Avail				
			11.20	37.55					
Name	Model	Yr	Work Description	Tech	Hrs	Sched	Prom	*	
PERRY, D.	XL883H	02	PRIMARY COVER HAS 2 MARKS		.00	10:57A			D
IN-HOUSE (NEW)	FXDL	02	INSTALL SECURITY ALARM FX/		4.00	11:11A			I
HALLIS, S.	FXRS	84	MIKUNI OR S&S CARB INSTALL		3.60	11:24A	3:30P		N
MORRISON, J.	XL1200	02	CUST STATES THE LEFT MIRRO	45	.10	11:44A			D
FLANIGAN, C.	FXDWG	01	SWITCH OUT FOOTPEGS FRONT		.00	11:53A			N
IN-HOUSE (NEW)	FXDL	02	SOFTAIL & DYNA SETUP		3.25	12:16P			N
STICH, J.	FLHTC	91	R&R LEAKING BASE GASKETS		.30	2:16P	5:00P		N
IN-HOUSE (NEW)	FLHR	02	TOURING & FL SPRINGER SET		3.25	2:44P			N
ITEN, C.	FLHR	02	INITIAL CHECK-TOURING BIKE		3.00	3:10P			N
BOULEY, R.	FXDX	01	DOES NOT HOLD A CHARGE.	N	.00	4:09P			N
ENGELE, L.	FLSTF	99	5000 CHECK BIG TWIN SPORT		3.80	5:52P			N
IN-HOUSE (NEW)	FLSTCI	02	TOURING & FL SPRINGER SET		3.25	6:14P			N
IN-HOUSE (NEW)	FLSTFI	02	SOFTAIL & DYNA SETUP		3.25	6:16P			N
IN-HOUSE (NEW)	FLSTCI	02	TOURING & FL SPRINGER SET		3.25	6:18P			N

* A = Appointment N = Not Started I = In Progress D = Delayed C = Completed

After you have created appointments and Repair Orders, the Service **Schedule** option allows you to view your department's workload on the screen. When you enter the schedule from the menu, it will display the appointments/Repair Orders for the current day or the next business day.

Explanation of Screen Command Options:

< T> Toggle	Enables you to go directly from this schedule to a related Repair Order to edit it, and then return here.
< N> Next	Shows the next business day's appointments and Repair Orders.
< B> Back	Shows the previous day's schedule.
< S> Search	Allows you to search for appointments by date.
< A> Anytime	Shows appointments made with no date scheduled.
< R> Scroll	Displays the full Schedule screen in RO number order so you can scroll down it and select the line for which you need to edit the RO (<i>see example on next page</i>).
< P> Print	Allows you to print a copy of this day's schedule.
< '> Exit	Leaves this screen.



NOTE: Only the first work line of the appointment/Repair Order is displayed. The last column* (asterisk) uses the following symbol meanings:

A = Appointment only; no Repair Order has been created.

N, I, or D = A Repair Order exists; this shows the current status.

The following screen shows how the Service Schedule is arranged when you invoke the < R> **Scroll** command. Simply enter the line number for the Repair Order that you want to edit, and COMPTRON® will take you directly to the RO screen so you can make whatever changes are needed. To return to the regular Schedule screen with customer names, use the < T> **Toggle** command.

Service Schedule
Scroll Screen

```

      <T> Toggle   <'> Exit                               Line Number < >
Schedule for Wednesday, 1/18/2006           Avl M-Hrs           Hrs Sched           Hrs Avail
                                           11.20                   37.55

                                           Time
Line   R/O   Model   Yr Work Description           Tech Hrs Sched Prom *
1     27694  XL883H  02 PRIMARY COVER HAS 2 MARKS           .00 10:57A           D
2     27695  FXDL    02 INSTALL SECURITY ALARM FX/           4.00 11:11A           I
3     27696  FXRS    84 MIKUNI OR S&S CARB INSTALL           3.60 11:24A           3:30P N
4     27697  XL1200  02 CUST STATES THE LEFT MIRRO 45     .10 11:44A           D
5     27698  FXDWG   01 SWITCH OUT FOOTPEGS FRONT           .00 11:53A           N
6     27699  FXDL    02 SOFTAIL & DYNA SETUP                 3.25 12:16P           N
7     27702  FLHTC   91 R&R LEAKING BASE GASKETS           .30 2:16P           5:00P N
8     27705  FLHR    02 TOURING & FL SPRINGER SET           3.25 2:44P           N
9     27708  FLHR    02 INITIAL CHECK-TOURING BIKE           3.00 3:10P           N
10    27710  FXDX    01 DOES NOT HOLD A CHARGE. N           .00 4:09P           N
11    27712  FLSTF   99 5000 CHECK BIG TWIN SPORT           3.80 5:52P           N
12    27713  FLSTCI  02 TOURING & FL SPRINGER SET           3.25 6:14P           N
13    27714  FLSTFI  02 SOFTAIL & DYNA SETUP                 3.25 6:16P           N
14    27715  FLSTCI  02 TOURING & FL SPRINGER SET           3.25 6:18P           N

<T> Toggle Schedule to Name or < > Enter Line # to edit R/O
    
```



NOTE: To maneuver up and down in the Scroll screen, use the < N> **Next** and < P> **Prev** commands. If you use the < ' > **Exit** command, you will find yourself back at the main **Service Menu**.

In this example, line 10 was selected from the Service Schedule Scroll screen for editing of the Repair Order, so the following **Repair Order** screen appears:

Repair Order Screen

```

      <N> Next  <S> Search  <A> Add  <e> Est  <R> Repairs  <'> Exit  < >
Repair Order <P> Prev  <C> Change  <d> Del  <U> Dup  <E> End RO

RO #      027710 Operator 41           Dt/Tm Sched 1/18/2006 4:09P
Status    NOT STARTED           Dt/Tm Prom  1/18/2006
Type Svc  WARRANTY Acct #      111106      Call When Ready
                Claim #

Last Name BOULEY           Model   FXDX           Year 2001
First Name RICHARD           Initial Make   GJV
Address   7832 COLFAX AVE N VIN      1HD1GJV131Y322883
City      BROOKLYN PARK           Engine #
State     MN Zip Code 55444           Lic/ID # WHITE PEARL Odom. 3900
Home Phone 763-561-3664           Stock #
Work Phone           Ext.           COLOR

=====
Parts      $85.00           Tax
Labor
Misc       $85.00           Paid
Sub        Balance    $85.00
    
```

When you have finished making changes to the **Repair Order** screen for this appointment, use < ' > **Exit** to return to the regular **Service Schedule** screen.

Creating a Repair Order (Service Menu Option 3)

To create a Repair Order, choose **Option 3** of the **Service Menu**. The following **Repair Order** screen will appear:

Repair Order Screen

```

      <N> Next  <S> Search  <A> Add  <R> Repairs  <e> Est  <'> Exit  < >
Repair Order <P> Prev  <C> Change  <D> Del  <M> Paymnts  <U> Dup  <E> End RO

RO #      000176  Operator  OPERATOR 4          Dt/Tm Sched  7/07/2004  1:10P
Status    IN PROGRESS          Dt/Tm Prom   7/07/2004
Type Svc  RETAIL              Call When Ready

Last Name  DEVAUX          Model      FLHS          Year  89
First Name SERGE          Initial    Make          HD
Address                               VIN         1HD1FAL0LY505988
City                               Engine #
State          Zip Code          Lic/ID #          Odom.  45264
Home Phone                               Stock #
Work Phone                               Ext.            COLOR
=====
          Parts          $67.43          Tax          $4.38
          Labor          $150.00         $221.81
          Misc                               Paid
          Sub           $217.43         Balance      $221.81

```

Explanation of Repair Order Screen Command Options:

- < N> **Next** Allows you to advance to the next Repair Order.
- < P> **Prev** Lets you go back to the previous Repair Order.
- < S> **Search** Lets you search for a previously created Repair Order by RO number, date/time scheduled, customer, model/year/make, VIN, stock number, or user-defined field.
- < C> **Change** Lets you make changes to an existing RO that you have brought up to the screen.
- < A> **Add** Allows you to start a new RO. COMPTRON® checks for an existing RO on the model, year, and make entered; if one is found, you can accept that or create a new one.
- < d> **Delete** Deletes an existing RO displayed on the screen. This can be done **ONLY** if there have been no payments, or they have been refunded. All parts must be canceled to delete an RO.
- < R> **Repairs** Displays a screen allowing you to enter repair data.
- < M> **Payments** Allows you to accept a deposit or make a refund. Payments can be made only on **Retail**-type service.
- < e> **Estimate** Prints an estimate for your customer. This can be done only if the Repair Order's status is **NOT** "Completed."
- < U> **Duplicate** Lets you duplicate applicable parts of an existing RO to create a new one for a similar job (a handy shortcut).

< E> **End RO** Allows you to end a completed RO and have it printed, provided that certain conditions are met (*see NOTE*).



NOTE: *The following conditions must be met to end the RO:*

- a. - If parts were ordered, they must have been **RECEIVED** and **PICKED UP**.
- b. - Parts entered on the RO by a Service operator (no Parts access) must be edited by a Parts operator, and none can be type **E** (**Exception**) parts.
- c. - Status must be **Completed** —the RO cannot be an estimate.
- d. - The RO must have **AT LEAST ONE** entry in **Parts, Labor, or Miscellaneous**; e.g., it has one or more **Sold** or **Ordered** parts lines, **OR** it has one or more labor or miscellaneous entries.

Repair Order Field Descriptions:

RO # Repair Order number. This is assigned by COMPTRON® when all data is complete and “accepted.”

Operator This is the operator who created the Repair Order.

Status < N> Not Started < I> In Progress < D> Delayed < C> Completed If the status is delayed, you can type in a reason for delay. If waiting for parts, select < P> ; otherwise, type in the reason.

Type Svc < R> Retail < I> Internal < W> Warranty (Default = Retail) If the type of service is Warranty or Internal (in-house), you will be asked to enter the warranty or internal account number (use < S> to Search by name or number). The account must have been established in the Customer/Account file with a credit limit. For warranty repairs, there will also be a field for entering a warranty claim number. This will print on the RO (changeable disclaimer forms only).

Dt/Tm Sched Date/Time Scheduled
Default = Current Date, Current Time

Dt/Tm Prom Date/Time Promised
Default = Current Date (no time promised).

Call When Ready < Y> or < N> Default = < Y> Yes - Notify customer when work is completed.

Enter Customer Data: Last Name, First Name, Initial (*These are key fields used when COMPTRON® searches the Customer file.*) **Address, City, State, Zip Code, Home Phone, Work Phone, Ext** (work phone extension). If the customer’s name is found on the Customer file, or if you chose to add the customer, these fields will be displayed automatically. Always try to get complete customer information so it will be available to all departments. (For IN-HOUSE NEW or USED units, just type **IN** at the **Last Name** field.) After entering all the information, press **Enter** to Accept the customer.

Enter Vehicle Data: **Model, Year, Make** (These are the key fields used when COMPTRON[®] searches the Vehicle file.) **VIN, Engine #, Lic/ID #, Stock #**, user-defined field, and **Odom**. If the model, year, and make are found in the Vehicle file and you accept the vehicle found, these fields will be displayed automatically. You will also be prompted to enter the current odometer reading. Fill in as much vehicle information as you can, pressing **Enter** to skip fields you plan to add later.



NOTE: Be sure to watch the upper left corner of the screen to be aware of which file screen you are on; i. e., **Repair Order, Vehicle, or Customer**.

You must have both customer data and vehicle data to create a Repair Order. Look over all the information displayed to be sure it is correct, then press **Enter** to continue.

The date last serviced, recommended service date, and date read will be updated on the Vehicle file when the Repair Order is completed and ended.

Creating an Aftermarket Warranty Repair Order

When a customer requests repairs under warranty, you will need be able to charge the work to the aftermarket warranty company, so before starting the Repair Order, make sure that a warranty account has been established in the Customer/Account file. (Refer to the *Build Your Customer File* section of this chapter, or see the *Customer File* section of Chapter 10, System Maintenance.)

Next, create the RO as you would normally do, except that you will select **< W> Warranty** for the **Type Svc** field. You will be asked for the warranty account number (use **< S>** to Search by the company name), and a warranty claim number. Setting up the RO this way will charge the basic book retail price for the parts used, but will not add tax (this will be handled later).

Enter customer and vehicle information as usual, then add the parts needed for the job. After you have added all the parts, go back to the **Type Svc** field at the beginning of the RO and change the type from **Warranty** to **Retail**. This causes COMPTRON[®] to automatically add sales tax for the parts, but will leave them priced at the original book retail rate. If you need to add more parts later, just change the service type from **Retail** to **Warranty** again first, add the new parts, and then change the type back to **Retail** again to update the tax.

The Repairs Option

If you choose < R> **Repairs** from the **Repair Order** screen, you will see the following **Repair Order Status** screen:

Repair Order Status Screen

```

      <P> Parts  <L> Labor  <N> Memos  <'> Exit Repairs  < >
Repair Order      <M> Miscellaneous  <R> Recommend

RO #      000252  Operator  OPERATOR 4          Dt/Tm Sched  9/02/2004  2:12P
Status    NOT STARTED                    Dt/Tm Prom   9/02/2004
Type Svc  WARRANTY      Acct #  284703          Call When Ready

Last Name  HARLEY DAVIDSON WARR              Model    XL883      Year  92
First Name                Initial      Make      HD

=====
    
```

Explanation of Repair Order Status Screen Command Options:

- < L> **Labor** Lets you enter work code (labor) information. You do not have to add a particular technician code or labor amount when first setting up the RO—merely enter a description of the work requested by the customer.
- < N> **Memos** This command allows you to check for any Memo page notes attached to this Repair Order.
- < M> **Miscellaneous** Allows you to enter miscellaneous charges to the RO.
- < R> **Recommend** Lets you enter comments about recommended service.
- < P> **Parts** Brings up the **Parts** screen and allows you to look up and sell parts on the RO. This is similar to **Parts Counter Operations** in COMPTRON®.

When you select < P> **Parts** from the **Repair Order Status** screen, you will see a **Parts** screen similar to this:

RO Parts Screen

```

< >  <C> Continue  <E> Edit  <C> Cancel All  <P> Pick Ticket  <O> Orders
      <M> Memo  <'> Exit
=====  RO # 001039  RETAIL  =====
Ven Code  Part Number  Description  On Hand  Price
-----
      Cost  Qty  Date Ord  On Order  Back Ord
=====
Ln Ven Part Number  Description  Qty Ty Pri %  Amount
1 000 08C35-A251L01  GN4 OIL 20W50 GAL  1 I  12.71
2 002 10014  CLAMP  @10 1 S .60
3 002 6157  THRUST WASHER  @10 1 S .12
4 002 11002  RETAIN RING  @10 1 S .46
5 002 26495-89  GASKET, OIL PUMP 883/1200  @2 1 S .81
6 002 26434-91  O RING  @10 4 E .92
7 002 10074  WORM DRIVE CLAMP  @2 1 O 3 2.24

Cost      $7.94  Sub      $17.86  Tax      $1.16      $19.02
    
```

A full list of part type codes used on ROs, with explanations, is shown below:

Part Type Codes Used on Repair Orders		
TYPE	MEANING	HOW IT WAS CREATED
I	<i>In stock</i>	Placed on RO by technician with no or low-level parts access. This line must be “edited” to relieve inventory.
N	<i>Not in stock</i>	Placed on RO by technician with no or low-level parts access. Must be “edited” to create a Special Order.
S	<i>Sold</i>	Item was sold or edited on RO by an employee with Parts access. Inventory is reduced.
O	<i>Ordered</i>	Item was < O> ordered and is not yet in the Special Order file. The “Order the Parts? <Y> or < N> ” question was answered < N> when exiting the RO, or you have not exited yet.
Z	<i>in SO file</i>	This was an “O” ordered item and the “Order the Parts? <Y> or <N>” question was answered < Y> when exiting the RO. The item is now in the Special Order file and will be on the next SO purchase order.
H	<i>it s Here</i>	This specially ordered item has been received and is ready to be picked up in the Parts department.
P	<i>Picked up</i>	A Parts operator has <i>picked up</i> this item from the Special Order screen.
C	<i>Canceled</i>	This item was <i>canceled</i> by a Parts operator on the Order Receiving screen.
E	<i>Exception</i>	More than one of these items were ordered, and some of them are not yet <i>Here</i> , not <i>Picked up</i> , or not <i>Canceled</i> . A quick fix for ending this RO is to have a manager CANCEL this line and SELL the quantity that you have received. Doing this will delete ALL of this line item (no matter what code type) from the Special Order file.

Explanation of RO Parts Screen Command Options:

< > **Continue** Moves to the **Ven** field, similar to a Parts counter ticket, allowing < S> to sell or < O> to order parts. If you decide to **Order** a part, the menu bar will change, as shown on the next page, to offer you a new < M> **Memo** command option. This lets you add a note (Memo page) to the Special Order record, such as special technical information about a part, other related items required, special shipping notes, authorization numbers, expected arrival date, etc. You can go back later and edit a Service Orders Memo page as needed. Pressing the **F2** key will let you access a **Help** screen.

RO Parts Screen:
Option to Create
SO Memo

```

< >          <C> Continue  <M> Memo for SO# 3720

===== RO # 001039  RETAIL =====
Ven Code   Part Number   Description                      On Hand   Price
002        26488-91      GEAR SHAFT                        0         $57.44
-----
          Cost      Qty                      Date Ord   On Order   Back Ord
-----
Ln Ven Part Number   Description                      Qty Ty Pri %   Amount
1 000 08C35-A251L01  GN4 OIL 20W50 GAL                1  I           12.71
2 002 10014          CLAMP                             @10 1  S            .60
3 002 6157          THRUST WASHER                     @10 1  S            .12
4 002 11002          RETAIN RING                        @10 1  S            .46
5 002 26495-89      GASKET, OIL PUMP 883/1200        @2  1  S            .81
6 002 26434-91      O RING                             @10 4  E            .92
7 002 10074          WORM DRIVE CLAMP                  @2  1  O 3          2.24

Cost      $7.94   Sub      $17.86   Tax      $1.16           $19.02
    
```

If you choose to **Order** a part for which COMPTRON® does not find a record in the Stock file or on a **Lost Sale** action listing (i.e., you have to type in all the information about the part), the system will create a stock record for that part automatically. As soon as you have entered the part quantity, a **Category** prompt will appear on the screen, with the cursor located directly beneath it, as shown below:

RO Parts Screen:
Category Prompt

```

</> Search

===== RO # 001039  RETAIL =====
Ven Code   Part Number   Description                      On Hand   Price
002        26488-91      GEAR SHAFT                        0         $57.44
-----
          Cost      Qty   Category                      Date Ord   On Order   Back Ord
          $25.85      1
-----
Ln Ven Part Number   Description                      Qty Ty Pri %   Amount
1 000 08C35-A251L01  GN4 OIL 20W50 GAL                1  I           12.71
2 002 10014          CLAMP                             @10 1  S            .60
3 002 6157          THRUST WASHER                     @10 1  S            .12
4 002 11002          RETAIN RING                        @10 1  S            .46
5 002 26495-89      GASKET, OIL PUMP 883/1200        @2  1  S            .81
6 002 26434-91      O RING                             @10 4  E            .92
7 002 10074          WORM DRIVE CLAMP                  @2  1  O 3          2.24

Cost      $7.94   Sub      $17.86   Tax      $1.16           $19.02
    
```

You may now enter a valid part category for the newly created stock record, or use the slash key < /> **Search** command to scroll through the Category file and select a category for the part, or press **Enter to skip** entering a category, in which case COMPTRON® will assign the default category "ZZ" to the new stock record.

If you have chosen the Sell command for a part that is not already listed in the Stock file, then as soon as you enter the quantity, COMPTRON® may display the prompt “Create Stock Record (Y/N)?” on the screen, as shown below, allowing you to tell the system NOT to create a new stock record for that part number/vendor:

RO Parts Screen: Create Stock Record Prompt

```

        </> Search
===== RO # 001039 RETAIL =====
Ven Code   Part Number   Description           On Hand   Price
002        26488-91        GEAR SHAFT           0         $57.44
-----
          Cost      Qty      Date Ord  On Order  Back Ord
          $25.85      1  Create Stock Record (Y/N) ? < >
=====
Ln Ven Part Number   Description           Qty Ty Pri %   Amount
1 000 08C35-A251L01  GN4 OIL 20W50 GAL      1  I           12.71
2 002 10014          CLAMP                  @10 1 S           .60
3 002 6157          THRUST WASHER          @10 1 S           .12
4 002 11002         RETAIN RING            @10 1 S           .46
5 002 10074         WORM DRIVE CLAMP       @2  1 S           2.24
6 002 26495-89      GASKET, OIL PUMP 883/1200 @2  1 O 3           .81
7 002 26434-91      O RING                 @10 4 E           .92
-----
Cost      $7.94  Sub      $17.86  Tax      $1.16      $19.02
    
```

Any new stock records created on a Repair Order with a default “ZZ” category will appear on the Category Adjustment Report, which prints as part of the End of Day. You can also print this report by selecting **Option 3, Category**, from the **System Reports** menu. (See the *Category Option* section of Chapter 9, System Reports.) Management uses the report as a worksheet to resolve “ZZ” stock categories to meaningful values.

< M> Memo

This command lets you add a comment (Memo page) to the Repair Order, such as a description of any problems, what parts may be needed, special technical information, etc. If a Repair Order Memo page exists for this record, the < M> option on the menu bar at the top of the screen will flash, alerting you to check the Memo for special notes. You can also edit the Memo page. Press the F2 key to see a **Help** screen.



NOTE: A Memo page will stay with the record to which it is attached, as long as that record remains in the system; deleting a record will delete the Memo attached to it.

< E> Edit

- < E> **Edit Line** – Change Ven, Code, Part Number, Qty, Price, or Tax field.
- < C> **Cancel Line** – Remove the line.
- < M> **Move Line** – Move line to a new line number.
- < ' > **Exit** – Leave edit operation.

If you want to edit/add to the parts data, but are unsure of the number for a vendor, for example, you can use the slash key < /> **Search** command in the **Ven** field to open a window for a scrolling search of the Vendor file. (The < /> command works the same way in the **Part Number**, **Code**, and **Category** fields.) You will be asked to choose whether to arrange the Vendor file list in name or number order, and what range to display. A window like the following will appear:

RO Parts Screen:
Scroll Search Window

```

                                <'> Exit </> Search
===== RO # 001039  RETAIL =====
Ven Code   Part Number   Description           On Hand   Price
/   1113737  15410-426-010      OIL FILTER                5       $5.68

```

Ln Number	<'> Exit	<Pg-Dn>	<Pg-Up>	<HOME> First	<END> Last	< >
Vendor List						
Line	Name	Vendor				
1	TORO	011				
2	TRIUMPH	114				
3	TUCKER-ROCKY-NEMPCO	009				
4	U.S. MARINE	021				
5	V-TWIN MFG.	052				
6	VOLVO MARINE	022				
7	WESTERN POWER SPORTS	035				
8	WHITE BROS.	051				
9	WHITE OUTDOORS	073				
10	WISCONSIN	068				
11	YAMAHA MOTORS, U.S.A.	003				
12	YAZOO	067				

The menu bar shows that the *Page Down*, *Page Up*, *Home*, and *End* keys will move the cursor to other parts of the vendor list until you locate your vendor. The *Page Down* key will display the next screenful of vendors, *Page Up* will return to the previous screen, *Home* will take you to the beginning of the list, and *End* will display the last screen.

When you find the vendor that you need, just type its line number and press *Enter*; instantly the window will disappear, and COMPTRON® will show that vendor in the **Ven** field, with the cursor at the **Part Number** field.

< C> **Cancel All**

Cancels all parts lines at once, after you type a lower-case c to confirm your decision.

< T> **Pick Ticket**

A Service Parts Request will be printed, similar to the example illustrated on the following page, after you choose whether you want all parts lines printed or only the unedited lines. This will assist the Parts department in retrieving, selling, or ordering parts for the RO. Here you can use a < R> **Remarks** command to add a special note to the Parts operator as needed.

SERVICE PARTS REQUEST

Writer : TOM BATEMAN
Operator: TOM BATEMAN

Date: 11/17/2004 Time: 4:26P Page No. 1 of 1

RO# 006621 Type Svc: Retail Sched: 11/17/04 2:39P Prom: 11/17/04

Model	Yr Make	Lic/Id #	Engine #	VIN
GN125EM	91 SUZUKI			JS1NF41A6M2100479

Customer SIMSON, REBECCA J.
Remarks: CALL CUSTOMER IF ANY DELAY ARISES.

Ven Code	Part Number	Description	Qty	Type	Amount	Note
000 3535861	08C35-A251L01	GN4 OIL 20W50 GAL	1	N	12.71	_____
002 00000574	10014	CLAMP	@ 1	I	.60	_____
002	10074	WORM DRIVE CLAMP	1	I	2.24	_____

< O> Orders

Selecting this **RO Parts** screen option, and then < A> **All Orders**, brings up an **Orders** screen similar to the example below, showing the status of the ordered parts on the Repair Order:

RO (Parts) Orders Screen

Ln	Ven	Part Number	Description	Qty	Action	PO #	Date	Op
RO # 006621 Orders								
=====								
6	002	26495-89	GASKET, OIL PUMP 883/	1	Ordered	8040	10/16/2003	99
				1	Received	8040	10/21/2003	99
				1	Picked Up	8040	10/22/2003	99
7	002	26434-91	O RING	4	Ordered	8040	10/16/2003	99
				3	Received	8040	10/21/2003	99
				1	Backorder	8040	10/21/2003	99
				3	Picked Up	8040	10/22/2003	99
8	002	26488-91	GEAR SHAFT	1	Ordered	8040	10/16/2003	99
				1	Received	8040	10/21/2003	99
				1	Picked Up	8040	10/22/2003	99

The operator code on the far right side of the screen identifies the operator who ordered the part on the RO.

Explanation of Orders Screen Command Options:

- | | |
|------------|---|
| < N> Next | Use this command to see the next Repair Order Parts Orders record in sequence. |
| < ' > Exit | This command lets you leave the RO (Parts) Orders screen. |
| < M> Memo | This command allows you to add a note (Memo page) to the RO Parts Orders record, such as technical information about ordered parts, other related items needed, special shipping information, authorization numbers, arrival date notes, backorder status, etc. |

If a Service Orders Memo page exists for a record, the < M> option on the menu bar will flash, alerting you to check the Memo for special notes. You can also edit the Memo page. Press the F2 key to see a **Help** screen.



NOTE: A Memo page will stay with the record to which it is attached, as long as the record stays in the system. Deleting a record will delete its Memo.

At the **RO Parts** screen, after an item is sold or ordered on the RO, the < K> **Add Kit** command option will appear at the top of the screen, as illustrated below, indicating that you may choose to add a Stock Kit to the Kit file.

**RO Parts Screen:
Add Kit Option**

```

< > < > Continue <E> Edit <C> Cancel All <K> Add Kit <T> Pick Ticket
<M> Memo <'> Exit
===== RO # 003720 RETAIL =====
Ven Code Part Number Description On Hand Price
-----
Cost Qty Cust # Name Date-Ord On-Order Back-Ord
=====
Ln Ven Part Number Description Qty Ty Pri % Amount
1 000 11311-216-010 COVER R CASE 1 S 6.28

Cost $3.73 Sub $6.28 Tax $.46 $6.74
    
```

Introduced in COMPTRON® Version 3.21, a Stock Kit (or “Kits”) is a tool for grouping stock or catalog part numbers into “kits” that are accessible from Parts **Counter Operations** or the **RO Parts** screen, simply by entering a “kit number.” Upon entry of a kit number, each item in the kit is automatically pulled onto the screen in turn, for the operator to **Sell** or **Skip**. All the part information for each item sold or ordered is placed on the RO as though the operator had manually entered it on the keyboard. This feature simplifies looking up parts, increases operator speed, and ensures accuracy when a specific group (or groups) of items is/are sold.

Since it makes no sense to create a kit consisting of only one item, continue adding items to the RO until you have a list of all the vendors, part numbers, and quantities that will make up this new Stock Kit. Next, enter the < K> **Add Kit** command.

< K> **Add Kit** Pressing < K> **Add Kit** will display a window, as shown on the next page, that allows you to enter a kit number of up to 20 characters in length. When you have done so, the prompt will change and ask you to enter a description of the kit (up to 30 characters).

This will make it easier for you or another user to identify the correct Stock Kit in the future.

**RO Parts Screen:
Add Kit Window**

```

<K> < > Continue <E> Edit <C> Cancel All <K> Add Kit <T> Pick Ticket
<M> Memo <'> Exit
===== RO # 003720 RETAIL =====
Ven Code Part Number Description On Hand Price
-----
Cost Add Kit rder Back-Ord
=====
Kit Number: OIL PUMP KIT
Description:
Enter (optional) kit description.
=====
Ln Ven Part Nu % Amount
1 000 11311- 6.28
2 000 91251-0 3.60
3 000 13103-2 42.36
4 000 15611-9 3.52
5 000 15200-2 70.25
=====
Cost $74.93 Sub $126.01 Tax $9.14 $135.15
    
```

When you have typed in a kit number and description, COMPTRON® will offer these command options across the bottom of the window:

< > Accept <C> Correct <'> Exit < >

When you press *Enter* to accept it, the **Add Kit** window will close and the **RO Parts** screen will reappear.

**RO Parts Screen: Parts
List for Kit**

```

< > < > Continue <E> Edit <C> Cancel All <K> Add Kit <T> Pick Ticket
<M> Memo <'> Exit
===== RO # 003720 RETAIL =====
Ven Code Part Number Description On Hand Price
000 0017640 42711-033-000 275X17KR-NT114 3 30.33
-----
Cost Qty Cust # Name Date-Ord On-Order Back-Ord
$18.04 1
=====
Ln Ven Part Number Description Qty Ty Pri % Amount
1 000 11311-216-010 COVER R CASE 1 S 6.28
2 000 91251-001-023 OIL SEAL 45X58X7 1 S 3.60
3 000 13103-268-010 PISTON 0.50 1 S 42.36
4 000 15611-921-000 CAP OIL 1 S 3.52
5 000 15200-286-010 PUMP ASSY OIL 1 S 70.25
=====
Cost $74.93 Sub $126.01 Tax $9.14 $135.15
    
```

After you have added a Stock Kit, notice that when the cursor is in the **Vendor** field, "<K> Kits" is displayed on the menu bar at the top of the screen. Pressing < K> while in the **Vendor** field will advance the cursor to the **Part Number** field and the field name will change to "**Kit Number.**" You may either enter a kit number or use the slash key < /> **Search** command to display a window where you can scroll through a list of all the kits with their descriptions.

Explanation of Kits Window Command Options:

- < #> **Ln** - Lets you enter a line number to select a kit for the Repair Order.
- < V> **View** - Changes the window to let you enter a kit's line number so you can see a list of all the part numbers included in that kit, with their vendor numbers and descriptions.
- < d> **Delete** - Prompts you to enter the line number for the kit you want to remove, or else exit the window. If you choose a line number, you are asked to verify (Y/N) that you want to delete the kit on that line.



NOTE: The Delete command option will not appear unless the operator is at the Management access level set up in Chapter 11.

- < ' > **Exit** - Allows you to leave the **Kits** window.

**RO Parts Screen:
Kits Window**

Ln	Kit Number	Description
1	PDI	00001PDI KIT
2	BRK	00002BRAKE REPAIR KIT
3	CRKCS	00003CRANKCASE REPAIR KIT
4	OLCH	00004OIL CHANGE KIT

Cost \$74.93 Sub \$126.01 Tax \$9.14 \$135.15

If you select a kit from the **Kits** window, you will be returned to the ticket and the first part in the kit will be displayed for you to **Sell, Order, Supersede**, etc.—or you may **Skip** that item. Then each remaining part in the kit will be pulled onto the ticket screen automatically, one item at a time, for you to **Sell** or **Skip**, until the complete kit has been processed. Each kit item that you sell or order appears on the ticket as if you had typed in its vendor, part number, and other information from the keyboard.



NOTE: Each item in the kit must be dealt with before you can do anything else.

To change a kit, first process it onto a counter ticket, changing the individual parts as you go. Next, select the < **K**> **Add Kit** command to add the changed kit to your Kit file with a **NEW** kit number. Finally, < **d**> **Delete** the **OLD** kit number entry.

When you choose < L> **Labor** from the **Repair Order Status** screen, a **Repair Order Labor** screen like the following will be displayed:

Repair Order Labor Screen

```

      <A> Add  <C> Change  <d> Delete  <M> Memo  <'> Exit  < >
Repair Order Labor

RO #      000217 Operator  RANDY WILLIAMS      Dt/Tm Sched  11/17/2004  2:39P
Status    NOT STARTED                               Dt/Tm Prom   11/17/2004
Type Svc  RETAIL                                     Call When Ready

Last Name  ABERNATHY                               Model      GN125EM      Year  1993
First Name REBECCA                               Initial    J          Make      SUZUKI

=====
Ln W-Code  Description                               Tech  Hrs   Rate  Amount
  1 3341    R/R OIL PUMP                               2     .70  30.00  21.00
  2 3326    R/R GEARCASE GASKET                       2     2.30  30.00  69.00

Hours    3.00  Sub      $90.00  Tax      $5.85  Labor      $95.85

```

Explanation of Repair Order Labor Screen Command Options:

< A> **Add** Use this command to add a new line, and an **Adding Labor Line** screen similar to the following example will appear:

Adding Labor Line Screen

```

      <'> Prev  <.> Skip  <. > Search
Adding Labor Line

RO #      000235 Operator  CLIFF 2      Dt/Tm Sched  12/16/2004  1:57P
Status    COMPLETED                               Completed    1/11/2005    7:47A
Type Svc  RETAIL                                     Call When Ready

Last Name  WINSTON                               Model      AC7500GD2E   Year  1998
First Name RICHARD                               Initial    L          Make      ARCTIC CAT

=====
Ln W-Code  Description                               Tech  Hrs   Rate  Amount
  1 CHGTIRE REPLACE TIRE WITH NEW TIRE       2     .50  45.00  22.50
  2 PDI     PRE DELIVERY INSPECTION\GET READY  2     .75  45.00  33.75
  3 FR     MOUNT FRONT RACK                   2     .50  45.00  22.50
  4 FR     MOUNT FRONT RACK                   2     .50  45.00  22.50
  5 FR     MOUNT FRONT RACK                   2     .50  45.00  22.50
  6 SS     INSTALL STICK STOPPERS              AB     .50  45.00  22.50
  7

Hours    3.25  Sub      $146.25  Tax      $12.07  Labor      $158.32

```

The cursor appears at the **W-Code** field so you can enter a work code for the new labor line. Use the forward slash key < /> **Search** command option to perform a scrolling search of your Work Code file. If you press *Enter* at the **Starting** and **Ending** fields, COMPTRON® will default to **First** and **Last**.

A window like the following will appear, prompting you for a range of work codes to search:

Adding Labor Line Screen: Work Code Range Window

```

        <'> Prev <|> Skip </> Search
Adding Labor Line
RO #      000235 Operator CLIFF 2          Dt/Tm Sched 12/16/2004  1:57P
Status    COMPLETED                    Completed    1/11/2005  7:47A
Type Svc  RETAIL                          Call When Ready
Last Name WI                               Year 1998
First Name RI
=====
Ln W-Code  De          First: "First"          Rate  Amount
1  CHGTIRE  RE          Last : "Last"             5.00  22.50
2  PDI      PR          < > Continue  <C> Correct  <'> Exit  < > 5.00  33.75
3  FR       MO          5.00  22.50
4  FR       MO          5.00  22.50
5  FR       MO          5.00  22.50
6  SS      INSTALL STICK STOPPERS          AB   .50  45.00  22.50
7
Hours 3.25 Sub $146.25 Tax $12.07 Labor $158.32
    
```

The list of work codes will be displayed according to the range selected, as shown in the following example. You can scroll down through it to pick the line number representing the work code that you need.

Adding Labor Line Screen: Work Code List Window

```

        <'> Prev <|> Skip </> Search
Adding Labor Line
R
S
T
Ln      Work-Code  Model      Hours  Description
-----
1  ASPRP      KDX200E3   1.70   ASSEMBLY & PREP
2  C-CARB     GS350      3.20   CLEAN CARBS
3  CLCVG      XJ650      .20    CLUTCH COVER GASKET/COVER CAP
4  CMCHTNX    XJ650      1.00   CAM CHAIN TENSIONER ASSY EX.
5  CMSPVLX    XJ650      1.10   CAM/SPROCKET/VALVE LIFTERS EX.
6  CRSHASX    DT50A      4.10   CRANK SHAFT ASSEMBLE EX.
7  CYLHDC     DT50A      .40    CYLINDER HEAD, DECARBONIZE
8  ESTMTRX    XJ650      .20    ELECTRIC START MOTOR EX.
9  FFNDX      DT50A      .20    FRONT FENDER EX.
10 FRM1      VF1100C    .80    FRONT RIM 1-PIECE (EACH)
11 KSSH       ATC200X    .20    KICK STARTER SHAFT SEAL
12 OCL        * (ALL)    1.00   OIL CHANGE & LUBE
13 OSTRCVX    XJ650      .20    OIL STRAINER, COVER EX/CLEAN
14 SI        * (ALL)    .20    STATE INSPECTION
15 TR-OFF    * (ALL)    .25    TIRE REPAIR-OFF VEHICLE
Hours 3.25 Sub $146.25 Tax $12.07 Labor $158.32
    
```

< C > Change

Use this command to make changes to a line. You will be asked: Change Actual Time? <Y> or <N> The selection < Y > allows entering an actual start and stop time on each work code line. This is not used for billing, but is recorded on the Repair Order History file for reports comparing flat rate and actual time.

- < d> **Delete** This command removes a line.
- < M> **Memo** Use this command to add a note (Memo page) to the Labor entry, such as details on labor performed (the service story) or special mechanic's notes. If a Memo page exists for a Repair Order Labor line, the < M> option on the menu bar will flash, alerting you to check the Memo for notes. You can also edit the Memo page. A **Help** screen is available by pressing the *F2* key.



NOTE: A Memo page will stay with the record to which it is attached, as long as that record remains in the system. Deleting a record will delete the Memo attached to it.

When you choose < M> **Miscellaneous** from the **Repair Order Status** screen, a **Repair Order Miscellaneous** screen similar to this will appear:

Repair Order Miscellaneous Screen

```

                                <C> Change  <'> Exit  <.>
Repair Order Miscellaneous

RO #      000198 Operator OPERATOR 6          Dt/Tm Sched  8/20/2004  1:18P
Status    COMPLETED                        Completed    8/22/2004  8:38A
Type Svc  RETAIL                            Call When Ready

Last Name  BINGHAM                          Model      TRX300      Year  88
First Name STEVE                            Initial    Make        HONDA

=====
Miscellaneous      Qty  Meas  Description      Price  Tax      Amount
SHOP SUPPLIES      2   GALS  GAS              3.00   0.00     6.00
DELIVERY           3.4  MILES  3.4 MILES       12.00   0.00    12.00

```

Explanation of Repair Order Miscellaneous Screen Command Options:

- < C> **Change** Selecting < C> allows you to add or modify miscellaneous charges to the RO.

When you select < R> **Recommend** from the **Repair Order Status** screen, you will see a **Repair Order Recommend** screen like the example on the next page:

**Repair Order
Recommend Screen**

```

                                <C> Change <'> Exit < >
Repair Order Recommend

RO #      000198 Operator OPERATOR 6          Dt/Tm Sched  8/20/2004  1:18P
Status    COMPLETED                          Completed    8/22/2004  8:38A
Type Svc  RETAIL                              Call When Ready

Last Name  BINGHAM                            Model       TRX300      Year  88
First Name STEVE                            Initial     Make       HONDA

=====
Recommended Service
SHOULD HAVE FLAT PROOF INSTALLED IN EACH
TIRE. ALSO SHOULD GET NEW BATTERY
    
```

Explanation of Repair Order Recommend Screen Command Options:

< C> **Change** Choosing < C> lets you add or modify recommended service comments on the RO.

The Estimate Option

This option allows you to print an estimate on parts and labor for your customer. Estimates will not decrease stock balances until they are changed to regular Retail, Internal, or Warranty Repair Orders.

You can have a separate Repair Order printer loaded with white paper for printing estimates, leaving the other printer dedicated to printing regular ROs. You can then choose which printer to use each time, or set one as the default printer with the other as an option. This saves you money on printer supplies (white paper being much cheaper than multi-part RO forms), and provides a spare printer as backup in case your RO printer goes down and needs repairs.

If you select < e> **Estimate** from the **Repair Order** screen, COMPTRON® asks that you confirm you want an estimate printed. If you answer < Y> es, the system will print an estimate statement similar to the example illustrated on the following page.

```

ESTIMATE
1999 YAMAHA SMITH ACTION SPORTS 000225 1 of 1
                22 BROADWAY
YFZ350 RIVERSIDE, CA 92500 OPERATOR 5
                (909) 687-9538
8FGH-77562 Retail 11/19/04 2:55P
KYA4HF00HK0077562
                Promised: 11/20/2004 Yes
                WILLIAMS, ANDREW M
                2598 ASH ST 909 685-2526
                RIVERSIDE CA 92502-
Parts
Ven Part Number Description Type Qty Price % Amount
003 2GU-11181-00-00 GASKET, CYL HEAD 1 Z 1 20.00 .10 18.00
003 3GG-11351-00-00 GASKET, CYLINDER Z 2 15.60 .10 28.08
003 3XV-12435-00-00 GASKET Z 1 2.40 .10 2.16
003 4L0-11633-00-00 PIN, PISTON Z 2 7.60 .10 13.68
003 93310-316D6-00 BEARING, CYLINDR Z 2 15.00 .10 3.60
003 2GU-11610-11-00 PISTON RING 1ST 05 Z 2 29.00 .10 52.20
003 2GU-11635-00-00 PISTON 1 O/S 0.25 Z 2 57.00 .10 102.60
                Parts $220.32
Labor
W-Code Description Tech Hrs Rate Amount
TE TOP END 1 4.00 40.00 160.00
BC BORE CYLINDERS 1 2.00 40.00 80.00
                Labor $240.00
Recommended Service
NEEDS NEW REAR AXLE BEARINGS/SEALS
ESTIMATE
I hereby authorize the repair work to be done, along with the necessary $220.32
material, and hereby grant you and/or your employees permission to
operate the
vehicle herein described on streets, highways or elsewhere for the $240.00
purpose of
testing and/or inspection. An express mechanic's lien is hereby acknowledged $15.42
on vehicle to secure the amount of repairs thereto. Dealer is not responsible
for unavailability of parts or delays in parts shipments beyond dealers $504.63
control. NOT RESPONSIBLE FOR LOSS OR DAMAGE TO VEHICLES OR ARTICLES LEFT ON
    
```

The Duplicate Option

This option lets you create a new Repair Order more quickly by copying information from an existing one for a similar job. If you select < U> **Duplicate** from the **Repair Order** screen, the screen title will change to read **Duplicating a Repair Order**, and this prompt will display at the bottom:

Duplicate Repair Order? <Y or N> < >

If you answer < Y> , the prompt message will change to ask:

Duplicate Customer Information? <Y or N> < >

If you answer < N> here, you will get a **Repair Order** screen containing the same money amounts in the **Parts**, **Labor**, **Miscellaneous**, **Tax**, and **s** fields at the bottom; but with the customer and vehicle data fields left blank. Parts lines will be recorded as unedited (type **I** if in stock, or **N** if not). The cursor will be waiting at the **Last Name** field. If you answer < Y> to the customer prompt, you will see another prompt:

Duplicate Vehicle Information? <Y or N> < >

If you answer < N> to the vehicle prompt message, you will get a **Repair Order** screen showing the same customer information and the same values in the money fields at the bottom; but with the vehicle fields blank, and the cursor waiting at the **Model** field. If you answer < Y> , all the information from the source Repair Order will be copied, and the prompt will change to:

< > Accept <'> Correct <U> Undo < >

The Payments Option

If you select < M> **Payments** from the **Repair Order** screen, a **Repair Order Payments** screen similar to the following will appear:

Repair Order Payments Screen

```

                                <C> Change <'> Exit < >
Repair Order Payments

RO #      000152 Operator OPERATOR 4          Dt/Tm Sched  9/15/2004  2:12P
Status    NOT STARTED                        Dt/Tm Prom   9/15/2004
Type Svc  RETAIL                              Call When Ready

Last Name  HARLEY DAVIDSON WARR              Model      XL883          Year  98
First Name          Initial                 Make       HD
Address      918 THATCHER BLVD.
=====

Invoice      $148.70      Payments      $ .00      Balance      $148.
    
```

If, as in the screen sample shown above, there have been no prior payments on this Repair Order, choose < C> **Change** from the **Repair Order Payments** screen, and you will see the following **Enter Amount Received** screen:

Enter Amount Received Screen

```

                                <'> Exit < ;> Skip
Enter Amount Received

RO          $148.70

Payments          $ .00

Balance          $148.70

Type Payment          Amount

Cash.....
Check
Visa
Mastercard
Other
    
```

Press *Enter* to continue, and you can input payment information, using the *Enter* key to advance down to the appropriate payment type field(s). Whether you enter a full or partial payment, COMPTRON® will immediately display it in a new **Received** field below the **Payment** fields, followed by a **New Balance** entry. You will be prompted to **Accept**, **Correct**, or **Undo** the information; once you accept it, you will be asked:

Print Receipt Ticket? <Y or N

If you select < **Y** > , a receipt ticket will be printed.

If a payment (deposit) was previously made on this Repair Order and you now select < **C** > **Change**, you will be prompted to pick either < **P** > **Payment** or < **R** > **Refund**. The **Payment** option (default) will bring up the same **Enter Amount Received** screen illustrated on the preceding page.

Suppose, however, that there has been a delay in starting work on this Repair Order, so the customer decides he doesn't want to wait and asks for his deposit back. If you choose < **R** > **Refund** from the **Repair Order Payments** screen, the screen title will change to read **Enter Amount Paid Out**, and you will be able to type in the cash amount that you are refunding to the customer.

The End RO Option

You can use this option to end and print a Repair Order that has been completed, provided that (1) it includes at least one entry under Parts, Labor, or Miscellaneous; (2) any parts entered by a Service operator (one without Parts access) have been edited by a Parts operator; and (3) any parts ordered have been received and picked up. If the last odometer reading date is older than the current date (i.e., the current reading was not entered when starting this RO), you will be reminded to enter the current reading now, and the vehicle record will be updated with the new reading and date read.

If the RO is to be charged to a warranty or internal account, you will be prompted for verification, to prevent ending it by mistake, and the account number will be included on the printout. For warranty repairs, you will also have the option of not showing prices or amounts on the printout, to keep them confidential.

If you select < **E** > **End RO** for a completed job, the **Repair Order Payments** screen will appear. (If the job's status is not yet shown as completed, you will have a chance to change the status to "Completed" and end the Repair Order.) Enter the amount of cash paid, or press *Enter* to advance the cursor to the appropriate payment type field. When you enter a dollar amount for any field other than **Cash**, a pound sign (#) will appear to the right, waiting for you to input an identifying check or credit card number, but you can leave this blank and move through the remaining fields. After you finish the last field, you will see this prompt:

< > Accept <'> Correct <U> Undo < >

Once you have accepted the information as correct by pressing *Enter*, you will be asked:

Print Receipt Ticket? <Y or N> < >

Selecting < Y> will cause COMPTRON® to print a receipt for your customer. If you answer < N> , you will be asked if you want to print the Repair Order.

If you have selected < E> **End RO** on a completed job for an account customer, the **Repair Order Payments** screen will display an **Account** payment field above the **Cash** field. Suppose, however, that the customer previously made a \$50.00 payment (deposit), but now wants to charge this RO to his/her account. If you enter any amount in the **Account** field, the system will display the following message:

Must Refund \$50.00 to Charge to Account

This means that in order to charge this RO to the customer's account and end it, you must first refund his/her cash payment. If a cash customer is due a refund but does not have a regular account with you, you can still keep the funds in your store by building a *Temporary* in-store account credit under the customer's name for use against a future purchase. When that credit is used, COMPTRON® will remove the account.

Service Reports (Service Menu Option 4)

From the **Service Menu**, select **Option 4** to access this **Service Reports Menu**:

Service Reports
Menu

Service Reports Menu

Select

1. Customer
 2. Vehicle
 3. Work Code
 4. Repair Order
 5. Tech Schedule
 6. Technician
 7. Report Generator
- ' Exit

Customer Lists 4-1

From the **Service Menu**, select **Option 4**, then **1**, and you will see a menu offering four different options for printing customer lists. These are by Name, City, Zip Code, or State.

For our example below, we have chosen to print a list of customers by Name. Type the starting name and ending name and press *Enter*.

Print Customers by
Name Screen

```

                                <'> Prev <.> Erase <;> Skip
Print Customers by Name

Starting Name  "First"

Ending Name   "Last"

----- C A T E G O R Y -----
 1  2  3  4  5  6  7  8  9 10
Include Categories  < >

----- C U S T O M E R T Y P E -----
Customer Account Internal Temporary
Include Customers   Y       Y       Y       Y

<0-9><A-Z> Match Single Character Only  <?> Match Any Valid Character

```



If you press *Enter* at the **Starting** and **Ending** fields, COMPTRON® will default to First and Last.

Include Categories - When you first added your customers to the Customer file, you had the option of placing them into 10 different categories. Using these categories, you will be able to design your printout to suit your preferences. If you choose more than one category, you will be asked to select “each” or “any.”

If you select < **each**> , your printout will include customers who **MUST** be in each of the categories selected. If you select < **any**> , your printout will include customers in **ANY** of those selected. *Example:*

C A T E G O R Y

	1	2	3	4	5	6	7	8	9	10
Cust 1	X		X							
Cust 2	X		X	X						
Cust 3	X	X		X						

If you want all customers in one particular category, regardless of characters, type a question mark (?) in that category.

Include Customers - Answer **Y** to include the customer type on your printout, or **N** to exclude customer type.

Once you have completed the fields specifying your printout preferences for the Customer List, you will be prompted to press *Enter* to accept the screen (or you can use < ' > to **Correct** it, < U > to **Undo** it), and **COMPTRON®** will display the message **W O R K I N G**; then your report will print.

Each customer entry will display on two lines in the printout. The first line shows the name, address, phone number, etc. The second line is for remarks, if any, which will print if you answered yes to the question “Include Remarks?” The listings by City, Zip Code, and State are similar, except that they are listed in the order you select. The second line on the far right shows the customer’s Category/Code. The ten categories are represented by ten dashes, with Xs in those that apply to this customer. An example follows:

Customer List by Name								Page 25
11/19/2004								
Name	Address	City	St	Zip Code	Phone	Date Added	Date Last in	
BARTOLAMEDI, PERRY	3896 CASEY KEY ROAD	SARASOTA	FL	34875	966-7645	9/28/2004	09/29/04	
						Category/Code: ---X---X--		
BARUCK, SAM	1387 LANDINGS DRIVE	SARASOTA	FL	34831	999-2211	6/26/2003	08/24/04	
Attention: SER	Remarks: 88-WR 500							
						Category/Code: ----X-----		
BATES, JACK	5818-5TH ST E	BRADENTON	FL	33876	753-2186	6/23/2004	06/23/04	
Attention: SER	Remarks: 91 750 VULCAN							
						Category/Code: X-----		
BATTAGLIA, RAY	1428 BEACH CIR.	PUNTA GORDA	FL	33958	1-639-6286	12/16/2000	11/05/04	
						Category/Code: -X-----		
BAUER, RANDY	1878 BUCCANEER CIRCLE	SARASOTA	FL	34281	924-1734	10/15/2004	10/15/04	
Attention: SER								
						Category/Code: X-----		

Vehicle Lists 4-2

You can print out lists from your Vehicle file in five different data formats. These can be printed either on paper or to the computer screen.

From the **Service Menu**, select **Option 4**, then **2**, and you will see this **Print Vehicle File** menu:

Print Vehicle File Menu

Print Vehicle File By

Select

1. Model and Year
 2. Customer Name
 3. Next Service Due Date
 4. Warranty Expiration Date
 5. Extended Warranty Expiration
- ' Exit

All the file printout possibilities are similar in layout, but arranged in different column sequences, depending on the menu option selected. Below is an example of a vehicle list printed using **Option 3, Next Service Due Date**.

Vehicle List by Next Service Due Starting with "First" Ending with "Last"											
										Page 1	
Model	Yr	Make	Customer Name	Date Added	Last Service	Odom Read	Odom Date	Wkly Use	Next Service	Next Odom	Warranty Expirat
750	02	HONDA	BARNETT, LUKE	2/28/04	5/12/04	6242	5/12/04		11/12/04		
654 LTD	98	KAWASAKI	COMIANNI, MARY	5/02/03	4/07/04	12644	4/07/04	100	11/21/04*	15000	
NINJA 600 R	01	KAWASAKI	MCCORD, RAYMOND	4/16/04	4/16/04	7519	4/16/04		10/17/04	10000	
VN1500	04	KAWASAKI	SALAZAR, JONNY	1/20/04	7/23/04	3812	7/23/04		10/23/04	5000	
RIVA JOG	04	YAMAHA	SHUMACHER, LEONARD	5/02/04	5/04/04	2648	5/04/04		11/04/04	5000	11/30/04
			Recommended Service:	CUST NEEDS TO USE UNIT MORE TO AVOID SAME PROBLEMS USE STABILIZER IN FUEL WHEN SETTING UP-CHG BATT AS NECESSARY							
PW250D	05	YAMAHA	ANDERSON, EDWARD R	10/06/03	4/06/04	2217	4/06/04	75	2/07/05*	5000	10/04/05
			Remark:	YAMAHA EXT WARR							
KZ1000P11	04	KAWASAKI	POLICE DEPT.	1/16/04	7/21/04	2030	7/21/04		1/21/05	5000	1/31/05
			Remark:	POLICE BIKE							
640 LTD	99	KAWASAKI	GORDON, JOHN	2/10/04	8/13/04	11347	8/12/04	50	8/12/05*	12000	
FA 450D	03	SUZUKI	VASQUEZ, RAY	1/15/04	6/25/04	5745	6/24/04		12/29/04		
1100 MAXIM	03	YAMAHA	PURSINGER, BOBBIE	1/13/04	8/05/04	3871	8/05/04		2/05/05	5000	

* = Next Service Date Computed from Next Odom

After selecting a format option, you will be prompted to enter the starting and ending model and year, or last names (for the first two options), or the starting and ending dates (for the last three options). Then you will be asked: Include Remarks? <Y or N>. If you want the remarks in the Vehicle file printed on this report, answer Y.

After answering this prompt, you will be asked another question: Include Recommended Service? <Y or N>. This is the recommended service date that is printed on the Repair Order and stored with a particular vehicle.

Next you will be asked: Print Mailing Labels? <Y or N>. If you want a mailing label printed for the customers who own each of the vehicles listed, answer Y.

Field Descriptions:

- Date Added -** This is the date the vehicle was added to your data base.
- Last Service -** This is the date of last service on the unit, as recorded in the Vehicle file. This date will be updated automatically when a Repair Order is ended.
- Odom Read -** The odometer/hour meter reading last recorded. This reading will be updated automatically when a Repair Order is ended.
- Odom Date -** The date of the odometer/hour meter reading. This date will be updated automatically when a Repair Order is ended.
- Wkly Use -** The average weekly use in miles/hours.
- Next Service -** This is the date next service should be performed on the unit.*
- Next Odom -** The scheduled/anticipated odometer/hour meter reading when the next service should be performed.
- Warranty Expirat -** The date when the manufacturer warranty expires.

* = **Next Service** *date computed from Next Odom date.*

Work Code Lists 4-3

A report listing your work codes is available with three different format options.

From the **Service Menu**, select **Option 4**, then **3**. You will see this menu:

Print Work Code File Menu

Print Work Code File by

Select

1. Model/Work Code
2. Work Code/Model
3. Description
- ' Exit

Select the order in which you want your list to be printed, then answer the screen prompts for starting and ending model and work codes, or descriptions. The example below is arranged by Work Code/Model.

Work Code List by Work Code/Model

11/17/2004

Page 1

W-Code	Model	Description	Hours	Amount
1000	DT50A	CYLINDER HEAD, DECARBONIZE	.40	
112105	ATC200X	KICK STARTER SHAFT SEAL	.20	
1402	XJ650	CAM/SPROCKET/VALVE LIFTERS EX.	1.10	
1420	XJ650	CAM CHAIN TENSIONER ASSY EX.	1.00	
2000	DT50A	CRANKSHAFT ASSEMBLE EX.	4.10	
2210	XJ650	CLUTCH COVER GASKET/COVER CAP	.20	
2310	XJ650	OIL STRAINER, COVER EX./CLEAN	.20	
2700	XJ650	ELECTRIC START MOTOR EX.	.20	
5202	DT50A	FRONT FENDER EX.	.20	
710109	VF1100C	FRONT RIM ONE PIECE (EACH)	.80	
AP	KDX200E3	ASSEMBLY & PREP	1.70	\$10.00
C-CARB	GS350	CLEAN CARBS	3.20	
FRT	R100	R & R REAR TIRE	.50	
OCL	* (All)	OIL CHANGE & LUBE	1.00	\$19.95
TR-OFF	* (All)	TIRE REPAIR-OFF VEHICLE	.25	\$7.95

Repair Order Reports 4-4

COMPTRON® offers three different Repair Order report options: **Status of Service** (by date scheduled), **Service Completed** (but not ended), and **Repair Order Summary** (completed and/or finalized).

From the **Service Menu**, select **Option 4**, then **4**, and you will see the following menu:

Repair Order Reports Menu

```

Repair Order Reports

Select █

1. Status of Service
2. Service Completed
3. Repair Order Summary
4. Repair Order Totals (not ended)
' Exit
    
```

Explanation of Menu Options:

< 1> **Status of Service** - This option prints a report showing the status of each Repair Order in date order according to when it is scheduled. You will be offered choices as to whether you wish to include Repair Orders not started, delayed, in progress, or completed.

Example:

Status of Service										
11/17/2004									Page	1
Model	Year	Make	Customer Name	Status	Type	Svc	Dt/Tm Sched	Dt/Tm Prom	Tech	RO #
KZ305	2004	KAWASAKI	PEASE, DUANE	COMPLETED	WARRANTY		6/15/04 3:05P	6/15/04	1	82
FXST	2001	HD	SINDEL, SCOTT	IN PROGRESS	RETAIL		6/16/04 4:09P	6/16/04	2	97
FLHTCU	2003	HD	BLYTHE, ROY	COMPLETED	RETAIL		6/19/04 12:02P	6/19/04 12:02P	2	98
CT-90		HONDA	MAXWELL, CHARLES E	COMPLETED	RETAIL		6/20/04 3:02P	6/20/04 7:54A	1	109
TRX450	2004	HONDA	AMERICAN WARRANTY	COMPLETED	RETAIL		6/21/04 3:01P	6/21/04 3:02P	1	120
XLS	2004	HD	SALES	NOT STARTED	INTERNAL		6/22/04 10:27A	6/22/04		132
400A		HONDA	ROUTH, GLENICE	IN PROGRESS	RETAIL		6/22/04 10:42A	6/22/04		136
654 LTD	2000	KAWASAKI	SHORTON, RUSSELL	IN PROGRESS	RETAIL		6/30/04 12:24P	6/30/04		169
FLHS	2000	HD	DEVAUX, SERGE	IN PROGRESS	RETAIL		7/02/04 1:10P	7/02/04	2	176
FXRE	2004	HD	SALES	COMPLETED	INTERNAL		7/06/04 8:38A	8/01/04 11:30A	2	183
JL850-A1	2004	KAWASAKI	KAWASAKI WARRANTY	IN PROGRESS	WARRANTY		7/06/04 3:10P	7/06/04		185
FXRS	2004	HD	BURRESS, DAVID	IN PROGRESS	WARRANTY		7/10/04 9:21A	7/10/04	2	213
XL1000	2002	HD	DANE, AUDIE	COMPLETED	RETAIL		7/12/04 8:39A	8/14/04 10:14A	2	218
VT1100C	2003	HONDA	ASHTON, HERBERT H	NOT STARTED	RETAIL		7/14/04 9:05A	7/14/04		223
FJ1200	2004	YAMAHA	SALES	IN PROGRESS	WARRANTY		7/17/04 3:13P	7/17/04		237

< 2> **Service Completed** - This option on the **Repair Order Reports** menu allows you to print reports of Repair Orders that are completed (not ended), specifying a particular status. It brings up the following submenu, showing four different Service Completed report options, based on status:

List Service Completed Menu

List Service Completed

Select

1. All Completed
2. Retail
3. Internal
4. Warranty
- ' Exit

All four types of Service Completed reports are similar in format. The example below illustrates a Service Completed report printed from **Option 2** of the submenu, showing completed work orders with a service type of RETAIL.

Service Completed										
1/05/2005										
									Page 1	
Type Service	Date Compl	Model	Year Make	Customer Name	Home Phone/ Work Phone	RO	Amt Paid	Balance	RO #	
RETAIL	9/09/04	XL1000	1998 HD	DANE, AUDIE	428-3857		\$375.17	\$375.17	218	
RETAIL	9/18/04	FLSTC	2002 HD	GARZA, FERNIE	505-537-3077		\$815.08	\$658.04	\$157.04	322
RETAIL	9/30/04	TRX400	2000 HONDA	BINGHAM, STEVE	428-3532		\$177.24	\$177.24	338	
RETAIL	10/08/04	EX350	2001 KAWASAKI	FAJARDO, CHRIS			\$129.76	\$129.76	346	
RETAIL	10/20/04	KLF400	1999 KAWASAKI	HALLE, RODY			\$19.46	\$19.46	381	
RETAIL	11/17/04	PW250D	2002 YAMAHA	ANDERSON, JOHN R	602-678-5935 602-681-4800	Ext. 12	\$83.00	\$83.00	6616	
RETAIL	12/14/04	654 LTD	2001 KAWASAKI	SHORTON, RUSSELL	475-2329		\$13.89	\$13.89	169	

< 3> **Repair Order Summary** - This option on the **Repair Order Reports** menu allows you to print a summary of Repair Orders. After a prompt message for starting and ending dates, the following submenu appears, offering you three options as to the scope of the summary report:

**Print Repair Order
Summary Menu**

Print Repair Order Summary

Select

1. Completed (not Ended)
 2. Finalized
 3. Both
- ' Exit

< 1> **Completed (not Ended)** - Selecting this option displays the following submenu, allowing you two format choices for arranging the full report printout (either by RO Number or by Technician). There is also a third choice which yields only the technician s instead of printing the entire summary report.

**Print Repair Order
Summary Menu**

Print Repair Order Summary by

Select

1. RO Number
 2. Technician
 3. Technician s
- ' Exit

< 2> **Finalized** - This prints a summary of Repair Orders that have been finalized. It first brings up the same submenu shown above, giving you the two format options for a complete summary, plus the abbreviated report with just technician s. Then if you have chosen **Option 1** or **2** for a full report, you will be offered a choice of printing either by date completed or by date ended.

< 3> **Both** - This prints a combination of the two summaries above, after first displaying the submenu for selecting a complete report or the technician totals only.

The following example illustrates a full Repair Order Summary report that covers just completed ROs, with s arranged by RO number:

Repair Order Summary by RO Number				From Date:	"First"	To Date:	"Last"				
Includes: Completed (not Ended) Repair Orders											
4/30/2004				Page 3							
RO #	Date Compl	Customer	Model	*----Service Labor Income----*			Parts	Miscell Charges	Hours Billed	Hours Worked	Tech ID
				Retail	Warranty	Internal					
154	1/05/04	MUNNY	GEL	\$714.50				\$55.00	17.49		
155	1/06/04	PEDERSON	FBR			\$535.45	\$2,044.86	\$43.25	12.89		DH
168	1/15/04	DELTON	DJL	\$80.00			\$417.25		2.00		DF
185	1/21/04	JANSSEN	BML			\$509.50	\$659.84	\$35.10	10.19		KW
244	2/18/04	MIDWEST SPORTS CEN	NONE			\$40.00		\$2.50	1.00		MW
251	2/19/04	HOEFT	CEM			\$100.00	\$2.79	\$9.80	2.00		JE
252	2/19/04	OGARA	BNL			\$154.50		\$17.10	3.09		DH
260	2/23/04	MUNNY	BJL			\$819.40	\$1,951.48	\$50.60	16.39		KW
262	2/24/04	FC ENTERPRISES	CYLINDERS ON	\$75.00			\$70.32	\$3.75	1.50		DH
267	2/25/04	MEISCH	BNL			\$154.50		\$17.10	3.09		DB
271	2/25/04	PIETRAFITTA	CFM	\$40.00			\$231.77		.80		DB
273	2/25/04	DEVERY	FDL			\$429.50	\$692.23	\$27.50	8.59		DF
275	2/26/04	JENKINS	CGP			\$100.00	\$2.79	\$11.20	2.00		DB
276	2/26/04	PARTS/COUNTER	TRAILER			\$40.00		\$2.00	1.00		JE
277	2/26/04	PARTS/COUNTER	TRAILER			\$40.00		\$2.00	1.00		JE
279	2/27/04	PARTS/COUNTER	FORKS			\$80.00	\$1,087.41	\$5.00	2.00		DH
283	3/01/04	GAMBINO	HEADS ONLY			\$80.00	\$99.19	\$4.00	2.00		MW
286	3/02/04	TUCKER	BJL			\$75.00	\$4.06	\$3.75	1.50		DB
292	3/04/04	EDGAR	BNL			\$35.00	\$924.59	\$42.60	.70		JE
						\$624.50			12.49		MW
298	3/08/04	LINDGREN	CGP			\$60.00	\$449.96		1.20		
299	3/08/04	LINDGREN	CGP			\$60.00	\$449.96		1.20		
304	3/09/04	GUTHRIE	FBR			\$5.00	\$86.32		.10		
327	3/23/04	HAMELINK	BJL			\$100.00	\$209.45	\$5.00	2.00		JE
414	4/23/04	ANGERMEIER	FXSB	\$920.92				\$10.00	20.93		BW
Report Totals				\$1,710.42	\$120.00	\$4,042.35	\$9,384.27	\$347.25	127.15		

The example on the next page shows an abbreviated Repair Order Summary with only the technician s, arranged by RO number.

Repair Order Summary by RO Number		From Date: "First"		To Date:			
"Last"							
4/29/2005						Page 4	
Totals by Technician							
Tech ID	Technician Name	Hours Billed	Hours Worked	Hours Over	Hours Under	Percent	Comments
	"No Technician"	19.99					
BW		20.93					
DB		7.39					
DF		10.59					
DH		19.48					
JE		6.70					
KW		26.58					
MW		15.49					

< 4> **Repair Order Totals (not ended)** - This option on the **Repair Order Reports** menu allows you to print money s for Repair Orders that have not been ended. The following submenu appears, with three choices for the scope of the Repair Order s report:

Print Repair Order Totals Menu

```

Print Repair Order Totals (not ended)

Select █

1. All Repair Orders
2. Type Service
3. Status
' Exit
    
```

< 1> **All Repair Orders** - This prints a report showing the charges, deposits, and refunds from all Repair Orders not ended. It offers you a submenu with format choices of arranging the printout by RO number, type of service, status, or date scheduled. This option will enable you to check which units are supposed to still be in your Service department or have money owed and have been released. If you find any unit that has been repaired but never picked up, you may need to file a lien against it to get the title in order, so that you can sell the unit and recoup your money.

< 2> **Type Service** - This generates a report on the charges, deposits, and refunds for Repair Orders by type of service, after you choose from a submenu whether you want the totals for retail, internal, or warranty Repair Orders.

< 3> **Status** - This produces a report on the charges, deposits, and refunds on Repair Orders with a particular status, after you use a submenu to specify totals for Repair Orders not started, in progress, delayed, or completed (but not ended).

The following example illustrates a Repair Order s report for ROs with a status of "In Progress":

Repair Order Totals (not ended) Status "In Progress"										
11/19/2004										Page 1
RO #	Type Svc	Status	Dt Sched	Customer Name	Model	Yr	Deposits	Refunds	Charges	Amount
98	Retail	In Progress	11/18/04	HARRIS	FLTC	91	\$100.00		\$335.26	\$335.26
99	Warranty	In Progress	11/18/04	KAWASAKI WAR	EX350	94			\$68.87	\$68.87
100	Retail	In Progress	11/19/04	MORGAN	PW50D	93			\$115.37	\$115.37
102	Retail	In Progress	11/19/04	MIDWAY CYCLE INC	XV750	92			\$98.04	\$98.04

Tech Schedule 4-5

Use this option to print a list of your technicians' appointments, either on paper or to the computer screen. You can get a schedule for just one technician or several, and you can choose a range of dates to cover. Individual technicians' hourly s and pay amounts will be calculated based on the projected time for each service job, along with a grand .

From the **Service Menu**, select **Option 4**, then **5**, and the following menu will be displayed, showing two different format options:

Appointment List Menu

Appointment List by

Select

1. Tech-ID

2. Name

' Exit

Based on your format choice, you will be prompted for starting and ending Tech-IDs or Technician names, then for starting and ending dates.

This example of the Technician Appointment Schedule is arranged by Tech-ID:

```

Appointments from Tech: "First"
                      to Tech: "Last"
1/04/2005
Page 1
ID   Dt/Tm Sched      Dt/Tm Prom      Hours  Amount Tp Make      Model      Year Customer Name      Phone      Wk/Hm
AJR  1/04/05 11:00A  1/04/05 12:00P  1.00   16.00 R  FORD      F250      2000 JOSEPH SMITH      520 392-2200 Wk
AJR  1/04/05  1:00P  1/04/05  2:15P  1.25   20.00 R  CHEVROLET C10      1989 ED NORTON      520 459-6854 Wk
AJR  1/04/05  2:45P  1/04/05  4:15P  1.50   24.00 R  DODGE     DAKOTA    2004 MIKE WINSTON
      AJR : 3.75  60.00
GEA  1/04/05  1:30P  1/04/05  4:00P  2.50   43.75 R  MERCURY   COUGAR    2003 DAVE M GRANT      520 515-4870 Wk
      GEA : 2.50  43.75
JRE  1/04/05  8:00A  1/04/05 10:30A  2.50   30.00 R  FORD      TAURUS    2001 RICHARD ETHERIDGE 520 378-8395 Hm
JRE  1/04/05 11:00P  1/04/05 12:30P  1.50   18.00 R  CHEVROLET G-10     1985 JOHN D RANSOM    520 458-2679 Wk
      JRE : 4.00  48.00
RTG  1/04/05  9:00A  1/04/05 11:15A  2.25   31.50 R  DODGE     D150     2001 BILL HARDING     520 458-1853 Hm
      JRE : 2.25  31.50
    
```

Lists 4-6

Use this option to keep a printed copy of the Technician file handy. From the **Service Menu**, select **Option 4**, then **6**, and the following menu will display two format options:

Print Technician File Menu

```

Print Technician File by

Select 
1. Tech-ID
2. Name
' Exit
    
```

Based on your choice, you will be prompted for starting and ending Tech-IDs or names. The following example is organized by Tech-ID:

```

List by Tech-ID
1/04/2005
Page 1
Tech ID      Name                      Bay/ Stall  Commission  Hourly Rate
AJR          RIBAUDO, ANTONIO          5           5.00%      $16.00
GEA          ANDERSON, GARY            1           5.00%      $17.50
JRE          EVERETT, JOE              4           5.00%      $12.00
RTG          GARCIA, RUDY              2           5.00%      $14.00
    
```

Report Generator 4-7

As you've seen from reading this section, COMPTRON® offers many standard reports to help you evaluate how your department is doing. However, you may have identified other factors and areas of information that you want to track. The **Report Generator** function allows you to custom design additional reports tailored specifically to your needs.

From the **Service Menu**, select **Option 4**, then **7**, and you will see a screen similar to the following example, listing the title and description of whatever report was last generated here:

Sample Report Title Screen

```

                                <A> Add   <N> Next  < > Print  <'> Exit  < >
Repair Order Report  <S> Search <P> Prev  <d> Delete  <F> Filters

                                Report Title  R.O-STATUS      Description Status,Type_svc,_Parts
                                Filter Title  TECHNICIAN      Description

Date 10/19/2001                                                    Page 1

Status      Type_svc _Parts _Labor _Misc      Charges
xxxxxxxxxx xxxxxxxx $$$$,$$$.$$$ $$$$,$$$.$$$ $$$$,$$$.$$$ $$$$,$$$.$$$

```

If you want to design a new report, use the **< A> Add** command option to see this blank **Report Title** screen:

New Report Title Screen

```

                                <'> Exit

                                Report Title  Description
                                Filter Title  Description

Date 10/22/2001                                                    Page 1

```

Enter a meaningful title for your report. You will find that if you try to type a two-word title such as "WORK CODE," you will see a message across the bottom of the screen saying that you cannot use spaces or special characters in the report name. This means that you must either run title words together or use a period (.) or a hyphen (-) to separate them—a slash (/) is considered a special character.

Next, press *Enter* to move to the **Description** field. Type a brief description of your new report here; otherwise, this field will just list abbreviated names of the data fields that you select for inclusion in the report. After typing your report description, press *Enter* to move to the **Filter Title** field, and the following window will open for you to select the type of report that you want to create (i.e., the file from which you wish to draw your report information):

New Report Title
Screen: Report Type
Window

```

        <'> Exit
Report Type
Select 
1. Stock
2. Vendor
3. Customer
4. Vehicle
5. Repair Order
6. Special Order
7. Hold Ticket
8. Work Code
9.
A. R/O History
-HISTORY Description
Description
Page 1
    
```

After you choose the report type (for this example we'll extract data from the Repair Order History file), a window like the following will open, offering you a list of the target file's data fields from which you can select the information factors you want included in your report (you must choose at least three):

R/O History Report
Screen: RO History
Data Window

```

R/O History R
Enter Line No. or <'> Exit < >
RO History Data
1. RO #
2. CUSTOMER #
3. CLAIM #
4. TYPE SVC
5. STATUS
6. CUSTOMER NAME
7. ADDRESS
8. CITY
9. STATE
10. ZIP CODE
11. HOME PHONE
12. WORK PHONE
13. EXT
14. OPERATOR
15. STOCK #
16. MAKE
17. MODEL
18. YEAR
19. VIN
20. ENGINE #
21. LIC/ID #
22. ODOM
23. USER DEF1
24. PARTS
25. LABOR
26. MISC
27. DATE SCHEDULED
28. DATE COMPLETED
29. DATE PROMISED
30. DELAY REASON
31. TAX PARTS
32. NONTAX PARTS
33. TAX LABOR
34. NONTAX LABOR
35. TAX MISC
36. NONTAX MISC
37. TAX
38. CHARGES
39. TECHNICIAN
Repor
Filte
Date 10/22/2
    
```

Try to select the data fields in the order in which you want them to be displayed on your report. Type the line number for the first data field, press *Enter*, and the data window will close, revealing your **Report Title** screen with the name of the first data field displayed in the lower left corner above a string of **x**'s, **9**'s, or **\$**'s (dollar signs) to indicate the field's size (in characters, numeric digits, or dollar amounts, respectively). The cursor will be waiting to the right of the data field name.

To choose the next data field for your report, just press *Enter* again, and the data window will reopen for you to repeat the process by typing the next line number. When you've chosen the last field to include in your report, use the apostrophe <'> command to exit the data window. The **Report Title** screen will be displayed with all data fields listed in the lower left corner (and also abbreviated in the **Description** field if you have not entered your own report description there). For our example from the Repair Order History file, we chose lines 28 (**Date Completed** field), 4 (**Type Svc**), 33 (**Tax Labor**), 34 (**Nontax Labor**), 24 (**Parts**), 38 (**Charges**), and 39 ():

R/O History Report Title Screen

```

R/O History Report      <A> Add      <N> Next  < > Print  <'> Exit  < >
                        <S> Search  <P> Prev  <d> Delete  <F> Filters

                        Report Title  R.O-HIST      Description  Date_Cmpl,Type_svc,Tax_Labor
                        Filter Title   Description

Date 10/22/2001                                           Page 1

Date_Cmpl Type_svc  Tax_Labor  NonTaxLabor  _Parts  Charges  Tech
99/99/9999 xxxxxxxx $$$$,$$$.$$$ $$$$,$$$.$$$ $$$$,$$$.$$$ $$$$,$$$.$$$ $$$$,$$$.$$$ $$$$,$$$.$$$ xxxxx

```

After identifying all the data fields to be covered in your new report, use the < **F** > **Filters** command to narrow further the range of information that you wish to include, and a **Filter** screen similar to the following example will appear:

RO History Filter Screen

```

RO History Filter      <C> Change  <A> Add      <'> Exit  < >
                        <S> Search  <R> Remove

                        Report Title  R.O-HIST      Description  Date_Cmpl,Type_svc,Tax_Labor
                        Filter Title   Description

Date 10/22/2001                                           Page 1

Date_Cmpl Type_svc  Tax_Labor  NonTaxLabor  _Parts  Charges  Tech
99/99/9999 xxxxxxxx $$$$,$$$.$$$ $$$$,$$$.$$$ $$$$,$$$.$$$ $$$$,$$$.$$$ $$$$,$$$.$$$ $$$$,$$$.$$$ xxxxx

```

The < A> **Add** command option moves the cursor to the **Filter Title** field, where you must type in a name for the filter that you wish to add, and press **Enter**, before you can see a **Filters** window similar to this example:

R/O History Report
Screen: R/O History
Report Filters Window

```

R.O-HIST          Enter Line No  or < > Accept  < >
                  R/O HISTORY REPORT FILTERS
                  The filter limits the report to ONLY these fields

Ln#  FIELDS                FILTER
  1.  Type Service
  2.  Date Finalized       99/99/9999
  3.  Date Completed
  4.  Account Number
  5.  Customer Lname
  6.  Make
  7.  Model
  8.  Year
 10.
 11.  Operator
 12.  Not in Use
 13.  Not in Use
 14.  Not in Use
 15.  Not in Use
 16.  Not in Use
    
```

If you had chosen to generate an existing type of report from the initial **Report Title** screen, the < S> **Search** command option would have moved the cursor to the **Filter Title** field, where you could use the slash key </> scrolling search command to display the **Filters** window for a list of all filters already defined for that report, as illustrated on the next page. You could then select the line number for the filter that you wanted to apply at that time. Once you have defined the filter for your report, press **Enter** to **Print** it, and this screen will appear, prompting you to choose whether you want to send the output to a printer (default), display it on the screen, or export it to a diskette:

Output Selection
Screen

```

Select Output  < >

<P>  Send to Printer

<S>  Display on Screen

<X>  Export
    
```

Next, a screen similar to the example on the next page will appear, on which you can indicate the range of data to be included for each field of your report.

Report Range Parameters Screen

```

< > "First" <'> Exit

DATE COMPLETED
  Starting
  Ending

TYPE SERVICE
  Starting
  Ending

TAX LABOR
  Starting
  Ending

```



If you press *Enter* at the **Starting** and **Ending** fields, COMPTRON® will default to "First" and "Last."

When you have defined the range parameters for each data field to be included in your report, a command line will appear at the bottom of the screen, allowing you to verify your choices or make corrections:

Report Range Verification Screen

```

< > "Last" <'> Prev

DATE COMPLETED
  Starting  9/01/2001
  Ending   10/22/2001

TYPE SERVICE
  Starting "First"
  Ending  "Last"

TAX LABOR
  Starting "First"
  Ending  "Last"

< > Continue <C> Correct <'> Exit < >

```

The message **W O R K I N G** will display briefly on the screen while COMPTRON® sorts through your records for the data requested. Then your report will print out or appear on the screen; or, if you specified export, you will see the following menu offering you three options for exporting the report to a diskette:

**Copy RPG Export to
Diskette Menu**

Copy RPG Export to Diskette

Select

1. Comptron
2. Windows
3. Transfer
- ' Exit

Explanation of RPG Export to Diskette Menu Options:

- < 1> **Comptron** - This option formats your custom-designed report for export to a COMPTRON[®] (UNIX-based) computer operating system.
- < 2> **Windows** - With this option, you can export your customized report to a computer with a Windows[®] operating system.
- < 3> **Transfer** - This option copies your custom-tailored report to a diskette for use on a DOS-based computer.

On the following page is an example of an R/O History file report created using the **Report Generator** function:

Date: 10/22/2001
Title: R.O-HIST

R/O HISTORY

Page: 1

Desc: Date_Compl, Type_svc, Tax_Labor

Date_Compl	Type_svc	Tax_Labor	NonTaxLabor	_Parts	Charges	Tech
9/10/2001	Retail				\$3,689.90	\$3,689.90
9/23/2001	Retail				\$27,036.95	\$27,036.95
9/30/2001	Retail				\$21,971.10	\$21,971.10
10/12/2001	Retail				\$11,038.05	\$11,038.05
10/21/2001	Retail				\$24,847.05	\$24,847.05
				-----	\$88,583.05	

						\$88,583.05

Lines = 5
END OF REPORT

File Maintenance (Service Menu Option 5)

You have already used the **File Maintenance** option to set up files initially in your data base, including your Service department's schedule calendar, service holiday defaults, work code definitions, the Customer and Vehicle files, the Technician file, and your Repair Order History and Service Orders History files. As your department changes, COMPTRON® can change with you.

You will often need to add new customers and vehicles, and there will also be changes in your staff of mechanics, the hours/days your department will be open, and the types of work you find your department is performing frequently enough to justify having specific work codes assigned to them. Use **File Maintenance** for making these changes.

From the **Service Menu**, select **Option 5, File Maintenance**, and the following **Service Files** menu appears:

Service Files Menu

```
Service Files

Select █

1. Customer
2. Vehicle
3. Work Code
4. History
5.
6. Calendar
7. Holiday

' Exit
```

Explanation of Menu Options:

- < 1> **Customer** - Use this option to add new Service customers or change customer information, so that you can schedule appointments and create Repair Orders for them. You can also do this from the **Appointment** screen or the **Repair Order** screen. *(See pages 11-12 of this manual.)*
- < 2> **Vehicle** - This option allows you to add or change vehicle information used for setting appointments or creating Repair Orders. *(See pages 12-15.)*
- < 3> **Work Code** - This option is great for creating shortcut codes to speed up your staff's entry of appointments and Repair Order labor lines. You can design work codes for commonly performed jobs, so that the work description and labor rate won't have to be typed out each time. *(See pages 10-11.)*

- < 4> **History** - You can use this option to review (but not change) information on completed or canceled Repair Orders, such as tax rates in effect at the time, or what parts were ordered for the work done. *(See pages 15-18.)*
- < 5> **Technician** - This option lets you add or change information about your technicians (mechanics), which is used to bill labor charges on Repair Orders and is needed for management reports. *(See pages 18-19.)*
- < 6> **Calendar** - Use this option to make changes in your schedule calendar defaults, which simplifies your department's scheduling of service appointments. *(See page 9.)*
- < 7> **Holiday** - This option enables you to modify your list of default Service holiday settings, for the dates when your department will be closed, to prevent errors in appointment scheduling. *(See pages 9-10.)*

Summary

In the Service Module section of the COMPTRON® manual, you have learned to:

- > Build Dealership Default Options
- > Set up Your Service Schedule Calendar
- > Define Your Service Holidays
- > Build Your Work Codes
- > Build Your Customer File
- > Build Your Vehicle File
- > Build Your File
- > Create/Schedule Appointments
- > Create Repair Orders
- > Use Services
- > Custom Design Your Own Reports (through Report Generator)
- > Maintain and Update Your Service Files