MPK CHEAT SHEET

REPORTS

A) UNPOSTED RO'S

1) CLICK ON REPORTS IN RIGHT COLUMN
2) DOUBLE CLICK ON UNPOSTED REPAIR ORDERS
3a) UNCHECK BOX TO RUN ONLY RO'S THAT ARE CLOSED AND UNPOSTED
OR
3b) LEAVE BOX CHECKED TO RUN ALL OPEN/ UNPOSTED REPAIR ORDERS

B) ADVISOR PERFORMANCE

1) CLICK ON REPORTS IN RIGHT COLUMN
2) DOUBLE CLICK ON ADVISOR PERFORMANCE
3) SELECT DATE RANGE HEADER
4) TYPE IN DATE RANGE (i.e. 08/01/09...08/14/09)
5a) CLICK PREVIEW TO VIEW ON SCREEN ONLY
OR
5b) CLICK PRINT TO PRINT COPY

CREATING A P.O. (PURCHASE ORDER)

1) FROM SERVICE WRITE UP MAIN SCREEN SELECT PURCHASE ORDER
2) PRESS F3 TO CREATE A NEW P.O.
3) CLICK ON VENDOR NAME AND A BOX WILL APPEAR, SELECT FOR REPAIR ORDER
4) TYPE IN EITHER VENDOR NAME AND PRESS ENTER
5) THIS WILL GIVE YOU LIST OF VENDORS WITH THAT NAME TO SELECT FROM
6) SELECT CORRECT VENDOR
7) INPUT VENDOR INVOICE NUMBER
8) SELECT ACCOUNT G/L
9) NO. COLUMN DROP DOWN SELECT SUBLET REPAIRS
10) TYPE IN DESCRIPTION
11) TYPE IN QUANTITY ORDERED
12) TYPE IN YOUR COST
13) TYPE IN RO COST (THIS IS THE AMOUNT YOU WANT CHARGED ON RO)
14) EITHER TYPE IN RO# OR SELECT FROM DROP DOWN MENU
15) TYPE IN TASK NUMBER OR SELECT FROM DROP DOWN MENU
16a) SELECT SUBLET IN SELL THRU TYPE DROP DOWN MENU
16b) IF IT IS A PART THEN SELECT PART IN SELL THRU TYPE DROP DOWN MENU
17a) YOU CAN CHOOSE TO ONLY PRINT AT THIS POINT, THIS WILL NOT POST IT TO RO THOUGH
17b) OR YOU CAN SELECT TO POST AND PRINT UNDER THE POSTING MENU, THIS WILL CHARGE ON RO

CREATING CREDIT MEMO/ USE THIS TO VOID ALREADY POSTED P.O.

1) FROM SERVICE WRITE UP MAIN SCREEN SELECT PURCHASE CREDIT MEMOS
2) PRESS F3 TO CREATE A NEW CREDIT MEMO
3) CLICK ON VENDOR NAME AND A BOX WILL APPEAR, SELECT FOR REPAIR ORDER
4) AT BOTTOM OF SCREEN CLICK ON FUNCTIONS
5) SELECT COPY DOCUMENT
6) MAKE SURE DOCUMENT TYPE IS POSTED INVOICE
7) TYPE IN P.O. # YOU WISH TO WRITE CREDIT MEMO FOR
8) MAKE SURE BOX FOR "INCLUDE HEADER" IS CHECKED
9) CLICK OK
10) TYPE IN VENDOR CREDIT NO.
11) POST AND PRINT

TO LOOK UP CUSTOMER BY NAME, CAN USE THIS FEATURE IN ANY MENU TO SEARCH CUSTOMER BY NAME

1) CLICK ON NAME FIELD
2) TYPE "*CUST LAST NAME"
3) IF NOT THE CUST YOU ARE LOOKING FOR, CLICK THE NEXT BUTTON ON THE POP UP SCREEN

CLOCKING IN

1) IN LEFT COLUMN SELECT TIME CLOCK
2) SELECT CLOCK IN/ OUT
3) TYPE IN EMPLOYEE NUMBER
4) PASSWORD IS EMPLOYEE NUMBER
5) CLICK OK
6) SELECT CLOCK IN/ OR CLOCK OUT
7) PRESS EXIT

WRITE UP REPAIR ORDER

1) SELECT REPAIR ORDER FROM MAIN SCREEN
2) F3 TO CREATE NEW REPAIR ORDER
3) ENTER VIN# OR CUST NAME IN CORRESPONDING FIELD
4) ENTER MILEAGE
5) ENTER TAG #
6) FUNCTIONS TAB
7) NEW TASK
8) SELECT OPCODE FIELD DESIRED
9) SELECT SPECIFIC OPCODE
10) SELECT LABOR TYPE
11) TYPE IN COMPLAINT
12) TYPE IN ESTIMATE AMOUNT

FUNCTIONS AVAILABLE WHILE IN REPAIR ORDERS

VEHICLE TAB
1) VIN QUERY SERVICE HISTORY - DISPLAYS ALL WARRANTY SERVICE HISTORY
2) VIN QUERY WARRANTIES - SHOWS WARRANTIES ON PARTICULAR VEHICLE
3) VIN QUERY RECALLS - SHOWS ALL OPEN RECALLS ON THAT VEHICLE
4) VIN QUERY OPTIONS - DISPLAYS VEHICLE OPTIONS
5) VIEW VIN QUERY - DISPLAYS GENERAL OUTLINE OF FACTORY VIN QUERY
6) SERVICE HISTORY - DISPLAYS ALL SERVICE HISTORY PERFORMED AT THIS DEALER
7) CARD - VEHICLE CARD, ALL VEHICLE INFORMATION
   a) USING CTRL E WILL LET YOU MODIFY VEHICLE INFORMATION IN THIS FIELD
8) FACTORY VIN QUERY - RUNS FACTORY VIN QUERY TO GET UP TO DATE INFORMATION

ORDER TAB
1) LIST / F5 - LISTS ALL OPEN REPAIR ORDERS IN SHOP
2) STATISTICS / F9 - SHOWS CURRENT PRICING ON RO. (CP, WARR, SVC CONT, INT, TOTAL)
3) CUST CARD / SHFT-F5 - SHOWS CUST INFORMATION
   a) TO MAKE CHANGES USE "CTRL E" TO UNLOCK
4) COMMENTS - ALLOWS TO TYPE COMMENTS FOR RO WHICH WILL HIGHLIGHT BOX NEXT TO RO#

FUNCTIONS TAB
1) HEADER CHANGES

a) RE-VALIDATE CUSTOMER - AFTER MAKING CUST CHANGES USE THIS TO MAKE THEM CURRENT
b) CHANGE CUST - USE THIS FEATURE TO CHANGE CUST ON CURRENT RO
c) CHANGE VEHICLE - USE THIS FEATURE TO CHANGE VEH ON CURRENT RO
d) CHANGE TAG NO. - USE THIS FEATURE TO CHANGE TAG NO. ON CURRENT RO

2) NEW TASK / SHFT-F3 - USED TO ADD A TASK TO CURRENT RO
3) ASSIGN TASK / SHFT-F4 - USED TO ASSIGN TECHNICIAN TO ONE OR MORE TASKS
4) START TASK - AFTER ASSIGNING TECH, THIS WILL START CLOCKING TIME ON PARTICULAR TASK
5) TASK COMMENT - SELECT WHICH TASK TO ADD COMMENT TO, WHICH WILL SHOW UP ON RO
   a) EXAMPLES OF USE - FOR EXTENDED WARRANTY INFO, AUTH #'S, DEDUCTIBLE NOTES
6) TASK CCC - SELECTING THIS WILL BRING UP SCREEN TO GO INTO THE THREE C'S OF RO
   a) WHEN CCC BOX COMES UP, SELECT FIELD YOU WANT TO EDIT
   b) PRESS EDIT
   c) TYPE IN CORRESPONDING INFORMATION
   d) PRESS SAVE
   e) WHEN DONE WITH ALL THREE X OUT
7) HOLD TASK
   a) HOLD CUSTOMER OK - USED WHEN PUTTING TASK ON HOLD FOR AUTHORIZATION
   b) HOLD PART - USED WHEN PUTTING TASK ON HOLD FOR PART ORDER
   c) HOLD TECH - USED WHEN PUTTING ON HOLD FOR TECH (i.e. ROADTEST)
   d) HOLD SUBLET - USED WHEN PUTTING ON HOLD FOR SUBLET REPAIRS
   e) HOLD SERVICE DEPT - USED FOR PUTTING ON HOLD BY ADVISOR OR MANAGER
8) CHANGE PAY TYPE - SELECT THIS WHEN NEEDING TO CHANGE PAY TYPE FOR A TASK
9) ADD TECHNICIAN - USE THIS TO SPLIT TIME ON A TASK
10) ADD WARRANTY OPCODE - USED TO ADD WARRANTY OPCODES
   a) CHOOSE TASK TO ADD TO
   b) AT BOTTOM UNDER OPCODE FIELD TYPE IN OPCODE
   c) TYPE IN DESCRIPTION
   d) INPUT FLAG HOURS
   e) INPUT FAIL CODE
   f) INPUT TECH
11) SELL ACCOUNT G/L - TO ADD GENERAL LABOR ON RO WITHOUT HAVING TO PAY TECHNICIAN
12) REASSIGN SUBLET - USE THIS FEATURE TO MOVE SUBLET BILL BETWEEN TASKS
13) REASSIGN PART - USE THIS TO MOVE PARTS BETWEEN TASKS
14) ADD WARRANTY CO-PAY - USED TO ADD CO-PAY TO WARRANTY LINE
15) ADD INTERNAL CO-PAY - USED TO ADD INTERNAL CO-PAY
16) MOVE TASK TO APPOINTMENT - USED TO MOVE ONE OR MORE TASKS TO AN APPOINTMENT

POSTING TAB

1) CLOSE TASK - USE TO CLOSE ONE OR MORE TASKS
2) RE-OPEN TASK - USE TO RE-OPEN A COMPLETE OR TECH COMPLETE TASK
3) CLOSE RO - USE TO CLOSE/ FINALIZE RO, THIS WILL PRINT FINAL COPY WHEN SELECTED
4) RE-OPEN RO - USE TO RE-OPEN AN RO IN CLOSED STATUS, NOT A POSTED RO THOUGH
5) POST RO - USED TO POST RO AFTER BEING PAID, POSTS TO MONTHLY TOTALS
6) POST WARRANTY - THIS WILL POST WARRANTY TASKS TO MONTHLY TOTALS
7) POST SERVICE CONTRACT - THIS WILL POST SERVICE CONTRACT TASKS TO MONTHLY TOTALS

PRINT TAB

1) INITIAL PRINT - WILL PRINT TECH COPY AND CUSTOMER ESTIMATE
2) CUST ESTIMATE - WILL PRINT ONLY CUST ESTIMATE COPY
3) TECH RO - WILL PRINT TECHNICIAN COPY ONLY
4) CUSTOMER INVOICE - PRINTS COPY OF FINAL BILLING AT RO'S CURRENT STATE
5) WARRANTY CLAIM - PRINTS WARRANTY COPIES OF CURRENT RO
6) INTERNAL INVOICE - PRINTS INTERNAL COPIES OF CURRENT RO

CREATING AN APPOINTMENT

1) SELECT APPOINTMENT FROM MAIN WRITE UP SCREEN

2) PRESS F3 TO CREATE A NEW APPOINTMENT
3) TYPE IN CUST NAME OR VIN# TO LOOK UP CUST BY THAT FIELD.
4) TYPE IN DATE APPOINTMENT IS TO BE SET FOR
5) TYPE IN APPOINTMENT TIME
6) SELECT FUNCTIONS TAB
7) ADD IN NEW TASKS

CREATING REPAIR ORDER FROM APPOINTMENT

1) SELECT APPOINTMENT FROM WRITE UP MAIN SCREEN
2) PRESS F5 TO BRING UP LIST OF APPOINTMENTS
3) DOUBLE CLICK ON DESIRED APPOINTMENT
4) SELECT CREAT TAB AT BOTTOM
5) OPTIONS ARE
   a) CREATE RO (ALL TASKS) - THIS MOVES ALL TASKS TO A NEW RO
   b) MOVE TASK TO NEW RO - USE THIS TO MOVE ONLY ONE OR MORE, BUT NOT ALL, TO AN RO
   c) MOVE TO EXISTING RO - MOVE ONE OR MORE TASKS TO AN EXISTING RO FOR THAT CUST

CUSTOMER LOOKUP

BY CUSTOMER

1) SELECT CUSTOMER FROM MAIN SERVICE WRITE UP SCREEN
2) PRESS F5 TO BRING UP LIST OF ALL CUSTOMERS IN DATA BASE
3) CLICK ON NAME FIELD
4) TYPE "*CUST LAST NAME" TO SEARCH FOR CUST BY LAST NAME
5) IF NOT CUST LOOKING FOR PRESS FIND NEXT IN BOX UNTIL YOU FIND CUST
6) ONCE YOU FIND CORRECT CUST PRESS ENTER
7) WHEN IN CUSTOMER CARD USE FUNCTIONS TAB TO PERFORM FOLLOWING
   a) EDIT / CTRL E - TO UNLOCK CUST CARD TO CHANGE INFORMATON
   b) STATISTICS - USE THIS FEATURE TO SEE IF ANY OUTSTANDING BALANCES OR CREDITS
   c) VEHICLES - USE THIS TO VIEW ALL VEHICLES ASSIGNED TO THIS CUST NO.
   d) SVC HISTORY - VIEW ALL SERVICE HISTORY FOR THIS CUST NO.

BY VECHILE

1) SELECT VEHICLE FROM MAIN SERVICE WRITE UP SCREEN
2) PRESS F5 TO BRING UP LIST OF ALL VEHICLES IN DATA BASE
3) CLICK ON LEFT COLUMN
4) TYPE IN LAST SIX OF VIN TO SEARCH FOR VEHICLE
5) IF NOT VEHICLE YOU ARE LOOKING FOR PRESS FIND NEXT BUTTON UNTIL YOU FIND VEHICLE
6) ONCE YOU FIND CORRECT VEH PRESS ENTER
7) WHEN IN VEHICLE CARD USE VEHICLE TAB TO PERFORM FOLLOWING
   a) CUSTOMER HISTORY - USE THIS TO LOOK UP CUSTOMER HISTORY
   b) SERVICE HISTORY - USE THIS TO LOOK UP ALL SERVICE HISTORY FOR THIS VIN #
   c) EDIT / CTRL E - USE THIS TO UNLOCK VEHICLE CARD TO CHANGE INFORMATION

CREATE NEW CUSTOMER

1) SELECT CUSTOMER FROM MAIN SERVICE WRITE UP SCREEN
2) PRESS CTRL E - THIS WILL UNLOCK THE HEADER TO BE ABLE TO CREATE NEW
3) PRESS F3 - TO CREATE NEW
4) AFTER CLICKING ON HEADER YOU WILL NEED TO PRESS CRTL E AGAIN TO UNLOCK IT AGAIN
5) TYPE IN NAME HIT TAB
6) TYPE IN STREET ADDRESS HIT TAB
7) TYPE IN ZIP HIT TAB, THIS WILL AUTOMATICALLY PUT IN CITY AND STATE
8) PRESS COMMUNICATIONS TAB AT TOP
9) TYPE IN PHONE NUMBERS

10) SELECT CONTACT PREFERENCE
11) EXIT OUT

SERVICE MANAGEMENT TO SET UP NEW OPCODES/ OR MODIFY EXISTING OPCODES

1) SELECT SERVICE MANAGEMENT FROM LEFT COLUMN
2) IN SERVICE MANAGEMENT MAIN SCREEN SELECT SETUP
3) SELECT FUNCTIONS
4) SELECT EDIT / CTRL E
5) F3 TO CREATE NEW
6) NAME OPCODE SECTION
7) TYPE IN DESCRIPTION
8) SELECT FUNCTIONS
9) SELECT EDIT / CTRL E

HAVE TO MAKE SUBFIELD

1) SELECT OPCODE SECTION
2) PRESS OPCODE BUTTON
3) NAME OPCODE
4) TYPE IN DESCRIPTION
5) OPTIONS TO PRE-PRICE
   a) PART NO.
   b) PART PRICE
   c) DEFAULT HOURS
   d) DEFUALT PRICE (LABOR)
   e) DEFAULT ESTIMATE
   f) PRE TYPE COMPLAINT
   g) PRE TYPE CAUSE
   h) PRE TYPE CORRECTION
6) SELECT FUNCTIONS
7) EDIT / CTRL E - THIS WILL LOCK SETTING INTO PLACE