

# JSER GUDE

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Version 7.5

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# Chapter 1: Overview

## Introduction

| Welcome                  | Congratulations on your selection of the TRACS application.<br>This document is intended to provide you with the information you will need<br>to set up your system after it is delivered.  |
|--------------------------|---|
| The TRACS<br>Application | TRACS is an Automotive Shop Management program designed for the automotive repair business. TRACS combines several key information components such as Work Orders, Scheduling, Customer History, Purchasing, and Reporting into a fully integrated system that makes service writing, invoicing, and inventory control fast and efficient. The TRACS application is compatible with the Windows® XP, XP Home, 2000, 2003, and Vista operating systems. It works with Vista User Access Control (UAC) for enhanced security. |
|                          | TRACS LINK is the stand-alone version of the TRACS application.   |
|                          | TRACS NET is the network version of the TRACS application.  |
| User's Guide             | Although the system is user-friendly, the user's guide will be helpful in gathering company information necessary for proper system use. You can also set up additional detailed options for preferences and lists.   |
|                          | This guide also provides you with the basic steps to enter a customer and a Work Order using the system.  |
| Online Help              | The TRACS application contains an <b>Online Help</b> feature that contains more comprehensive information than the user's guide. To access the <b>Online Help</b> feature, click the <b>Help</b> button ? Help located throughout the application.  |

#### Sections This user's guide is divided into six sections: • Overview Setting Up Preferences • Setting Up Lists • E-Mail • Items • • Customer Basics Administrative Features • Integrating TRACS and QuickBooks • Reports • **Additional Functions** • Wireless Service Assistant • Setting Up The TRACS set up process allows you to enter the necessary information Preferences about the way your company operates so that you can create accurate estimates and work orders for your customers. You can also customize the system to your specific business operations. These details are divided into Preferences and Lists. This chapter deals with preferences. **Setting Up Lists** This chapter continues the set up process by giving you the opportunity to establish all of your lists from which you will later select items. E-Mail This chapter provides information on how to compose and send e-mail in TRACS. Items This chapter includes information about how to work with different types of items Customer This guide includes the "Customer Basics" chapter to provide you with the **Basics** basic processes related to adding customers to the system. Administrative The fifth chapter of this guide presents how to work with administrative Features features such as recommending services to customers and creating reports.

## **User's Guide Sections**

| Integrating<br>TRACS and<br>QuickBooks | This chapter covers how to integrate the QuickBooks software into TRACS, including exporting information from TRACS into QuickBooks. |
|--|--|
| Reports                                | This chapter covers the different types of reports that TRACS can generate.  |
| Additional<br>Functions                | This section covers additional TRACS functions that were not included elsewhere in this guide.                                       |
| Wireless<br>Service<br>Assistant       | This section covers the functions of the wireless service assistant supported<br>by the TRACS application.                           |

## How to Use This Guide

Using This Guide Within each chapter of this guide, you will find the content logically organized to follow the flow of the set-up processes. This guide also provides the following component:

| Component         | Description  |  |
|-------------------|--|--|
| <b>Before You</b> | The Before You Begin component identifies          |  |
| Begin             | the information that you will want to gather       |  |
|                   | before you begin working with this system          |  |
|                   | function online. Since you may need to refer       |  |
|                   | back to this information, this component is        |  |
|                   | provided in "Chapter 2: Setting Up                 |  |
|                   | Preferences" and "Chapter 3: Setting Up            |  |
|                   | Lists."  |  |
| How To            | The <b>How To</b> component identifies the actions |  |
|                   | or steps that you will need to perform to          |  |
|                   | complete a specific task.                          |  |
| Tabs,             | The Tabs, Folders, and Forms components            |  |
| Folders,          | are divisions that organize some windows into      |  |
| and Forms         | logical clusters of information.                   |  |

Audience In most cases, your company's decision-maker, such as the business owner, will want to complete the set-up processes. There may be input based on operational decisions.

"Chapter 2: Setting Up Preferences" and "Chapter 3: Setting Up Lists" requires someone with a functional knowledge of the details of processing orders such as the business owner or service writer.

"Chapter 6: Customer Basics" includes basic activities that would be performed by the service writer.

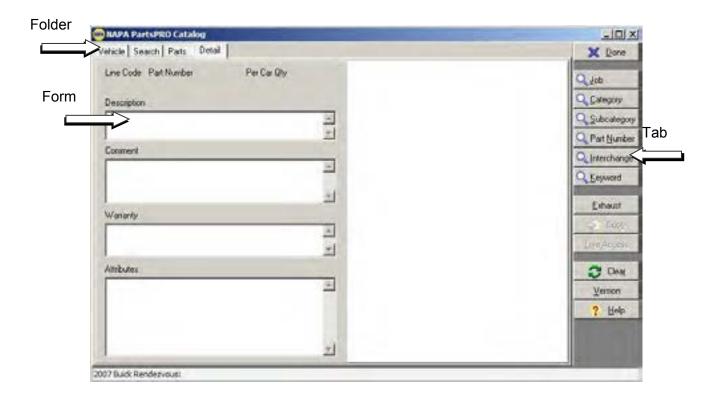
"Chapter 7: Administrative Features" provides discussion of advanced procedures and should be completed by the business owner or manager.

Tabs, Folders,<br/>and FormsSome sections in TRACS are organized by tabs. Each tab is a logical group<br/>of related questions. Tabs are located on the right side of the screen.

Folders are located within Tabs. Folders provide subcategories for Tabs. Some Tabs are brief and have no need to be divided into Folders.

Forms are parts of the screen where you can enter information or make selections. Forms also provide basic information about the type of information the system needs to effectively process your company's data.

The following image indicates the location of Tabs, Folders, and Forms:



Maximizing<br/>Your WindowWhen using TRACS, you may at times need to maximize the size of your<br/>viewing window. Otherwise, you will not be able to see and use the Help,<br/>Previous, Next, and Done buttons at the bottom of the screen.

| MAA PartsP80 Cellelog<br>Vehicle   Search   Parts Defail | LiDia<br>X Dore |
|--|-----------------|
| Live Code Part Number Per Car Gry                        | Queb            |
| Description  | Q Category      |
| 1  |                 |
| Connert  | Q Pat Suite     |
| 2  | Q. Enword       |
|  | 1 Educat        |
| Wanarity   |                 |
| 1  | - Langeconsi    |
| Anibules   | C One           |
| -  |                 |
|  | ? Heb           |
|  |                 |
| 1 2  | 1               |

**How To** To maximize your viewing window, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click the <b>Maximize</b> button above the EXIT sign.                             |
|      |   |
|      |   |
|      |   |
|      | 🚟 😤 🛄   |
|      | and the window will maximize, displaying the buttons at the bottom of the screen. |
|      |   |

| INAPA PartsPED Catalog<br>Incle   Search   Parts   Detail |   | x Dove        |
|---|---|---------------|
| Line Code Part Number Per Car Gry                         | - | 9,00          |
| Description   |   | Category      |
|   |   | Q Subcategor  |
|   | 1 | Q Part Number |
| Convent   | - | QInterchange  |
|   |   | C. Eesword    |
|   | 1 | Eshaut        |
| Waterly   | - | 2 Ow          |
|   |   | - surrecons   |
| Athibudes   |   | C City        |
|   |   | Уесноя        |
|   |   | ? Heb         |
|   |   | - States      |
|   | 1 |               |

**Resolution** The system operates most effectively at a screen resolution of 800 x 600 pixels. If your desktop is at a lower resolution, some options available on specific screens will not be displayed.

**How To** To set your screen resolution, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click the Start button on your Windows toolbar.  |
| 2    | Click Settings.  |
| 3    | Click Control Panel.   |
| 4    | Double click the <b>Display</b> icon, and the <b>Display Properties</b> window displays.                                       |
| 5    | Click the Settings folder.   |
| 6    | Slide the bar in the <b>Desktop area</b> box to the right or left until <b>800 x 600 pixels</b> displays under the slidebar.   |
| 7    | Click the <b>OK</b> button, and the system will ask you to wait.   |
| 8    | Click the <b>OK</b> button, the system displays the new resolution and asks you if you would like to keep the current setting. |
| 9    | Click the <b>Yes</b> button. You have now set your screen resolution to 800 x 600 pixels.                                      |

# **Navigational Terms**

| Terms                | Some of the terms used in this guide might be new to you. Review any new terms listed below before you begin working with the TRACS application.   |
|----------------------|--|
| Click                | This function allows you to select specific items on the screen by pressing the left mouse button down one time.   |
| Double-click         | This function allows you to perform certain tasks such as editing or selecting<br>an item by pressing the left mouse button down twice very quickly.   |
| Right-click          | This function provides quick access to other system features by pressing the right mouse button one time.  |
| Down Arrow           | Down arrows display in fields that have pull-down menus allowing you to select items from a list. Click on a down arrow to activate the pull-down menu.  |
| Type Ahead<br>Search | The Type Ahead Search feature allows you to type in the first few letters of<br>the item you are searching for, and the system produces a list of those items<br>beginning with the letters you typed. This feature is designed to decrease<br>time spent scrolling through a large list of items such as parts.   |
| Case Sensitive       | Case sensitive refers to the way in which the system responds to a data search that is typed.  |
|                      | For example, if you are searching for John Smith's work order by typing in<br>the customer's name, you would need to make sure that you typed the name<br>exactly as it appears in the database. If the customer's name was originally<br>spelled in all upper case letters (that is, JOHN SMITH), the system would not<br>be able to locate the customer's name typed any other way. It is<br>recommended that you keep your caps lock on at all times. |

## Registration

The first time that you run TRACS after you have installed it (or updated to version 7.2), the program will prompt you to complete the online registration process.

**How To** To register your TRACS software online, complete the following steps:

| Step | Action  |
|------|---|
| 1    | When the registration window appears, enter your Product Key,   |
|      | which can be found on the mailing label of your mailing packet.   |
| 2    | Click the <b>Register Online</b> button.  |
| 3    | Your software is now registered. You only have to do this once,<br>on the Server; you do not have to re-enter the Product Key for<br>individual clients. If an error message appears, check that your<br>Internet connection is working properly and try again. |

|              |   | Register Online          |
|--------------|---|--------------------------|
| RACS Proc    |   |                          |
| 1E           | Found on mailing label or Certificate of Authenticity | Register by <u>Phone</u> |
| Shop Name    |   | X Cancel                 |
|              |   | 1                        |
| Address      |   |                          |
|              |   |                          |
|              |   |                          |
| City         | State Zip   |                          |
|              |   |                          |
| Phone        |   |                          |
|              |   |                          |
| Jwner Name   |   |                          |
|              |   |                          |
|              |   | 1                        |
| Required Fie | lds   |                          |
|              |   |                          |

#### **Online Updates**

TRACS automatically searches for online updates and downloads them in the background until you are ready to install them. You can continue to work while the download occurs, so updates can download during the day while you are running TRACS but you can wait until you are ready to install them.

The search occurs automatically when you launch the software. TRACS will notify you when the download is complete.

The update status will appear in the lower left corner of your TRACS screen. If you see an error message like the one below, check to make sure your Internet connection is working properly.

Can't connect to the TRACSCare service. Something is preventing access to the service or the service is down.

Back-ups help protect your business by making copies of your computers work related information. Situations can arise such as: a disk crash, fire, theft, software or hardware failure, accidental deletion, power fluctuations, or the forces of nature. Performing good back-ups help to prevent the inconvenience and possible high costs associated with lost data.

LINK/NET are both designed to request a back-up every 30 hours. This is not to say that a back-up can not be done more frequently, but that is the schedule the program uses. Most users will do one at the end of each business day. That is the recommended and safest method. The following pages will instruct you on how to correctly perform a back-up.

**NOTE:** NET users only have to perform a back-up on the Server.

Before You<br/>BeginBefore you do a back-up, you will need to:• Close all other programs<br/>• Have the back-up medium readily available<br/>• Log out all clients (NET ONLY)<br/>• Verify the back-up path is correct.

NOTE: Backing up to "C" could result in permanent loss of all information! The best option is to back up to an external medium, such as a jump drive. These insert into the USB port of your computer and the path is usually "E:\" or "F:\" though this may vary.

**How To** To correctly perform a back-up , perform the following steps:

| Step | Action  |  |
|------|---|--|
| 1    | Start on the TRACS main screen and click on the menu option |  |
|      | File.   |  |
| 2    | A drop menu appears. Click the <b>Backup</b> option.        |  |
| 3    | The Back-up window appears. Insert the back-up medium (for  |  |
|      | example, a jump drive into the USB port of your computer).  |  |

# Back-up, Continued

#### How To (continued)

| 📾 Backup   |   |
|--|---|
| Set the backup path and press the "Start Backup" button. Backup Path | <mark>≥ D</mark> one<br><u>S</u> tart<br>∑ <u>C</u> ancel |
| A:\  |   |
| A:\  |   |
|  |   |
| 0%   |   |
|  |   |

| Step | Action   |
|------|--|
| 4    | Click the Next button, and the Your Business Name form   |
|      | displays.  |
| 5    | The back-up path determines where the information is sent to be stored. Locate the letter of the drive where you have the removable medium inserted and press <b>Start</b> . In the example above the computer has a diskette drive, which is "A:\" but if you are using a jump drive it is likely "E:\" or "F:\". |

# Back-up, Continued

#### How To (continued)

| Step | Action   |
|------|--|
| 6    | Once the back-up is complete, the information screen appears and |
|      | declares the back-up a success.                                  |

| Informat | ion and the second state of the second state 🔀  |
|----------|---|
| ٩        | Successfully copied Database to<br>A:\TRACS.GDB DBVersion 233 6-18-2001 11.27.14 AM.zip |
|          | OK  |

| 7 | You may now click OK. As a reference, the back-up will have the date and time it was performed in its title. This serves as an                        |
|---|---|
|   | identifier on the diskette.   |
| 8 | The back-up window will still be open. Click the Done button to close it. The back-up process is now complete. You may resume daily activities.       |
|   | <b>NOTE!</b> Never do a back-up to a drive that does not use some type of removable medium. If Hardware   |
|   | problems occur the information could be lost!   |
|   | If you are using diskettes, it is also a good idea to have<br>a diskette for each business day. Using the same<br>diskette daily is a potential risk. |

## **Chapter 2: Setting Up Preferences**

#### **Preferences Overview**

*Introduction* The **TRACS Set Up** feature provides you with the opportunity to set up or modify options related to system preferences or system lists.

This chapter covers preferences, and Chapter 3 covers lists.

To access the set up feature, choose **Set Up** from the **File** drop-down menu.

| references          |                   | Lists       |                 | × Do       |
|---------------------|-------------------|-------------|-----------------|------------|
| Accounting          | 🔒 Item            | Account     | Manufacturer    | <u>?</u> H |
| Accounts Receivable | Internet          | Bay         | Se Pricing      |            |
| 🗐 Approval          | Parts Catalog     | Category    | A Rec Serv      |            |
| Barcodes            | Purchasing        | Credit Card | द्र्म् Symptoms |            |
| Exports             | 👔 Supplies Charge | Employee    | Vendor          |            |
| 🖉 Labor/OnDemand    | t axes            | Dabor Rate  | Zip Codes       |            |
| 😿 General           | 📑 Work Order      | Ad Source   |                 |            |

## Preferences Overview, Continued

This chapter covers the following concepts and processes:

This Chapter

- Accounting
- Accounts Receivable
- Approval
- Barcodes
- Exports
- Labor/OnDemand
- General
- Item
- Internet
- Parts Catalog
- Purchasing
- Supplies Charge
- Taxes
- Work Order

# Accounting

| Accounts Tab | The <b>Accounts</b> tab is designed to assist you in the collecting and exporting of accounting information to QuickBooks. (Optional and customer supplied)                                       |
|--------------|---|
| Purpose      | <i>NOTE</i> : TRACS Technical Support only ensures the successful importing of your TRACS data into QuickBooks. NAPA TRACS does not sell, support or train you on QuickBooks Accounting Software! |

## Accounting, Continued

AccountThe Account Configuration window provides you with a table, which shows<br/>the relationship between the common account names in Quickbooks and their<br/>default account types in TRACS.Configuration

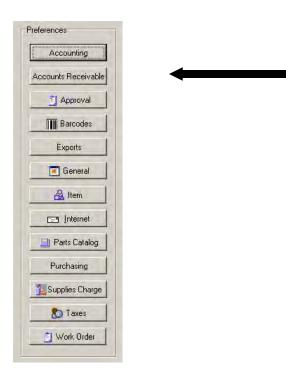
Again, it is usually not necessary to add or edit this information. The system provides you with the ability to add and modify account information. However, since this process usually is not necessary, those steps are not presented in this documentation.

| Default Account For  | Account Name           | Account Type            | A Done  |
|----------------------|------------------------|-------------------------|---------|
| Accounts Payable     | Accounts Payable       | Accounts Payable        | × Lione |
| Accounts Receivable  | Accounts Receivable    | Accounts Receivable     | 1 Edt   |
| Cath Payment         | Undeposited Receipts   | Bank.                   |         |
| Cash Retund          | Miscellaneous Journals | Bank.                   |         |
| Check Payment        | Undeposited Receipts   | Dank.                   |         |
| Credit Card Payment  | Merchant Account       | Bank                    |         |
| Dredit Journal       | Mitcellaneous Journals | Bank.                   |         |
| Debit Journal        | Miscellaneous Journals | Bank.                   |         |
| Finance Charges      | Finance Charges        | Income                  |         |
| Inventory Adjustment | Inventory Adjustments  | Other Current Asset     |         |
| Labor Sales          | Labor Salés            | Income                  |         |
| Part Asset           | leiventory             | Other Current Asset     |         |
| Part Cost            | Cost of Parts Sold     | Cost of Goods Sold      |         |
| Part Sale:           | Part Sales             | Incone                  |         |
| Relund Credit Card   | Merchant Account       | Bank.                   |         |
| Return Check         | Miscellaneous Journals | Bank.                   |         |
| Sales Tax            | Sales Tax Payable      | Other Current Liability |         |
| Shop Supplier        | Shop Suppler           | Income                  |         |
| Sublet Asset         | Sublet Purchased       | Other Current Asset     |         |
| Sublet Cost          | Cost of Sublet Sold    | Cost of Goods Sold      |         |
| Sublet Sales         | Sublet Sales           | Income                  |         |

# Accounts Receivable/Finance Charges

time

| Before You        | Before you begin working with the <b>Accounts Receivable</b> detail option, you will need to make the following decisions.  |
|-------------------|---|
| Begin             | <ul> <li>Do I want to have accounts receivable?</li> <li>How long will customers have to pay their bills?</li> <li>Will there be finance charges and if so how much?</li> </ul>   |
| Accounts Receival | Businesses often have large accounts with customers who require<br>frequent services and may have more than one vehicle to maintain.<br>These are the accounts that benefit both you and the customer. To<br>assist with these types of situations their is the Accounts Receivable<br>option. It will allow you to customize accounts and generate<br>statements. It also is equipped with the option to use finance<br>charges for those customers who may carry a balance from time to |



To set up your Accounts Receivable options, perform the following steps:

How To

| Step | Action  |
|------|---|
| 1    | Click the Accounts Receivable button on the Preferences list, and |
|      | the Accounts Receivable Configuration form displays.              |

| 📾 Accounts Receivable Configurati  | on   | ×                             |
|--|--|-------------------------------|
| Monthly Statements<br>Most recent monthly statement date<br>1/1/1998 Payment Due Days 30 | Previous monthly statement date<br>12/31/1997  Sort Statements by<br>Customer Number | Save<br><u>Save</u><br>Cancel |
| Finance Charges  |  |                               |
| Charge finance charge on previous  | finance charges  |                               |
| Percent Minimum  | Charge Grace Days 0.75 2   |                               |
| Accounts Receivable Statement print op   |  |                               |
| Show Aging on statement  |  |                               |
| ☐ Print Zero balance statements fo   | r new customers  |                               |
| ✓  |  |                               |
| Receipt Print Options  |  |                               |
| Print on plain paper (no pre-printe  | ed letterhead)   |                               |
| Prompt for receipt on payment  |  |                               |
|  |  |                               |

How To (continued)

| 2 | The Accounts Receivable Configuration screen has many fields to        |  |  |  |
|---|--|--|--|--|
|   | help setup/maintain Accounts. The following list will help clarify     |  |  |  |
|   | these options.   |  |  |  |
|   | • Most recent and previous monthly statement dates: These              |  |  |  |
|   | show past dates when statements were generated                         |  |  |  |
|   | • <b>Payment Due Days:</b> The amount of days a customer has to        |  |  |  |
|   | pay their bill before finance charges are applied.                     |  |  |  |
|   | • Sort Statements by: Statements are printed based on customer         |  |  |  |
|   | number or Zip Code   |  |  |  |
|   | • Use finance charge: This checkbox has to be filled to signal         |  |  |  |
|   | the program to calculate finance charges.                              |  |  |  |
|   | Charge finance charge on previous finance charges: This                |  |  |  |
|   | check box signals the program to include previous finance              |  |  |  |
|   | charges in the current AR close.                                       |  |  |  |
|   | • <b>Percent:</b> This is where the finance charge percentage is added |  |  |  |
|   | • Minimum Charge: Lowest finance charge a customer can                 |  |  |  |
|   | receive regardless of their account balance.                           |  |  |  |
|   | • Grace Days: These are bonus days given to a customer that            |  |  |  |
|   | extend the actual payment due days. A payment period of 30             |  |  |  |
|   | days with 2 grace days is actually a pay period of 32 days.            |  |  |  |
| 3 | The following options relate to printing statements.                   |  |  |  |
|   | • <b>Print on plain paper:</b> This signals that statements will be    |  |  |  |
|   | printed on plain paper.  |  |  |  |
|   | • Show Aging on statement: This puts past activity on                  |  |  |  |
|   | statements. This selection usually causes statements to be long.       |  |  |  |
|   | • <b>Print Zero balance statements for new customers:</b> This will    |  |  |  |
|   | print a statement for new customers with a zero balance.               |  |  |  |
|   | • <b>Print to fit #10 window envelope:</b> This signals the program to |  |  |  |
|   | print customers' names and addresses so that when statements           |  |  |  |
|   | are folded the information will be seen through the envelope           |  |  |  |
|   | window.  |  |  |  |
| 4 | Once all these options have been added click the Save button.          |  |  |  |

How To (continued)

 5
 The following message box will appear.

 Confirm
 Image: Second secon

| 6  | Each of these buttons will cause different changes to occur if                |  |  |
|----|---|--|--|
|    | finance charges have been enabled.  |  |  |
|    | <b>Yes:</b> This will activate finance charges for all customers.             |  |  |
|    | No: Finance charges will be activated, but you are required to                |  |  |
|    | manually enable each customer's record.                                       |  |  |
| 7  | You will now be back at the TRACS Setup screen. The following                 |  |  |
|    | will show you how to change customer files and enable/disable                 |  |  |
|    | finance charges.  |  |  |
| 8  | Click on the Customers button.  |  |  |
|    | 2   |  |  |
| 9  | The customer list will appear. Double click on an account you wish to change. |  |  |
| 10 | The Edit Customer screen appears for the selected customer.                   |  |  |

How To (continued)

#### 11 Click the **Accounts** tab.

| 📟 New Custo   | omer  | ×  |  |
|---|---|--|--|
| Last Name<br> HAND<br>Company<br>General Billin<br>AF<br>A<br>Cr<br>St<br>Cr<br>St<br>Cr<br>St<br>Cr<br>D<br>Cr | First Name<br>C.J.<br>ag Info Accounts Note<br>Account<br>Account Note<br>Account Receivable<br>Eull Payment Required<br>edit Limit<br>00<br>agment Due Days<br>30<br>icing Profile<br>efault Pricing 30<br>icing Profile<br>icing Profile<br>efault Pricing 30<br>icing Profile<br>icing | ✓ Save         ✓ Cancel         S., Merge         Next Page         ? Help |  |
| 12  | The area titled Finance Charges has the checkbox that is<br>enabled. (Subject to finance charges)<br>The field for Grace Days may also be changed.  | needs to be  |  |
| 13  | Click <b>Save</b> when you are done editing the record. You will be returned to the customer list where you can continue this process if necessary.   |  |  |
| 14  | Finance charges need to be applied each month prior to statements. To do this click on Activities. It is located a the program screen<br>File Search List Activities Reports Tools Windows Help   |  |  |
| 15  | A drop menu will appear. Click the selection titled <b>Ap</b><br><b>Charges.</b>  | ply Finance  |  |

#### How To (continued)

| A Confirm window will appear and show the last date when<br>finance charges were applied. If this information is correct click |
|--|
| OK to continue.  |

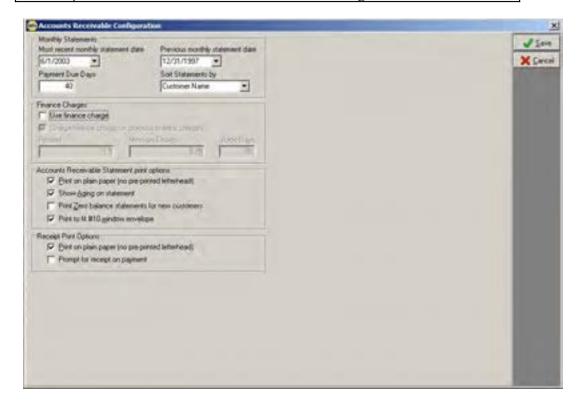
| Confirm |  |
|---------|--|
| ?       | Finance charges were last applied on 9/27/2000. Apply charges as of 2/15/2001? |
|         | Cancel   |

| 17 | The charges will be applied. Once that is complete click the OK |
|----|---|
|    | button that appears. You should now run statements as normal.   |

To unapply finance charges, perform the following steps:

How To

| Step | Action  |
|------|---|
| 1    | To unapply finance charges to ALL CUSTOMERS, Click the      |
|      | Accounts Receivable button on the Preferences list, and the |
|      | Accounts Receivable Configuration form displays.            |
|      |   |
| 2    | Uncheck the box labeled Use finance charge                  |



How To (continued)

 3
 The following message box will appear.

 Confirm
 Image: Second structure

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 Image: Operation of

| 4 | Each of these buttons will cause different changes to occur if                |  |  |
|---|---|--|--|
|   | finance charges have been enabled.  |  |  |
|   | Yes: This will unapply finance charges for all customers.                     |  |  |
|   | No: Finance charges will be unactivated, but you are required to              |  |  |
|   | manually enable each customer's record.                                       |  |  |
| 5 | You will now be back at the TRACS Setup screen. To unapply                    |  |  |
|   | finance charges to an individual customer, you will have to                   |  |  |
|   | manually do so in their record.   |  |  |
| 6 | Click on the Customers and Vehicles button.                                   |  |  |
|   | 22  |  |  |
| 7 | The customer list will appear. Double click on an account you wish to change. |  |  |
| 8 | The Edit Customer screen appears for the selected customer.                   |  |  |

How To (continued)

| Last Name                    | Fast Name                                    | J Same    |
|------------------------------|--|-----------|
| ALBANEZ                      | ANGELES                                      | X Dance   |
| Company                      |  | S. Merge  |
| l .                          | where d                                      | Next Page |
| ieneral   Billing Into Accou | RI   Note                                    | ? Heb     |
| AR Account                   |  | States in |
| Accounts Receiv              | able 💌                                       |           |
| Eul Payment                  | Ren med Tax                                  |           |
| Credit Limit                 | T Iax Evenpt                                 |           |
| CIRCALLER                    | 0 Exemption ID                               |           |
| Payment Due Day              | rt Tax Classification                        |           |
| - spring to see to se        | 30 DEFAULT                                   |           |
| Pricing Profile              |  |           |
| Default Pricing              | * Financi get                                |           |
| F Print Zero Bal             | ance Statements C Subject to finance charges |           |
| -                            | Grace Days                                   |           |
| F E0 Bequied                 | 30   |           |

| 10 | The area titled Finance Charges has the checkbox that needs to be    |
|----|--|
|    | unchecked.   |
|    | The field for Grace Days will become grayed out.                     |
| 11 | Click <b>Save</b> when you are done editing the record. You will be  |
|    | returned to the customer list where you can continue this process if |
|    | necessary.   |

# Approval

| Before You                               | Before you begin working with the <b>Approval</b> detail option, you will need to gather the following information.   |  |  |  |
|--|---|--|--|--|
| Begin                                    | 1. Would you like for the system to prompt you for approval when a customer's bill exceeds a specified limit?   |  |  |  |
|  | 2. If so, know a percentage of the customer's total not to be exceeded.   |  |  |  |
|  | OR  |  |  |  |
|  | 3. Know a dollar amount total not to be exceeded.   |  |  |  |
| Approval<br>Preference<br>Option Purpose | times when the work order exceeds the<br>estimate.<br>The system provides you with the<br>opportunity to protect the customer and<br>your service writer by setting a limit on<br>how much a work order can exceed an<br>estimate before you receive approval from<br>the customer. This limit can be set to a<br>percentage or an actual dollar amount.<br>Using the <b>Approval</b> detail option<br>provides an automatic message on your<br>screen when a customer exceeds his or her<br>billing estimate | Accounting<br>Ints Receivable<br>Approval<br>Dort Directory<br>General<br>Internet<br>Parts Catalog<br>Purchasing<br>upplies Charge<br>Taxes<br>Work Order |  |  |

To set up your approval options, perform the following steps:

How To

| Step | Action   |
|------|--|
| 1    | Click the Approval button on the Preferences list, and the |
|      | Approval Configuration form displays.                      |

| 📾 TRACS Set Up      |                          |                |
|---------------------|--------------------------|----------------|
| Preferences         | Lists                    | 🔀 <u>D</u> one |
| Accounting          | Account                  | 👷 Interview    |
| Accounts Receivable | 🔤 Approval Configuration | ×              |
| Approval            | Want Approvals           | ✓ <u>S</u> ave |
| Export Directory    | Approval Limits          | X Cancel       |
| 💌 General           | Approval Limit Percent   |                |
| 📑 Internet          | Approval Overrun Amount  |                |
| 🧾 Parts Catalog     | \$0.00                   |                |
| Purchasing          |                          |                |
| 🗽 Supplies Charge   | Pricing                  |                |
| 🏷 Taxes             | Vendor                   |                |
| 📋 Work Order        | Zip Codes                |                |
|                     |                          |                |

| 2 | Click to place a check mark in the Want Approvals field if  |
|---|---|
|   | necessary, and the fields in the Approval Limits box become |
|   | active.   |

# Approval, Continued

#### How To (continued)

| 🤓 Approval Configuration                              | ×                                  |
|---|------------------------------------|
| Want Approvals Approval Limits Approval Limit Percent | ✓ <u>S</u> ave<br>★ <u>C</u> ancel |
| Approval Overrun Amount<br>\$0.00                     |                                    |

| Step | Action  |
|------|---|
| 3    | Type one of the following:  |
|      | • a percentage in the <b>Approval Limit Percent</b> field to indicate the percentage that the estimate should not exceed,     |
|      | OR  |
|      | • a number in the <b>Approval Overrun Amount</b> field to indicate the dollar amount that the estimate should not exceed.     |
|      | <i>Note:</i> The Approval Limit Percent field has a default value of zero percent and the Approval Overrun Amount field has a |
|      | default value of \$0.00.  |
| 4    | Click the <b>Save</b> button, and the <b>TRACS Set Up</b> window displays.  |

# Barcodes

| Barcode<br>Scanning | To use a barcode scanner, you will need to set up the correct <b>Distribution Center</b> . |
|---------------------|--|
|                     |  |

**How To** To select a distribution center, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Make sure that you have chose the appropriate distribution center               |
|      | when you set up TRACS. Go to <b>Setup</b> , then click <b>Barcodes</b> , then   |
|      | Select Distribution Center.   |
| 2    | If your correct distribution center does not appear, click <b>Select</b>        |
|      | <b>Distribution Center</b> . Select the correct city and click <b>OK</b> . Then |
|      | click Save. You only need to do this once.                                      |

| Name            |   | X <u>C</u> a |
|-----------------|---|--------------|
| Albany, NY      |   |              |
| Albuquerque, NM |   |              |
| Altoona, PA     |   |              |
| Anchorage, AK   |   |              |
| Atlanta, GA     |   |              |
| Billings, MT    |   |              |
| Birmingham, AL  |   |              |
| Buffalo, NY     |   |              |
| Carlisle, PA    |   |              |
| Carrollton, OH  |   |              |
| Charleston, WV  |   |              |
| Charlotte, NC   |   |              |
| Cherry Hill, NJ |   |              |
| Chicago, IL     |   |              |
| Columbia, SC    |   |              |
| Columbus, OH    | = |              |

# Exports

| Before You<br>Begin                              |      | re you begin working with <b>Export Directory</b> preferences, you will need cide four things.  |
|--|------|---|
|  | 1. W | Vould you like to export accounting transactions to Quickbooks?   |
|  |      | now the path with which you would like to export accounting aformation:   |
|  |      | Vould you like to export mailing information (such as customer names nd addresses)?   |
|  | 4. K | now the path with which you would like to export mailing information:   |
|  |      |   |
| Export Directory<br>Preferences Optic<br>Purpose |      | The <b>Export Directory</b> preferences allow you to identify a path for exporting TRACS information.   |
|  |      | You can export accounting information to Quickbooks, an optional accounting package used in the industry, or you can export customer mailing lists to Microsoft Word, another optional package. |
|  |      | You also can specify where to export mailing information. With<br>this information, you can mail your customers notices on special<br>offerings or services.                                    |

# Exports, Continued

**How To** To specify export paths for accounting and mailing information, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click the <b>Exports</b> button on the <b>Preferences</b> list, and the <b>Export</b> |
|      | Directory Configuration form displays.  |

| TLACS Set Up        | 110        |  |                             |     |
|---------------------|------------|--|-----------------------------|-----|
| Preferenced         | Lists      | X Done   |                             |     |
| Accounting          | Account    | ? Heb  |                             |     |
| Accounts Receivable | Bay        |  |                             |     |
| Approval            | Calegory   |  |                             | 1   |
| III Barcodes        | Credit     | port Directory Configuration                                       |                             | 12  |
| Exports             | Faul       | coounting Transaction Export Directory.                            | Maling: Expot Directory     | XCo |
| General             | PLat 0     | tive, and c a  | Drive: See C 1              |     |
| A tem               | Manuf 0    | litectory:   | Directosy                   |     |
| Internet            | BF         | 446e7446c161c494687155c  | CA<br>CA                    |     |
| Parts Catalog       | <u> 48</u> | 0.40c11201454015e1503e6470254     ALIENWARE     ATI                | Contraction                 |     |
| Purchasing          | CTS Sp     | Bekin 🗾  | C Update Log                |     |
| Supplies Charge     | Ver        |  |                             |     |
| t axes              | (0)        | Accounting Export Options<br>Export Vendur Invoice Number on Bills | F Export Method on Payments |     |
| 🔟 Wark Osder        |            |  |                             |     |

| I | 2 | Click to place a check mark in the <b>Export Accounting</b>        |
|---|---|--|
|   |   | <b>Transactions</b> * field if you would like to export accounting |
| l |   | information.   |
| l |   |  |
|   |   | An asterisk (*) indicates that the field is on by default.         |

# Exports, Continued

#### How To (continued)

4

| Step | Action   |
|------|--|
| 3    | Click the down arrow next to the <b>Drive</b> field in the <b>Accounting</b> |
|      | <b>Transaction Export Directory</b> box (if it is not already selected),     |
|      | and the dropdown list displays your systems drives.                          |

| Export Accounting Transactions                                     |                           | X Care |
|--|---------------------------|--------|
| Drive: C C C C C C C C C C C C C C C C C C C                       | Drive: Imit C. []         |        |
| Accounting Export Options<br>Export Vendor Invoice Number on Bills | Export Method on Payments |        |

Click the desired drive, and the selected drive's directory displays.

| Accounting Transaction Export Directory  | Mailings Export Directory   | J San  |
|--|-----------------------------|--|
| P Export Accounting Transactions   |                             | X Cano   |
| Dave California -  | Driver and c []             | 1000   |
| Directory:   | Directory                   |  |
| - CA   | C1                          |  |
| 4Id5e7d45c161cl8did4587155c 8d0c1126id516ibe1b83ab(702bc   | E NAPA                      |  |
| ALIENWARE  | C Update Log                |  |
| 🔁 Bekin 💌  | work                        |  |
| And a state of the |                             |  |
| Accounting Export Options  | 1                           |  |
| 🕫 Export Vendor Invoice Number on Bills  | P Export Method on Payments |  |
|  |                             |  |
|  |                             | and the second s |

# Exports, Continued

#### How To (continued)

7

| Step | Action  |
|------|---|
| 6    | Click the down arrow next to the <b>Drive</b> field in the <b>Mailing</b> |
|      | Export Directory (if it is not already selected), and the dropdown        |
|      | list displays your systems drives.  |

| Accounting Transaction Export Directory | Malings Export Directory  | ✓ Saw   |
|---|---|---------|
| P Export Accounting Transactions        |   | X Canor |
| Drive 🖾 c 🛛 🕑                           | Drive: and c.  ]  |         |
| Directory                               | Director and a  |         |
| P 01 -                                  | Class of (audio cd)   |         |
| 146e7d46c161cr8drd4687r95c              | P NAPA  |         |
| C 840c1/26/d5/6/be1b83ab/702b/          | Photo Colored |         |
| TA TI                                   | Dpdate Log  |         |
| Bellin 📩                                | 1 💼 1006.   |         |
|   | 4.1   |         |
| Accounting Export Options               |   |         |
| P Export Vendor Invoice Number on Bills | F Export Method on Payments   |         |

Click the desired drive, and the selected drive's directory displays.

| Accounting Transaction Export Directory  | Malings Export Directory                  | J Save  |
|--|---|---------|
| V Export Accounting Transactions   |   | X Cance |
| Dave Gelding   | Driver Gell -                             | 1000    |
| Deectory   | Directory                                 |         |
| Alder745c151c18dt4587755c     Addc11264d583bd702bd     ALIENWARE     ATI     Bekin | C1<br>NAPA<br>Stace<br>Update Log<br>work |         |
| Accounting Export Options  | Expot Method on Payments                  |         |

| 8 | Click the desired directory.                                 |
|---|--|
| 9 | Click the Save button, and the TRACS Set Up window displays. |

## Labor/OnDemand

#### Labor/OnDemand

Preferences

The **Labor/OnDemand** preferences allow you to change options involved in using the Mitchell Labor and OnDemand systems.

Note: Do not change the Mitchell Labor Estimating Data Preferences without instructions from TRACS Support.

You can use this window to set up Mitchell OnDemand to print. Simply be sure that the bottom box is checked. Maintenance notes from OnDemand will then be printed onto the Job Ticket.

| Mitchell Labor Estimating Data Preference                                 | Sav |
|---|-----|
| 🔽 Data rom (he Interne)   |     |
| NAPA Labor Server URL   |     |
| https://www.napaecat.com/cgi-bin/NAPAMDEK.exe                             |     |
| (Change only on the instructions of TRACS Support).                       |     |
| C Reset Labor Data URL  |     |
| Mitchel OnDemand  |     |
| Aintenance Notes are copied to Work Orders                                |     |
| ☞ Maintenance Notes are copied to Work Order Notes (prints on Job Ticket) |     |
|   |     |
|   |     |
|   |     |
|   |     |

# General

#### The TRACS Preferences gives you access to the following options:

General

Preferences

- 1. Desktop Preferences
- 2. Shop Name and Information
- 3. Workstation Information
- 4. Security Options
- 5. WebConnect License Key

To set your desktop preferences, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click General from the Setup bar.                               |
| 2    | Choose the <b>Desktop</b> tab.                                  |
| 3    | Under Toolbar Position, choose "None", "Across the sop", or "On |
|      | the side".  |
| 4    | Under Startup Animation, choose "Don't show" or "Show".         |



To set your shop preferences:

| Step | Action  |
|------|---|
| 1    | Click General from the Setup bar.                           |
| 2    | Choose the <b>Shop Name</b> tab.                            |
| 3    | Enter the appropriate information under Shop Name, Address, |
|      | City, State, Zip, Phone, and Owner Name.                    |

|        | S Preference<br>Shop Name |               | Security | WebConnect CRM     |           |
|--------|---------------------------|---------------|----------|--------------------|-----------|
| reside | and the second            | - Wolkstodori | occurry  | Mebbolilioer erint | Save      |
| Shop I | Name                      |               |          |                    | X Cancel  |
| NAPA   | AUTOCARE                  | CENTER        |          |                    | Next Page |
| Addre: | No.                       | 2             | -        |                    |           |
| 5603   | ARLINGTON                 | ROAD          |          |                    |           |
| 1      |                           |               |          |                    |           |
| City   |                           | State         | Zip      |                    |           |
| 1      |                           |               |          |                    |           |
| Phone  |                           |               |          |                    |           |
| 1      | 4000                      |               |          |                    |           |
| Uwner  | Name                      | _             | -1       |                    |           |
| 1      |                           |               |          |                    |           |
|        |                           |               |          |                    |           |
|        |                           |               |          |                    |           |
|        |                           |               |          |                    |           |
|        |                           |               |          |                    |           |
|        |                           |               |          |                    |           |
|        |                           |               |          |                    |           |
|        |                           |               |          |                    |           |
|        |                           |               |          |                    |           |

To set your workstation preferences:

| Step | Action   |
|------|--|
| 1    | Click General from the Setup bar.  |
| 2    | Choose the <b>Workstation</b> tab.   |
| 3    | Enter the appropriate information under <b>Workstation Name.</b> You may also change the <b>Spell Check Custom Dictionary Path</b> by entering text. |
| 4    | Check or uncheck the bottom boxes to choose or unchoose those options.   |

| TRACS Preferences  |           |
|--|-----------|
| Desktop Shop Name Workstation Security WebConnect CRM  | Save      |
| Workstation Name:  | X Cancel  |
| Main Console   |           |
| Spell Check Custom Dictionary Path:  | Next Page |
| C:\NAPA\TBACS\Spell  |           |
| Workstation Server Path  |           |
| CAMAPAAradeADBATRACS.FDB   |           |
| C Reset Server Path  |           |
| NAPA VCD Path  |           |
| C:\Napa\Tracs\Napavcd\NAPAVCD.FDB  |           |
| C Reset NARA VCD Path  |           |
| This workstation can use the NAPA PartsPRO Catalog via the internet if the Catalog is enabled in Internet setup. |           |
| This workstation can send e-mail if the TRACS system is<br>enabled for e-mail in Internet setup.                 |           |
| ✓ Notify if blank E-Mail address when saving a Customer  |           |
| V Automatically mark all parts in Live Access to networked NAPA stores.  |           |
|  |           |
|  |           |
|  |           |
|  |           |

To set your security preferences:

How To

| Step | Action   |
|------|--|
| 1    | Click General from the Setup bar.                            |
| 2    | Choose the <b>Security</b> tab.                              |
| 3    | Check "On" to turn TRACS security on. Check "Off" to turn it |
|      | off.   |

| Desktop       Shop Name       Workstation       Security       WebConnect CRM       Image: Security         TRACS Security       © On       Mext Page       Mext Page         © Off       Image: Security       Image: Security       Image: Security |
|---|
|   |

To enter your WebConnect CRM license key:

| Step | Action  |
|------|---|
| 1    | Click General from the Setup bar.                           |
| 2    | Choose the WebConnect CRM tab.                              |
| 3    | Enter your license key into the text area.                  |
| 4    | Click <b>Save</b> to save the preferences you have changed. |

| 😇 TRACS P | Preference                    | s | -        | -              | <br>×                                |
|-----------|-------------------------------|---|----------|----------------|--------------------------------------|
| Desktop S | hop Name  <br>S Security<br>า |   | Security | WebConnect CRM | ×<br>✓ Save<br>★ Cancel<br>Next Page |
|           |                               |   |          |                |                                      |
|           |                               |   |          |                |                                      |

## Item

ItemThis option allows you to choose some of the fields that will appear when a<br/>list of items is displayed.

- The optional fields include:
- 1) Cost and Average Cost
- 2) Tire Fields
- 3) Multi-Level Pricing
- 4) Accounts



## Item, Continued

#### **How To** To complete the **Item Configuration**, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click Item in the Setup box and the Item Configuration window |
|      | appears.  |



| 5 | Click the boxes by each list field to check or uncheck them. |
|---|--|
| 6 | When the desired list fields are checked, click Save.        |

### Internet

Before You

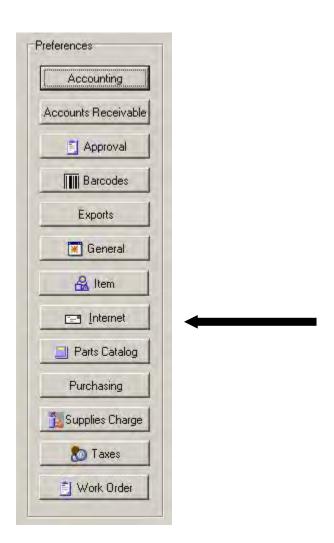
Begin

Before you begin working with the Internet preferences option, you will need an account with an ISP. These functions will not perform until you have a working account. There are several ISP's you can choose from. Examples of an ISP would be Earthlink, BellSouth, SegaNet, Microsoft Network, and whatever may be offered by your local phone service. The ISP (Internet Service Provider) also has to use a SMTP server and a POP 3 Server. These required options effect the sending and receiving of email. They should be addressed with the ISP prior to account activation.

**NOTE:** America Online does not meet these requirements and is known to create several issues in the TRACS NET environment.

Internet Purpose

The Internet feature provides you with the opportunity to communicate with your customers and other NAPA stores on the wide area network. You will be able to send emails to customers in regard to estimates and invoices. It can also be used to do recommended services and special mailings.



| Internet | The Internet Feature contains the |
|----------|-----------------------------------|
| Option   | following options:                |

- Setup fields
- Subject fields for estimates and invoices and recommended services
- Fields for messages on estimates and invoices and recommended services
- E-procurement
- Internet-enabled Parts-Pro Catalog
- Online Updates

To setup the Internet function for email, perform the following steps:

How To

| Step | Action   |
|------|--|
| 1    | Click the Internet button in the Preferences box, and the Internet |
|      | Setup window displays.   |
| 2    | Click the E-Mail Configuration Tab. This screen is where you       |
|      | need to contact your ISP to enter the correct information.         |
| 3    | You will also need to enter your username and password, if your    |
|      | email address requires it.   |
| 4    | If you check the "Send E-mail as HTML" box, emails will be sent    |
|      | with HTML formatting that include proportional font and blue and   |
|      | yellow bars on the top and bottom.                                 |



**Note:** Your From: button must contain your logon from your ISP. You cannot put your address from NAPA WEB Connect here. If you do not place the logon from your ISP, you will get an invalid login error from your SMTP server while you are trying to send an E-Mail.

You May put your E-Mail address from NAPA WEB Connect in the reply to area. If a customer replies back to you it can be accessed via your AutoCare WEB connect account.

| Step   | Action   |                |
|--|--|----------------|
| 3  | When the E-Mail Configuration screen is complete, click the Work<br>Order E-Mail tab.  |                |
| TRACE  |  | - 0 X          |
| and the second state of th | Internet Setup Internet Setup Internet Catalog Online Updates Web Browser  |                |
| and the second se  | Email Setting: [Invoice E Mail Setting:] Recommanded Service E Mail Vehicle Ready Notice E Mail  | Sava<br>Cancel |
| T En   | able Automatic Vehicle Ready Notification  | Frank Street   |
| Subjec   | E:   | E-Mail Queue   |
| Marca  | ge to send when Vehicle is ready:  |                |
| We have  | e and it is ready for pick-up.   |                |
| 4<br>5<br>6  | The Work Order E-Mail screen is where you can specify<br>information sent in e-mails for estimates, invoices, recommended<br>services, and vehicle ready notices. In the <b>Vehicle Ready Notice</b><br><b>E-Mail</b> tab, be sure to click the "Enable Automatic Vehicle Ready<br>Notification" box if you plan to send automatic e-mails once work<br>orders are completed. For more information about sending these e-<br>mails, see Chapter Six under "Completing an Order."<br>Click <b>Save</b> to exit the Internet Setup screen once all information<br>has been added. You will be returned to the setup screen and the<br>main TRACS screen.<br><b>NOTE:</b> Customers must have an email address entered in their |                |
|  | personal information to receive email. Chapter Four covers how to send email to individual customers.  |                |

# **Parts Catalog**

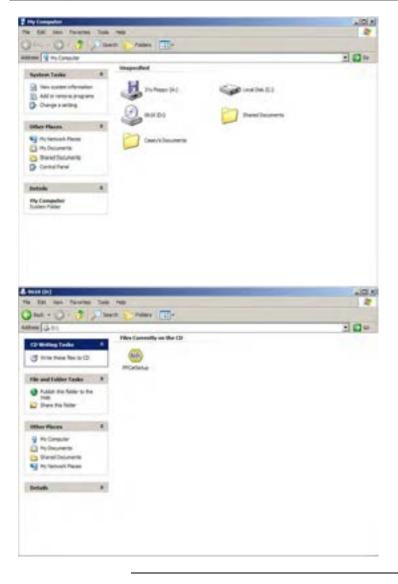
| About the           | TRACS now has an online option for both the Parts and Labor Catalogs. This catalog provides easy access to the most up-to-date NAPA and Mitchell data online. It also works locally with the catalogs you have installed.   |
|---------------------|---|
| Catalog             | <ul> <li>Features include: <ul> <li>The loading / updating of Mitchell Labor data is no longer necessary</li> <li>Saves disk space on your workstations</li> <li>Provides access to the latest, most current flat rate data available</li> <li>Labor data is always available even if your local Internet connection is down</li> <li>New setup option allows you specify which labor data source you prefer - online or local</li> </ul> </li> </ul> |
|                     | <u>We strongly suggest</u> that you use the online versions and use you local copy<br>as a backup in the event your local Internet connection is down.<br>Following are instructions for installing the local copy of the catalog.  |
| Before You<br>Begin | To install or update the <b>Parts Catalog, Labor Data</b> and/or <b>Prices</b> , you will need to gather the following items. (Use this workspace to organize your progress.)<br>1. Obtain the following items:<br>a current NAPA Parts Catalog DVD<br>a current Mitchell Labor Data DVD  |
|                     | Also be sure that you have <b>at least 6 GB</b> of disk space free on your hard drive.  |

Purpose of Registration
Even if you have already installed the catalog, you will need to perform the Parts Catalog set up within the TRACS Set Up.
The Parts Catalog feature provides you with the opportunity to register your NAPA Electronic Catalog DVD of parts and download current parts and pricing information to your hard drive.
This information will be helpful later when you work with estimates and work orders in providing your customers with the most current and accurate costs.
These preferences are very important to the proper operation of the system. You are required to perform these setup tasks before working with customer work orders.
Note: Running the NAPA Pricing Diskette updates both the Parts Catalog and the Items List.

To install the NAPA Parts Catalog, perform the following steps:

#### How To

| Step | Action   |
|------|--|
| 1    | Be sure that TRACS and other programs on your computer are           |
|      | shut down, and insert the blue NAPA Parts Catalog DVD into your      |
|      | computer's DVD drive.  |
| 2    | Run the executable file on the DVD. This may happen                  |
|      | automatically. If not, go to My Computer in the Windows start        |
|      | menu, double-click on the DVD drive folder (in the example           |
|      | below it is the "D" drive but this is not always the case), and then |
|      | double-click on the PPCatSetup icon.                                 |



| Step | Action  |
|------|---|
| 3    | You will see the Parts Catalog set-up screen. Click Next. |



#### How To (continued)

| Step | Action   |
|------|--|
| 4    | If you are installing the catalog on a network server, click the   |
|      | check box and enter the name of the serve or the IP Address. If it |
|      | is not a server installation, unclick the check box. Click Next.   |

| ctup   | 1  |
|--|--|
| Network Install<br>Is this a Network Catalog | i natalation?  |
| supply a Server Na                           | rerver install please check the box and<br>me or IP Address below. |
|  | these files will be shared.  |
| SERVER                                       | Server Name or IP Address  |
|  |  |
|  |  |
|  | < Back Next > Cancel   |

5 If you wish to change the default locations where the catalog will be installed, then do so now by clicking **Browse** and choosing a new location. Otherwise, accept the defaults by clicking **Next**.

| elect the folders in which Setup should install catalog fi | es, then click Next, |
|--|----------------------|
| Parts Pro Catalog - finit file.                            |                      |
| A Vispa Vinece Visitality                                  | Browse               |
| PartsPro Catalog - second Re:                              |                      |
| C·Wapa\Trace\Catalog                                       | firosce.             |
| Neps VCD:  |                      |
| C:\Napa\Tracs\Napavcd                                      | Browse.              |
| Napa UPC   |                      |
| C:\Viapa\Trace\UPC   | Browne.              |

#### How To (continued)

| Step | Action   |
|------|--|
| 6    | Review the information that you have entered, and click Install. |

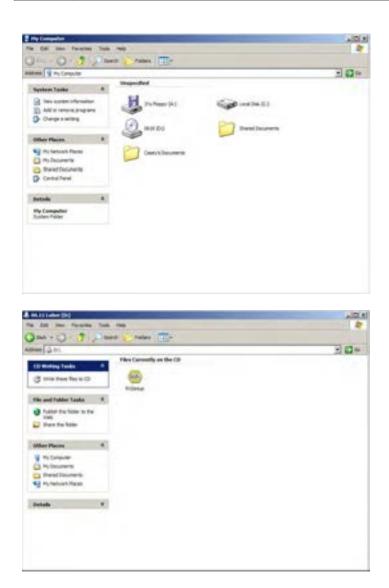


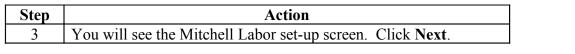


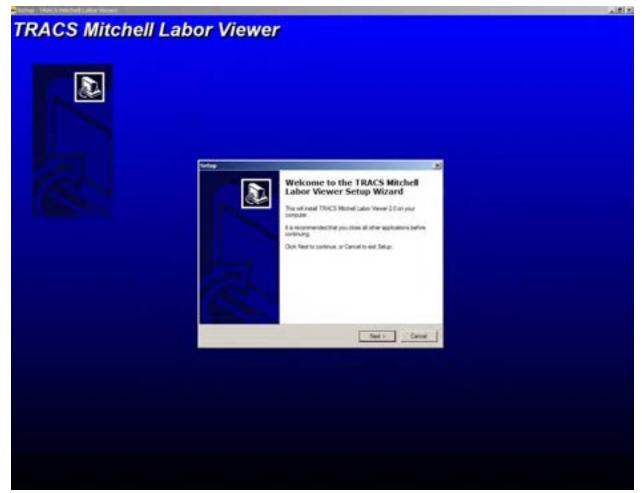
| 5 | If the install was successful you will see the screen above. Click |
|---|--|
|   | Finish. You have successfully installed the Parts Catalog.         |

To install Mitchell Labor Data, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Be sure that TRACS and other programs on your computer are           |
|      | shut down, and insert the green Mitchell Labor Data DVD into         |
|      | your computer's DVD drive.   |
| 2    | Run the executable file on the DVD. This may happen                  |
|      | automatically. If not, go to <b>My Computer</b> in the Windows start |
|      | menu, double-click on the DVD drive folder (in the example           |
|      | below it is the "D" drive but this is not always the case), and then |
|      | double-click on the MlSetup icon.                                    |



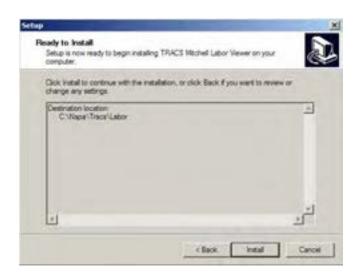




| Step | Action   |
|------|--|
| 4    | If you wish to change the default location where the data will be      |
|      | installed, then do so now by clicking <b>Browse</b> and choosing a new |
|      | location. Otherwise, accept the default by clicking Next.              |

| Setup will install TR           | ACS Mitchell Labor Viewer in    | nto the following folder.  |
|---------------------------------|---------------------------------|----------------------------|
| To continue, click Next. If you | u would like to select a differ | rent folder, click Browse. |
| C:\Napa\Tracs\Labor             |                                 | Browse                     |
|                                 |                                 |                            |
|                                 |                                 |                            |
|                                 |                                 |                            |
|                                 |                                 |                            |
|                                 |                                 |                            |

| Step | Action   |
|------|--|
| 6    | Review the information that you have entered, and click Install. |



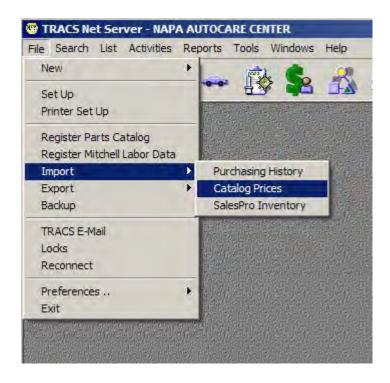


| 5 | If the install was successful you will see the screen above. Click |  |
|---|--|--|
|   | Finish. You have successfully installed the Mitchell Labor Data.   |  |

| Price Update | The <b>Price Update</b> option allows you to update your system with the most current pricing information from your local NAPA Auto Parts Store.  |
|--------------|---|
| Option       | The price update process will refresh the prices included in your parts catalog<br>as well as the prices of the NAPA items included in your items list.   |
|              | In order to update your prices, you need to have the newest NAPA Pricing Diskette in your 3.5" diskette drive. Your local NAPA Auto Parts Store will probably send you a new diskette monthly; however, you can call your local NAPA store at any time to request an updated NAPA Pricing Diskette. |
|              | <i>Tip</i> : This process should be done at least monthly, but can be done as often as you like to ensure price accuracy.   |
|              | To update your NAPA prices, perform the following steps:  |

How To

| Step | Action   |
|------|--|
| 1    | Choose File -> Import -> Catalog Prices from the top menu. |



| Step | Action                     |            |
|------|----------------------------|------------|
| 2    | A confirm message appears. | Click Yes. |

| Confirm |                        |                    |                   | ×                 |
|---------|------------------------|--------------------|-------------------|-------------------|
| ?       | Would you like to upda | ite your Part Item | s with the prices | on this diskette? |
|         | Yes                    | <u>N</u> o         | Cancel            |                   |

| 3 | If you already have prices stored in TRACS, another confirmation |
|---|--|
|   | will appear. Click <b>OK</b> .                                   |



How To (continued)

| Informa | ition  | × |
|---------|--|---|
| į)      | Place your Pricing Diskette into the Diskette Drive and press "OK". Or press "OK" to select a path to the information. |   |
|         | OK Cancel  |   |

| 4 | Place your NAPA Pricing Diskette into the diskette drive.   |
|---|---|
| 5 | Click the <b>OK</b> button, and the following actions occur:                                      |
|   | <ul> <li>custom prices are imported</li> <li>parts are updated with the custom prices,</li> </ul> |
|   | and the <b>Information</b> message displays.  |

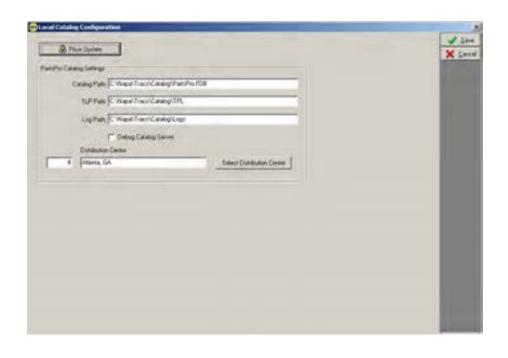
| Informa | tion   | × |
|---------|--|---|
| į)      | Custom catalog prices where imported and parts item prices were updated successfully |   |
|         | <u>()</u>  |   |

| NAPA                   | You can use the <b>Line Code Update</b> option to update your current line codes from your local NAPA store.                                 |
|------------------------|--|
| Manufacturer<br>Update | In order to update your line codes, you will need to have the NAPA<br>Electronic Catalog DVD containing the Parts Catalog in your DVD drive. |
|                        |  |

How To

To update your line codes, perform the following steps:

StepAction1Click the Parts Catalog button in the Preferences box, and the<br/>Catalog Configuration window displays.



#### 2 Click Select Distribution Center.

How To (continued)

|   | ose your NAPA Stores' Distribution |   | X Canc |
|---|------------------------------------|---|--------|
| Ļ | Name                               | 4 |        |
| ₽ | Albany                             |   |        |
|   | Albuquerque                        |   |        |
|   | Altoona                            |   |        |
|   | Anchorage                          |   |        |
|   | Atlanta                            |   |        |
|   | Billings                           |   |        |
|   | Birmingham                         |   |        |
|   | Buffalo                            |   |        |
|   | Carlisle                           |   |        |
|   | Carrollton                         |   |        |
|   | Charleston                         |   |        |
|   | Charlotte                          |   |        |
|   | Cherry Hill                        |   |        |
|   | Chicago                            |   |        |
|   | Cincinnati                         |   |        |
|   | Cleveland                          |   |        |

| Step | Action   |
|------|--|
| 3    | Click to select your NAPA store's Distribution Center. |

| Step | Action   |
|------|--|
| 4    | Click the <b>OK</b> button, and the following actions occur:                               |
|      | <ul> <li>line codes are updated</li> <li>NAPA manufacturers are added to TRACS,</li> </ul> |
|      | and the <b>Information</b> message displays.   |

| Informati | on 🔀                                |
|-----------|-------------------------------------|
| ٩         | Part Catalog Manufacturers Imported |
|           | OK )                                |

|  | 5 | Click the <b>OK</b> button. | You have now update | d your Line Codes. |
|--|---|-----------------------------|---------------------|--------------------|
|--|---|-----------------------------|---------------------|--------------------|

# Purchasing

| Before You<br>Begin                         | <ul> <li>Before you begin working with the <b>Purchasing</b> preference or need to know the answer to the following two questions.</li> <li>1. Would you like to use plain paper or letterhead purchase orders?</li> </ul>  |   |
|---|---|---|
|   | 2. Would you like to enable the "receive all" feature when yo purchase orders?  | ou receive  |
| Purchasing<br>Preferences<br>Option Purpose | <ul> <li>The <b>Purchasing</b> preferences allow you to make specific choices related to receiving purchase orders.</li> <li>You can determine if you would like for your purchase orders to print on plain paper or on your company's letterhead paper.</li> <li>You can also turn on the system feature to indicate that you have received all items on the purchase order at one time. This feature saves time and keystrokes!</li> <li>See the "Purchasing" section in Chapter 4 for more information.</li> </ul> | Preferences<br>Accounting<br>Accounts Receivable<br>Accounts Receivable<br>Approval<br>Export Directory<br>Reneral<br>Parts Catalog<br>Purchasing<br>Supplies Charge<br>Supplies Charge |

# Purchasing, Continued

To work with purchasing options, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click the <b>Purchasing</b> button from the <b>Preferences</b> list, and the |
|      | Purchasing Configuration form displays.                                      |

| Purchasing Configuration   | ×   |
|--|---|
| Print Purchase Orders on plain paper (no pre-printed letterhead) | <u>✓ S</u> ave<br><u>X</u> <u>C</u> ancel |
| ☑ Enable "Receive All" in PO Receive                             |   |

| 2 | Click to place a check mark in the <b>Print Purchase Orders on</b><br><b>plain paper (no pre-printed letterhead)</b> * field if necessary. |
|---|--|
|   | An asterisk (*) indicates that the field is on by default.   |
| 3 | Click to place a check mark in the <b>Enable "Receive All" in PO</b><br><b>Receive*</b> field if necessary.                                |
|   | An asterisk (*) indicates that the field is on by default.   |
| 4 | Click the <b>Save</b> button, and the <b>TRACS Set Up</b> window displays.   |

# **Supplies Charge**

| Supplies | In the <b>Supplies Charges</b> window, you will enter information concerning supplies charges for your work orders.   |
|----------|---|
| Charges  | Your tasks for this folder include the following:   |
|          | <ul> <li>determining if you are charging for supplies</li> <li>deciding if you want to use the term "supply charges" or if you need to use another term</li> <li>entering the percentage to charge</li> </ul> |

- determining what to base supplies charge on (either Total Labor or Total Work Order)
- selecting to use either the minimum charge or the maximum charge
- entering the amount of the minimum or maximum charge

| Step | Action  |
|------|---|
| 1    | Enter the <b>Setup</b> bar.                       |
| 2    | Choose <b>Supplies Charge</b> from the Setup bar. |

| ✓ Use Shop Supply Charge Rate 5 % ✓ Iax   | Charge based on<br>© % of Labor<br>© % of Total | <u>Save</u> |
|---|---|-------------|
| Work Order Printed Description<br>Shop Supplies & EPA   |   |             |
| and the second se |   |             |
| Charges   | unt \$0.00                                      |             |

# Supplies Charge, Continued

To enter supplies charges, perform the following steps:

How To

| Step | Action  |  |
|------|---|--|
| 1    | Click to place a check mark in the <b>Check this box</b> * field if you   |  |
|      | will be charging a supplies charges.  |  |
|      |   |  |
|      | An asterisk (*) indicates that this field is on by default.   |  |
| 2    | Type the description of the supplies charge in the <b>Work Order</b>  |  |
|      | Printed Description field.  |  |
|      |   |  |
|      | <i>Note:</i> This description will print on the work order.   |  |
| 3    | Type the percentage you charge for supplies charges in the  |  |
|      | Percentage field.   |  |
|      | Note: The Percentage field has a default value of one   |  |
| 4    | <ul> <li><i>Note:</i> The Percentage field has a default value of one.</li> <li>Click to place a check mark in the This charge is to be taxed*</li> </ul> |  |
| -    | field if the supplies charges amount is to be taxed.  |  |
|      | neia n'ille supplies charges anount is to be aixed.   |  |
|      | An asterisk (*) indicates that this field is on by default.   |  |
| 5    | Click the appropriate box to select whether to base supplies  |  |
|      | charges on either total labor or on total work order.   |  |
|      |   |  |
|      | <i>Note:</i> The <b>Total Labor</b> field is on by default.   |  |
| 6    | Click to place a check mark in either the Use Minimum Charge  |  |
|      | field or in the Use Maximum Charge field.   |  |
|      | Note: The Minimum Change field has a default value of \$0.00  |  |
|      | <i>Note:</i> The <b>Minimum Charge</b> field has a default value of \$0.00. Additionally, the <b>Use Maximum Charge</b> field is on by default            |  |
|      | with a value of \$5.00.   |  |
| 7    | Type the amount to charge once a charge field is chosen. You  |  |
| ,    | have now entered all necessary information on the <b>Supplies</b>   |  |
|      | Charges form.   |  |
| 8    | Click the <b>Save</b> button to save the information you have entered.  |  |

# Taxes

| Before You<br>Begin                       | Many states have passed laws which require different items to be taxed at different rates. Before you begin this task you will need to determine the rates you will use for: |
|---|--|
|   | Labor<br>Parts<br>Charges<br>Sublets<br>Supplies<br><b>Note:</b> TRACS supports Virginia's repair tax.   |
| Taxes<br>Preferences<br>Option<br>Purpose | The purpose of this section is to help<br>businesses comply with states that require<br>items to have different tax rates.   |

💼 Internet

📕 Parts Catalog

Purchasing

🗽 Supplies Charge

🏡 Taxes

📋 Work Order

 $\Rightarrow$ 

Γ

### Taxes, Continued

To setup items with different tax rates, perform the following steps

How To

| Step | Action  |  |
|------|---|--|
| 1    | Click the <b>Taxes</b> button in the <b>Preferences</b> box, and the <b>Tax Class</b> |  |
|      | List screen displays.   |  |

| 📟 Tax Class List | _ 🗆 ×             |
|------------------|-------------------|
| Tax Class Name   | 🔀 <u>D</u> one    |
|                  | <mark>₩</mark> ew |
|                  | 📝 <u>E</u> dit    |
|                  | Delete            |
|                  |                   |
|                  |                   |
|                  |                   |
|                  |                   |
|                  |                   |
|                  |                   |
| <b>_</b>         |                   |

| 2 | <ul><li>Double click the <b>Tax</b> class you want to change.</li><li>The tax class you have chosen will open in a new screen.</li></ul> |  |
|---|--|--|
| 3 |  |  |

# Taxes, Continued

(continued)

| 🥶 Tax Class - Default   |  |   |   | ×   |
|---|--|---|---|---|
| Tax Class Name<br><mark>Default</mark>  | Tax Calculation Meth<br>© Use Straight Perc  |   |   | <u>✓ S</u> ave<br><u>X</u> <u>C</u> ancel |
| Tax Rate  | C Use Tax Bracket<br>C Use Tax By Item   |   |   |   |
| Tax Defaults<br>Tax Labor<br>Tax Part<br>Tax Sublet<br>Tax Core<br>Tax Core Credit<br>Tax FET<br>Tax Other Charge<br>Tax Ceiling<br>Use Tax Ceiling<br>Ceiling Amount | Tax Bracket Table         Tax         Amount         .00         .01         .02         .03         .04         .05         .06         .07         .08         .09 | Tax     Largest       Amount     Amount       .10 | Tax By Item Type<br>Labor Tax Rate<br>Rat Tax Rate<br>Charge Tax Rate<br>Sublet Tax Rate<br>Supplies Tax Rate |   |

| 4 | Find the area titled Tax Calculation Method and fill in the field |  |
|---|---|--|
|   | next to the option Use Tax by Item Type.                          |  |
| 5 | The Tax by Item Type column will activate. You should now fill    |  |
|   | in your values as needed.   |  |

# Taxes, Continued

| (continued) | ) |
|-------------|---|
|-------------|---|

| Tax By Item Type  |
|-------------------|
| Labor Tax Rate    |
| ×                 |
| Part Tax Rate     |
| ×                 |
| Charge Tax Rate   |
| ~ ~ ~             |
| Sublet Tax Rate   |
| %                 |
| Supplies Tax Rate |
| %                 |
|                   |

| 6  | Once all the necessary information has been added click the <b>Save</b> button. |
|--|---|
| 7 You will now have different tax rates for different items. |   |

# Work Order

| Before You<br>Begin                         | You will not need to gather any information before <b>Order</b> preferences option.   | re working with the <b>Work</b>  |
|---|---|--|
| Work Order<br>Preferences<br>Option Purpose | <ul> <li>Work Order preferences when you access these options through Setup and customize TRACS include:</li> <li>Check credit limit when opening a work order,</li> <li>Complete odometer reading when invoicing,</li> <li>Group items by type when printing,</li> <li>Set your minimum profits, and</li> <li>Set the option to lock prices when changing a basis percentage.</li> <li>Some of these preferences are reminders that you can activate for assistance in working with your customers.</li> </ul> | Preferences<br>Accounting<br>Accounts Receivable<br>Approval<br>Export Directory<br>Ceneral<br>Parts Catalog<br>Purchasing<br>Supplies Charge<br>Taxes |

**How To** To change your work order options, perform the following steps:

| Step | Action  |  |
|------|---|--|
| 1    | Click the <b>Work Order</b> button in the <b>Preferences</b> box, and the |  |
|      | Work Order Configuration form displays.                                   |  |

# Work Order, Continued

| Step | Action  |
|------|---|
| 2    | Click to place check marks next to the <b>Reminders</b> fields for each one that you wish you activate.   |
| 3    | Click to place check marks next to the <b>Appearance</b> fields for each one you wish you activate.   |
| 3    | Type in the text fields to change the <b>Minimum Gross Profit</b><br><b>Percentage</b> , etc.   |
| 4    | Click to place a check mark for each additional option you wish you activate.   |
| 5    | Click the <b>Save</b> button, and the <b>TRACS Set Up</b> window displays.<br>You have now changed your options and activated your work<br>order reminders. |

### Work Order, Continued

**How To** To set up the **Group items by type** print option, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click the <b>Work Order</b> button on the <b>TRACS Set Up</b> form, and |
|      | the Work Order Configuration form displays.                             |

| PierDonne Dutamen  |   | J 200    |
|--|---|----------|
| Agenerative<br>Salt Cales<br>Page<br>Salt Cales<br>Salt Cales<br>Salt Cales<br>Salt Cales<br>Start Start Start<br>Start Start Start<br>Start | Measure Down Profit Presentage     50       Number of days Extension and hold before carceled     30       Number of days Extension and hold before Carceled     15       IP     Carcelera Extension and hold before Carceled     15       IP     Carcelera Extension Carcelera     15       IP     Danging Basel, Extension Extension     15       IP     Danging Basel, Extension Extension     15       IP     Danging Basel, Extension Extension     15       IP     Dank model (not observation on the previous model of the resource)     15       IP     Dank model (not observation on the previous model of the resource)     15       IP     Open Fragment methor of the resource)     15 | X Second |
| Leed   | INNERCOURSET (Adams IT THE HEAH COST<br>IR ANA REPAIR ASSOCIATING PLAN TODAY)<br>REQUITE  |          |
| PROTECT YOUR VEHICLE LAND YOUR &<br>Law 3<br>[OF AUTO REPAIRS] INQUIRE ABOUT ON<br>Law 3   | IR AMA REPAIR ASSURANCE PLAN TODAYA   |          |

# Work Order, Continued

| Step | Action   |
|------|--|
| 2    | Click the <b>Print Options</b> folder, and the available print options |
|      | display.   |

| a Job Ticket cost options   | 1000   |
|---|--|
|   | X Dark   |
|   | Next Pa  |
|   | and the second   |
|   |  |
| The second se |  |
| Press recommended services  |  |
| C Data 3 had Disarbanan   |  |
|   |  |
|   |  |
| 12 Lines to sup for energiesd<br>(Work orders paint at 6 lines per inch.)                                       |  |
| Invoice print options   |  |
| Pivet Dealer header text  |  |
| Pint Message of the Day   |  |
| P Pivit time being printed  |  |
| Print billed hours  |  |
| Pint pat numbers / item   |  |
| Print to fit window envelope  |  |
| F Pint discourts  |  |
| P Part approvals  |  |
| Group items by type   |  |
|   | Invoice print options<br>Pint Dealer header test<br>Pint Message of the Day<br>Pint me being pinted<br>Pint billed hours<br>Pint pat numbers / kens<br>Pint to fit vendow envelope<br>Pint discounts<br>Pint approvals |

| 3 | Click to place a check mark in the Group items by type field in          |  |
|---|--|--|
|   | the Estimate print options box if desired.                               |  |
| 4 | Click to place a check mark in the <b>Group items by type</b> field in   |  |
|   | the <b>Repair Order print options</b> box if desired.                    |  |
| 5 | Click to place a check mark in the <b>Group items by type</b> field in   |  |
|   | the <b>Invoice print options</b> box if desired.                         |  |
| 6 | Click the <b>Save</b> button. You have set up the print options to print |  |
|   | by items type.   |  |

### **Chapter 3: Setting Up Lists**

#### **Lists Overview**

**Introduction** The **TRACS Set Up** feature provides you with the opportunity to set up or modify options related to system preferences or system lists.

The previous chapter covered preferences, and this chapter covers lists.

To access the set up feature, choose **Set Up** from the **File** drop-down menu.

| Preferences         |                    | Lists        |                |                   |
|---------------------|--------------------|--------------|----------------|-------------------|
| Accounting          | 🔒 Item             | Account      | Manufacturer   | <u>?</u> <u>H</u> |
| Accounts Receivable | 🖃 Internet         | Bay          | 1 Pricing      |                   |
| 🗐 Approval          | 📃 Parts Catalog    | Category     | A Bec Serv     |                   |
| Barcodes            | Purchasing         | Credit Card  | C Symptoms     |                   |
| Exports             | 12 Supplies Charge | Employee     | Vendor         |                   |
| 🖉 Labor/OnDemand    | t axes             | 🎤 Labor Rate | Zip Codes      |                   |
| 💌 General           | 🔄 📃 Work Order     | Ad Source    | Profit Center  |                   |
|                     |                    |              | Customer Group |                   |
|                     |                    |              |                |                   |
|                     |                    |              |                |                   |
|                     |                    |              |                |                   |
|                     |                    |              |                |                   |

Continued on next page

#### Lists Overview, Continued

**This Chapter** This chapter covers the following concepts and processes:

- Account
- Bay
- Category
- Credit Card
- Employee
- Labor Rate
- Ad Source
- Manufacturer
- Pricing
- Rec Serv
- Symptoms
- Vendor
- Zip Codes
- Profit Center
- Customer Group

# **Lists Purpose** The **Lists** option provides you with the opportunity to establish all of your lists from which you will later select items.

For each list, you can either add new items to the list or edit existing items on the list.

# Account

Account The Account window allows you to enter the names and types of your accounts.

| Account Name           | Account Type            | 📥 🔀 Done       |
|------------------------|-------------------------|----------------|
| Accounts Payable       | Accounts Payable        |                |
| Accounts Receivable    | Accounts Receivable     | New New        |
| Checking               | Bank                    |                |
| Cost of Parts Sold     | Cost of Goods Sold      | 🛃 <u>E</u> dit |
| Cost of Sublet Sold    | Cost of Goods Sold      | Delete         |
| Finance Charges        | Income                  | Dejete         |
| Inventory              | Other Current Asset     |                |
| Inventory Adjustments  | Other Current Asset     |                |
| Labor Sales            | Income                  |                |
| Merchant Account       | Bank                    |                |
| Miscellaneous Journals | Bank                    |                |
| Part Sales             | Income                  |                |
| Sales Tax Payable      | Other Current Liability |                |
| Shop Supplies          | Income                  |                |
| Sublet Purchased       | Other Current Asset     |                |
| Sublet Sales           | Income                  |                |
| Undeposited Receipts   | Bank                    |                |

Continued on next page

### Account, Continued

**How To** To add an account, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click the New Account button, and the New Account window |
|      | displays.  |

|              | J Save |
|--------------|--------|
| Account Name |        |
| Account Type |        |

| 2 | Type the appropriate information in the following fields:                    |
|---|--|
|   | <ul><li>Account Name</li><li>Account Type</li></ul>                          |
|   | • Account Type   |
| 3 | Click the <b>Save</b> button, and the new bay displays on the <b>Account</b> |
|   | list.  |

#### **How To** To edit an existing account, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click an account name to select the bay to be edited.   |
| 2    | Click the <b>Edit Account</b> button, and the bay to be edited displays in the <b>Account</b> window. |

| Edit Account | -        |          |
|--------------|----------|----------|
|              |          | Save     |
| Account Name | Checking | X Cancel |
| Account Type | Bank     |          |

Continued on next page

### Account, Continued

| Step | Action   |  |
|------|--|--|
| 3    | Modify the appropriate information in any of the following fields:   |  |
|      | <ul><li>Account Name</li><li>Account Number</li></ul>                |  |
| 4    | Click the <b>Save</b> button, and the edited bay will display on the |  |
|      | Account window.  |  |

**Bay** The **Bay** window allows you to enter the names and numbers of your bays.

| Bay List      |       |          |
|---------------|-------|----------|
| Name          | Bay # | 📥 🔀 Done |
| ALIGNMENT BAY | 1     |          |
| GEN 2         | 2     | Kew New  |
| GEN 3<br>SMOG | 2 3 4 | Edit     |
| SMOG          | 4     |          |
|               |       | 🔀 Dejete |
|               |       |          |
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|               |       |          |
|               |       | -        |

Continued on next page

### Bay, Continued

**How To** To add a bay, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click the New Bay button, and the New Bay window displays. |

| 📟 New Bay |            | ×              |
|-----------|------------|----------------|
| Bay Name  | Bay Number | <u>√ S</u> ave |
|           |            | X Cancel       |

| 2 | Type the appropriate information in the following fields:                 |
|---|---|
|   | <ul><li>Bay Name</li><li>Bay Number</li></ul>                             |
| 3 | Click the <b>Save</b> button, and the new bay displays on the <b>Bays</b> |
|   | window.   |

**How To** To edit an existing bay, perform the following steps:

| Action   |
|--|
| ck a bay name to select the bay to be edited.  |
| ck the <b>Edit Bay</b> button, and the bay to be edited displays in the <b>v</b> window. |
| (  |

| 📟 Bay - Alignment                  |            | ×   |
|------------------------------------|------------|---|
| Bay Name<br><mark>Alignment</mark> | Bay Number | <u>√ S</u> ave<br><u>X</u> <u>C</u> ancel |

### Bay, Continued

| Step | Action   |
|------|--|
| 3    | Modify the appropriate information in any of the following fields:               |
|      |  |
|      | <ul><li>Bay Name</li><li>Bay Number</li></ul>                                    |
|      | Bay Number   |
| 4    | Click the <b>Save</b> button, and the edited bay will display on the <b>Bays</b> |
|      | window.  |

### Category

Category

The **Category** lists option allows you to specify the types of work you do.

After you have set up your categories, you can associate any item on a repair order with a category.

Then, you can determine how much business you are doing in a certain category and which repairs are the most profitable.

You can review your findings in a summary report.

### Category, Continued

How To To add a category to the Category List, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click the <b>Category</b> button in the <b>Lists</b> box, and your current |
|      | Category List displays.  |

| TRACS - (Conceptory List)<br> | ×        |
|-------------------------------|----------|
| ≝ ⊴ 18 ≗ 19 \$ 3 ⇒ ≦          | 😹 🤋 🧾    |
| Calegory ar conditioning      | L Done   |
| brail-es<br>exhaust           | See Dise |
| ol paint                      | Dejete   |
|                               |          |
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|                               | 1        |
|                               |          |
|                               |          |
|                               |          |
|                               |          |
|                               |          |
|                               | -1       |

2 Click the **New** button, and the **New Category** form displays.

How To (continued)

| 📟 New Category |                             |
|----------------|-----------------------------|
| Category       | <mark>√</mark> <u>S</u> ave |
|                | X <u>C</u> ancel            |
|                |                             |

| Step | Action   |
|------|--|
| 3    | Type the new category in the <b>Category</b> field.  |
|      | <i>Note:</i> For the purposes of this procedure, we will be using "tires" as our new category.   |
| 4    | Click the <b>Save</b> button, and your <b>Category List</b> displays with the new entry in alphabetical order. You have now added a category to the <b>Category List</b> . |

**How To** To edit a category in the **Category List**, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click the Category button in the Lists box, and your current |
|      | Category List displays.                                      |

Continued on next page

Category air conditioning brakes exhaust oil paint tires

# Category, Continued

| - TRACS - (Concepting Line)<br>         | X        |
|---|----------|
| 1 1 1 1 2 4 1 2 1 1 1 1 1 1 1 1 1 1 1 1 | x ? 🥑    |
| Califygon:                              | * X Done |
| Drakes                                  | See Dame |
| eñaut                                   | 254      |
| ol paint                                |          |
| ties                                    | Dejete   |
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|   | *        |

| Γ | Step | Action  |
|---|------|---|
|   | 2    | Click to select the category to be modified.                              |
|   | 3    | Click the <b>Edit</b> button, and the <b>Edit Category</b> form displays. |

How To (continued)

| 📟 Edit Category                           |             |  |
|---|-------------|--|
| Category<br><mark>air conditioning</mark> | <u>Save</u> |  |
| Step                                      | Action      |  |

| Step | Action  |
|------|---|
| 4    | Type the desired text in the <b>Category</b> field.         |
| 5    | Click the Save button and the modified text displays in the |
|      | Category List. You have now edited a category on the        |
|      | Category List.  |

| Γ            | Category |
|--------------|----------|
| $\mathbf{i}$ | HVAC     |
|              | brakes   |
|              | exhaust  |
|              | oil      |
|              | paint    |
|              | tires    |

**How To** To delete an item in the **Category List**, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click the <b>Category</b> button in the <b>Lists</b> box, and your current |
|      | Category List displays.  |

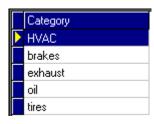
### Category, Continued

#### How To (continued)

| Step | Action                                      |
|------|---|
| 2    | Click to select the category to be deleted. |



#### 3 Click the **Delete** button, and the category is deleted from the list.



| 4 | Click the <b>Done</b> button, and the <b>TRACS Set Up</b> window displays. |
|---|--|
|   | You have now deleted an item from the <b>Category List</b> .               |

### **Credit Cards**

**Credit Cards** The **Credit Cards** option allows you to list all of the credit cards that your company accepts. You can list all the cards that might be appropriate for your business needs.

| AMERICAN EXPRESS<br>DISCOVER DISCOVER<br>MASTERCARD MASTERCARD<br>P PH AND H<br>MISA MISA | Cond Prove | THE OWNER OF THE OWNER OWNER OF THE OWNER OWNE |   | _101    |
|---|------------|--|---|---------|
| DISCOVER DISCOVER SX New Asstercard Mastercard P PH AND H                                 | Card Type  | Description  |   | X Done  |
| MASTERCARD MASTERCARD P PH AND H  |            |  |   | Chi New |
| P PHANDH  |            |  |   |         |
| VISA VISA XDelete   |            |  |   | > Edi   |
| X Dejete  | VISA       | VISA   | 1 |         |
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|   |            |  |   |         |
|   |            |  |   |         |
|   |            |  |   |         |

**How To** To add a new credit card or modify an existing card on the list, perform the following steps:

| Step | Action   |  |
|------|--|--|
| 1    | Click the New Card button, and the New Card window displays. |  |

### Credit Cards, Continued

#### How To (continued)

| 📟 New Card                   | ×                       |
|------------------------------|-------------------------|
| Credit Card Type             | <u>✓ S</u> ave          |
| Credit Card Name/Description | <u>X</u> <u>C</u> ancel |

| Step | Action  |  |
|------|---|--|
| 2    | Type the appropriate information in the following fields:   |  |
|      | <ul> <li>Credit Card Type (examples: AmEx, MC, and NAPA)</li> <li>Credit Card Name/Description</li> </ul> |  |
| 3    | Click the Save button, and the new card will be listed on the Card  |  |
|      | folder.   |  |

**How To** To modify a credit card listing, perform the following steps:

| Step | Action  |  |
|------|---|--|
| 1    | Click the name of the card to be modified.                |  |
| 2    | Click the Edit Card button, and the Card window displays. |  |

| 📟 Card - AMX  | ×                                 |
|---|-----------------------------------|
| Credit Card Type<br>AMX<br>Credit Card Name/Description | <u>✓ S</u> ave<br><u>X</u> Cancel |
| American Express  |                                   |

# Credit Cards, Continued

| Step | Action  |  |  |
|------|---|--|--|
| 3    | Modify any of the following fields:                                 |  |  |
|      | Credit Card Type  |  |  |
|      | Credit Card Name/Description  |  |  |
| 4    | Click the Save button, and the modified credit card displays on the |  |  |
|      | Cards folder.   |  |  |

### Employee

**Employee** You can use the **Employee** option to establish specific information about your employees.

The system will use this data to calculate employee processes, such as labor rates and payroll.

*Note*: For more information on how to set up your security features, including the **Password** and **Authorize** buttons, contact The NAPA TRACS Support Center. 1-800-742-3578

|      | yee List          |              |
|------|-------------------|--------------|
| Code | Name              | 📥 🔀 Done     |
| BR   | BRADLEY RASMUSSEN |              |
| GR   | GLEN ROSEN        | -New         |
| KK   | KEN KOENIG        |              |
| LA   | LARRY AHRENS      | <u>E</u> dit |
| MGR  | Manager           | 💥 Delete     |
| SW   | STACEY WOOD       | - Dejete     |
| TI   | TIM IVES          |              |
| TW   | TERRY WILSON      |              |
|      |                   |              |
|      |                   |              |
|      |                   |              |
|      |                   |              |

**How To** To add a new employee, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click the New Empl (New Employee) button, and the New |
|      | Employee window displays.                             |

| 📟 New Employee       |               | ×   |
|----------------------|---------------|---|
| Employee Code        | Employee Name | <u>✓ S</u> ave<br><u>×</u> <u>C</u> ancel |
| Certification Number | Default Bay   | Rassword                                  |
|                      |               |   |
|                      |               |   |
|                      |               |   |

| 2 | Type the appropriate information in the following fields:             |  |
|---|---|--|
|   | Employee Code   |  |
|   | ( <i>Note:</i> The <b>Employee Code</b> can be initials or a number.) |  |
|   | Employee Name   |  |
|   | Certification Number  |  |
|   | Default Bay   |  |
|   | Cost per Hour   |  |

| Step | Action   |
|------|--|
| 3    | Click the <b>Password</b> button, and the <b>Set Password</b> window |
|      | displays.  |

| 📾 Set Password   |      |
|--|------|
| The password is case senstive and can be up to 8 characters and numbers. | Save |
| New Password   |      |
| Retype Password for Verification   |      |
|  |      |

|   | Type the employee's password in the <b>New Password</b> field.             |
|---|--|
| 5 | Retype the employee's password in the <b>Retype Password for</b>           |
|   | Verification field.  |
| 6 | Click the <b>Save</b> button, and the <b>New Employee</b> form redisplays. |

| Step | Action  |
|------|---|
| 7    | Click the Save button, and the new employee displays on the |
|      | Employees folder.   |

|            | TRACS Setup Interview  | the second second statement is shown in the second s |             |               |        |                |
|------------|--|---|-------------|---------------|--------|----------------|
|            | the process of the local data and the second s | en Took Mexices Rep   | 2           |               |        | دلقلہ          |
| <b>2</b> 2 | 7 19 2 19  | \$ 5 8 8  | 4           |               |        | a ? 🖱          |
| I Bans I C | ada Employees Vendor   | MIg   |             |               |        | General        |
|            |  | ployees. To enter a new   |             | 1935          | New    | mpl Work Orden |
| NOTE       | Employee Code is typi  | g employee press "Edit E<br>celly unique initials or nem  | mpr.<br>W   |               |        |                |
| -          |  | all all   | -           | 2000000       | Edel   | P01            |
|            | de Eng. Name   | Cet. #  |             | t Default Bay | •      | Accts Rec.     |
| 4400       | Joe Schuhm<br>Manager  | 266456799   | joes<br>MGR | ON .          |        | 12000          |
|            | 0.000  |   |             |               |        | Tares          |
|            |  |   |             |               |        | Supplies       |
|            |  |   |             |               |        | Labor Rates    |
|            |  |   |             |               | -      | Lists          |
|            |  |   |             |               |        | Accounts       |
|            |  |   |             |               |        |                |
|            |  |   |             |               |        |                |
|            |  |   |             |               |        |                |
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| ? 54       |  |   | Devis       | ut De Nest    | × Done |                |
|            |  |   | Ca Deno     |               |        |                |

**How To** To edit an existing employee, perform the following steps:

| Step | Action  |  |  |
|------|---|--|--|
| 1    | Click to select the name of the employee to be modified.                                    |  |  |
| 2    | Click the <b>Edit Empl</b> (Edit Employee) button, and the <b>Employee</b> window displays. |  |  |

| 📟 Employee - Mark Tho             | npson                    | X                           |
|-----------------------------------|--------------------------|-----------------------------|
|                                   | yee Name<br>Thompson     | <mark>√</mark> <u>S</u> ave |
| Certification Number<br>498622342 | Default Bay<br>Emissions | Cancel                      |
| Cost per Hour<br>\$40.00          |                          | Authorize                   |

| 3 | Modify any of the following fields:  |
|---|--|
|   | Employee Code  |
|   | Employee Name  |
|   | Certification Number   |
|   | • Default Bay  |
|   | Cost per Hour  |
| 4 | Click the <b>Authorize</b> button, and the <b>Employee Authorization</b> window displays a list of actions the employee can perform. |
|   | <i>Note:</i> Check marks default for all of the actions in the <b>Allowed</b> column.  |

| 📟 Employee Authorization                       |         |   | _ 🗆 ×                                    |
|--|---------|---|--|
| Employee     Code       Mark Thompson     7744 |         |   | <b>√</b> <u>S</u> ave<br><b>X</b> Cancel |
| Action   | Allowed |   |  |
| Create/Edit Work Order                         | V       |   |  |
| Access to Profit Tab                           |         |   |  |
| Allowed to Invoice                             |         |   |  |
| Allowed to Uninvoice                           |         |   |  |
| Allowed to Print a Work Order                  |         |   |  |
| Allowed to Approve an Estimate                 |         |   |  |
| Create/Edit Customer and Vehicles              |         |   |  |
| Allowed to make Customer or Vehicle Inactive   |         |   |  |
| Create/Edit Purchasing Documents               |         |   |  |
| Send an Order to NAPA with Access              |         | - |  |

| Step | Action   |  |
|------|--|--|
| 5    | Click to deselect the specific action or actions that you do not want    |  |
|      | the employee to perform in the Allowed column.                           |  |
| 6    | Click the <b>Save</b> button, and the <b>Employee</b> window redisplays. |  |

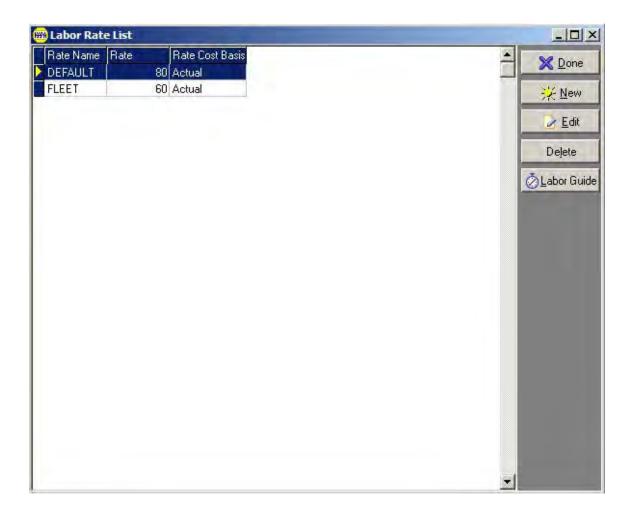
| 📟 Employee - Mark Thompson                              | ×              |
|---|----------------|
| Employee Code Employee Name<br>7744 Mark Thompson       | <u>✓ S</u> ave |
| Certification Number Default Bay<br>498622342 Emissions |                |
| Cost per Hour<br>\$40.00                                | Authorize      |

| 7 | Click the <b>Save</b> button, and the modified employee displays on the |
|---|---|
|   | Employees folder.   |

Labor Rates The Labor Rates tab assists you in gathering information about your labor rates and in associating each of your labor rates with a specialized skill set as established by the Mitchell Mechanical Labor Estimating Guide.

You can either enter new labor rates or edit labor rates that you have already created.

The Mitchell Mechanical Labor Estimating Guide indicates five different skill levels for labor items. Later, you will associate each skill level with a labor charge you enter here.



Continued on next page

# Labor Rates, Continued

**How To** To enter a new labor rate, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click the New Rate button, and the Labor Rate window displays. |

| 📟 Labor   | Rate X  |
|-----------|---|
| Rate Nam  |   |
| I         |   |
| Rate      |   |
| 1         |   |
| Rate Cost |   |
|           |   |
|           |   |
| 2         | Type the rate name in the <b>Rate Name</b> field.                           |
| 3         | Type the rate in the <b>Rate</b> field.                                     |
| 4         | Type the rate cost basis in the <b>Rate Cost</b> field.                     |
| 5         | Click the <b>Save</b> button, and the new rate displays in the <b>Items</b> |
|           | folder.   |

### Labor Rates, Continued

**How To** To edit a labor rate, perform the following steps:

| Step | Action   |  |  |  |  |  |  |
|------|--|--|--|--|--|--|--|
| 1    | Click a rate name to select the rate to be edited.                             |  |  |  |  |  |  |
| 2    | Click the <b>Edit Rate</b> button, and the <b>Labor Rate</b> form displays     |  |  |  |  |  |  |
|      | with the selected rate active.   |  |  |  |  |  |  |
| 3    | Add, modify, or delete data in the following fields, as appropriate:           |  |  |  |  |  |  |
|      | Rate Name  |  |  |  |  |  |  |
|      | • Rate   |  |  |  |  |  |  |
|      | Rate Cost  |  |  |  |  |  |  |
| 4    | Click the <b>OK</b> button, and the modified rate displays on the <b>Items</b> |  |  |  |  |  |  |
|      | folder.  |  |  |  |  |  |  |
| 5    | Click the Next button to continue, and the Labor Guide folder                  |  |  |  |  |  |  |
|      | displays.  |  |  |  |  |  |  |

#### Labor Rates, Continued

Labor Guide The Mitchell Mechanical Labor Estimating guide indicates skill levels. Rate A is considered to be associated with the most difficult repair procedure. Rate E is the easiest.

Each of the five skill levels can be associated with a different labor rate or they can all have the same labor rate.

**Important** You must already have entered **Labor Rates** to select the rate names.

You must select a rate for each skill level (even if it is the same rate). If you don't select a rate for each level, or if you select a non-defined rate, your work order will bill that rate at \$0.00.

| 📟 Labor Rate                  | e List                       |                                  |                               |                       |   | - D ×   |
|-------------------------------|------------------------------|----------------------------------|-------------------------------|-----------------------|---|---|
| Rate Name<br>DEFAULT<br>FLEET | 80                           | Rate Cost Ba<br>Actual<br>Actual | isis                          |                       | 1 | <mark>≫</mark> <u>D</u> one                             |
| FLEET                         | Guid<br>Guid<br>Guid<br>Guid |                                  | DEFAULT<br>DEFAULT<br>DEFAULT | X<br>Save<br>X Cancel |   | <u>¥ N</u> ew<br><u>E</u> dit<br>Delete<br>⊘Labor Guide |
|                               |                              |                                  |                               |                       | - |   |

**How To** To select a Labor Estimating Guide rate, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click the down arrow next to the <b>Guide Rate A=</b> field.   |
| 2    | Select from the rates available on the dropdown list.<br><i>Note:</i> This dropdown list displays the rates that you defined in the <b>Items</b> folder. |
| 3    | Repeat steps one and two until all fields have been defined. You have now completed working with labor rates.  |

| Flatrate<br>Estimating<br>Guide | Use the Flatrate Estimating Guide to view the approximate flatrate hours required to perform a specific service or repair.  |
|---------------------------------|---|
|                                 | <ul> <li>Note: Depending on how you copied the catalog files, you may need to have the NAPA Electronic Catalog CD in your CD-ROM drive to access this function. If the CD you need is not in your CD-ROM drive, a reminder message displays, "The Parts Catalog data or CD is not available, please check the drive or CD."</li> <li>The Flatrate screen contains the following folders:</li> </ul> |
|                                 | <ul> <li>Year</li> <li>Make</li> <li>Model</li> <li>Sub Model</li> </ul>  |

**How To** To access and use the TRACS **Flatrate Estimating Guide** to determine labor rates, perform the following steps:

| Step | Action  |  |
|------|---|--|
| 1    | Click the <b>Open the Flatrate Estimating Guide</b> icon from the |  |
|      | Main Menu form, and the TRACS-[Flatrate] form displays.           |  |

| 📾 NAPA Parts Catalog   |                       |
|--|-----------------------|
| Catalog Selection Catalog Results  | 🔀 <u>D</u> one        |
| Year Make Model Engine Category Subcategory  |                       |
| Year   | <u> </u>              |
| 2002   | 💫 Сору                |
| 2001   | Live Access           |
| 2000   | Eine Mooess           |
| 1998   | 🔒 Interchange         |
| 1997   | <u> </u>              |
| 1996   | <u>?</u> <u>H</u> elp |
| 1995   |                       |
| 1994   |                       |
| 1993   |                       |
| 1992   |                       |
| 1991   |                       |
| 1990   |                       |
| 1989   |                       |
| 1988   |                       |
| 1986   |                       |
| 1985   |                       |
| 1984   |                       |
| 1983   |                       |
| 1982   |                       |
| 1981   |                       |
|  |                       |
| 2002 Lincoln Blackwood - 330Cl 5.4Liter V8 - Ignition Parts & Filters - Ignition Parts |                       |

#### How To (continued)

| Step | Action   |
|------|--|
| 2    | Double-click to select the year of the vehicle, and the <b>Make</b> folder |
|      | becomes active.  |

| 📾 NAPA Parts Catalog   |                |
|--|----------------|
| Catalog Selection Catalog Results  | 🔀 Done         |
| Year Make Model Engine Category Subcategory  |                |
| Make   | <u> </u>       |
| Buick<br>Cadillac  | 💫 Сору         |
| Calinac<br>▶ Lincoln   | Live Access    |
|  | 🔒 Interchange  |
|  | ? <u>H</u> elp |
|  |                |
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|  |                |
|  |                |
| 2002 Lincoln Blackwood - 330Cl 5.4Liter V8 - Ignition Parts & Filters - Ignition Parts |                |

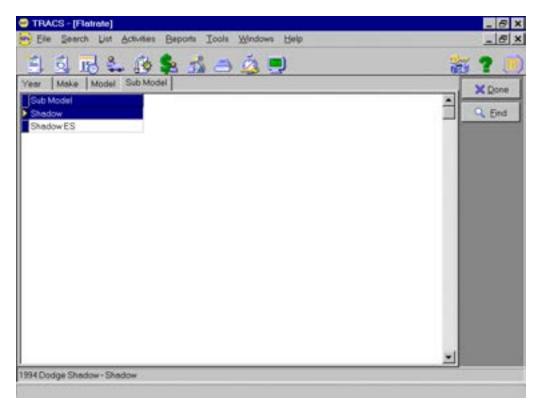
#### How To (continued)

| Step | Action   |  |
|------|--|--|
| 3    | Double-click to select the make of the vehicle, and the <b>Model</b> |  |
|      | folder becomes active.   |  |

| 📾 NAPA Parts Catalog   |                  |
|--|------------------|
| Catalog Selection Catalog Results  | 🗙 <u>D</u> one   |
| Year Make Model Engine Category Subcategory  |                  |
| Model           Blackwood         Image: Control of the second s |                  |
| Elackwood  | ->> Сор <u>у</u> |
|  | Live Access      |
|  | 🔒 Interchange    |
|  | ? <u>H</u> elp   |
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|  | ━                |
| 2002 Lincoln Blackwood - 330Cl 5.4Liter V8 - Ignition Parts & Filters - Ignition Parts   |                  |
|  |                  |

#### How To (continued)

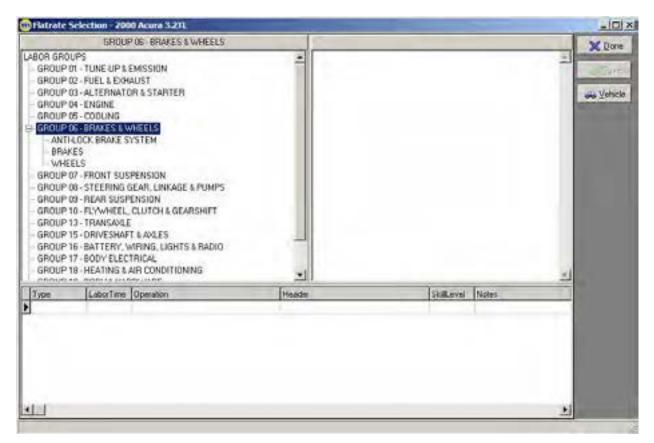
| Step | Action  |
|------|---|
| 4    | Double-click to select the model of the vehicle, and the <b>Sub</b> |
|      | Model folder becomes active.  |



| Step | Action   |
|------|--|
| 5    | Double-click to select the sub model of the vehicle, and the Labor |
|      | Worksheet displays.  |

| GROUP 02 - FUEL & EXHAUST<br>GROUP 03 - ALTERNATOR & STARTER<br>GROUP 04 - ENGINE<br>GROUP 05 - COOLING<br>GROUP 06 - BRAKES & WHEELS<br>GROUP 07 - FRONT SUSPENSION<br>GROUP 00 - STEERING GLARL, LINKAGE & PUMPS<br>GROUP 00 - STEERING GLARL, LINKAGE & PUMPS<br>GROUP 00 - REAR SUSPENSION<br>GROUP 10 - PLYWHEEL, CLUTCH & GEARSHIFT<br>GROUP 13 - TRANSAGLE<br>GROUP 13 - TRANSAGLE<br>GROUP 15 - DRIVESHAFT & AGLES<br>GROUP 15 - DRIVESHAFT & AGLES<br>GROUP 16 - BATTERY, WIRING, LIGHTS & RADIO<br>GROUP 17 - BODY ELECTRICAL<br>GROUP 18 - HEATING & AIR CONDITIONING<br>GROUP 19 - BODY & HARDWARE<br>GROUP 19 - BODY & HARDWARE<br>GROUP 20 - WINDOW MOTORS & REGULATORS |        |            |       | un Velick |
|---|--------|------------|-------|-----------|
| GROUP 21 - CRUISE CONTROL<br>ype LaborTime Operation  | Heador | Skill.evel | Notes |           |

| Step | Action   |
|------|--|
| 6    | Click to select the labor category on the Labor Worksheet, and |
|      | the labor subcategories display.                               |



- Step 7
- Action

   Click to select the labor subcategory, and the labor type displays.

| BRAKES  | E Done            |
|---|-------------------|
| CALIPER - BUIS O/H<br>CALIPER - BSR<br>DISC ROTOR - BLR<br>DISC ROTOR ION VEHICLE) - BEFINISH<br>DISC ROTOR (REMOVED) - BEFINISH<br>MASTER CYLINDER - BUR<br>PARKING BRAKE CABLE - BUR<br>PARKING BRAKE CABLE - BUR<br>PARKING BRAKE CABLE - BUR<br>PARKING BRAKE SHOE & LINING - BER<br>POWER BRAKE SHOE & LINING - BER<br>POWER BRAKE SHOE & LINING - BER |                   |
| Type LaborTime Operation Head   | s Stattevel Notes |
| )   |                   |

#### How To (continued)

| Step | Action  |
|------|---|
| 8    | Click the labor activity, and the details of the labor activity display |
|      | on the right of the Labor Worksheet screen.                             |

| Step | Action  |
|------|---|
| 9    | Click to select any appropriate additional time activities that apply |
|      | to this repair order, and a check mark displays next to all selected  |
|      | items.  |

| 10 | Repeat Steps 6 through 9 to add labor activities to the repair order     |
|----|--|
|    | as necessary.  |
| 11 | Click the <b>OK</b> button when all necessary labor activities and       |
|    | additional time items have been added to the repair order.               |
|    |  |
|    | <i>Note</i> : The additional time items do not display as separate items |
|    | on the repair order but their time is included in the related labor      |
|    | item in the <b>Qty</b> (Quantity) field.                                 |
| 12 | Click the <b>Save</b> button to save the new items to the repair order.  |

CategoryThe Ad Source lists option allows you to specify the types of<br/>ad sources available for listing on a work order.

After you have set up your ad sources, you can associate any work order with an ad source. A drop-down list of these sources will appear on the **Detail** tab of a work order.

**How To** To add a source to the **Ad Source List**, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click the Ad Source button in the Lists box, and your current Ad |
|      | Source List displays.  |

| ADSOURCE                     | 📥 🔀 Done     |
|------------------------------|--------------|
| AAA Glass                    |              |
| AAA Member Services          | New          |
| AAA On Hold Message          |              |
| AAA Travler                  | <u>E</u> dit |
| AAA.Com                      | Delete       |
| Bank Of America Insert       | Dejete       |
| Blood Drive Gift Certifcates |              |
| Call Center Referral         |              |
| Car Care Web Site            |              |
| Car Seat Events              |              |
| Carco Inspections            |              |
| Customer Referral            |              |
| Independent Press            |              |
| Internet                     |              |
| Kenilworth Local Source      |              |
| Kids Stuff Coupon Book       |              |
| New Member Packet            |              |
| Post Card                    |              |
| Primer Member Packet         |              |
| Renewal bills                |              |
| Return Customer              |              |
| Signage                      |              |
| Springfield Patriot Paper    |              |
| Suburban News                |              |

### Ad Source, Continued

How To (continued)

#### 2 Click the **New** button, and the **New Ad Source** form displays.

| Ad Source | ✓ Save   |
|-----------|----------|
|           | X Cancel |

| Step | Action  |
|------|---|
| 3    | Type the new source in the <b>Ad Source</b> field.  |
| 4    | Click the <b>Save</b> button, and your <b>Ad Source List</b> displays with the new entry in alphabetical order. You have now added a source to the <b>Ad Source List.</b> A drop-down list of all sources will appear in the <b>Detail</b> tab of a work order. |

| 1                     |    |  |                          |
|-----------------------|----|--|--------------------------|
| and the second second |    |  | may   Value Read   Total |
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|                       |    |  |                          |
|                       |    |  |                          |
| _                     |    |  |                          |
|                       |    |  |                          |

|   | Category         |
|---|------------------|
| Þ | air conditioning |
|   | brakes           |
|   | exhaust          |
|   | oil              |
|   | paint            |
|   | tires            |

### Ad Source, Continued

#### **How To** To edit a source in the **Ad Source List**, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click the Ad Source button in the Lists box, and your current Ad |
|      | Source List displays.  |
| 2    | Click to select the source to be modified.                       |
| 3    | Click the Edit button, and the Edit Ad Source form displays.     |

| Edit Ad Source |          |
|----------------|----------|
| Ad Source      | Save     |
| AAA Glass      | X Cancel |

| 4 | Type the desired text in the <b>Ad Source</b> field.   |  |
|---|--|--|
| 5 | Click the <b>Save</b> button and the modified text displays in the <b>Ad</b><br><b>Source List</b> . You have now edited a category on the |  |
|   | Ad Source List.  |  |

### Manufacturer

**Manufacturer** The **Manufacturer** option provides a place for you to specify information about your manufacturers.

**NOTE:** Registering the NAPA Catalog will automatically add your servicing Jobber's NAPA Manufacturers Line Codes.

| Abbreviation | Manufacturer Name | NAPA | 📥 🔀 Done       |
|--------------|-------------------|------|----------------|
| AC           | NAPA AC           | Y    |                |
| AIR          | NAPA AIR          | Y    | New New        |
| AIT          | NAPA AIT          | Y    |                |
| AMM          | NAPA AMM          | Y    | 🖉 <u>E</u> dit |
| ANC          | NAPA ANC          | Y    | Delete         |
| ABI          | NAPA ARI          | Y    | Diciete        |
| ASN          | NAPA ASN          | Y    |                |
| ASP          | NAPA ASP          | Y    |                |
| ATK          | NAPA ATK          | Y    |                |
| ATP          | NAPA ATP          | Y    |                |
| AVX          | NAPA AVX          | Y    |                |
| BA.          | NAPA BA           | Y    |                |
| BAT          | NAPA BAT          | Y    |                |
| BB           | NAPA BB           | Y    |                |
| BC           | NAPA BC           | Y    |                |
| BCO          | NAPA BCO          | Y    |                |
| BD           | NAPA BD           | Y    |                |
| BEL          | NAPA BEL          | Y    |                |
| BHK          | NAPA BHK          | Y    |                |
| BK           | NAPA BK           | Y    |                |
| BOS          | NAPA BOS          | Y    |                |
| BRG          | NAPA BRG          | Y    |                |
| BRIDG        | BRIDGESTONE TIRE  | N    |                |
| BRP          | NAPA BRP          | Y    |                |
| BSH          | NAPA BSH          | Y    |                |

### Manufacturer, Continued

**How To** To add a new manufacturer, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click the New Manuf (New Manufacturer) button, and the Edit |
|      | Manufacturer window displays.                               |

| 📟 Edit Manufacturer | ×                |
|---------------------|------------------|
| Abbreviation        | <u>√</u> Save    |
| Full Name           | X <u>C</u> ancel |
|                     |                  |
| NAPA Manufacturer   |                  |

| 2 | Type or select the appropriate information in the following fields:    |
|---|--|
|   | <ul><li>Abbreviation</li><li>Full Name</li></ul>                       |
|   | NAPA Manufacturer  |
| 3 | Click the <b>Save</b> button, and the new manufacturer displays on the |
|   | Mfg (Manufacturer) folder.   |

**How To** To edit an existing manufacturer, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click to select the name of the manufacturer to be modified.  |
| 2    | Click the <b>Edit Manuf</b> (Edit Manufacturer) button, and the <b>Edit</b><br><b>Manufacturer</b> form displays. |

## Manufacturer, Continued

| 📟 Edit Manufacturer | ×             |
|---------------------|---------------|
| Abbreviation        | <u>✓ Save</u> |
| Full Name           | <u> </u>      |
| Rayloc              |               |
| 🔽 NAPA Manufacturer |               |
|                     |               |

| Step | Action   |
|------|--|
| 3    | Modify the appropriate fields.                                   |
| 4    | Click the Save button, and the modified manufacturer displays on |
|      | the Mfg (Manufacturer) folder. You have now completed your       |
|      | lists.   |

| Pricing List | The <b>Pricing</b> list option provides you with the opportunity to set<br>up rules related to pricing. You could use these pricing rules<br>when you have a sale or a unique pricing situation for a<br>customer.             |
|--------------|--|
|              | Using the <b>Pricing</b> list option, you can add new pricing rules and<br>edit or delete existing pricing rules. But, before you can add<br>these rules, you will need to name the pricing profile that<br>contains the rule. |
|              | The default pricing rule will be assumed unless otherwise selected.  |
|              | <i>Note:</i> Running the NAPA Pricing Diskette updates both the Parts Catalog and the Items List.  |
| How To       | To name a <b>Pricing Profile</b> , perform the following steps:  |

| Step | Action  |
|------|---|
| 1    | Click the <b>Pricing</b> button in the <b>Lists</b> box, and the <b>Pricing Profile</b> |
|      | List displays.  |

How To (continued)

| TRACS - (Pricing Partie List)     Escape List Activities Expose Losh Windows Help | Lex<br>Lex   |
|---|--------------|
| E G 18 & B & B A A A  | 🏭 <b>?</b> 🤳 |
| Pricing Padle Name Default Pricing  | A Rome       |
| Eds Fleet Discount  | Biles        |
|   | - A Maren    |
|   | - Edit       |
|   | Depte        |
|   |              |
|   |              |
|   | -            |
|   |              |
|   |              |
|   |              |
|   |              |
|   |              |
|   | -            |

| Step Action |   |
|-------------|---|
| 2           | Click the <b>New</b> button, and the <b>Edit Pricing Profile</b> form displays. |

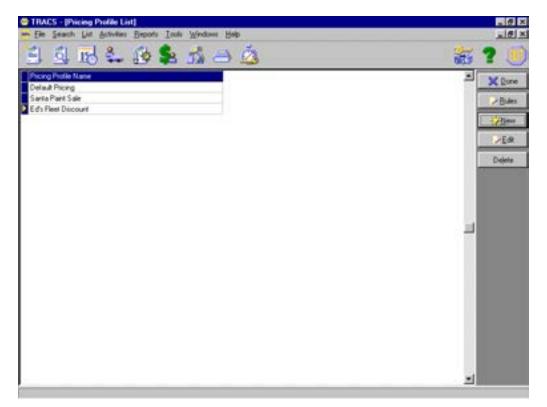
| 📟 Edit Pricing Profile | ×            |
|------------------------|--------------|
| Pricing Profile Name   | <u>S</u> ave |
|                        | X Cancel     |
|                        |              |

#### How To (continued)

| Step | Action  |
|------|---|
| 3    | Type the new profile name in the <b>Pricing Profile Name</b> field. |

| 📟 Edit Pricing Profile | ×                           |
|------------------------|-----------------------------|
| Pricing Profile Name   | <mark>√</mark> <u>S</u> ave |
| Santa Paint Sale       | 🔀 <u>C</u> ancel            |
|                        |                             |

4 Click the **Save** button, and the new pricing profile displays on the **Pricing Profile Name** list.



**How To** To edit a **Pricing Profile Name**, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click to select the profile to be edited.                         |
| 2    | Click the Edit button, and the Edit Pricing Profile form displays |
|      | with the current name of the profile.                             |

| 📟 Edit Pricing Profile | ×             |
|------------------------|---------------|
| Pricing Profile Name   | <u>√</u> Save |
| Santa Paint Sale       | X Cancel      |
|                        |               |

| 3 | Type the desired name of the profile in the <b>Pricing Profile Name</b> |
|---|---|
|   | field.  |

| <mark>√</mark> <u>S</u> ave |
|-----------------------------|
| 🔀 <u>C</u> ancel            |
|                             |

#### How To (continued)

| Step | Action   |
|------|--|
| 4    | Click the Save button, and the Pricing Profile List form       |
|      | redisplays with the edited profile name in the Pricing Profile |
|      | Name list.   |

| TRACS - [Pricing Profile List]                      |    | _ # ×   |
|---|----|---------|
| Be Search List Bolivières Beports Inch Windows Bolp |    | <u></u> |
| 🗄 🗐 🖬 🗳 🚯 象 🖧 🔿 🙆                                   |    | 🏭 🚼 💓   |
| Price Prote Name     Default Price                  |    | × Done  |
| Holiday Paint Touchup Special                       |    | Bales   |
| Ed's Fleet Discourt                                 |    |         |
|   | Da | -Edu    |
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|   |    | 1       |

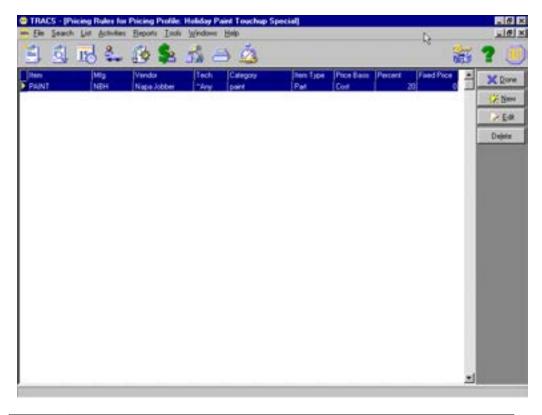
**How To** To delete a pricing profile, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click to select the profile to be deleted.   |
| 2    | Click the <b>Delete</b> button, and the profile is deleted from the <b>Pricing Profile List.</b> |

**Pricing Rules** Pricing Rules allow you to identify the detailed conditions and specifications of a pricing profile. By presetting these rules, the service writer can simply select the profile with the appropriate rules already attached.

**How To** To add a pricing rule to a profile, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click to select the pricing profile to which you would like to add             |
|      | (or define) a rule.  |
| 2    | Click the <b>Rule</b> button, and the <b>Pricing Rules for Pricing Profile</b> |
|      | list displays the rules associated with your selected profile.                 |



| 3 Click the <b>New</b> button, and the <b>Pricing Rule</b> form display | /S. |
|---|-----|
|---|-----|

| 📟 Pricing Rule   |                          |             |      |   | ×   |
|------------------|--------------------------|-------------|------|---|---|
| Pricing Profile: | Holiday Paint Touchup Sp | ecial       |      |   | <u>✓ S</u> ave<br><u>X</u> <u>C</u> ancel |
| ltem             | Many 💌                   | Basis       | List | • |   |
| Mfg.             | ~Any 💌                   | Percent     | 0    | % |   |
| Vendor           | ~Any 💌                   | Fixed Price |      |   |   |
| Technician       | ~Any 💌                   | Labor Rate  |      | Y |   |
| Category         | ~Any 💌                   |             |      |   |   |
| Item Type        | The Any                  |             |      |   |   |

| Step | Action  |
|------|---|
| 4    | Scroll down the list in the following fields to enter the desired information:  |
|      | <ul> <li>Item</li> <li>Mfg (Manufacturer: BK, ECH, FIL)</li> </ul>  |
|      | <ul> <li>Vendor</li> <li>Technician</li> </ul>  |
|      | <ul><li>Category</li><li>Item Type</li></ul>  |
|      | • Basis   |
| 5    | Type the percentage associated with the rule in the <b>Percent</b> field.   |
| 6    | Click the <b>Save</b> button, and the new rule displays on the <b>Pricing</b><br><b>Rules for Pricing Profile</b> list. |

**How To** To edit an existing pricing rule, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click to select the pricing rule to be edited on the <b>Pricing Rules</b> |
|      | for Pricing Profile list.   |
| 2    | Click the Edit button, and the Pricing Rule form displays the             |
|      | current rule.   |

| 📟 Pricing Rule   |                          |             |      | ×                |
|------------------|--------------------------|-------------|------|------------------|
|                  |                          |             |      | ✓ <u>S</u> ave   |
| Pricing Profile: | Holiday Paint Touchup Sp | ecial       |      | 🗙 <u>C</u> ancel |
| Item             | PAINT                    | Basis       | Cost |                  |
| Mfg.             | NBH                      | Percent     | 20 % |                  |
| Vendor           | Napa Jobber 💌            | Fixed Price |      |                  |
| Technician       | ~Any                     | Labor Rate  | Y    |                  |
| Category         | paint 💌                  |             |      |                  |
| Item Type        | Part 💌                   |             |      |                  |

| 3 | Edit the desired field or fields as necessary.                                   |
|---|--|
| 4 | Click the <b>Save</b> button, and the edited rule displays on the <b>Pricing</b> |
|   | Rules for Pricing Profile list.  |

| Item  | Mfg | Vendor      | Tech | Category | Item Type | Price Basis | Percent | Fixed Price |  |
|-------|-----|-------------|------|----------|-----------|-------------|---------|-------------|--|
| PAINT | NBH | Napa Jobber | ~Any | paint    | Part      | Fixed       | 0       | 0           |  |

**How To** To delete a pricing rule, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click to select the rule to be deleted on the <b>Pricing Rules for</b> |
|      | Pricing Profile list.  |
| 2    | Click the <b>Delete</b> button, and the rule is deleted from the list. |
| 3    | Click the <b>Done</b> button when you have completed all of your       |
|      | pricing rule activities, and the <b>Pricing Profile List</b> displays. |
| 4    | Click the <b>Done</b> button when you have completed all of your       |
|      | pricing profile activities, and the Lists box displays.                |
|      | Note: You must apply the pricing profile under the vehicle             |
|      | profile as well as the Customer Profile.                               |

### The following are examples of Pricing rules.

| 1 | All Parts with XXX line code are Profit 50% (Margin)             |
|---|--|
| 2 | Create a pricing rule that says that all parts that are category |
|   | Preventative Maintenance, that have Mfg. Line code SFI are Fixed |
|   | at \$8.99.   |
| 3 | Any Parts with OEM line code are profit 40%.                     |
| 4 | Any Parts with NBH are List –5%                                  |
| 5 | Any Part with ECH are Cost 40% (Mark-up)                         |
| 6 | Any Sublet item is Profit 45%                                    |
| 7 | Any Part, Any everything else is List                            |

**Rec Serv** The **Recommended Service** window (**Rec Serv**) allows you to enter the information about standard recommended services to be applied to new vehicles. These services will be placed on all new vehicles added to TRACS.

For more information on **Recommended Services**, see Chapter 7.

| Standard Reco     | minended Service                            | _io);       |
|-------------------|---|-------------|
| These standard re | rvices will be applied to all new vehicles. | Rome Server |
| ITEM.             | DESCRIPTION<br>LUBE OF, AND PETER           | 2 2 64      |
|                   | ON STATE EMISSION INSPECTION                | Delete      |
| LEVELT            | NAPA AUTOCARE CENTER PM PROGRAM             | 10000       |
| LEVEL2            | NAPA AUTOCARE CENTER PM PROGRAM             |             |
| LEVEL3            | NAPA AUTOCARE CENTER PM PROGRAM             |             |
| LEVEL4            | NAPA AUTOCARE CENTER PM PROGRAM             |             |
| €w\A              | FOUR WHEEL AUGNMENT                         |             |
| BRAKEFLUSH        | FLUSH BRAKES                                |             |
|                   |   |             |
|                   |   |             |
|                   |   | -           |

## Recommended Service, Continued

**How To** To add a recommended service, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click the New button, and the Standard Recommended Service |
|      | window displays.   |

| Standard Recon       | nmended Servi | ice         |          |                        |          |
|----------------------|---------------|-------------|----------|------------------------|----------|
| Service<br>Item Type | Item          | м           | lfg      | Description            | ✓ Save   |
|                      | -             |             |          | -                      | X Cancel |
| Note                 |               |             |          |                        |          |
|                      |               |             |          |                        |          |
|                      |               |             |          |                        |          |
|                      |               | Repeated (c | yclic) s | ervices and increments |          |
|                      |               | E Repeat    |          |                        |          |
|                      |               |             |          |                        |          |
|                      |               |             |          |                        |          |
|                      |               |             |          |                        |          |
|                      |               |             |          |                        |          |
|                      |               |             |          |                        |          |
|                      |               |             |          |                        |          |
|                      |               |             |          |                        |          |
|                      |               |             |          |                        |          |
|                      |               |             |          |                        |          |
|                      |               |             |          |                        |          |
|                      |               |             |          |                        |          |
|                      |               |             |          |                        | <br>1    |

| 2 | Choose the appropriate item from the following drop-down fields:  |
|---|---|
|   | <ul><li>Item Type</li><li>Item</li></ul>  |
|   | Type any notes into the <b>Note</b> text box.   |
|   | <b>Note:</b> The only items that will appear in the drop-down list are those that are already listed in the "work with items" table. To add a recommended service not listed, you will first have to add an item using the procedure outlined in the Items chapter. |
| 3 | Check the <b>Repeat</b> box if you wish the service to be cyclic.   |
| 4 | Click the <b>Save</b> button, and the new bay displays on the <b>Bays</b> window.   |

#### **How To** To edit an existing recommended service, perform the following steps:

|   | Step | Action   |
|---|------|--|
|   | 1    | Click a service name to select the service to be edited.   |
| ſ | 2    | Click the <b>Edit</b> button, and the bay to be edited displays in the <b>Standard Recommended Service</b> window. |
| L |      | Standard Kecommended Service Window.   |

| Standard Recommend<br>Service | d Service               |             |                      |     |         |
|-------------------------------|-------------------------|-------------|----------------------|-----|---------|
| Item Type Iter                | 1                       | Mfg         | Description          |     | Save    |
|                               | AKEFLUSH 💌              | ÷           | FLUSH BRAKES         |     | X Cance |
| Note                          |                         |             |                      |     |         |
|                               |                         |             |                      |     |         |
|                               |                         |             |                      |     |         |
|                               |                         | (cuclic) se | ervices and incremen | ate |         |
|                               | Ticpodica               | (cyclic) st |                      | n   |         |
|                               | <u> ∏</u> <u>R</u> epea | ət          |                      |     |         |
|                               |                         | _           |                      |     | _       |
|                               |                         |             |                      |     |         |
|                               |                         |             |                      |     |         |
|                               |                         |             |                      |     | _       |
|                               |                         |             |                      |     |         |
|                               |                         |             |                      |     |         |
|                               |                         |             |                      |     |         |
|                               |                         |             |                      |     | _       |
|                               |                         |             |                      |     | _       |
|                               |                         |             |                      |     |         |
|                               |                         |             |                      |     |         |
|                               |                         |             |                      |     |         |

# Recommended Service, Continued

| Step | Action  |
|------|---|
| 3    | Modify the appropriate information in any of the following fields:        |
|      | <ul> <li>Item Type</li> <li>Item</li> <li>Note</li> <li>Repeat</li> </ul> |
| 4    | Click the <b>Save</b> button, and the edited service will display on the  |
|      | Recommended Services window.  |

### Symptoms

**Symptoms** The **Symptoms** window allows you to enter the names and descriptions of symptoms that can be selected to appear as notes on repair forms.

| These symptomic can be selected a | o reads on impos on an randia.                              | 32 Bm  |
|-----------------------------------|---|--------|
| SYMPTOM                           | DESCRIPTION   | Edit   |
| ABSLIGHT                          | ABS LIGHT STAYS ON  | Deiete |
| AC NOT COOL                       | AIR CONDITIONING IS NOT COOLING PROPERLY                    |        |
| 0voxine                           | ENGINE BACKFIFIES   |        |
| BELT SQUEAL                       | DRIVE BELTS ARE SQUEALING                                   |        |
| BRUKE NOISE                       | BRAKES ARE MAKING NOISE                                     |        |
| BRAKE PEDAL SOFT                  | BRAKE PEDAL IS SOFT OR SINKS TO THE FLOOR                   |        |
| CHAPINE LIGHT ON                  | DWRDING SYSTEM WARNING LIGHTS COMES ON OR GLOWS             |        |
| CODLANT LEAK                      | CUSTOMER STATES THAT THEY SEE COOLANT LEAKING FROM THE      |        |
| DEAD BATTERY                      | BATTERY DEAD  |        |
| ENGINE KNOCK                      | ENGINE IS MAKING UNUSUAL NOISES                             |        |
| ENGINE MISS                       | ENGINE IS MISFIRING OR LACKS POWER                          |        |
| ENGINE OVERHEATS                  | ENGINE IS OVERHEATING. STEAH, LOSING COOLANT, PRESSURE RE   |        |
| EXHAUST OD OR                     | VEHICLE IS PRODUCING A SULPHUR SMELL. CHECK CATALYTIC CON-  |        |
| HARD SHIFTING MT                  | MANUAL TRANSMISSION IS DIFFICULT TO GET INTO A DIFFERENT GE |        |
| HEAT                              | THERE IS NO HEAT INSIDE THE VEHICLE                         |        |
| HESITATION                        | ENGINE HESITATES, STUMBLES OR SAGS WHEN ACCELERATING        |        |
| IDLE TOO HIGH                     | ENGINE IS IDUNG TOO FAST                                    |        |
| IDLE TOO LOW                      | ENGINES (DLES TOO SLOW                                      |        |
| LACKS POWER                       | ENGINE LACKS POWER AND OR POOR PERFORMANCE                  |        |
| NO CRANK                          | LIGHTS ON THE DASH COME ON BUT CAR DOES NOT CRANK.          |        |
| ND START OR HARD START            | ENGINE CRANKS OK BUT EITHER IS HARD TO START OR WILL NOT S  |        |
| PAPIK BRAKE NOT HOLDING           | PWRKING BRAKE DOES NOT HOLD THE VEHICLE IN PLACE            |        |
| PARK OR NEUTRAL                   | ENGINE CAN START IN GEAR                                    |        |
| PING                              | ENGINE IS PINGING   |        |
| POOR FUEL ECONOMY                 | VEHICLE IS GETTING POOR FUEL ECONOMY, MILES PER GALLON      |        |
| PULL                              | VEHICLE PULLS ONE WW/ OR THE OTHER. CHECK AUGNEMENT AND     |        |
| ROUGH IDLE                        | ENGINE RUNS ROUGH OR MISFIRES AT IDLE                       |        |
| RUNS ON                           | ENGINE RUNS ON AFTER KEY IS TURNED OFF                      | -1     |

### Symptoms, Continued

**How To** To add a symptom, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click the <b>New</b> button, and the <b>Edit Symptoms</b> window displays. |

| Bdit Symptoms |        |
|---------------|--------|
| Symptoms      | ✓ Save |
| Symptom       |        |
|               |        |
| Description   |        |
|               |        |
|               |        |

| 2 | Type the appropriate information in the following fields:                                 |
|---|---|
|   | Symptom Name  |
|   | Symptom Description   |
| 3 | Click the <b>Save</b> button, and the new symptom displays on the <b>Symptoms</b> window. |

**How To** To edit an existing symptom, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click a symptom name to select the symptom to be edited.                   |
| 2    | Click the <b>Edit</b> button, and the symptom to be edited displays in the |
|      | Edit Symptom window.   |

| Bdit Symptoms      | ×    |
|--------------------|------|
| Symptoms           | Save |
| Symptom            |      |
| ABS LIGHT          |      |
| Description        |      |
| ABS LIGHT STAYS ON |      |
|                    |      |
|                    |      |

## Symptoms, Continued

| Step | Action   |
|------|--|
| 3    | Modify the appropriate information in any of the following fields:       |
|      | <ul><li>Symptom Name</li><li>Symptom Description</li></ul>               |
| 4    | Click the <b>Save</b> button, and the edited symptom will display on the |
|      | Symptoms window.   |

**Vendor** You can list all of your vendors' information in the **Vendor** option. You will want to list vendors from whom you buy parts or services.

| Vendor                      | C)y          | Telephone II | NAPA.   | TAMS    | Store ID  |   |               |
|-----------------------------|--------------|--------------|---------|---------|---|---|---------------|
| APPLE VALLEY FORD hawai     | APPLE WALLEY | -            |         |         | 900008130   | - | X Done        |
| ARROW PONTIAC GMC           | INVER GROVE  | k            | E       | C D     |   |   | W hen         |
| ATL Test                    |              |              | F.      | Г       |   |   | 1             |
| AUTOMOTIVE COOLING PRODUCTS | MINNEAPOLIS  |              |         | -       | 1.2009-0.00   |   | ≥ <u>E</u> di |
| BLANCHARD MACHINE           |              |              | Г       | Г.      |   | 1 | 1200          |
| BLOOMINGTON ACURA -SUBARU   | BLOOMINGTON  |              | Г       | Г       | the second se |   | Defete        |
| BURNSVILLE TOYOTA           | BURNSVILLE   |              | C       | Г       |   |   |               |
| CARQUEST                    | ROSEMOUNT    |              |         | Г       |   |   |               |
| CSK PRO SHOP                | APPLE VALLEY | 952-432-9237 |         |         |   |   |               |
| DODGE OF BURNSVILLE         | BURNSVILLE   |              | Г       | Г       |   |   |               |
| FACTORY MOTOR PARTS         | EAGAN        |              | E       | E       |   |   |               |
| FORT DODGE TRANSMISSION     | FORT DODGE   |              | Г       | Г       |   |   |               |
| FRIENDLY CHEVROLET          | FRIENDLY     |              | E       | <b></b> |   |   |               |
| GROSSMAN CHEVROLET          | BURNSVILLE   |              | <b></b> | E.      |   |   |               |
| HALLMAN OIL                 | ST PAUL      |              | Г       | Г       |   |   |               |
| HAROLD CHEVROLET            | BLOOMINGTON  |              | Г       | Г       |   |   |               |
| INTERSTATE BATTERY          | FARMINGTON   |              |         | Г       |   |   |               |
| ITCO                        |              |              |         | Г       |   |   |               |
| JASPER ENGINES              | ST PAUL      | 1            |         | E       |   |   |               |
| JOE O'BRIEN CHEVROLET       | HASTINGS     |              | Г       | Г       | 10000000000   |   |               |
| Johnson Machine             | INVER GROVE  |              | P       | 4       | 700001995   |   |               |
| KREMER SPRING AND ALIGNMENT | INVERGROVE   |              | <b></b> | Г       |   |   |               |
| MASTER TRANSMISSION         | ROSEMOUNT    |              |         | E       |   |   |               |
| MERIT CHEVROLET             | ST PAUL      |              | Г       | Г       |   |   |               |
| METRIC AUTO PARTS           | ST PAUL      | r            | Г       | Г       |   |   |               |
| NAPA J and M                | ROSEMOUNT    | 1            | 되       | 9       | 700001995   | - |               |

**How To** To add a new vendor, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click the New Vendor button, and the Vendor window displays. |

## Vendor, Continued

| 📟 Vendo | n   | ×  |  |  |
|---------|---|--|--|--|
| Name    |   | ✓ Save   |  |  |
|         |   |  |  |  |
| Phone I | Number                                    | Accounts Payable Account   |  |  |
|         |   | Accounts Payable   |  |  |
| Address | 8   | Address Line 2   |  |  |
| Chu -   |   | State Zip  |  |  |
| City    |   | State Zip  |  |  |
|         | Access                                    | C. Januari D., (De NOT ententing log fing D.)  |  |  |
|         | ⊻endor is a NAPA Jobber                   | Customer ID (Do NOT enter the leading D)   |  |  |
| Г       | NAPA Jobber has TAMS                      | Madam Manhar   |  |  |
| Г       | This is my <u>P</u> rimary NAPA Jobber    | Modem Number   |  |  |
|         |   |  |  |  |
|         | Mandaria a Danata TRACC autor             | Modem<br>U.S. Robotics 56K Win INT   |  |  |
|         | Vendor is a <u>R</u> emote TRACS syster   |  |  |  |
| Step    |   | Action   |  |  |
| 2       | Type the appropriate                      | information in the following fields:   |  |  |
|         |   | č  |  |  |
|         | Name                                      |  |  |  |
|         | Phone Number                              |  |  |  |
|         | Accounts Payab                            | le Account   |  |  |
|         | • Address 1                               |  |  |  |
|         | Address 2                                 |  |  |  |
|         | • City                                    |  |  |  |
|         | • State                                   |  |  |  |
|         |   |  |  |  |
|         | • Zip                                     |  |  |  |
|         | <ul><li>Zıp</li><li>Customer ID</li></ul> | (Only accessible if Vendor is a NAPA Jobber)   |  |  |
|         | Customer ID                               | (Only accessible if Vendor is a NAPA Jobber)<br>(Only accessible if Vendor is a NAPA Jobber) |  |  |

## Vendor, Continued

| Step | Action   |
|------|--|
| 3    | Click to place a check mark in the following fields as needed:   |
|      | <ul> <li>Vendor is a NAPA Jobber</li> <li>NAPA Jobber has TAMS</li> <li>This is my Primary NAPA Jobber</li> <li>Vendor is a Remote TRACS system (<i>This option is for businesses with multiple locations</i>) SEE STEP 4</li> </ul> |
| 4    | Placing a check next to the phrase, "Vendor is a Remote TRACS  |
|      | system" activates the Remote TRACS System Setup screen.  |

| Remote TRACS System Set Up                  |                  |  |  |  |
|---|------------------|--|--|--|
| IP (dotted quad)                            | Secret Word      |  |  |  |
| Database Path<br>c:\NAPA\TRACS\DB\TRACS.GDB | Remote Host Name |  |  |  |

# Vendor, Continued

#### How To (continued)

| Step | Action  |  |  |  |
|------|---|--|--|--|
| 5    | Correctly setting up a remote TRACS system requires that the above information be added. ( <i>See List Below for Detailed Instructions</i> )  |  |  |  |
|      | • The box next to the phrase "Inventory may be transferred from the Remote TRACS System" must have a check in it.   |  |  |  |
|      | • The IP (dotted quad) field must be filled in with numbers provided by your Internet Service Provider.   |  |  |  |
|      | • The Static IP address box needs to be checked. It acts as a lock to prevent the IP address from being changed. It can be disabled to allow changes when necessary.  |  |  |  |
|      | • The Secret Word is very important. It acts as the password for<br>the systems that are linked together. The Secret Word has to be<br>the same on each computer to allow communication. Choose<br>something that will be easy to remember. |  |  |  |
|      | • The Database path can be left at the default.<br>c:\NAPA\TRACS\DB\TRACS.GDB   |  |  |  |
|      | <ul><li>The Remote Host Name can be anything that you want.</li><li>This requires that both locations have a DSL line.</li></ul>  |  |  |  |
| 6    | Click the <b>Save</b> button, and the modified vendor displays on the <b>Vendor</b> folder.   |  |  |  |

## Vendor, Continued

#### How To (continued)

**How To** To edit an existing vendor, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click to select the vendor to be modified.                    |
| 2    | Click the Edit Vendor button, and the Vendor window displays. |

|     | Vendor<br>Name          |  | ×<br>✓ <u>S</u> ave   |
|-----|-------------------------|--|---|
| J   | I<br>Phone N<br>Address | [  | Accounts Payable Account Accounts Payable Accounts Payable Address Line 2 |
|     | City                    | s<br>  | itate Zip   |
|     |                         | Access<br><u>/endor is a NAPA Jobber</u><br><u>I</u> APA Jobber has TAMS<br>This is my <u>P</u> rimary NAPA Jobber | Customer (D (Do NOT enter the leading D)<br>Modem Number                  |
|     |                         | /endor is a <u>R</u> emote TRACS system  | Modem<br>U.S. Robotics 56K Win INT  |
| Ste | ep                      |  | Action  |
|     | 3                       | Modify any of the ap   | ppropriate fields.  |
|     | 4                       | Click the Save butto   | n, and the modified vendor displays on the                                |
|     |                         | Vendor folder.   |   |

**Zip Codes** The **Zip Codes** window allows you to enter zip codes, along with their corresponding cities and states.

| Zip   | City           | State |   | X Done      |
|-------|----------------|-------|---|-------------|
| 30132 | DALLAS         | GA    |   |             |
| 32211 | JACKSONVILLE   | FL    |   | <u>₩</u> ew |
| 54703 | EAU CLAIRE     | WI    |   | 🖉 Edit      |
| 55009 | CANNON FALLS   | MN    |   | Ent.        |
| 55024 | FARMINGTON     | MN    |   | X Delete    |
| 55031 | HAMPTON        | MN    |   | -           |
| 55033 | HASTINGS       | MN    |   |             |
| 55044 | LAKEVILLE      | MN    |   |             |
| 55046 | LONSDALE       | MN    |   |             |
| 55055 | NEWPORT        | MN    | ] |             |
| 55056 | NORTH BRANCH   | MN    |   |             |
| 55057 | NORTHFEILD     | MN    |   |             |
| 55066 | RED WING       | MN    |   |             |
| 55068 | ROSEMOUNT      | MN    |   |             |
| 55075 | SO.ST. PAUL    | MN    |   |             |
| 55076 | INVER GROVE HE | MN    |   |             |
| 55077 | INVER GROVE HT | MN    |   |             |
| 55085 | VERMILLION     | MN    |   |             |
| 55104 | ST.PAUL        | MN    |   |             |
| 55105 | ST PAUL        | MN    |   |             |
| 55109 | NO ST PAUL     | MN    |   |             |
| 55116 | ST PAUL        | MN    |   |             |
| 55117 | ST PAUL        | MN    |   |             |
| 55118 | WEST ST. PAUL  | MN    | - |             |

## Zip Codes, Continued

**How To** To add a zip code, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click the New button, and the New Zip Code window displays. |



| 2 | Type the appropriate information in the following fields:                     |
|---|---|
|   | Zip Code  |
|   | <ul> <li>Zip Code</li> <li>City</li> <li>State</li> </ul>                     |
|   | • State   |
| 3 | Click the <b>Save</b> button, and the new zip code displays on the <b>Zip</b> |
|   | Codes window.   |

**How To** To edit an existing zip code, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click a bay name to select the zip code to be edited.                       |
| 2    | Click the <b>Edit</b> button, and the zip code to be edited displays in the |
|      | Zip Code Setup window.  |

# Zip Codes, Continued

| Zip Code Setup |                |
|----------------|----------------|
| Zip Code:      | ✓ Save         |
| 55056          | X Cancel       |
| City:          | P. Constanting |
| NORTH BRANCH   |                |
| State:         |                |
| MN 💌           |                |

| Step | Action  |
|------|---|
| 3    | Modify the appropriate information in any of the following fields:        |
|      | <ul><li>City</li><li>State</li></ul>                                      |
| 4    | Click the <b>Save</b> button, and the edited zip code will display on the |
|      | Zip Codes window.   |

**Profit Centers** The purpose of a **Profit Center** is to allow you to classify individual invoices. Once invoices are grouped into a center, you can run sales reports by Profit Center.

This can be useful if you run multiple businesses that share the same property and wish to divide up their profits, or if you wish to categorize invoices in other ways for the purpose of analysis – such as by salesman or promotion.

**Note:** Profit Centers can be configured by an individual machine or by the overall shop.

**How To** To add a new Profit Center, perform the following steps:

| Step | Action  |
|------|---|
| 1    | From the <b>Profit Center List</b> window, click the <b>New</b> button. |

| 🐝 Profit Center List |         | - |                   |
|----------------------|---------|---|-------------------|
| PROFITCENTER         | DEFAULT | * | X Done            |
| My Profit Center     | Y       |   |                   |
| Profit Center #2     | N       |   | <mark>₩</mark> ew |
|                      |         |   | 🛃 <u>E</u> dit    |
|                      |         |   | Dejete            |
|                      |         |   |                   |
|                      |         |   |                   |
|                      |         |   |                   |

## Profit Center, Continued

#### How To (continued)

| Step | Action  |
|------|---|
| 3    | Enter the name of the Profit Center, and check the box to the right |
|      | if you wish the new center to be your default for all work orders.  |
| 4    | Click the Save button, and the new Profit Center will appear in the |
|      | Profit Center List.   |

| Profit Center |                                    | Save    |
|---------------|------------------------------------|---------|
| [             | T Ihis is my Default Profit Center | X Cance |

Note: Profit Centers can be specified on the **Summary** tab of any work order.

| C Invoice #10015 / John Dee                              |                                       | 10.100.100 |
|--|---------------------------------------|------------|
| Summary   Worksheet   Detail   Totals                    |                                       | 1 Save     |
| Customer   | Viola Oder<br>Status Odo er in        | × Cancel   |
| Tang John Dee  | Invoice • 0                           | od Preview |
| THE PROPERTY   | Created Pholit Center                 | Ent        |
| miting): 3993 Bugati Viryton 16.4 8.9 L 9000 CC W16 DCHC | OV/15-2010 12-41 PM - My Plait Center | 100000     |

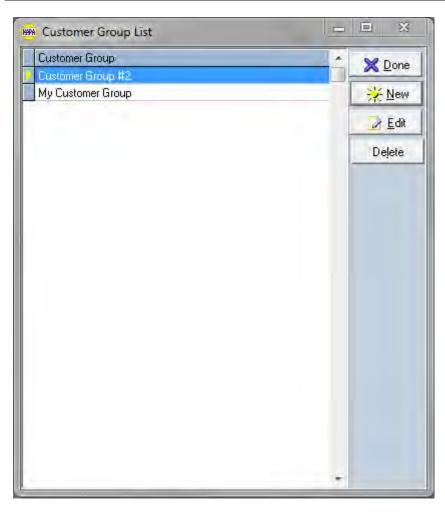
## **Customer Group**

Customer<br/>GroupsThe purpose of a Customer Group is to allow you to classify individual<br/>customers. Once customers are gathered together, you can run sales reports<br/>by Customer Group.

Customer Groups are also useful for classifying your customers for the purpose of sending out promotions, etc.

**How To** To add a new Customer Group, perform the following steps:

| Step | Action   |
|------|--|
| 1    | From the <b>Customer Group List</b> window, click the <b>New</b> button. |



## Customer Group, Continued

How To (continued)

| Step | Action   |
|------|--|
| 3    | Enter the name of the Customer Group.  |
| 4    | Click the <b>Save</b> button, and the new Customer Group will appear in the <b>Customer Group List</b> . |

| <mark>.√</mark> <u>S</u> ave |
|------------------------------|
| Cancel                       |
|                              |

Note: Customer Groups can be specified on the Edit page for any customer.

## Chapter 4: Internet and E-Mail

#### **Overview**

| Introduction        | Once you have set up your Internet options (detailed in Chapter Two), you will be able to send E-Mail using TRACS.   |  |  |  |  |
|---------------------|--|--|--|--|--|
|                     | The following methods of sending E-Mail are available in TRACS:  |  |  |  |  |
|                     | <ul> <li>Sending an E-Mail from a work order</li> <li>Sending an E-Mail from scratch</li> <li>Sending an E-Mail using a template</li> <li>Sending an E-Mail using the batch E-Mail system</li> </ul> |  |  |  |  |
| Before You<br>Begin | Before you begin to send customers E-Mail messages, be sure you have done<br>the following things.   |  |  |  |  |
|                     | <ul> <li>Setup your Internet Service</li> <li>Enter all necessary information required by the LINK/NET programs</li> <li>Enter customers' E-Mail addresses in their records</li> </ul>               |  |  |  |  |

• You must have the Internet connection open before sending *E-Mail*.

| Sending an E- | The E-Mail feature will show you how to |
|---------------|---|
| Mail from a   | send E-Mail messages from any type of   |
| Work Order    | work order. They all use the same       |
|               | function for this operation.            |
|               |   |

**How To** To send an E-Mail message from a work order, perform the following steps.:

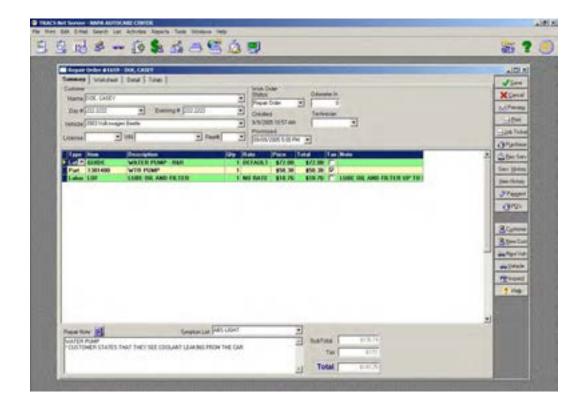
| Step | Action  |
|------|---|
| 1    | Click the customers and vehicles button to open the Customer List.  |
| 2    | Select a customer to work with, and double click on their entry<br>from the list, or select them and click <b>Edit</b> . This will open the Edit<br>Customer screen for that entry. |

| Customer List: 694 entries |                  | The second | delate alla | in the second se |  |
|----------------------------|------------------|------------|-------------|--|--|
| C Lines .                  | See 8            | Devil      |             | Addeus 2   | × Done   |
| DOE, ANNON                 | 1.000            | 351,9785   | 777 Steel   | -  |  |
| DOE, ANNA                  |                  |            | 555 Street  | -  | Q Ent  |
| DOE, AUDREY                |                  | -          | 777 Street  | 1.1  | >Id  |
| DOE CASE?                  | 222 2222         | 222 2222   | 222 Cased   |  | and the second   |
| DOE, CHRIS                 | 2000             | 585,8585   |             | -  | 3 tim  |
| DOE.EVE                    |                  | 222 2222   | 333 Stinet  |  | New Vety   |
| DOE. GERALD                | 444.4484         | 222.2222   |             |  | And in case of the local division of the loc |
| DOE, HADEN                 | 444,4444         | 111 3113   |             | 10   | indicted and   |
| DOE, JANE                  |                  |            | 111 Stoet   |  | Coll and All Public Collins  |
| DOE, JOHN                  |                  | 555,5555   |             |  | Beet Holdy   |
| DOE, JUDY                  | and and a second |            |             |  | Locations  |
| DOE, KAREN                 | 111.1111         |            |             |  | Contract Charlotter  |
| DOE, LAUREN                | 222 2222         | 777.7277   |             |  | MagEil   |
| DOE, USA                   | 111.1111         | 111.1111   | 111 Sheet   |  | Chiersh  |
| DOE, MICHAEL               |                  |            | 444 Street  | -  | 2 Carlotter  |
| DOE, MILES                 |                  | 777,7777   | 333 Street  |  | -Despace.  |
| DOE, NANCY                 |                  | 203.3333   |             | 10   |  |
| DOE, NED                   | 222 2222         |            | 555 Street  | 1  | gringest .   |
| DOE, PATRICK               |                  | 333 3333   |             |  | E test   |
| DOE, QUINCY                | 777.7777         | 222 2222   |             |  |  |
| DOE, RYAN                  |                  | 111.1111   |             | 1  | 16 任任法法  |
| DOE, SAM                   | 558 5055         | 89380      | 113 Steet   |  |  |
| DOE, WARER                 | 222 2222         | 111.1111   | 303 Steet   |  | ? Help   |
| in .                       |                  |            |             | 2  |  |

| Step | Action   |
|------|--|
| 3    | The field labeled E-Mail Address is where you should add the |
|      | customer's address. An example of an E-Mail address is       |
|      | casey@mycompany.com. The customer will have to provide you   |
|      | with this information. NOTE! Customers must have an E-Mail   |
|      | address in their customer information to be able to send an  |
|      | E-Mail directly from a work order.                           |

| Edit Customer - DOE, CASEY                            |                |                                    |
|---|----------------|------------------------------------|
| Last Name   | First Name     | 1 20m                              |
| OOE   | (CASEY         | X Cano                             |
| Company   |                | S. Hero                            |
| eneral   Billing Into   Accounts                      | 100x 1         | New Pag                            |
| Title Customer Type<br>[Individual<br>Day Number Ever |                | Date of<br>Circation<br>(4/12/2006 |
| Contact Name EMail Address Ecarey@mycompany.com       | Contact Number | Last Service                       |
| Addens<br>Steet<br>222 Steet                          | _              | Last Thank You                     |
| Additional  | -              |                                    |
| Zo Code City  | State          |                                    |

| Step | Action  |
|------|---|
| 4    | When the E-Mail address has been added, click the <b>Save</b> button. |
|      | This will return you to the customer list. You may continue to add    |
|      | information by selecting other customers. Now we will send an E-      |
|      | Mail using a work order.  |
| 5    | Open a work order of your choice. Be sure the customer you have       |
|      | chosen has an E-Mail address entered in their information             |
| 6    | The work order you have chosen will appear. We are using a repair     |
|      | order. Click the word E-Mail on the top menu.                         |



| Step | Action   |  |
|------|--|--|
| 7    | This will activate a drop menu with the option "Preview."        |  |
|      |  |  |
|      | E-Mail<br>Preview  |  |
| 8    | Click on <b>Preview</b> and an E-Mail message will be generated. |  |

| C Pal Preview  |           |
|--|-----------|
| To Joarey@eycompany.com  | 2 Send    |
| Euliped Stepar Order   | a ser     |
|  | Save As   |
| Menage: Stort Dark   | X Cartoni |
| Read & Origing "Linform<br>The State of the St |           |

| 9  | The message above as well as any message you may generate can<br>be modified by clicking on the message and typing in what you<br>need to add. |
|----|--|
| 10 | Once the message is complete and you are ready to send it, click the <b>Send</b> button.   |
| 11 | You have now sent an E-Mail.   |

| Sending an E-Mail from | The E-Mail feature will show you how to send any type of E-Mail |
|------------------------|---|
| Scratch                | message using TRACS.  |

**How To** To send an E-Mail message not associated with a work order, perform the following steps:

| Step | Action   |  |  |
|------|--|--|--|
| 1    | Choose TRACS E-Mail from the File drop-down list.        |  |  |
|      | Expert +<br>Eaclup<br>TRACS E-Mail<br>Lodis<br>Reconnect |  |  |
|      | Preferences *<br>Exit                                    |  |  |
| 2    | Click on New to create a new E-Mail.                     |  |  |



#### How To (continued)

| Step | Action   |
|------|--|
| 3    | Type in the E-Mail address, subject, and message.  |
| 4    | To send to more than one person, separate the E-Mail addresses by commas.                |
| 5    | Once the message is complete and you are ready to send it, click the <b>Send</b> button. |



How To (continued)

| Step | Action   |  |
|------|--|--|
| 6    | Once you have clicked Send, you will return to your E-Mail         |  |
|      | outbox. If your Internet connection is available, then all E-Mails |  |
|      | in the queue will be sent.   |  |

| TRACS E-Mail   |                   | _101×        |            |
|--|-------------------|--------------|------------|
| Outox Sent Templates                                 |                   |              | X Done     |
| To Subject<br>Schnamb (%) This is an E-Mail subject. | Message<br>Heliol |              | (Cland Du  |
|  |                   |              | - New      |
|  |                   |              | > Edit     |
|  |                   |              | X Delete   |
|  |                   |              | 🗙 Delete & |
|  |                   | -            | C Betreat  |
|  |                   |              | Queue Ted  |
|  |                   |              | Setup      |
|  |                   |              |            |
|  |                   |              |            |
|  |                   | <u>ل</u> تر. |            |
|  |                   | 2            |            |

| Step | Action  |  |
|------|---|--|
| 7    | Once your E-Mail is sent, it will disappear from the Outbox. If           |  |
|      | you click on the <b>Sent</b> tab, you will see all recently sent E-Mails. |  |
|      | This shows that your E-Mail was successfully sent.                        |  |
| 8    | You have now sent an E-Mail.  |  |

| TRACS E-Mail<br>Abox Sent Template | a                                  |                                      |        | - III<br>X Done |
|------------------------------------|------------------------------------|--------------------------------------|--------|-----------------|
| Ser/ Date<br>4/12/2006 7:26:49 PM  | To<br>phomith@nycompany.com.coury@ | Subject<br>This is an E-Mail subject | Nett A | <u>國</u> 第1110  |
|                                    |                                    |                                      |        | 2 Now           |
|                                    |                                    |                                      |        | ₩ E49           |
|                                    |                                    |                                      |        |                 |
|                                    |                                    |                                      |        | 🗶 Delete §      |
|                                    |                                    |                                      |        | C Beles         |
|                                    |                                    |                                      |        | Queue Ted       |
|                                    |                                    |                                      |        | Sepup           |

| E-Mail Templates | E-Mail templates allow you to save E-Mail messages to send    |
|------------------|---|
|                  | again at a later date, or to send the same type of message to |
|                  | different recipients.   |

**How To** To create and use an E-Mail template, perform the following steps:

| Step | Action   |  |
|------|--|--|
| 1    | In the <b>TRACS E-Mail</b> window, click on <b>New</b> and create a new E- |  |
|      | Mail as explained in the previous section.                                 |  |
| 2    | Instead of clicking Send to send the E-Mail, click on Save As to           |  |
|      | save the current E-Mail message as a template.                             |  |
| 3    | Choose a name for the template. Click Save.                                |  |

| E-Mail Preview   |   |                |
|--|---|----------------|
| To: casey@mycompany.com  |   | 🖄 <u>S</u> end |
| Subject : Generic E-Mail Subject   |   | Save .         |
| the second s |   | Save As        |
| Message: K Spell Check   |   | 🛛 🗶 Cancel     |
|  | Save E-mail Template As Template Name Generic | Save<br>Cancel |

# E-Mail Templates, Continued

How To (continued)

| Step | Action  |
|------|---|
| 4    | Your saved template will appear under the <b>Templates</b> tab of the |
|      | TRACS E-Mail window.  |
| 5    | To use a template later, return to this tab and double click on the   |
|      | template, or click on Edit with the template selected.                |

| Abox Sent Templates            |                        |  |           | X Done  |
|--------------------------------|------------------------|--|-----------|---|
| Template Name                  | Subject                | Last Changed Date                            | Message + | (Server)  |
| Rec Serve                      |                        | 11/28/2005 2:29:04 P                         |           | STATISTICS.   |
| Transmission Flush             |                        | 11/29/2005 8:26:02 A                         |           | * New   |
| Electronic Tune Up<br>Generico | Companya Prov          | 11/29/2005 8:27:58 A<br>4/12/2006 7:35:49 Ph |           | > Edi   |
| La enerico                     | Generic E-Mail Subject | 4/12/2006 / 35145 Ph                         | 176545-81 | and the second se |
|                                |                        |  |           | X Delet   |
|                                |                        |  |           | X Delete  |
|                                |                        |  | _         | C Behe  |
|                                |                        |  |           | Queue Te  |
|                                |                        |  |           | 1000  |
|                                |                        |  |           | Setur   |
|                                |                        |  |           | Setu:   |
|                                |                        |  |           | an Seju   |

# E-Mail Templates, Continued

| Step | Action  |
|------|---|
| 6    | You can edit the saved subject and message of the template E-Mail |
|      | by typing in the boxes.   |
| 5    | Enter an E-Mail address for the person to which you are sending   |
|      | the E-Mail.   |

| 🗰 E-Mail Preview   |                   |
|--|-------------------|
| To:  | 🖄 <u>S</u> end    |
| Subject : Generic E-Mail Subject   | - Save            |
| and the second sec | 🚽 Save <u>A</u> s |
| Message : 😺 Spell Check  | <br>🔀 Cancel      |
| This is a generic email!   | -                 |
|  |                   |
|  |                   |
|  |                   |
|  |                   |
|  |                   |
|  |                   |
| /  | -                 |

| 6 | Click <b>Save</b> if you want to save any changes that you made to the subject or message in the template.      |
|---|---|
| 7 | Click Send to send the E-Mail.  |
| 8 | You have now sent an E-Mail. The template will still be available for later use under the <b>Templates</b> tab. |

**Sending an E-Mail using** The E-Mail feature will show you how to send an E-Mail to a specific group of customers.

**How To** To query a group of customers and send an E-Mail to all of them, perform the following steps:

| Step | Action  |
|------|---|
| 1    | From the <b>Customer List</b> , click on <b>Find</b> in order to make a query |
|      | on your list of customers. (A "query" is a search that will yield a           |
|      | group where each customer has a specific characteristic in                    |
|      | common. For example, you can query for all customer names                     |
|      | beginning with the letter D, or for all customers with a certain              |
|      | model of car.   |

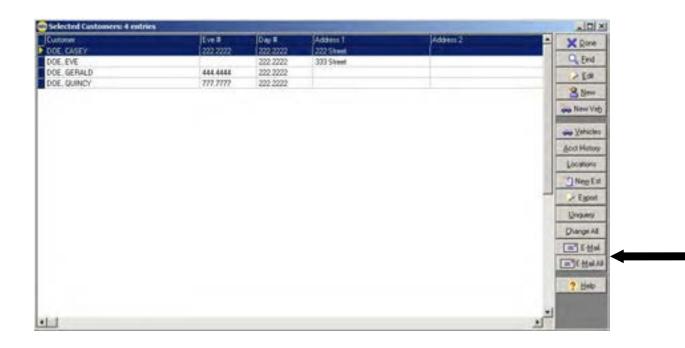
| Customer                      | Eve #                 | DAY #           | Address 1          | Addwir 2  | XD             |
|-------------------------------|-----------------------|-----------------|--------------------|---|----------------|
| ACEVEDO HECTOR                | and the second second | 6125564405      | STREET.            | ANNO AND ANNO ANNO ANNO ANNO ANNO ANNO A  | -              |
| ACKER, JASON                  |                       | 612-282-9268    |                    |   | C. End         |
| ADAMS, EARL                   |                       | 10000           |                    |   | 384            |
| ADAPTEK, DON                  | 651-451-6352          | 651 451 6351    | 123 WHITE STREET   | APARTMENT 2D  |                |
| AHERINS, ILENE                | 1 12 12 12 12 12 12   | 1000            |                    |   | B.Smi          |
| AHRENS, ED                    |                       | 23-3315         | 2965132ND 51       |   | and New Vet    |
| AHRENS, JASON                 |                       | 651.423.6790    | 3554 144TH ST W    |   | and the second |
| AISENDREY, BRIAN              |                       | (51-733-9224    | 4195 150TH. ST.W.  |   | - Vencleo      |
| ALEAREZ, ANGELES              |                       | 651-322-5090    | 14949 COLORADO AV  |   | an Tauran      |
| ALERECHT, JOHN                |                       | 651-214-4303    | 9600 EVELETH CRT   | 242   | Anict History  |
| ALES, MARK DISCOUNT CARD #165 |                       | 651 698 2189    | 1238 WELLESLEY     |   | Locatione      |
| ALLERY, JOHN                  |                       | 952-898-3020    | 179458 JUBILY WAY  | and the second se | Pocanose       |
| AMBUEHL KEN                   |                       | 612-919-0954    | 800 W 65TH ST      | 202   | NegTu          |
| AMMEND, FICHARD               |                       | 952-915-1111    | 1000 LINCOLN ST    |   |                |
| ANDERSON, BART                |                       | 612-382-4554    | 5601 100TH ST W    |   | 位于"生活"         |
| ANDERSON, BECKY DISC GARD 824 |                       | 851-322-4659    | 4301 159TH CR1 W   |   | (Inen-error)   |
| ANDERSON, BOB DISC CARD #24   |                       |                 | 4301 159TH CT. W.  |   |                |
| ANDERSON, SCOTT               |                       | 612-605-0955    | 82461ST AVE S      |   | Division       |
| ANDREASEN, CLAY               |                       | 651-306-5191    | 12900 SHANNON PKWY |   | I CHA          |
| ANDREASEN, CLAYTON            | 309-5951              | 322-1228        |                    |   |                |
| ANDREWS, SCOTT                |                       | 651-245-4997 CE | i 4337 358TH ST    |   | - 1 244A       |
| ANDRINGA, ERIC                | 282 4979              | 1-507-664-9228  | 104 SUMNER ST. E.  |   | - CONTRACTOR   |
| ANGELO, MIKE                  |                       | 651-270-3461    | 4212 147TH 5T W    |   | 7 Ento         |
| ANGLIN, ROBERT                |                       |                 |                    |   |                |
| ANGLIN, ROBERT                |                       |                 |                    |   |                |

| Step | Action   |
|------|--|
| 2    | To search, enter your criteria. In the example below, we are       |
|      | searching for all customers with a specific daytime phone number.  |
| 3    | You can also search by partial criteria using an asterisk (*). For |
|      | example, to search for all customers with a last name beginning    |
|      | with A, type "A*" into the Last Name field. To search for all      |
|      | customers who have cars made from 2000 on, type "2*" in the        |
|      | Year field under the Vehicle tab.                                  |

| ustomer Query By   |                |              |               |          |           |
|--|----------------|--------------|---------------|----------|-----------|
| Customer   | Vehicle Addits | mal          |               |          | X Done    |
| act Name   | First Name     |              | Customer Type |          | Q End     |
|  |                |              | 1             | <u>_</u> | 1 Dea     |
| ompany   |                |              | ng Number FAX | Number   | 10.000    |
|  | 10000          | 222 2222     |               |          | Next Page |
| ontact Name  | Contact Nu     | nber Bill To |               | Title    | ? Help    |
| and a second second  |                |              |               |          |           |
| Mail Address   |                |              |               |          |           |
|  |                | -            | 200           |          |           |
| Date of  | Address        | Billing Add  | han           |          |           |
| Caeation   | Steel          | Steel        |               |          |           |
| 2  | 1              | 11 12        |               |          |           |
| Last Service   | Additional     | Additiona    | 4:            |          |           |
| and the second s | -              |              |               |          |           |
| Last Reminder  | City           | City         |               |          |           |
| Contractor of the local division of the loca | 1              |              |               |          |           |
| Last Thank You   | Stale Zip Code | State        | Zip Code      |          |           |
|  |                |              |               |          |           |
|  | J.E.           |              |               |          |           |
| obes   |                |              |               |          |           |
|  |                |              |               | <u>-</u> |           |
|  |                |              |               | 24       |           |
|  |                |              |               |          |           |

How To (continued)

| Step | Action   |
|------|--|
| 4    | After you have entered your criteria, click Find.                        |
| 5    | You will return to a customer list that contains only the customers      |
|      | that fit your search criteria.   |
| 6    | From here, you can either E-Mail one selected customer by                |
|      | clicking <b>E-Mail</b> , or you can E-Mail the entire group of customers |
|      | by clicking E-Mail All.  |



# Batch E-Mails, Continued

How To (continued)

| Step | Action  |
|------|---|
| 7    | After choosing E-Mail or E-Mail all, you will be at the E-Mail    |
|      | templates window. From here, you can either double click or click |
|      | Edit with a template selected to E-Mail from a template, or you   |
|      | can click New to construct an E-Mail from scratch.                |

| Ibox Sent Templates |                        |   |           | X Done              |
|---------------------|------------------------|---|-----------|---------------------|
| Template Name       | Subject                | Last Changed Date                           | Message * | 12 Serie Du         |
| Rec Serve           |                        | 11/28/2005 2:29:04 1                        |           | and an other states |
| Transmission Flush  |                        | 11/29/2005 8:26:02/                         |           | *New                |
| Electronic Tune Up  | Generic E-Mail Subject | 11/29/2005 8:27:58 /<br>4/12/2005 7:35:48 P |           | 101                 |
| 1                   |                        | and the second second                       |           | X Delete            |
|                     |                        |   |           | X Delete A          |
|                     |                        |   | 1         | C Bebest            |
|                     |                        |   |           | Queue Test          |
|                     |                        |   |           | Setup               |
|                     |                        |   |           |                     |

## Batch E-Mails, Continued

| Step | Action   |
|------|--|
| 8    | If you are sending an E-Mail to the group you have just queried, |
|      | the address will read "Batch Customer Group." Edit your E-Mail,  |
|      | and click Send Batch to send the E-Mail.                         |



| Step | Action  |
|------|---|
| 9    | If you are sending an E-Mail to an individual customer you have             |
|      | just selected, the address listed in their customer profile will be in      |
|      | the address field. Note: If the customer does not have an E-                |
|      | Mail address listed in their profile, you cannot send them an               |
|      | <b>E-Mail using this method.</b> Edit your E-Mail, and click <b>Send</b> to |
|      | send the E-Mail.  |

| I-Hall Previous - Selected Castomer   |   | -101     |
|---|---|----------|
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| Contraction of the second s |   | J Savada |
| Ressage 🛃 Spel Dack   |   | × Carcel |
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|   |   |          |
|   |   |          |
|   |   |          |
|   |   |          |
|   |   |          |
|   |   | all.     |

### **Bookmarks**

**Bookmarks** The Bookmarks feature in TRACS gives you the ability to add frequented website URL's and save them for future use.

**How To** To open a bookmarked website, perform the following steps.:

| Step | Action   |
|------|--|
| 1    | Select the <b>Bookmarks</b> drop-down menu.                              |
| 2    | Select the desired webpage name - for example, "NAPA TRACS."             |
|      | The Internet browser will open inside TRACS.                             |
| 3    | To close a browser window, clik <b>Done</b> in the upper right corner of |
|      | the window.  |
|      | Note: You can open more than one browser window at a time.               |

Bookmarks Windows Help Manage Bookmarks... NAPA TRACS (Empty)



## Bookmarks, Continued

**How To** To add a bookmark, perform the following steps.:

| Step | Action  |
|------|---|
| 1    | Select the Bookmarks drop-down menu.                              |
| 2    | Select Manage Bookmarks.  |
| 3    | In the <b>Bookmarks</b> window, click <b>New</b> .                |
| 4    | Type the name of the website into the box on the left and the URL |
|      | for the website in the box on the right.                          |
| 5    | Click Save.   |
| 6    | The new bookmark will now appear under the <b>Bookmarks</b> drop- |
|      | down menu.  |

| - JSen   |
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| and the second se  |
| X Carcel   |
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| 3  |
|  |

| Bookmarks | Windows    | Help |
|-----------|------------|------|
| Manage I  | Bookmarks. |      |
| NAPA TR   | ACS        |      |
| 1 NAPA    |            |      |
| 2 Google  |            |      |

# Bookmarks, Continued

**How To** To delete a bookmark, perform the following steps.:

| Step | Action   |
|------|--|
| 1    | Select the <b>Bookmarks</b> drop-down menu.                          |
| 2    | Select Manage Bookmarks.   |
| 3    | In the <b>Bookmarks</b> window, select the bookmark that you want to |
|      | delete.  |
| 4    | Click <b>Delete.</b>   |

#### **Chapter 5: Items**

### **Item Lists**

**Displaying Item Lists** There are several ways to get to a list of items in TRACS.

1. the Work With Items icon



2. the Items menu option under Search



3. the Item menu option under List



With each of the above, the **Find Item** window appears. Simply click **Find** without any search criteria to yield a list of all available items.

#### Item Lists, Continued

Item Lists An Item list contains the following tabs:

- Labor
- Parts
- Sublet
- Notes
- Charges
- All Items

With each of these tabs, you can

- add new items
- edit, copy, and delete existing items
- find items
- perform the **Parts Fast!** function

The categories at the top of the columns (Item, Cost, Description, etc.) can be dragged and dropped so that they appear in a different order. Each workstation remembers these position changes. Column position changes are available in the following windows:

- o Work Order
- Work Order List
- o Item List
- Customer List
- o Vehicle List
- o Schedule
- Physical Inventory Session List (used with TRACS Wireless Assistant)
- Physical Inventory Session (used with TRACS Wireless Assistant)

Since finding items and performing the **Parts Fast!** function are the same in each of the folders, these tasks will be covered at the end of the **Items** section.

*Note:* Running the NAPA Pricing Diskette updates both the Parts Catalog and the Items List.

## Labor

| Copying It | The <b>Copy</b> feature allows you to copy items to an open work order. To use<br>the copy feature, you must have an open work order. See the <b>Adding Items</b><br><b>to a Work Order</b> section at the end of this chapter for more information.  |
|------------|---|
| Labor Fol  | der The Labor folder is used to enter information about the labor items on a customer repair order.   |
|            | The Labor folder contains the following fields:   |
|            | <ul> <li>Item</li> <li>Description</li> <li>List</li> <li>Cost</li> <li>Qty (Quantity)</li> <li>Rate Name</li> <li>Category</li> <li>Sales Account</li> <li>Note</li> <li>The Sub Items footer contains the following fields:</li> <li>Item</li> <li>Description</li> <li>Mfg</li> <li>List</li> <li>Tax</li> <li>Cost</li> <li>Note</li> </ul> |
| How To     | To add data in your Labor folder, perform the following steps:  |
| Step       | Action  |
| 1 0        | Click on the top of the Labor folder, and the Labor folder isplays.   |

## Labor, Continued

#### How To (continued)

| Dete<br>Zwih          | TWO WHEEL ALIONMENT                            | Cent      | the Category                         | Caller Account             | -                                     | - 19 Am  |
|-----------------------|--|-----------|--------------------------------------|----------------------------|---------------------------------------|----------|
| 464                   | FOUR WHEEL ALIGNMENT                           | In such a | 143.00 ALIGAMENT                     |                            |                                       | 2.10     |
| ACINE                 | AR CONDITIONING SERVICE                        | \$25.00   | \$49.95 AC                           | Labor Sales                |                                       | 00.0     |
| AUGNAN                | FOUR WHEEL ALIGNMENT                           | \$40.00   | \$79.98 ALIGAMENT                    | Labor Sales                |                                       | Q De     |
| AUGNOTO               | STANDARD ALIGNMENT                             | \$3.00    | \$55.99 ALIGNMENT                    | Labor Sales                |                                       | OF CH    |
| ASSIST                | Arost with labor                               |           |                                      | Labor Sales                |                                       |          |
| Lingth at             | BALANCE TIPE                                   |           |                                      | Labor Sales                |                                       | × Dete   |
| 121                   | INSTALL BATTERY                                |           | \$5.00 ELECTRICAL                    |                            |                                       | Bate Fas |
| INAKE FLUSH           | PLUSH BRAFES                                   |           |                                      | Labor Sales                |                                       |          |
| DROWT                 | FRONT BRAKE LABOR 2 WHEEL DRIVE                |           | \$70.00 BNAKES                       | Labor Sales                |                                       | OnFed    |
| ERMITERA              | FRONT BRAKE LABOR FOUR WHEEL ORIVE             |           | a second second second second second | Labor Sales                | -                                     | Dargel   |
| ERNEAT                | REAR BRAKE LABOR TWO WHEEL DRIVE               |           | \$70.00 BRHARES                      | Labor Sales                |                                       | 2.20.    |
| BRKREARDISK<br>DHE CK | REAR BRAKE LABOR DISK<br>DHECK DAMAGING SYSTEM |           | \$100.00 BRAKES                      | Labor Sales<br>Labor Sales |                                       | Advil    |
| CALLAN AGAVLT         | CLEAN & ACLUST REAR BRAKES                     | -         | \$15.95<br>\$19.99 \$544.05          | Labor Sales                | -                                     | Update   |
| DAUMONT               | DIAGNOSTIC                                     |           | \$80.00 ELECTRICAL                   | Newsley Western            |                                       |          |
| DISCOUNT              | DISCOUNT                                       |           | SHOULDECTION                         | Labor Sales                |                                       | THO HA   |
|                       | - Provident                                    |           |                                      | Labor Signa                |                                       | OPDH     |
| d) literal            |  |           | and the state of the state           |                            |                                       |          |
| Type Item             | Decoption Mg Dy Cost Last Carego               | Cond      | tion Location                        |                            | ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ | Get Qv   |
|                       |  | 200       | CALL AND ADD                         |                            |                                       | -        |
|                       |  |           |                                      |                            |                                       | 7 294    |

| Step | Action  |
|------|---|
| 2    | Click the New button, and the New Item form displays. |

|              | Tare |         |     | Descrip                 | 601                        |          | 1 Sere  |
|--------------|------|---------|-----|-------------------------|----------------------------|----------|---------|
| .e.e         |      |         |     |                         | State in the second second |          | X Caro  |
| lort         | Lat  | - 0     | 1   | Rate NO RATE            | Billed Hrs. Categor        |          | Set 221 |
| Look.Cont    | I Lo |         |     | 100000                  |                            | ~        | Edition |
| eles Account |      | 10000   | 200 |                         | Terffide                   | 200      | Delion  |
| abor Salen   | 1    | Páne    | PW  | skude in Shop Suppliers | Follow Tax Date            | alicator | Babber  |
| - 2          |      |         |     |                         |                            |          | Erben   |
|              |      |         |     |                         |                            | -        | ENPO    |
|              |      |         |     |                         |                            |          | ? 194   |
|              |      |         |     |                         |                            | =1       | 1000    |
| d-lens.      |      |         |     |                         |                            |          |         |
| Date its     |      | Cetappe | n   | Oy Mg                   | List Tay Cast No           | 16 A     |         |
|              |      |         |     |                         | 101                        |          |         |
|              |      |         |     |                         |                            |          |         |
|              |      |         |     |                         |                            |          |         |
|              |      |         |     |                         |                            | -        |         |
|              |      |         |     |                         |                            | -        |         |

## Labor, Continued

How To (continued)

| Step | Action  |  |  |  |  |
|------|---|--|--|--|--|
| 3    | Type the desired item information in the following fields:                |  |  |  |  |
| 5    | Type the desired item information in the following herds.                 |  |  |  |  |
|      | • Item (example: lube, oil, and filter)                                   |  |  |  |  |
|      | <ul> <li>Description (of the above item)</li> </ul>                       |  |  |  |  |
|      | <ul> <li>Cost</li> </ul>  |  |  |  |  |
|      | List  |  |  |  |  |
|      |   |  |  |  |  |
| 4    | • Billed Hrs. (Hours)   |  |  |  |  |
| 4    | Delete the default quantity of one in the <b>Qty</b> (Quantity) field if  |  |  |  |  |
|      | necessary and enter correct numeric quantity.                             |  |  |  |  |
| 5    | Scroll down the lists in the following fields to highlight the desired    |  |  |  |  |
|      | information:  |  |  |  |  |
|      |   |  |  |  |  |
|      | <ul><li>Rate</li><li>Category</li></ul>                                   |  |  |  |  |
|      |   |  |  |  |  |
|      | • Sales Account   |  |  |  |  |
|      |   |  |  |  |  |
|      | <i>Note:</i> The <b>Rate</b> field has a default value of NO RATE and the |  |  |  |  |
|      | Sales Account field has a default value of Labor Sales.                   |  |  |  |  |
| 6    | Click the <b>Active</b> box to deselect, if necessary.                    |  |  |  |  |
| 7    | Click the <b>Include in Shop Supplies</b> box to deselect, if necessary.  |  |  |  |  |
| 8    | Click the <b>Never Tax</b> box to change the tax rule, if necessary       |  |  |  |  |
| 9    | Add any <b>Sub Items</b> as necessary. (See the next section for more     |  |  |  |  |
|      | information on adding Sub Items).   |  |  |  |  |
| 10   | Click the <b>Save</b> button. You have now entered the new labor item.    |  |  |  |  |
| 10   |   |  |  |  |  |

**How To** To add a **Sub Item** to an item, perform the following steps:

| Step | Action  |
|------|---|
| 1    | From the New Item or Edit Item window, right click in the Sub |
|      | Items window and select Add Sub Item, or click the Add Sub    |
|      | Item button on the right.                                     |

| Type Bem   | Descriptio                        | n                                     |        | J Save        |
|--|-----------------------------------|---------------------------------------|--------|---------------|
| Labor 7  |                                   |                                       |        |               |
| Cost List  | Qty Rate                          | Billed Hrs. Category                  |        | SHUDOH        |
|  | 1 NO RATE -                       |                                       | *      | Add Sub-Iter  |
| Lock Cost T Lock List  |                                   |                                       |        | Edit Sub-Iter |
| Sales Account  | Active 🕼 Include in Shop Supplies | Tax Rule<br>Follow Tax Classification |        | Del Sub-Iter  |
| and the second s | Ronke IA sucros o pubbiorobies    | C Never Tax                           |        | EddNed        |
| Note 🛃   |                                   | 1                                     | _      | EditBreviou   |
| The Party of the Art o |                                   |                                       |        |               |
|  |                                   |                                       | E      | EGRUPES       |
|  |                                   |                                       | 1      |               |
|  |                                   |                                       | 1      | Editurite     |
|  |                                   |                                       | N<br>N | Editures      |
| Appendix and a second se  | Verception Div Mina L             | It Tes Conto Note                     | N N    | Editurite     |
| Type Item [  | Description Description           | it Tes Cont Note                      | k<br>K | Editurite     |
| Add Sub-Item   | Percription Oty Mig L             | it Tes Cont Note                      | N N    | EditUPEs      |
| Add Sub-Item<br>Ed: Sub-Item<br>Deleter Sub-Item   | Description [Qty. [Mfg [L]        | at Teo Cost Note                      | 4<br>4 | EditUPEs      |
| Add Sub-Item   | Description Oty Ming L            | it Tes Cont Note                      | N N    | EditUPEs      |

## Labor, Continued

#### How To (continued)

| Step | Action  |
|------|---|
| 2    | Choose information about the Sub Item from the drop-down lists. |
|      | Click Save.   |
|      |   |
|      | Note: The Sub Item must be an item already included in          |
|      | TRACS' inventory. If it something new, you must add it as a     |
|      | new item before you are able to use it as a Sub Item.           |

| Item Type   | Item      | Qty  | 🚽 Save   |
|-------------|-----------|------|----------|
| 2           |           |      | 🔀 Cance  |
| Description |           |      | ? Help   |
| Mfg         | Category  | Cost |          |
| Location    | Condition | List |          |
| Note        |           |      |          |
|             |           |      |          |
|             |           |      | <b>.</b> |

## Labor, Continued

#### How To (continued)

| Step | Action  |
|------|---|
| 3    | Once a Sub Item is associated with an item, it can be viewed from<br>the items list window. However, you cannot edit the Sub Items<br>directly from there. To work with Sub Items, you must click <b>Edit</b><br>with the original item selected. |

| Labor Fais | Sublet Notes Diveges All Tests     |   | Contraction of the local division of the loc | Dies             |
|------------|------------------------------------|---|--|------------------|
| SHLANCE    | Demetrice                          | Kont Lift Kangay Salin Account                      | · 1 7  | - Siene          |
|            | BALANCE THE<br>MOUNT & BALANCE THE | \$6.00 TMES Labor Sales<br>\$8.00 TIRES Labor Sales |  | 10               |
| FATCH      | TREPERAR PATCH                     | \$15:00 TIRES Later Sales                           | -  | -                |
| 100        | TIPE REPAIR PLUG                   | \$10:00 TIMES Labor Sales                           |  | Erd              |
| RUTATE     | ROTATE TIRE                        | \$10.00 TVRES Labor Sales                           | 9  | Copy             |
| HOTEN.     | ROTATE AND BALANCE                 | ETB190 TURES Labor Sales                            | ×  | Debra            |
|            |                                    |   | 1 Per  | 5 Faill          |
|            |                                    |   |  | and              |
|            |                                    |   | Ove  | nge Ad           |
|            |                                    |   |  | dert             |
|            |                                    |   | U  | pdape .          |
|            |                                    |   | . 350  | Q Hery           |
|            |                                    |   | - 09   | 1000             |
| Sub Trens  |                                    |   |  | 1 House          |
| Los Item   |                                    | Canagony Condition Location                         | A 54   | g Hunn<br>R Ginn |
| Flat VS    | WALVE STEM 1 BITTS BITTS           | TIMES   |  | e gen            |
| Flat VS    |                                    | TIMES   |  |                  |

**How To** To edit data in your **Labor** folder, perform the following steps:

| Step | Action                                 |
|------|--|
| 1    | Click to select the item to be edited. |

| Zerik.      | DVD VARIEL ALCOMENT                | (Cear )   | 21510    |   | See Arount<br>Labor Selec  |   | 梁前   |
|-------------|------------------------------------|-----------|----------|---|--|---|--|
| MA          | FOUR WHEEL ALIGNMENT               |           |          | ALIGAMENT   |  |   | 2.1  |
| ACINE       | AR CONDITIONING SERVICE            | \$25.00   |          | 1 Page 1 | Labor Sales  |   |  |
| ALCONOM!    | FOUR WHEEL ALIONMENT               | \$40.00   |          | ALIGAMENT   | feature contraction of the second sec |   | Q.B  |
| AUGAGITO    | STANDARD ALIGNMENT                 | \$3.00    |          | ALIGNMENT   |  |   | 4 6  |
| ASSIST      | Acust with labor                   |           |          |   | Labor Sales  |   |  |
| Logdhill.   | BALANCE TIPE                       |           | \$6.00   | TIRES   | Labor Sales  |   | X De   |
| 121         | INSTALL BATTERY                    |           | \$5.00   | ELECTRICAL  | Labor Sales  |   | Paters   |
| IFARE FLUSH | FLUSH BRAKES                       |           |          |   | Labor Sales  |   | Casting  |
| DRAWL       | FRONT BRAKE LABOR 2 WHEEL DRIVE    |           | \$70.00  | BIWES   | Labor Sales  |   | UnTe   |
| DENTIFIE    | FRONT BRAKE LABOR FOUR WHEEL DRIVE |           | \$100.00 | BRWES   | Labor Sales  |   | -  |
| ERRIEAR     | REAR SPAKE LABOR TWO WHEEL DRIVE   |           | \$70.00  | BRAYES  | Labor Sales  |   | Duron  |
| REFERENCESS | REAR BRAKE LABOR DISK              |           | \$100.00 |   | Labor Sales  |   | - Admit  |
| DHE DK      | DIECK CHARGING SYSTEM              |           | \$15.95  |   | Labix Sales  |   | and the local division of the local division |
| HEAN ADJUST | CLEAN & AQUUST REAR BRAKES         |           |          |   | Labir Sales  |   | Upda   |
| DIAGAAJSTIC | DHADNOSTIC                         |           | \$80.00  | <b>DLECTRICAL</b>   |  |   | THOM   |
| DISCOUNT    | DISCOLINT                          |           |          |   | Labor Sples  |   |  |
| d lines     |                                    |           |          |   |  |   | OPDH   |
| Type (hes   | Demoples Mg Dy Die Lat Care        | ore Conde | ian lite | ator  |  | 2 | Geige  |
|             |                                    | 1000 C    |          |   |  |   | and the local division of the local division |
|             |                                    |           |          | _   |  |   | 1.8  |

## Labor, Continued

#### How To (continued)

| Step | Action   |
|------|--|
| 2    | Click the <b>Edit</b> button, and the completed form for that item |
|      | displays.  |

| tdit Item :   | 784  | and the second se |    | 2                     |
|---------------|--|---|----|-----------------------|
| Type          | ltem Des   | cipton  |    | J Save                |
| Labor 💌       | 2004   | D WHEEL ALIGNMENT   |    | X Dancel              |
| Cost          | List Qty Rate  | Billed Hrs. Category  |    | SHOUGH!               |
|               | \$20.00 1 NO PATE  |   | -  | ådd Sub-iten          |
| Cock Cost     | T Look List  |   |    | Edit Sub-Iten         |
| Sales Account | and a second sec | Tax Rule<br>Follow Tax Classification   |    | Del Subiten           |
| Labor Sales   | P Botwa P Include in Shop Supp   | C Never Tax   |    | EditNext              |
| Note 🛃        |  | - I - Contractive   | -  | Edit Devicus          |
|               |  |   | -  | E GREEPSE             |
|               |  |   |    | ? Help                |
|               |  |   | -1 |                       |
| Sec.          |  |   |    |                       |
| Sub-Renz      | ten Description Dty Mig  | Let Tax Cost Note   | -  |                       |
|               |  | Г   |    |                       |
|               |  |   |    |                       |
|               |  |   |    |                       |
|               |  |   |    |                       |
|               |  |   | -  |                       |
|               |  |   |    |                       |
|               |  |   |    | and the second second |

| 3 | Edit the desired field or fields as necessary.                           |
|---|--|
| 4 | Click the Edit Next button if you want to continue editing data in       |
|   | your Labor folder.   |
|   |  |
|   | OR   |
|   |  |
|   | click the Edit Previous button to back up.                               |
| 5 | Click the <b>Save</b> button to save your changes, and the list of labor |
|   | items displays. You have now edited and saved your changes.              |

## Labor, Continued

| 10 utile data in your Labor folder, perform the following ste | How To | To delete data in your <b>Labor</b> folder, perform the following steps: |
|---|--------|--|
|---|--------|--|

| Step     |        | Action                                  |         |         |            |     |           |          |                   |  |  |
|----------|--------|---|---------|---------|------------|-----|-----------|----------|-------------------|--|--|
| 1        | Clic   | Click to select the item to be deleted. |         |         |            |     |           |          |                   |  |  |
| Labor    | Parts  | Sublet                                  | Notes   | Charges | s 📔 All It | ems |           |          |                   |  |  |
| Item     |        | Description                             |         | List    | Cost       | Qty | Rate Name | Category | Sales Account     |  |  |
| OIL CHAN | NGE    | 10W30                                   |         | \$17.00 | \$12.00    | 1   | В         | oil      | Labor Sales       |  |  |
| OIL REFF | RESH   |   |         |         |            | 1   | NO RATE   |          | Labor Sales       |  |  |
|          | -      |   |         |         |            |     |           |          |                   |  |  |
| 2        | Clic   | k the De                                | elete b | utton.  | You        | hav | ve now    | deleted  | the item from the |  |  |
|          | list o | of labor                                | items.  |         |            |     |           |          |                   |  |  |

| Labor  | Parts | Sublet      | Notes | Charges | : Allit | ems |           |          |               |          |
|--------|-------|-------------|-------|---------|---------|-----|-----------|----------|---------------|----------|
| Item   |       | Description |       | List    | Cost    | Qty | Rate Name | Category | Sales Account | <b>A</b> |
| OIL CH | ANGE  | 10W30       |       | \$17.00 | \$12.00 | 1   | В         | oil      | Labor Sales   |          |

### Parts

**Parts Folder** The **Parts** folder is used to enter information about the parts used on a customer repair order.

The Parts folder contains the following fields:

- Item
- Description
- Mfg (Manufacturer)
- List
- Cost
- Unit of Measure
- Vendor
- Category
- Std. Pkg.
- Stocked
- Asset Account
- Cost Account
- Sales Account
- Note
- Condition
- Location
- Lock Description
- Max Qty (Maximum Quantity)
- Min Qty (Minimum Quantity)

The Sub Items footer contains the following fields:

- Item
- Description
- Mfg
- List
- Tax
- Cost
- Note

#### Active Function

A part is considered active unless you delete it. If you decide you do not want a part to display in the part listings, simply highlight the part number and click the **Delete** button. This does not actually delete the part from your system -- it just will not display in your part listings.

If you decide to display the part again, you can make it active.

How To To add data in your **Parts** folder, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click the top of the <b>Parts</b> folder, and the <b>Parts</b> folder displays. |

| 940<br>9425.7 | Desception             |               | Mig.<br>1927   | Lif 01         | Hand Dri Dide | M. | Calegory | Colt I  | te leg Ca | 16 BH                 |
|---------------|------------------------|---------------|----------------|----------------|---------------|----|----------|---------|-----------|-----------------------|
| 00506         | FUEL IN CLEANER        |               | NCE            | \$1.00         |               |    |          | \$2.19  |           | 14                    |
| 00515         | 6 DISC                 |               | MAM            | 12.49          |               |    |          | \$1.63  | E I       |                       |
| AD1001        | COCA COLA DIASSIC      |               | CC             | \$1.20         | _             |    |          | \$1.79  | E I       | 9.54                  |
| 011011        | 1PRITE                 |               | CC             | \$1.20         |               |    |          | \$1.19  | E         | . Ca                  |
| 0211073       | TIMING BELTS           |               | 54             | 195.23         |               |    |          | \$52.67 | г         |                       |
| 00019         | SHEETS                 |               | MMM            | \$3.61         |               |    |          | \$2.90  | Г         | X DH                  |
| 00672         | SCOTON                 |               | MMM            | \$11.25        |               |    |          | \$8.73  | Г         | Partition             |
| 0061606       | WAL COVER GASKET SET   |               | 64             | \$45.07        |               |    |          | \$23.79 | Г         | Detra                 |
| 0.675         | DO NOT SELL THIS       |               | BA<br>HAV      | \$21.49        |               |    |          | \$9.50  | Г         | UnFed                 |
| Append.       | HANFOLD BASKETS        |               | 8A<br>8A<br>84 | \$5.00         |               |    |          | \$315   | Г         |                       |
| 0094007       | a second second second |               | BA -           | \$2.95         |               |    |          | \$1.33  | E         | (Drange)              |
| 0094108       | 100                    |               | 84             | \$412          |               |    |          | \$2.14  | F         | 8.6wt                 |
| 0450309       | FILTER                 |               | BA -           | \$18.07        |               |    |          | \$9.33  | Г         |                       |
| 01101         | MOTHERS                |               | NCB            | \$4.39         |               |    |          | \$1.99  | Г         | Upder                 |
| 0014518       | BALL POLLER BEARINGS   |               | BA .           | \$5810         |               |    |          | \$48.20 | F .1      | 1100                  |
|               |                        |               |                |                |               |    |          |         | 2         | and the second second |
| d lare        |                        |               |                |                |               |    |          |         |           | ( PDH                 |
| Tipe Iten     | Description            | Mg 20 Det Lat | Caregoy Cov    | Non Locators   |               |    |          |         | -         | Get 25                |
|               |                        |               |                | and the second |               |    |          |         | 1         | 100 27                |
|               |                        |               |                |                |               |    |          |         | 1.1       | 2 8*                  |

| 2 | Click the <b>New</b> button, and the <b>New Item</b> form displays. |  |
|---|---|--|
|   |   |  |

| ype Item   | D                     | ecription.                            | V Ser           |
|--|-----------------------|---------------------------------------|-----------------|
| Nat. B   | 194                   |                                       | X Date          |
| 6p Vendor  | Cent                  | List Per Car Gip Unit of Mean         | um Sel QOF      |
| 2  | -                     |                                       | Add Sub-R       |
| the second secon | dilon Location        | Tas Fule<br>Follow Tas Classification | EditSub-R       |
| 1  | 2                     | C Never Tax R Schere                  | DelSuble        |
| Use Average Cost 🔍 🗆   | Lock Cost   Lock List | Lock Description 🖓 Include in Shop Su | oples Law lies  |
| Accounts   | Inventory Quantiles   | Tie                                   | FB CH           |
| Sales Account  | T" East Stocked       | Patis Tee - P 10(0)0:111000           | Paris La Farpes |
| Pat Sales 💌  | Hereitan Handlan      | Owner                                 | - ? Hel         |
| Cast Account   |                       |                                       |                 |
| Cost of Parts Sold   | Quantity On Hand      | Amount Vie Narber                     | _               |
| Asset Account  | Quantity On Order     |                                       |                 |
| Inventory •  | WIP quantity          | ELSA His Lond Breek                   |                 |
| b-lens   |                       | Note 🛃                                |                 |
| Editor and Editor and American   | Description Qty M     |                                       | -               |
| ·  |                       |                                       |                 |
|  |                       |                                       |                 |
|  |                       |                                       |                 |
|  |                       |                                       |                 |
|  |                       | 2                                     |                 |
| •[=]   | 1                     |                                       | 21              |

| Step | Action  |  |  |  |  |  |
|------|---|--|--|--|--|--|
| 3    | Type the desired information in the following fields:                               |  |  |  |  |  |
|      | • Item (In this case, the Item is the part number).                                 |  |  |  |  |  |
|      | Description   |  |  |  |  |  |
|      | • Cost  |  |  |  |  |  |
|      | • List  |  |  |  |  |  |
|      | • Unit of Measure   |  |  |  |  |  |
|      | Location  |  |  |  |  |  |
| 4    | Scroll down the lists in the following fields to highlight the desired information: |  |  |  |  |  |
|      | • Mfg (Manufacturer)  |  |  |  |  |  |
|      | • Vendor  |  |  |  |  |  |
|      | Category  |  |  |  |  |  |
|      | Condition   |  |  |  |  |  |
|      | For detailed information on Average Cost, see page 60.                              |  |  |  |  |  |

#### How To (continued)

| Step | Action   |
|------|--|
| 5    | Click to change the item information in the following fields as  |
|      | necessary:   |
|      | <ul> <li>Per Car Qty (Per Car Quantity)</li> <li>Lock Description</li> <li>Include in Shop Supplies*</li> <li>Active*</li> </ul> |
|      | An asterisk (*) indicates that the field is on by default.   |
|      | <i>Note:</i> The <b>Per Car Qty</b> (Per Car Quantity) field has a default value of one.   |
| 6    | Click the <b>Add Sub Item</b> button, and the <b>Item: - Sub Item : New</b> form displays.                                       |

| Item Type   | Item      | Qty  | Save     |
|-------------|-----------|------|----------|
| Description | I I       |      | X Cance  |
| Description |           |      | ? Help   |
| Mfg         | Category  | Cost |          |
| Location    | Condition | List |          |
|             |           |      |          |
| Note        |           |      |          |
|             |           |      | <u>_</u> |
|             |           |      |          |
| 11          |           |      | -        |

#### How To (continued)

| Step | Action  |
|------|---|
| 7    | Use the drop-down menus to fill in the sub item information.<br>Enter a quantity into the <b>Qty</b> text box.  |
| 9    | Click the <b>Save</b> button. You have now entered a parts item.<br>Note: If the part you are working with is a <b>Tire</b> , you will need to<br>enter additional information, detailed in the next section. |

**How To** If your part is a **Tire**, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Check the <b>Part is Tire</b> box and enter the information about the   |
|      | tire.   |
| 2    | If you wish to use <b>Multi Level Pricing</b> , check that box as well, and click the <b>Set Multi Level Prices</b> button. |

| Edit Item : 31X105R15LTH | A DESCRIPTION OF TAXABLE PARTY. | and the second se | ×             |
|--------------------------|---------------------------------|---|---------------|
| Type Item                | Descr                           | plion   | J Save        |
| Pat 31X10.5R15LTH        | 3154                            | 0.5R15 MICHEUN LTH  | X Cancel      |
| Mig Vendor               | Cost                            | List Per Car Day Unit of Measure  | Set QOH       |
| місн 💽 (тсо              | . 38.500                        | \$95.00 1   | Add Sub-Item  |
| Category Conditi         | Received and a second second    | is Rule<br>Follow Tax Classification  | Edit Sub-Item |
| TIRES 💌                  |                                 | Never Tas   | Del Sub-Item  |
| ₩ Use Average Cost Q     | ock Cost 🔽 Lock List 🔽          | Lock Description 🔽 Include in Shop Supplies   | Edit Nest     |
| Accounts                 | Inventory Quartities            | Teo   | Edit Devious  |
| Sales Account            | Part Stocked                    | Partis Tze 🕫 Use Mubi Level Pricing   | EditUPCs      |
| Part Sales               | Maramum<br>6 14                 | Tare Size   | ? Help        |
| Cost Account             | Quantity On Hand : 4            | 31×10.5R15 MICHEUN LTH  |               |
| Cost of Parts Sold       |                                 | Alternate Parl Number<br>123456   |               |
| Asset Account            | Quantity On Order : 0           |   |               |
| Inventory 💌              | WIP quantity : 0                | Set Multi Level Prices  |               |
| Sub-Itenic               |                                 | Note E  |               |
| Type Item D              | escription Oty Mic              |   |               |
| Charge ROAD R            | 0AD HAZARD 1 -                  |   |               |
| Charge TIRE DISPOSAL TI  | RE DISPOSAL FEE 1               |   |               |
|                          |                                 |   |               |
| 17                       |                                 | 1   |               |
|                          | <u>)</u>                        | 1   |               |

#### How To

| Part     31X10 SR15 LTH     31X10 SR15 MICHELIN LTH     X San       Mig     Vender     Cost     Lat     Per Cor Oly     Unit of Measure       MICH     ITCD     Ito S100     Ito Rule     S5100     Ito Rule       Categopy     Condition     Location     Tax Rule     Ito Rule     Set 00       ITRES     Condition     Location     Tax Rule     Ito Rule     Set 00       ITRES     Condition     Location     Tax Rule     Ito Rule     Set 00       ITRES     Condition     Location     Tax Rule     Ito Rule     Set 00       Itres     Ito Account     Lock Cost     Lock List     Lock Description     Ito Rule in Shop Supplies       Account     Inventory Quantities     Time     Sates Account     State Soc     Sates Account       Sates Account     Price 1     Price 2     Price 3     Price 4     Price 5     Save       Cont of Parts Sole     State Soc     State Soc     Sates Account     State Soc     State Soc       Sub-Hensi     W/P quantity '0     State Soc     State Soc     State Soc     State Soc       Cont of Parts Sole     Ito Parts Sole     Note     Ito Parts Sole     State Soc       Sub-Hensi     Ito Pare Socount     Ito Parts Sole     Ito Pa   | Cdr Dem - LDC/958356791   |                      |                            |                       |  | ×              |
|---|---|----------------------|----------------------------|-----------------------|--|----------------|
| Mig     Vendor     Cost     List     Per Car (by     Unit of Measure     Set (g)       MICH     TCD     30:500     T     Add Sub-     Set (g)     Add Sub-     Eds Sub-   | Type Item   | D                    | escription                 |                       |  | ✓ ∑ave         |
| MICH     TCD     Image: State Score and S   | Part + 31X10.5R15 LTH   | 1                    | 31×10.5R15 MICHE           | UNLTH                 |  |                |
| Category Condition Location Tax Rule Follow Tax Rule Follow Tax Classification Del Sub-<br>TIRES Condition Location Rever Tax Fulle Follow Tax Classification Del Sub-<br>Use Average Cost Cost Cost Cost Cost List Lock List Lock Description Relade in Shop Supplex Edit Net<br>Account Inventory Quantities Tax<br>Sales Account Folic 1 Price 2 Price 3 Price 4 Price 5 Save<br>Cost of Parts Sole Sci 2 St5 45 \$52.49 \$49.99 \$45.99 | and the second |                      | and a second second second | Per Car Qty           | Init of Measure  | Set QOH        |
| Category       Condition       Location       IF Follow Tax Classification       IF Active         TIRES       I       IF Never Tax       If Active       Delive         If Use Average Cost       If Lock Cost       If Lock List       Lock Description       If Include in Shop Supplex         Account       Inventory Quantities       Tate       If Dec 1       Price 2       Price 3       Price 4       Price 5       Save         Cost Account       Price 1       Price 2       Price 3       Sate 49       Sate 59       Save       Edit UP         Cost Account       Stor A  | місн 🗾 Ітсо   | <u>-</u> 38.5        | and the second second      | 1                     |  | Add Sub-Item   |
| Use Average Cost       I Lock Cost       I Lock Lot       Lock Lot       Lock Desception       I Include in Shop Supplex         Accounts       Inventory Quantities       Tae       Edt Bev         Sates Account       Inventory Quantities       Tae       Edt Desception       I Include in Shop Supplex         Part Sales       Price 1       Price 2       Price 3       Price 4       Price 5       I Include in Shop Supplex         Cost Account       Price 1       Price 2       Price 3       Price 4       Price 5       I Include in Shop Supplex         Cost Account       I Price 1       Price 2       Price 3       Price 4       Price 5       I Include in Shop Supplex         Cost Account       I Stop 545       I Include in Shop 539         Sub-Items       WIP quantity: 0       I Include in Shop 539       Include in Shop 539       I Inclu   | Category Condition  | Location             |                            | autication            |  | Edit Sub-Item  |
| Accounts Inventory Quantities Tite Sales Account Part Sales Price 1 Price 2 Price 3 Price 4 Price 5 Cost Account Stor of Parts Sol  | TIRES   | 1                    | C Never Tax                | and the second        | Active 5   | Quel Sub-litem |
| Sales Account     Image: Edit Pricing Levels       Part Sales     Price 1     Price 2     Price 3     Price 4     Price 5     Savet     Image: Savet     Image  | Vise Average Cost Q   | Cost 🔽 Look List     | Lock Descriptio            | n 🔽 Include           | in Shop Supplies   | Edit Next      |
| Sales Account     Frice 1     Price 2     Price 3     Price 4     Price 5     Save       Cost Account     S6212     \$55.45     \$52.49     \$49.99     \$45.99     S45.99     Concel     ? Hr       Asset Account     WIP quantity: 0     Ep : Set Must Levels Prices     Sole     Sole     Sole     Sole       Sub-Heres     WIP quantity: 0     Ep : Set Must Levels Prices     Sole     Sole     Sole   | Accounts  | riventory Quantities | Tee                        |                       |  | Edit Previous  |
| Part Sales     Price 1     Price 2     Price 3     Price 4     Price 5     Save       Cost Account     \$6212     \$5545     \$5249     \$49.99     \$45.99     \$45.99     \$25.90       Asset Account     WIP quantity: 0     \$5, 36t Multi Level Prices     \$600     \$600     \$600       Sub-Items     WIP quantity: 0     \$5, 36t Multi Level Prices     \$600     \$600     \$600       Sub-Items     Note     \$600     \$600     \$100     \$600  |   |                      |                            | -                     | -101 ×1  | EditUPCi       |
| Cost Account<br>Cost of Parts Sol<br>Asset Account<br>Inventory<br>Sub-Heres<br>Sub-Heres<br>Charge R0AD R0AD HAZARD 1 -<br>Charge TIRE DISPOSAL TIRE DISPOSAL FEE 1  |   | Dina 7 Dina 7        | Dire 4                     | Price 6               | procession of the local division of the loca | ? Helo         |
| Asset Account<br>Inventory WIP quantity: 0 Est Set Model Level Prices Sub-Heres Charge R0AD R0AD HAZARD 1 Charge TIRE DISPOSAL TIRE DISPOSAL FEE 1  | Cost Account  |                      |                            | a state of the second |  | 1 400          |
| Inventory     WIP quantity: 0     Est set multi Level Prices       Sub-Items     Note       I Charge     ROAD     ROAD       Charge     TIRE DISPOSAL     TIRE DISPOSAL FEE   | leave a an one a  | 1 200.40 1 200.4     | 5 1 \$40.00                | \$40.00               | a conse  |                |
| Sub-Herra Sub-Herra Charge ROAD ROAD HAZARD 1 Charge TIRE DISPOSAL TIRE DISPOSAL FEE 1  |   |                      |                            |                       | And the second second  |                |
| Type         Description         Oly         Mile           If Charge         ROAD         ROAD HAZARD         1           Charge         TIRE DISPOSAL         TIRE DISPOSAL FEE         1   | Inventory   | WIP quantity : 0     |                            | St Securit            | ever mices   |                |
| Type Unet Description Oly Mit  Charge ROAD ROAD HAZARD 1 Charge TIRE DISPOSAL TIRE DISPOSAL FEE 1   | Gudullaners   |                      | Note M                     | U.                    |  |                |
| Charge ROAD ROAD HAZARD 1<br>Charge TIRE DISPOSAL TIRE DISPOSAL FEE 1   | the second se   | ption Qty 1          |                            | •                     | 1  |                |
|   | Charge ROAD ROAD  |                      |                            |                       |  |                |
|   | Charge TIRE DISPOSAL TIRE   | DISPOSAL FEE 1       |                            |                       |  |                |
|   |   |                      | -                          |                       |  |                |
|   |   |                      | -1                         |                       |  |                |
|   | 101   |                      | · · · ·                    |                       | -1   |                |

| Step | Action   |
|------|--|
| 3    | Enter the desired prices for each level. Click Save. |

How To To use Average Cost, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Check the Average Cost box, and click the magnifying glass |
|      | icon.  |

| dit Item : 06133   | and the second se |  |                        | ×                    |
|--|---|--|------------------------|----------------------|
| Type item  | Desc  | riphon   |                        | Seve                 |
| Part 9 06123   | TAP   | E  |                        | X Dancel             |
| Mig Vendor   | Cost  | procession and a second | Unit of Measure        | Set QOH              |
| MMM 💌 Johnson Machine  | 4 090   | New York Contraction of the local data   |                        | Add Sub-Item         |
| Category Condition   | in I was first  | ax Rule<br>Follow Tax Classification   | -                      | Edit Sub-Item        |
| 1  | 1   | Nover Tax  | C Detive               | Qel Sub-Item         |
| Use Average Cost Q   | ock Cost 🖵 Lock List 🗖  | Lock Description 🕼 Inc   | lade in Shop Supplies  | Edit Nest            |
| Accounts   | Inventory Quantities  | Tee  | 1                      | Edit Previous        |
| Seles Account  | P Eat Stocked   | T PatisTee T   | Ups.MultiLevell Polorg | Edt UPCs             |
| Part Sales   | Minimum Maximum   | TieSim   |                        | ? Help               |
| Cost Account<br>Cost of Parts Sold   | Quantity On Hand: 0   | Akermie Pet Nonto  |                        | - Constanting of the |
| Azert Account  | Quantity On Order : 0   | L. L.  |                        |                      |
| Inventory 💌  | WIP quantity : 0  | Eu Sal Mu  | n Level Frider         |                      |
| Sub-Items  |   | Note S   |                        |                      |
| And an an an and a second seco | escription Dip Mile   |  | -                      |                      |
|  |   |  |                        |                      |
|  |   |  |                        |                      |
|  |   |  |                        |                      |
|  | 5   |  |                        |                      |
| •  | <u>)</u>  |  | <u></u>                |                      |

#### How To

| Step | Action   |
|------|--|
| 2    | The Average Cost is calculated based on the total value of the     |
|      | parts on hand, and the quantity of parts on hand. Review this, and |
|      | click <b>Done</b> to return to the parts window.                   |
|      | Note: If you do not have the quantity listed for this part,        |
|      | TRACS will not be able to calculate the average cost.              |

| ew<br>Dity Purchased (4       | Average Cost Calculation<br>Total On He | Average Cost Calculation<br>Total On Hand Value / Quantity On Hand = Average Cost |                  |                  |                    |   |  |
|-------------------------------|---|---|------------------|------------------|--------------------|---|--|
| Qty Sold (0                   |   | \$140.00 / 4 = \$35.00  |                  |                  |                    |   |  |
| Qty on Hand: 4                |   |   |                  |                  |                    |   |  |
| In Hand Value, \$140.00       |   | Average   | Cost = \$3       | 5.00             |                    |   |  |
| arent Rem Quantities & Values |   |   |                  |                  |                    |   |  |
| Tranaction                    | Transaction Date                        | Cost  | Purchased<br>Qty | Remaining<br>Qty | Remaining<br>Value | - |  |
| Stock Order - PD #397         | 9/11/2003 1:03:03 PM                    | \$35.00   | 1                | 4                | \$140.00           | ) |  |
|                               |   |   |                  |                  |                    | 1 |  |
|                               |   |   |                  |                  |                    |   |  |
|                               |   |   |                  |                  |                    |   |  |

How To To edit data in your **Parts** folder, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click on the top of the <b>Parts</b> folder, and the <b>Parts</b> folder displays. |
| 2    | Click to select the part to be edited.   |

| W0                | Descretion                          | <b>146</b> 9   |   | In Hand On Dide | e Mer | Calegory | Cast    | lite Ang Call | 16. Br            |
|-------------------|-------------------------------------|----------------|---|-----------------|-------|----------|---------|---------------|-------------------|
| 845. <sup>4</sup> | FORM                                | 14237          | \$5.10  | and the second  |       | -        | 1149    |               | 1                 |
| 10506             | FUEL RU CLEANER                     | NCB            | \$2.00  |                 |       |          | \$3.99  | -             | 1.0               |
| 1615              | e pisc                              | NNM            | 12.49   | _               | -     |          | \$1.63  | F             | 9.5               |
| atour             | COCA COLA DUASSIC                   | CC             | \$1.20  |                 |       |          | \$1.19  | E             |                   |
| 1121              | SPRITE                              | CC.            | 11.20   |                 |       |          | \$1.19  | -             | - Ca              |
| 1000              | TIMING BELTS                        | 8A             | 196.23  |                 |       |          | \$52.67 |               | × Dep             |
| 10013             | SHEETS                              | MMM            | \$3.67  |                 |       |          | \$2.60  | 5             |                   |
| 0872              | SCOTON                              | MMM            | \$11.25   |                 |       |          | 10.73   | F             | BetsTa            |
| 18:505            | VAL COVER GASKET SET                | BA .           | \$45.07   |                 |       |          | \$23,79 | -             | 1.000             |
| 1696              | DO NOT SELL THES<br>MANFOLD GASKETS | HAV            | \$21.49   |                 |       |          | \$9.50  | -             | Unfin             |
| 10400             | HANNIGLD BADALTS                    | BA<br>BA<br>BA | \$9.00  | _               |       |          | \$315   | -             | Darge             |
| 034007            |                                     | BA .           | \$2.95  |                 |       |          | \$1.33  | -             |                   |
| 094101            | 1/01                                |                | \$412   |                 | -     |          | \$2.14  | F             | 6.6wt             |
| 450329            | PLIER                               | BA             | \$18.07   |                 |       |          | \$9.30  | F             | Upde              |
| 9100              | MOTHERS                             | - BA           | and the second se |                 |       |          | \$2.99  |               | _                 |
| 814511            | BALL ROLLER BEARINGS                | 34             | \$58.10   |                 |       |          | \$48.20 |               | - The H           |
| 1                 |                                     |                |   |                 |       |          |         | 2             |                   |
| b liams           |                                     |                |   |                 |       |          |         | 1000          | ()PDH             |
| ger Res-          | Description Mig Do Cost List D      | Category Cond  | Non Locator   |                 |       |          |         | -             | Ger 21            |
|                   |                                     |                |   |                 |       |          |         | 12            | and so the second |
|                   |                                     |                | 111   |                 |       |          |         | 0.78          | 2 8*              |

#### How To (continued)

| Step | Action   |
|------|--|
| 3    | Click the <b>Edit</b> button, and the folder for the selected item displays. |

| lype item                          | Dett                      | cription   |                         | I Save       |
|------------------------------------|---------------------------|--|-------------------------|--------------|
| Part 👻 00257                       | 100                       | KER .  |                         | X Cance      |
| Mig Vendor                         | Cost                      |  | Unit of Measure         | Set 00H      |
| NCB 💌 Johnson Mach                 |                           | a second and a second sec |                         | Add Sub-Ite  |
|                                    | Condition Location (      | ax Rule<br>Follow Tax Classification   | -                       | Edit Sub-Ite |
| 1                                  |                           | Never Tax  | I⊽ <u>A</u> ctive       | Del Sub-Ite  |
| Use Average Cost 🥰                 | T Lock Cost T Lock List T | Lock Description 😥 Includ  | e in Shop Supplies      | Edit New     |
| Accounts                           | Inventory Quantities      | The  | 1                       | Edit Previo  |
| Sales Account                      | Pert Stocked              | T Partit Tite T U:   | e Multi Larrys Philling | EditUPC      |
| Part Sales                         |                           | Tie.Gre  |                         | ? Help       |
| Cost Account<br>Cost of Parts Sold | Quantity On Hand: 0       | Abenais Pat Number   |                         | and more     |
| Asset Account                      | Duantity On Order : 0     |  |                         |              |
| Inventory 3                        |                           | Esseriant  | évél Pilises            |              |
|                                    |                           | Gal  |                         |              |
| ub-itens                           | Description Dis Mis       | Note 1   | 1                       |              |
| Type Ren                           | Description Dity Mic      | -  | 21                      |              |
|                                    |                           |  |                         |              |
|                                    |                           |  |                         |              |
|                                    |                           | -  |                         |              |
| 10                                 | •1                        |  | -1                      |              |

| 4 | Edit the desired field or fields as necessary.                        |
|---|---|
|   | <i>Note</i> : You can click the Edit Next button or the Edit Previous |
|   | button to locate other items to be edited.                            |
| 5 | Click the <b>Save</b> button. You have now edited a parts item and    |
|   | saved your changes.   |

How To To delete data in your **Parts** folder, perform the following steps:

| Step | Action                                  |
|------|---|
| 1    | Click to select the item to be deleted. |

| 240   | Description  |                            | Mg   |   | On Hand On Did | in Mar | Category | Cast    | lanking Com | 16 Br      |
|---|--|----------------------------|--|---|----------------|--------|----------|---------|-------------|------------|
| 06257   | FUEL IN CLEANER  |                            | NCE  | \$5.10  |                |        |          | \$2.99  | -           | 10         |
| 00506   | 6 DISC   |                            | MMM  | 12.42   |                |        |          | \$1.61  | 1           | 1 C 10     |
| dataut  | COCA COLA DIASSIC  |                            | CC   | \$1.20  |                | -      |          | \$1.19  | 1           | 9.5        |
| 011011  | IPR/IT   |                            | CC   | 11.20   |                |        |          | \$1.19  | 100         |            |
| 0010173   | TIMING BELTS   |                            | 54   | 196.20  |                |        |          | \$52.67 | E I         | - Co       |
| 03073   | SHEETS   |                            | Lines  | \$3.67  |                |        |          | \$2.60  | r.          | XDH        |
| 0.872   | SCOTOR   |                            | MMM  | \$11.25   |                | -      |          | \$8.73  | Ē           |            |
| 0061506   | WAL COVER GASKET SET   |                            |  | \$45.07   |                |        |          | \$23.79 | E I         | ButiFa     |
| 0.695   | DO NOT SELL THIS   |                            | BA<br>HAV  | \$21.49   |                |        |          | \$9.50  | E           | UnFe       |
| distants.   | MANFOLD GASKETS  |                            | 84   | \$9.00  |                |        |          | \$315   | E           | Bucc       |
| 0294002   | Contrast of State  |                            | 8A<br>8A<br>84   | \$2.95  |                |        |          | \$1.13  | F           | Diarge     |
| 0094108   |  |                            | 84   | \$412   |                | -      |          | \$214   | E I         | 8.6m       |
| 0450309   | FILTER   |                            | BA   | \$18.07   |                |        |          | \$9.33  | Г           | Daw        |
| 041100  | MOTHERS  |                            | NCE  | \$4.39  |                |        |          | \$2.99  | Г           | Uple       |
| 0514511   | BALL POLLER BEARINGS   |                            | BA   | \$5810  |                |        |          | \$40.20 | E           | The second |
|   |  |                            |  |   |                |        |          |         | 2           | - THER     |
| ub Tarne  |  |                            |  |   |                |        |          |         |             | (3PDH      |
| Distance of the local | Contraction of the local division of the loc | Mg Do Cost Lat             | Caregory Con   | No. Local   | -              |        |          |         |             |            |
| Tiger Inen  | Description  | Mg 100 Jone The            | Canadah Cove   | and the second  |                |        |          |         | -1          | Get Q      |
| COLUMN TWO IS NOT   |  | And I have a second second | And in case of the local division of the loc | and the owner of the |                |        |          |         | -           | 7 0        |

| 2 | Click the Delete button. You have now deleted the item from the |  |
|---|---|--|
|   | Parts folder.   |  |

### Sublet

**Sublet Folder** The **Sublet** folder is used to enter information about subcontracted services such as towing, machine shop, and miscellaneous labor items.

The **Sublet** folder contains the following fields:

- Item
- Description
- Vendor
- Cost
- List
- **Qty** (Quantity)
- Category
- Note

The Sub Items footer contains the following fields:

- Item
- Description
- Mfg
- List
- Tax
- Cost
- Note

**How To** To add data in your **Sublet** folder, perform the following steps:

|   | Step | Action  |
|---|------|---|
| ſ | 1    | Click the top of the <b>Sublet</b> folder, and the <b>Sublet</b> folder displays. |

| Labor. Parts | Sublet Notes                  | Darges Alth                     | W.                | States and the | And a support of                        | The second | × Der    |
|--------------|-------------------------------|---------------------------------|-------------------|----------------|---|------------|----------|
| TOWING!      | Denoigiligen<br>SUBLET TOWING |                                 | 140               | East Last      | Calegoy Arrel Account<br>Suber Pachared | 5 - C      | 17 Se    |
| 10 WYNGI     | South Contraction             |                                 |                   | Land Post      | 1 Addet Frankling                       |            | 1 50     |
|              |                               |                                 |                   |                |   |            | Q En     |
|              |                               |                                 |                   |                |   |            | · Dop    |
|              |                               |                                 |                   |                |   |            | X 04     |
|              |                               |                                 |                   |                |   |            | Exis Fai |
|              |                               |                                 |                   |                |   |            | United   |
|              |                               |                                 |                   |                |   |            | Darge    |
|              |                               |                                 |                   |                |   |            | Aber     |
|              |                               |                                 |                   |                |   |            | Upder    |
| 14           |                               |                                 |                   |                |   | 비          | JWDH     |
| Aut leni     |                               | In succession of the succession |                   |                |   |            | ()P()He  |
| Type then    | Deception                     | Mig Gay Cont                    | Lift Calegory Cor | dien Location  |   |            | Get Dy   |
|              |                               |                                 |                   |                |   | _          | 7 154    |
|              |                               |                                 |                   |                |   | -1         |          |

| Step | Action  |
|------|---|
| 2    | Click the New button, and the New Item form displays. |

| New Item                    | Des                            | siption |                     |   | J Save             |
|-----------------------------|--------------------------------|---------|---------------------|---|--------------------|
| Sublet 💌                    |                                |         |                     | - | × Cancel           |
| Vandor                      | Cost List                      | QV      | Accounts            |   | Set QDH            |
|                             |                                | 1       | Sales Account       |   | Add Sub-Item       |
| Category                    | T Lock Cost T Loc              | List    | Sublet Sales        | • | Edit Sub-Ren       |
|                             |                                |         | CostAccount         | _ | Del Sub-Item       |
|                             | Tax Pule<br>Follow Tax Clarofe | 1       | Cest of Sublet Sold | - | Edetand            |
| Active IP Include in Shop S | C Never Tax                    | yoon .  | Asset Account       | - |                    |
| Note 🛃                      | 1 - Stine                      |         | Sublet Purchased    | - | Editermon          |
|                             |                                | -       |                     |   | いまれに応知             |
|                             |                                |         | Quantity On Hand    |   | ? Heb              |
|                             |                                |         | Quantity On Order   |   | Contraction of the |
|                             |                                |         | WIP quantity :      |   |                    |
|                             |                                | 1000    |                     |   |                    |
|                             |                                | Y       |                     |   |                    |
| Sub-Items                   |                                |         |                     | - |                    |
| Type Ben D                  | ecception Dity Mility          | Unt Tax | Cost Note           | - |                    |
|                             |                                | 9.11    |                     |   |                    |
|                             |                                |         |                     |   |                    |
|                             |                                |         |                     |   |                    |
|                             |                                |         |                     | - |                    |
|                             |                                |         |                     | - | 0.00               |

| Step | Action   |
|------|--|
| 3    | Type the desired information in the following fields:                  |
|      |  |
|      | • Item   |
|      | Description  |
|      | • Cost   |
|      | • List   |
| 4    | Scroll down the lists in the following fields to highlight the desired |
|      | information:   |
|      |  |
|      | • Vendor   |
|      | Category   |
|      | Sales Account  |
|      | Cost Account   |
|      | Asset Account  |

| Step | Action   |  |  |  |  |  |
|------|--|--|--|--|--|--|
| 5    | Click to change the item information in the following fields if          |  |  |  |  |  |
|      | necessary:   |  |  |  |  |  |
|      | • Qty (Quantity)   |  |  |  |  |  |
|      | • Active*  |  |  |  |  |  |
|      | Include in Shop Supplies*  |  |  |  |  |  |
|      | Follow Tax Classification*   |  |  |  |  |  |
|      | • Never Tax  |  |  |  |  |  |
|      | An asterisk (*) indicates that the field is on by default.               |  |  |  |  |  |
|      | <i>Note:</i> The <b>Qty</b> (Quantity) field has a default value of one. |  |  |  |  |  |
| 6    | Type the necessary notes to accompany the item in the <b>Note</b> field  |  |  |  |  |  |
|      | if desired.  |  |  |  |  |  |
|      |  |  |  |  |  |  |
|      | <i>Note:</i> These notes attach to the item and display in small letters |  |  |  |  |  |
|      | under the description on all ticket types.                               |  |  |  |  |  |
| 7    | Add any <b>Sub Items</b> as necessary.                                   |  |  |  |  |  |
| 8    | Click the Save button. You have now entered and saved an item in         |  |  |  |  |  |
|      | the Sublet field.  |  |  |  |  |  |

|   | Labor | Parts | Sublet      | Notes | Charges | All Items | 1       |         |             |           |  |
|---|-------|-------|-------------|-------|---------|-----------|---------|---------|-------------|-----------|--|
|   | Item  |       | Description |       |         | Mfg       | Cost    | List    | Vendor      | Std. Pkg. |  |
| Þ | 1479  |       | Vacuum Serv | rice  |         | •         | \$15.00 | \$24.99 | Napa Jobber | 1         |  |

**How To** To edit data in your **Sublet** folder, perform the following steps:

| Step                |  |         | Act      | ion            |  |             |                  |
|---------------------|--|---------|----------|----------------|--|-------------|------------------|
| 1                   | Click to select the  | item to | be edite | d.             |  |             |                  |
| - Ein Sear          | nes (Jin)<br>ch List Activities Besorts Iosin<br>Rots Sublet Notes 0 |         |          |                |  | <b># ?</b>  | a di x<br>a di x |
| Dem<br>MLL<br>RACID | Description<br>Mil Heads<br>Relinsh 10" Bake Fotor                   | 1452    | Cost     | Let<br>\$12.50 | Vendor<br>NAPA Auto Parts<br>NAPA Auto Parts | Per Car Oly | Ser Ser          |

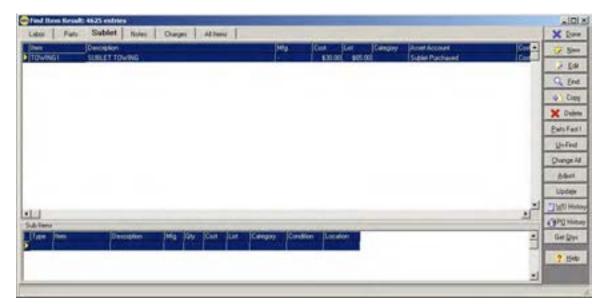
| 2 | Click the <b>Edit</b> button, and the completed form for that item |
|---|--|
|   | displays.  |

| Type Res                       | Desception<br>Desception   |   | V Inte  |
|--------------------------------|--|---|---|
|                                | Carl Let Qy<br>30.000 \$15.00 1<br>Lock Corl I Lock Let<br>P Follow Tax<br>Nerve Tax | Accounts<br>Sales Account<br>Subit Sobie<br>Cer of Subit Sobie<br>Cer of Subit Sobie<br>Accessed<br>Subit Practicated<br>Duratity On Hand: 2<br>Duratity On Hand: 2<br>Duratity On Hand: 3<br>WP quantly: 0 | Ser QOH<br>AntoSubiter<br>Ent Subiter<br>Ent Subiter<br>Ent Densor<br>7 Belle |
| Sub-Street<br>106 / Descaption | 스크<br>(Construction)(Latina (Tai)<br>(F  | Carl Note 1   |   |

| 3 | Edit the desired field or fields as necessary.                        |
|---|---|
|   | <i>Note</i> : You can click the Edit Next button or the Edit Previous |
|   | button to locate other items to be edited.                            |
| 4 | Click the Save button. You have now edited a Sublet folder and        |
|   | saved your changes.   |

**How To** To delete data in your **Sublet** folder, perform the following steps:

| Step | Action                                  |
|------|---|
| 1    | Click to select the item to be deleted. |



| 2 | Click the <b>Delete</b> button. You have now deleted the item from the |  |
|---|--|--|
|   | list of <b>Sublet</b> items.   |  |

### Notes

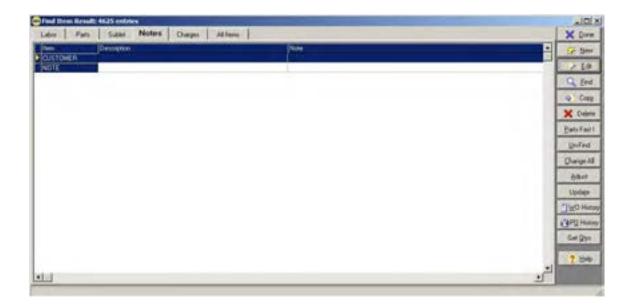
**Notes Folder** The **Notes** folder is used to enter important notes about any of the folders in the **Items** list.

The Notes folder contains the following fields:

- Item
- Description
- Note

How To To add data in your Notes folder, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click the top of the <b>Notes</b> folder, and the <b>Notes</b> folder displays. |



## Notes, Continued

#### How To (continued)

| Step | Action  |
|------|---|
| 2    | Click the New button, and the New Item form displays. |

| 😁 fiew Item  | the second se | ×               |
|--------------|---|-----------------|
| Type Ilem    | Description   | Save            |
| Type Note Ty |   | X Cancel        |
| F Active     |   | SH(QGH)         |
| Note 🛃       |   | Add Sub-Alam    |
|              | 2   | Edd Sub-term    |
|              |   | (1) of Schröden |
|              |   | EditNet         |
|              |   | Edigioran       |
|              | -   | Edit UPIDa      |
| 1.           | 2   | ? Help          |

## Notes, Continued

| Step | Action  |
|------|---|
| 3    | Type the desired information in the following fields:       |
|      | <ul> <li>Item</li> <li>Description</li> <li>Note</li> </ul> |
| 4    | Click to deselect the Active box if desired.                |

| 📟 New Item  |                                       |  | ×                           |
|---|---------------------------------------|--|-----------------------------|
| Туре  | Item                                  | Description  | <mark>√</mark> <u>S</u> ave |
| Note  | 5678                                  | Mustang's Engine                                     | X <u>C</u> ancel            |
| Active  |                                       |  | Adjust <u>0</u> 0H          |
| Note 🗾  |                                       |  | <u>₩A</u> dd Charge         |
| This car uses 15W-40 oil by reque<br>prefers Valvoline. | est. Normally it is supplied by the o | wner, but if not we are permitted to supply it. Also | 📝 <u>E</u> dit Charge       |
|   |                                       |  | Delete Charge               |
|   |                                       |  | E dit <u>N</u> ext          |
|   |                                       |  | Edit <u>P</u> revious       |
| 1   |                                       | Y  | ? Help                      |
|   |                                       |  |                             |

| 5 | Click the <b>Save</b> button. You have now added and saved the notes |
|---|--|
|   | that will appear on a customer repair order.                         |

How To To edit data in your Notes folder, perform the following steps:

| Step  | Action   |         |
|---|--|---------|
| 1   | Click to select the item to be edited.         |         |
|   |  |         |
| TRACS -   | (Item List)                                    | 日本国     |
| m fie Sea   | sch List Activities Beports Icols Windows Help | <u></u> |
| the second se |  |         |

| Labor Parts | Sublet Notes  | Oranges All litens  | X Do    |
|-------------|---|---|---------|
| Ren<br>1478 | Description<br>Free Cal Walk  | Note<br>Thank you for your purchase today. This receipt entities you to | ÷ 🔅 110 |
|             | The second se | The part of the construction of the base of the base                    |         |

2 Click the **Edit** button, and the completed **Notes** form displays the note to be edited.

| छ Edit Item : 7654                             |                |                    |
|--|----------------|--------------------|
| Type Item                                      | Description    | <u>S</u> ave       |
| Note 7654                                      | Car Wash       | X Cancel           |
| <b>I</b> ✓ <u>A</u> ctive                      |                | Adjust <u>D</u> OH |
| Note 🗾   |                | \<br>★Add Charge   |
| This receipt entitles the bearer to one free d | eluxe carwash. | Edit Charge        |
|  |                | Delete Charge      |
|  |                | Edit <u>N</u> ext  |
|  |                | Edit Previous      |
|  |                |                    |
|  |                |                    |

| 3 | Edit the desired field or fields as necessary.                          |
|---|---|
|   | <i>Note</i> : You can click the Edit Next button or the Edit Previous   |
|   | button to locate other items to be edited.                              |
| 4 | Click the <b>Save</b> button. You have now edited a note and saved your |
|   | changes.  |

## Notes, Continued

How To To delete data in your Notes folder, perform the following steps:

| Step | Action                                  |
|------|---|
| 1    | Click to select the note to be deleted. |

|         | a state and a state of the stat | k 5å ⊖ 🖄  | 653      |
|---------|--|---|----------|
| Labor P | Sublet Notes   | Overges All terms   | × Do     |
| 1471    | Free Car Walk  | Thank you for your purchase today. This receipt entitles you to | 17. LIV  |
| 1476    | Special Purchase   | Thank you for purchasing Quaker State Oil. The next time you (  | - 10     |
|         |  |   | Q Er     |
|         |  |   | ¢ Ce     |
|         |  |   | Dejete   |
|         |  |   | Eats Fa  |
|         |  |   | Defin    |
|         |  |   | 15797373 |
|         |  |   | 25.0     |
|         |  |   | Conve    |
|         |  |   | ? He     |
|         |  |   |          |
|         |  |   |          |
|         |  |   |          |

| Step | Action  |
|------|---|
| 2    | Click the <b>Delete</b> button, and the note is deleted from the <b>Notes</b> list. |

### Charges

**Charges Folder** The **Charges** folder is used to enter items that occur in relationship to other items such as recycling and disposal fees. You can attach charges to an item so that when you select an item for a work order, its related charge item is selected. (See the "How to Add Data to Your Parts Folder" section.)

The **Charges** folder contains the following fields:

- Item
- Description
- Cost
- List
- Category
- Asset Account
- Cost Account
- Sales Account

**How To** To add data in your **Charges** folder, perform the following steps:

| Step | Action  |  |  |  |
|------|---|--|--|--|
| 1    | Click the top of the Charges folder, and the Charges folder displays. |  |  |  |

| RATINE RY     | Description<br>BATTORY DEPOSAL | Car 1  | eite  | Exisport. | Acres Account | Cost Account       | · See    |
|---------------|--------------------------------|--------|---|-----------|---------------|--------------------|----------|
| CORE .        | Cole Overse                    | \$3.00 | and the second se | COFE      | Investory)    | Cost of Parts Sold | × E0     |
| CONCURRENT    | Con Code                       | \$0.00 | and the second second   | COPE      | Invertury     | Cost of Parts Sold |          |
| C015FON       | DOUPON                         |        |   |           | Invention     | Coal of Parts Sold | Q Ee     |
| Discount cake | DISCOUNT GARD                  |        |   | DISCOUNT  |               | Cost of Parts Sold | - Q - CH |
| HET.          | Federal Excise Tax             | \$1.00 | \$2.00  |           | Inventory     | Cost of Parts Sold |          |
| (PEDGART      | PREDENT CHARGE                 |        |   |           | Inventory     | Cost of Parts Sold | X Dale   |
| 142           | CPA-SISPOSAL                   | \$1.50 | \$3.00  | DISPOSAL: | Invertory     | Cost of Parts Sold | Patting  |
| MATERIAL      | HATERIAL HANDLING CHARGE       |        |   |           | Inventory     | Cost of Parts Sold | Carl. a  |
| kránů:        | ROAD HAZARD                    | \$7.21 | \$9.99  | DRES      | Inventory     | Cost of Parts Sold | - United |
| SHPPTING      |                                |        |   |           | Inventory     | Cost of Parts Sold | Sauce    |
| STOWARE       | STOPAGE CHARGE                 |        | \$12.00   |           | Inventory.    | Cost of Parts Sold | Dungel   |
| THEDSPOSAL    | TIPIE OLSPOSAL FEE             | \$1.50 | \$1.00  |           | loveritity    | Cost of Parts Sold | 644      |
| 104046        |                                |        | 10.10   |           | Inventory     | Cost of Parts Sold | 100.00   |
| PRMIS DOP     | TRANSMISSION FLUID DISP        | \$1.50 | \$3.00  |           | Inventory     | Cost of Parts Sold | Update   |
| WARPARTY CHER |                                |        |   |           | hoveritary    | Cost of Parts Sold | 1 YO H   |
|               |                                |        |   |           |               |                    |          |
|               |                                |        |   |           |               |                    | OPD Ha   |
|               |                                |        |   |           |               |                    | Geigh    |
|               |                                |        |   |           |               |                    |          |
|               |                                |        |   |           |               |                    | 1.84     |

| Step | Action  |
|------|---|
| 2    | Click the New button, and the New Item form displays. |

| 📟 New Item                |                        |                             | ×                             |
|---------------------------|------------------------|-----------------------------|-------------------------------|
| Туре                      | Item                   | Description                 | <mark>. √</mark> <u>S</u> ave |
| Charge 💌                  |                        |                             | X <u>C</u> ancel              |
| Cost List                 | Qty Category           |                             | Adjust <u>0</u> 0H            |
|                           |                        | Sales Account               | <u>₩A</u> dd Charge           |
| 🔽 Active 🔽 Include in Sho | op Supplies 💽 Tax Rule | Classification Cost Account | Edit Charge                   |
|                           | C Never Tax            | Cost of Parts Sold          | Delete Charge                 |
| Note 🗾                    |                        | Asset Account               | Edit <u>N</u> ext             |
|                           |                        |                             | Edit <u>P</u> revious         |
|                           |                        |                             | ? <u>H</u> elp                |
|                           |                        | <b>v</b> I                  |                               |
| 1                         |                        |                             |                               |

| Step | Action   |
|------|--|
| 3    | Type the desired information in the following fields:                              |
|      | T  |
|      | • Item   |
|      | Description  |
|      | <ul><li>Cost</li><li>List</li></ul>  |
| 4    | Scroll down the lists in the following fields to highlight the desired             |
| 4    | information:   |
|      |  |
|      | Category   |
|      | • Sales Account  |
|      | Cost Account   |
|      | Asset Account  |
|      |  |
|      | <i>Note:</i> The fields listed below have the following default values:            |
|      |  |
|      | • Sales Account field has a default value of Part Sales                            |
|      | • Cost Account field has a default value of Cost of Parts Sold                     |
|      | • Asset Account field has a default value of Inventory                             |
| 5    | Click to change the quantity of one in the <b>Qty</b> (Quantity) field if desired. |
| 6    | Click to deselect the following fields, if necessary:                              |
| 0    | Click to deselect the following fields, if fieldssafy.                             |
|      | • Active   |
|      | Include in Shop Supplies   |
| 7    | Click one of the following fields in the <b>Tax Rule</b> box to change             |
|      | the tax rule, if necessary:  |
|      |  |
|      | Follow Tax Classification*   |
|      | • Never Tax  |
|      |  |
|      | An asterisk (*) indicates that the field is on by default.                         |

| 📾 New Item  |   |
|---|---|
| Type         Item         Description           Charge  |   |
| Cost       List       Qty       Category         0.050       \$0.10       1       Image: Control of the second seco | Accounts<br>Sales Account<br>Part Sales<br>Cost Account<br>Cost of Parts Sold<br>Asset Account<br>Inventory<br>Edit Previous<br>Cost de la cont<br>Edit Previous<br>Cost Account<br>Cost of Parts Sold<br>Edit Previous |

| 8 | Click the Save button. | You have now added and saved a charge |
|---|------------------------|---------------------------------------|
|   | item.                  |                                       |

How To To edit data in your Charges folder, perform the following steps:

| Step | Action                                   |
|------|--|
| 1    | Click to select the charge to be edited. |

|            | 5 🚣 🥵 🏅            | 3 53    | 3      | 🕰 🚆         | )                      | a ?                    |        |
|------------|--------------------|---------|--------|-------------|------------------------|------------------------|--------|
| Libor Pats | Sublet Notes       | Charge  | S AL   | home        |                        |                        | X Don  |
| 21em       | Description        | Cost    | List   | Category    | Asset Account          | Cost Account A         | 🔆 Ber  |
| CORE       | Core Charge        | \$0.00  | \$0.00 | ).          | Inventory              | Cost of Parts Solution | of get |
| COPECHEDIT | Core Credit        | \$0.00  | \$0.00 | )           | Inventory              | Cost of Parts Solc     | 2 Edi  |
| FET        | Federal Excise Tax | \$1.00  | \$2.00 |             | Inventory              | Cost of Parts Sole     | -      |
| \$1        | State Inspection   | \$25.00 | 125.00 | State Inspe | ec Cost of Sublet Sold | Cost of Sublet So      | Q En   |
|            |                    |         |        |             |                        |                        | - Cap  |

| 2 | Click the Edit button, and the completed form for that item |
|---|---|
|   | displays.   |

| 📟 Edit Item : FET   |   | ×   |
|---|---|---|
| Type Item<br>Charge FET   | Description<br>Federal Excise Tax   | <u>✓ S</u> ave<br><u>X</u> <u>C</u> ancel |
| Cost List Qty<br>\$1.00 \$2.00<br>✓ ≜ctive ✓ Include in Shop Supplies<br>Note | Category Accounts Sales Account Part Sales Cost Account Cost Account Cost of Parts Sold Asset Account Inventory | Edit <u>N</u> ext<br>Edit <u>Previous</u> |

#### How To (continued)

| Step | Action   |  |  |  |
|------|--|--|--|--|
| 3    | Edit the desired field or fields as necessary.   |  |  |  |
|      | <i>Note</i> : You can click the <b>Edit Next</b> button or the <b>Edit Previous</b> button to locate other items to be edited. |  |  |  |
| 4    | Click the <b>Save</b> button. You have now edited a charge item and  |  |  |  |
|      | saved your changes.  |  |  |  |

**How To** To delete data in your **Charges** folder, perform the following steps:

| Step | Action                                    |  |  |  |  |
|------|---|--|--|--|--|
| 1    | Click to select the charge to be deleted. |  |  |  |  |

| Refs<br>BATTERY | Desception<br>Bat Tiplity Distributed  | Cast 1. |   | Calegory. | Acout Account | Cost Account   Cost of Parts Sale | y Ban      |
|-----------------|--|---------|---|-----------|---------------|-----------------------------------|------------|
| COPE            | Cole Charge  | \$3.00  | and the second se | COPE      | Inventory     | Cost of Parts Sold                | ~ E#       |
| CONCRETE        | Con Cedit  | \$0.00  | \$0.00  | COPIE     | Investory     | Cost of Parts Sold                | 0.04       |
| 405904          | DOUPON   | 1204.0  |   |           | Investory     | Cost of Parts Sold                | Q. End     |
| Discount cake   | DISCOUNT GARD  |         |   | DISCOUNT  | Envertoy      | Cost of Parts Sold                | Q Car      |
| HET             | Federal Excise Tax   | \$1.00  | \$2.00  |           | Inventory     | Cest of Parts Sold                |            |
| (HEIGHT         | FREIGHT CHARGE   |         |   |           | Inventory     | Cost of Parts Sold                | X Dable    |
| HAZ.            | (FA/SISPOSAL   | \$2.50  | \$3.00  | DISPOSAL: | Investory     | Cout of Parts Sold                | Patifatt   |
| MATERIAL        | HATERIAL HANDLING CHARGE   |         |   |           | Inventory     | Cost of Parts Sold                |            |
| kolači          | ROAD HAZARD  | \$7.21  | \$3.99  | DBES      | Inventory     | Cost of Parts Sold                | - United : |
| SHIPPING .      | and the second |         |   |           | Inventory     | Cost of Parts Sold                | milia      |
| STDWGE          | STOPAGE DWINGE   |         | \$12.00   |           | Inventory     | Cost of Parts Sold                | Durgent    |
| THE DISPOSAL    | TIPIE DESPOSAL FEE   | \$1.50  | \$1.00  |           | hoverfully    | Cost of Parts Sold                | 6dul       |
| 10whvia         | and the second | 1000    | 1.11  |           | Inventory     | Cost of Parts Sold                | 1000       |
| PRAIRS DOLP     | TRANSMISSION PLUID DISP  | \$1.50  | \$3.00  |           | Inventory     | Cost of Parts Sold                | Update     |
| WARRANTY CPEA   |  |         |   |           | howevery      | Cost of Parts Sold                | 1940 ние   |
|                 |  |         |   |           |               |                                   | (1970 Hans |
|                 |  |         |   |           |               |                                   | Gergiye    |
|                 |  |         |   |           |               |                                   |            |
|                 |  |         |   |           |               |                                   | 1 54       |

| 2 | Click the <b>Delete</b> button, and the charge is deleted from the charge |
|---|---|
|   | list.   |

All Items The All Items folder can be used to access any Item folder. Folder

### All Items, Continued

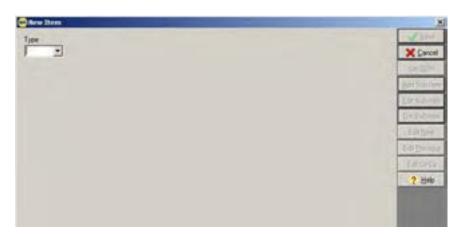
**How To** To use the **All Items** folder to access other **Item** folders, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click the top of the All Items folder, and the All Items folder |
|      | displays.   |

| 140      | Description   | Ma<br>Nor | Lif Caregoy |         | in Avg Ced | Ten Altervale Par Ten Size | Se Sime           |
|----------|---|-----------|-------------|---------|------------|----------------------------|-------------------|
| 0625.4   | FUE IN CLEANER  | NCE       | \$5.10      | \$1.99  | -          | E                          | > 64              |
| 00615    | 6 DSC   | MMM       | 12.43       | \$1.61  | 10         | F                          | the second second |
| COLUMN . | COCA EDLA DIASSIE   | CC        | \$1.20      | \$1.19  | 6          | Ē                          | Q. 54             |
| 011011   | LPRITE  | CC        | \$1.20      | \$1.19  | <b>E</b>   | C                          | - Core            |
| 0081013  | TIMING BELTS  | 8A        | 196.28      | \$52.67 | <b>D</b>   | C                          | - 000             |
| 0307.9   | SHEETS  | MMM       | \$3.67      | \$2.00  | Γ.         | F                          | X Defete          |
| 00572    | SCOTON  | MMM       | \$11.25     | \$5.73  | <b>C</b>   | F                          | Partitat          |
| 0061406  | WAL COVER GASKET SET  | 84        | \$46.07     | \$23.79 | Γ.         | C .                        | Charles and       |
| 0.646    | DO NOT SELL THIS  | HAV       | \$21.49     | \$3.50  | C          | C                          | Unfed             |
| 2104110  | HANFOLD GASKETS   | 84        | \$9.00      | \$3.05  | C          | F                          | 100 million       |
| 0204007  | a ser a ser a ser a   | BA        | 42.95       | \$5.30  | - C        | C                          | Quirge N          |
| 5054108  | and the second se | 84        | \$412       | \$2.14  | C          | F                          | B.Gut             |
| (9450309 | FLTER   | BA        | \$18.07     | \$5.30  | n          | C                          |                   |
| 25100    | MOTHERS   | INC8      | \$4.25      | \$3.99  |            | C                          | Upder.            |
| 2514211  | BALL ROLLER BEARINGS  | BA        | \$59.10     | \$48.20 | <u>c</u>   | C                          | The Hole          |
| 11-9-15  | OL SEALS  | BA .      | \$15.72     | \$8.05  | E          | E .                        |                   |
| M1       | CLEANER   | VAL       | \$4.69      | \$2.50  | E          | <u></u>                    | ()PD Hoto         |
| 015      | SYNPWRIND CHL BRK CLN   | VAL       | \$5.60      | \$2.45  | D          | <u></u>                    | Get Que           |
| 05060    | GLAZE   | MMM       | \$25.06     | \$13.46 | <u> </u>   | <u> </u>                   | 110 211           |
| 0(11)    | TAPE  | MMM       | \$5.79      | \$4.00  | 5          | E.                         | 0 March           |
| 16141    | TAPE  | MMM       | 12.99       | 1543    | - C        |                            | ? Uri             |

2 Click the **New** button, and the **New Item** folder displays.

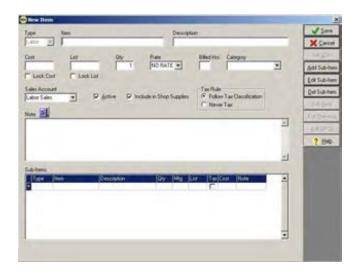
How To (continued)



| Step | Action   |
|------|--|
| 3    | Click the down arrow to display the list in the <b>Type</b> field. |

| Туре           |   |
|----------------|---|
|                | - |
| Labor          |   |
| Part           |   |
| Sublet         |   |
| Charge         |   |
| Charge<br>Note |   |

| 4 | Click the desired folder, and the New Item form for that folder |
|---|---|
|   | displays.   |



How To (continued)

| Step | Action   |
|------|--|
| 5    | Follow the steps for the appropriate folder to make changes.                   |
| 6    | Click the <b>Save</b> button. You have now saved the changes made to a folder. |

Using the Find Feature The Find feature is one of several tools available to you in the Item list option. You can use Find to search (query) for items by entering specific search criteria.

Once you have found certain item(s), you can work with the located items in the following ways:

- Make global changes to all found items
- Adjust on-hand quantities for all found items
- Update found items on TAMS

You can also save find criteria so that you can run the same search again later.

| How To | To find an item, perform | the following steps: |
|--------|--------------------------|----------------------|
|--------|--------------------------|----------------------|

| Step | Action   |
|------|--|
| 1    | Click the Item button in the Lists box, and the All Items list |
|      | displays.  |

| 7445<br>(9125)7 | Desceton<br>DEICER  | 100      | Lif Categoy<br>\$5.10 | Cost 1  | Jan Aug Cad | Ten Abarrale Par Tan Son | Se Sime           |
|-----------------|---|----------|-----------------------|---------|-------------|--------------------------|-------------------|
| 00506           | FUEL IN CLEANER   | NCE      | \$2.00                | \$2.99  | -           | E                        | > ER.             |
| 00615           | 6 DSC   | MAM      | 12.49                 | \$7.61  |             | E .                      |                   |
| 001001          | COCA COLA DIASSIC   | 00       | \$1.20                | \$1.19. | <b>C</b>    | E                        | 9,54              |
| 011011          | LEREAT C  | CC       | \$1.20                | \$1,15  | C           | E                        | 4 Con             |
| 008/10/13       | TIMING BELTS  | 54       | 196.29                | \$2.67  |             | C                        |                   |
| 100019          | SHEETS  | MMM      | \$3.67                | \$2.00  | Γ.          | 5                        | X Detete          |
| 0,672           | SCOTION   | MMM      | \$11.25               | \$8.73  | r           |                          | Partitant         |
| 0011406         | VAL COVER BASKET SET  | 84       | \$46.07               | \$23.79 | C           | C .                      | Carl value        |
| 32,695          | DO NOT SELL THIS  | HAV      | \$21.49               | \$3.50  | C           | C                        | Unfed             |
| 20104010        | MANFOLD GASKETS   | 84       | \$9.00                | \$2.05  | C           | Г                        |                   |
| 0204007         | a set of the set of   | BA<br>BA | 42.95                 | \$1.33  | - C         | C                        | Quarge M          |
| 0094108         | and the second se |          | \$4.12                | \$214   | C           | F                        | Bout              |
| (0450309)       | FLTER   | BA       | \$18.07               | \$5.32  | n           |                          |                   |
| 05100           | MOTHERS   | NCE      | \$4.25                | \$2.99  | C           | 0                        | Updays -          |
| 2014211         | BALL ROLLER BEARINGS  | BA .     | \$53.10               | \$48.20 | C           | C                        | The Holes         |
| VL-845          | OIL SEALS   | 84       | \$15.72               | \$1.05  | E           | E .                      | - I Mer resser    |
| 000             | CLEANER   | VAL.     | \$4.65                | \$2.50  | C           | F                        | PD Hotory         |
| 015             | SYNAWR NO CHIL BRK CLN  | VAL      | \$5.69                | \$2.45  | C           | E                        | C C.              |
| 05000           | GUAZE   | MMM      | \$25.06               | \$13.46 | C           | E                        | list Dys          |
| 0(110           | TAPE  | MMM      | \$5.79                | \$4.00  | C           | 0                        | The second second |
| 18141           | TAPE  | hibdbi   | \$7.99                | \$5.43  | - C         | C                        | ? Emp             |

#### How To (continued)

| Step | Action  |
|------|---|
| 2    | Click the <b>Find</b> button, and the <b>Find</b> Criteria form under <b>Find</b> |
|      | Item displays.  |

| and Item<br>Criteria Saved Diterio  |                                      |               |
|---|--------------------------------------|---------------|
| Type Item   | Sub-Item<br>177 Use Sub-Item Feature | Don<br>Weiter |
| Description   | Sub-Item Type Sub-Item Item          | 1 500         |
| Manufacturer Vendor   | Preserption Mia                      | 2 Voe         |
| Calegory Rale   | Cort Lat                             | ? Hel         |
| Cost List Location  | Sales                                |               |
| Lock Cost     IF Lock List     Fullee Average Cost     Unit of Measure     Per Car Quantity | Use Sales Feature (red.cove)         |               |
| Minimum Oty. Maximum Oty  |                                      |               |
| Asset Account Cost Account Sales Account  | Quarkhes On Order                    |               |
| Active IF Stocked IF Lock Description     F Calc Supples IF Never Tax                       | V/P OrrHand                          |               |
|   |                                      |               |
| Tees Atemped  | 501#                                 |               |

How To (continued)

| Step | Action   |   |  |  |
|------|--|---|--|--|
| 3    | Refer to the table below to determine your next step:  |   |  |  |
|      | IF you want tofind an item belonging to any of<br>the following fields:• Type<br>• Manufacturer<br>• Vendor<br>• Category<br>• Rate<br>• Asset Account<br>• Cost Account<br>• Sales Account                | <ul> <li>THEN</li> <li>perform the following steps:</li> <li>1. Click the desired field(s) down arrow.</li> <li>2. Select the appropriate search criteria.</li> </ul> |  |  |
| 4    | Refer to the table below to determine  |   |  |  |
|      | IF you want tofind an item belonging to any of<br>the following fields:• Item• Description• Cost• List• Location• Unit of Measure• Standard Package• Minimum Qty. (Quantity)• Maximum Qty (Quantity)• Note | THEN<br>type the desired search<br>criteria in the desired<br>field(s).   |  |  |

#### How To (continued)

| Action  |  |  |
|---|--|--|
| Refer to the table below to determine your next step:             |  |  |
| IF you want to  | THEN   |  |
| find an item belonging to any of<br>the following fields:         | click to place a check mark<br>in the desired field(s) to<br>select the field(s) as your   |  |
| <ul><li>Use Charge Feature</li><li>Use Quantity Feature</li></ul> | desired search criteria.   |  |
| Stocked   |  |  |
| Lock Description  |  |  |
|   | Refer to the table below to determin         IF you want to         find an item belonging to any of the following fields:         •       Use Charge Feature         •       Use Charge Feature         •       Use Quantity Feature         •       Active         •       Stocked         •       Calc Supplies |  |

#### How To (continued)

| Step | Action   |
|------|--|
| 6    | Click the <b>Find</b> button, and the system searches the available items.<br>All items that match your search criteria are displayed. |
|      | In the following example, all items matching manufacturer NBH display.   |

|         | es Sublet Notes Charges All Itoms |   |             |                   |          |                              | X Dav                |
|---------|-----------------------------------|---|-------------|-------------------|----------|------------------------------|----------------------|
| Deet.   | Desceptor                         | HIG -   | Unit Campoy |                   | + teg Ce | filte Aberran Par line Sun + | 17 Am                |
| 10020   | HTR HOLE                          | the second se |             | (5.44)            |          |                              | 2 10                 |
| 1008    | HTRHOSE                           | MEH   |             | \$14.30           | 1        | -                            | 5.70                 |
| 1000413 | HTR HOLE                          | NEH   | ~           | \$13.99<br>\$6.12 | 10       | 6                            | I Dec                |
| 10729   | HIN NOS                           | ABH   | 4 58        | \$7.26            | 10       | C                            | 10000                |
| 10710   |                                   | ADH   | 112.00      | 1511              | 10       | E.                           | <ul><li>Cm</li></ul> |
| 10001   | HTR HOSE                          | NEH   | 112.60      | \$5.26            | C        | E .                          | X Debr               |
| han-    | ann agus                          | NEH   | 117.88      | \$7.50            | 10       | F                            |                      |
| 11635   | EV/PASS                           | NEH   | \$5.67.     | \$2.46            | E.       | E.                           | Parts Fast           |
| 11006   | P/PASS                            | NON   | \$1.79      | \$1.55            | Ē        | E                            | Dufind               |
| 11004   | NTR HOSE                          | NEH   | \$15.83     | \$5.54            | E        | E.                           |                      |
| 1190    | CURVED HOSE                       | NEH   | \$21.36     | \$2.87.           | 1        | C                            | Diarge A             |
| 11114   | CURVED RADIATOR HOSE              | NEH   | \$50.17     | \$21.04           | 17       | C                            | hher                 |
| 11140   | SMALL ID COOLANT HOSE             | NEH   | \$14.66     | \$6.75            | <b>F</b> | E.                           | 0.410                |
| 11164   |                                   | ADM   | \$25.70     | \$11.20           | <b>C</b> | r .                          | Update               |
| 11165   |                                   | NDH   | \$20.43     | \$0.57            | E        | C .                          | -THO HA              |
| 1919.79 |                                   | NEH   | 126.90      | \$11.20           | 17       | (C)                          | CTR0.6m              |
| 11588   | CURVED RAD HOSE                   | NEH   | \$24.67     | \$10.34           | F        | r.                           | OPTIM                |
| 111196  |                                   | NEH   | \$27.60     | \$11.50           | C        | Г                            |                      |
| 111100  | CURVED SIDE FAD HOSE              | NEH   | 421.01      | \$9.85            | E        | <u>r</u>                     | Set Don              |
| 11200   | CURVED SIDE FAD HOSE              | NDH   | \$40.51     | \$10.25           |          | C                            | DISCOURSE.           |
| 11201   | CURVED SIDE RAD HOSE              | NDH   | \$41.11     | \$17.26           | -        | r<br>L                       | 7.5%                 |

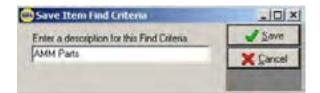
**How To** To save find criteria, perform the following steps:

| Step | Action  |
|------|---|
| 1    | In the Find Criteria window under Find Item, select the desired |
|      | search criteria.  |
| 2    | Click Save.   |

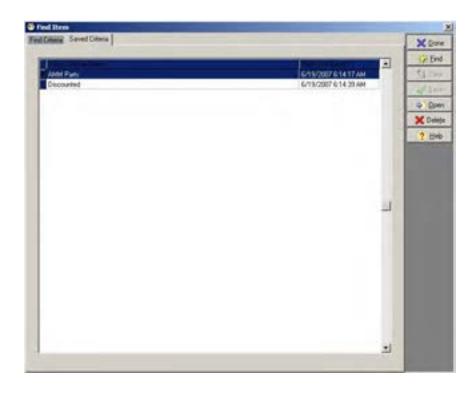
| ind Item                | And in case of the local division of the loc | and the second | -  |
|-------------------------|--|--|--|
| Criteria Saved Cilteria |  |  | × Done   |
| Type Item               |  | Sub-Item   | Se End   |
| Part 💌                  |  | I⊽ Use Sub-(tem Feature  | Clos   |
| Description             |  | Substematem Type Sub-Item Mem  |  |
|                         |  |  | - Save   |
| Manufacturer            | Vendor   | Desceton Mig   | 4 Eper   |
| АММ                     |  |  | X Deley  |
| Calegory                | Rate   | Con. Lat   | _ ? Hek  |
| *                       |  |  |  |
| Cost List               | Location   |  |  |
|                         |  | Sales  |  |
| 17 Lock Cost 17 Lock    | List 🖓 Use Average Cost  | Stat Date In Surve   | 1  |
| Unit of Measure         | Per Car Quantity   | 🖙 Use Sales Feature 📃 👱  | 1  |
|                         |  | Guarter End Date (inclusive  | land a state of the state of th |
| Minimum Oty.            | Maximum Oty  | 2  | ]  |
|                         |  |  |  |
| Asset Account Cost Acco | unt Sales Account  | Quarities  |  |
|                         | 2  | Dr. Dider  |  |
| Active IT Stocked       | 17 Lock Description  | 17 Use Quantity Feature  | 1  |
| 17 Cale Supplier        | D Never Tax  | WIP DerHend  | 1  |
| Note                    |  |  |  |
|                         |  |  |  |
| Tires                   |  |  |  |
|                         | Alestra  | RePot#   |  |
| P Patis Tre             |  | R Bie MobiLevel Pr   | Sec. 1   |

#### How To (continued)

| Step | Action  |
|------|---|
| 3    | Type a description for your saved criteria into the <b>Save Item Find</b> |
|      | Criteria box that pops up.  |
| 4    | Click Save.   |



| 5 | The new saved criteria will appear under the <b>Saved Criteria</b> folder under <b>Find Items</b> . |
|---|---|
| 6 | To run a saved search, double click on the description, or select it and click <b>Find.</b>         |
| 7 | To edit a saved search, click <b>Open</b> .   |



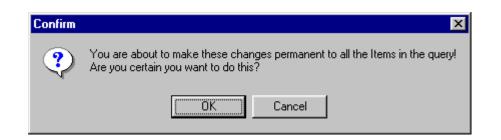
**How To** To make global changes to found items, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click the <b>Change All</b> button on the list of items you just queried, |
|      | and the Change All Found Items form displays.                             |
| 2    | Edit the field(s) to be changed <i>globally</i> .                         |

| Mig.       Vendor       Calegory       Image Cost       Duarge List       Image Cost       Duarge List       Image Cost       <   | 1  |  |   | Accounts         | X Cano  |
|---|--|--|---|------------------|---|
| Change Cost<br>Formula<br>Formula<br>Edit Formula<br>Edit Formula<br>Edit Formula<br>Edit Formula<br>Cost Account<br>Asset Account<br>Asset Account<br>Asset Account<br>Per Car Qty<br>UDM<br>Mar Qty<br>Rate<br>Edit Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula<br>Formula | Nig. Vendor  |  | Category  | Sales Account    | · dear F  |
| Formula       Formula       Asset Account       ?         Edit Formula       Edit Formula       Asset Account       ?         Pre Car Oby       UDM       Marcuby       Rate       Location       Condition         Pre Car Oby       UDM       Marcuby       Rate       Location       Condition         Pre Car Oby       UDM       Marcuby       Rate       Location       Condition         Pre Never Tax       Pr Ure to Calc Supplies       Pr Stock       Pr Active         Pr Lock Description       Pr Lock Cost       Pr Lock List       Pr Use Average Cost         Note       Image: Carter of the store of the st   | And and a second se | and the second se  | <u>×</u>  | Cost Account     | Hadd Sul  |
| Edit Formula     Image: Cold Formula       Per Cat Dip     UDM       Formula     Max Dip       Rate     Location       Condition       Image: Dip   | 20732D110200   | A REAL PROPERTY OF A READ REAL PROPERTY OF A REAL P |   |                  | Del Sub   |
| 다 Never Tax 다 Ure to Cale Supplies 다 Stock 다 Active<br>다 Lock Description 다 Lock Cost 다 Lock List 다 Use Average Cost<br>Note  |  | A DECEMBER OF A  | and the second se | Asset Account    | * ? Hel   |
| F Never Tax F Use to Calo Supplies F Stock. F Active<br>F Lock Description F Lock Cost F Lock List F Use Average Cost<br>Note   | Per Car Oty UDM  | Mercury Mexcury  |   | scation Conditio | the second se |
| F Lock Description F Lock Cost F Lock List F Use Average Cost   |  | 1 1  | 1 1   | 1                | 1   |
| Note  | 다 NeverTax 다 Une to  | Calc Supplies IP Stock   | 년 Active  |                  | _   |
| 2<br>2  | V Lock Description IV Lock (   | Cost 🕫 Lock List   | 17 Use Average Cor  | t.               | _   |
|   |  |  |   |                  | _   |
| Sub Dem Channes   | Note   |  |   | -                |   |
| Such Dans Channess  | Note   |  |   |                  |   |
|   | Note   |  |   | -1               |   |
| Type Nem Description Mig.   | Note<br>Sub Rem Changes  | - To be Added  | To be Deleted   | 2                |   |
| - To be Madea   | V Lock Description V Lock (  | Cost 🗹 Lock List   | 17 Use Average Cos  |                  |   |

#### How To (continued)

| Step | Action   |
|------|--|
| 3    | Click the <b>Save</b> button, and a <b>Confirm</b> message displays. |



| Step | Act   | tion   |
|------|---|--|
| 4    | Refer to the table below to determ  | nine your next step:   |
|      | IF you are  | THEN click the   |
|      | sure that you would like to<br>make these global changes to<br>the searched items     | OK button, the changes are<br>made to all searched items,<br>and the All Items list<br>displays. |
|      | not sure that you would like to<br>make these global changes to<br>the searched items | Cancel button.   |

**How To** To calculate a new Cost based on a formula, perform the following steps:

| Step | Action   |
|------|--|
| 1    | From the Change All Found Items form, click on Edit Formula    |
|      | under the Change Cost box.                                     |
| 2    | Choose one of the two formulas available: "Set Cost to a fixed |
|      | dollar amount" or "Calculate Cost based on Cost or List."      |

| Set Lo     | st to a fixed de         | ollar amount      |                       |             | X     |
|------------|--------------------------|-------------------|-----------------------|-------------|-------|
|            | Dollar Amount<br>\$ 0.00 | 100               |                       |             |       |
|            |                          |                   |                       |             | -     |
| Calcula    | ste Cost based           | l an Cast or List |                       |             |       |
|            | Based on                 | Add or Subtract   | Type<br>(7 )          | Amount      | 11    |
|            | CLI                      | C                 | C =(Harboo)           | 0.00        |       |
|            |                          |                   | Free meridia          |             | - 1 C |
| Lalcul     | ite Price by Gr          | lora Probi        |                       |             |       |
|            | Profit Amount            |                   |                       |             |       |
|            | 0.00                     | z                 | * Not Availble as a C | ost Formula |       |
|            | 4                        |                   |                       |             |       |
| nerit Form | ula.                     |                   |                       |             |       |
|            |                          |                   |                       |             |       |

| 3 | Change the desired variables in the formula. The new formula will |
|---|---|
|   | appear at the bottom of the window.                               |
| 4 | Click Save.   |

**How To** To calculate a new List based on a formula, perform the following steps:

| Step | Action   |
|------|--|
| 1    | From the Change All Found Items form, click on Edit Formula      |
|      | under the Change List box.                                       |
| 2    | Choose one of the three formulas available: "Set Cost to a fixed |
|      | dollar amount," "Calculate Cost based on Cost or List," or       |
|      | "Calculate List by Gross Profit."                                |

| ola knost                       |   |                 |  |  |
|---------------------------------|---|-----------------|--|--|
| 0.00                            |   |                 |  |  |
| ist based o                     | on Coat or List                           |                 |  |  |
| no bea                          | Add or Subtract                           | Type<br>C :     | Anount   |  |
| -The                            |   |                 | 0.00   |  |
| int by Gron<br>of Anount<br>100 | n Profit                                  |                 |  |  |
|                                 |   |                 |  |  |
|                                 |   |                 |  |  |
|                                 | int based on<br>Gan<br>Tan<br>Int by Grow | Add or Subtract | int based on Cost or List<br>and on Add or Subtract Type<br>Total C C C Subtract C Subtract<br>C C C Subtract C Subtract<br>C C Subtract C Subtract<br>C Subtract C Subtract C Subtract<br>C Subtract C Subtr | int based on Cost or List<br>and on Add or Subfract Type Annual<br>The Gran Cost of List<br>The Gran Cost of List<br>The Gran Cost of List<br>The Gran Cost of Cost of List<br>The Gran Cost of Co |

| 3 | Change the desired variables in the formula. The new formula will |
|---|---|
|   | appear at the bottom of the window.                               |
| 4 | Click Save.   |

**How To** To clear a Cost or List Formula, perform the following:

| Step | Action  |
|------|---|
| 1    | From the Change All Found Items form, click on Sun icon under |
|      | the Change Cost or Change List boxes.                         |

| Description   |                  |                        |           |      | Accounts   |           |  | X Cano     |
|---|------------------|------------------------|-----------|------|------------|-----------|--|------------|
| Nig. Vendor   |                  | $\sim$                 | Calegory  | _ ^  | Sales Acci | ount      | -  | 🖉 Clear Fi |
|   | M                | -                      |           | -N   | Cost Acco  | unt       | 1000   | HAdd Sub   |
| Change Cost<br>Formula                                  | *                | Change List<br>Formula |           | 2    | Asset Acc  | 100       | 1  | Del Sub    |
| 2. Edit Formula   |                  |                        | R Formula |      | HINK HCC   | ourk      | •  | ? Hel      |
| Per Car Qty UDM   | Mertina          | Max Qty                | Rate      | Loci | noite      | Condition | and the second s |            |
|   |                  |                        |           |      |            |           |  |            |
|   | T.               | 1                      | 1         | 1    |            | 1         | -  |            |
| 이 NeverTax 및 Use N                                      | lo Calc Supplies | 년 Stock                | I7 Active |      |            | 1         | 1  |            |
|   |                  |                        |           |      |            | 1         | 1  |            |
| 다 NeverTax 다 Une 1<br>다 Lock Description 다 Lock<br>Note |                  |                        |           |      |            |           | 1  |            |
| I⊽ Lock Description I⊽ Lock                             |                  |                        |           |      | 1          |           | T  |            |
| IF Lock Description IF Lock                             |                  |                        |           |      | 1          |           | 1  |            |
| 년 Lock Description 년 Lock<br>Note                       | Cost             | I7 Lock List           | I7 UseA   |      | -          |           | 1  |            |
| I⊽ Lock Description I⊽ Lock                             |                  | I7 Lock List           |           |      | 2          |           | T  |            |

**How To** To adjust the Multi-Level Pricing formulas for tires, perform the following steps:

| Step | Action  |
|------|---|
| 1    | From the <b>Change All Found Items</b> form, click on the <b>Tires</b> tab. |

|       | All Found Items         | and the second | د اعلم        |
|-------|-------------------------|--|---------------|
| neral | Tires                   |  | Save          |
| 7 Tie | Size                    | Alternate Part Number  | X Cancel      |
|       | 1                       |  | 🖉 Cjear Field |
| Mul   | h Level Prices          |  | Add Subile    |
| E     | Use Multi Level Pricing |  | Del Subiler   |
| Ŧ     | Price 1                 |  | ? Help        |
|       | Unchanged               | Change. Change   | 1.04          |
| 0     | Price 2                 |  |               |
|       | Unchanged               | Charge Beset   |               |
| 1     | Price 3                 |  |               |
|       | Unchanged               | Change Beset   |               |
| f     | Price 4                 |  |               |
|       | Unchanged               | Change Besel   |               |
| 1     | Price 5                 |  |               |
|       | Unchanged               | Change Beset   |               |

| Step | Action  |
|------|---|
| 1    | To change one of the multi-level pricing formulas, click on       |
|      | Change.   |
| 2    | Choose one of the three formulas available: "Set Price to a fixed |
|      | dollar amount," "Calculate Price based on Cost or List," or       |
|      | "Calculate Price by Gross Profit."                                |

|        | Dollar Amount<br>\$ 0.00 |                   |               |        |   |
|--------|--------------------------|-------------------|---------------|--------|---|
|        |                          |                   |               |        | _ |
| Calcul | ate Price base           | d on Cost or List | Туре          | Amount |   |
|        | C Cost                   | G +               | C \$          | 0.00   |   |
|        | C List                   | C                 | C ⊗ (Mark-up) | 10,00  | _ |
| Calcul | Profit Amount            |                   |               |        |   |
|        |                          |                   |               |        |   |

| 3 | Change the desired variables in the formula. The new formula will |
|---|---|
|   | appear at the bottom of the window.                               |
| 4 | Click Save.   |

**How To** To adjust on-hand quantities for all found items, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click the <b>Adjust</b> button on the list of items you just queried, and |
|      | the Adjust Item On-Hand Quantities list displays.                         |

| tem      | Manufacturer | Description | Adjust Qty I | Jnit Cost 👘 To 🔺 | • 🖌 🏑 <u>S</u> av    |
|----------|--------------|-------------|--------------|------------------|----------------------|
| 10741    | NBH          | HTR HOSE    | 0            | \$0.00           |                      |
| 10752    | NBH          | HTR HOSE    | 0            | \$0.00           | 🔰 🔀 <u>C</u> ano     |
| 250014   | NBH          | V-BELT      | 0            | \$0.00           |                      |
| 250067   | NBH          | V-BELT      | 0            | \$0.00           | 🔰 🔀 <u>D</u> elei    |
| 250071   | NBH          | V-BELT      | 0            | \$0.00           |                      |
| 250073   | NBH          | TIM BELT    | 0            | \$0.00           | <u>?</u> <u>H</u> el |
| 250114   | NBH          | TIM BELT    | 0            | \$0.00           |                      |
| 250128   | NBH          | TIM BELT    | 0            | \$0.00           |                      |
| 250132   | NBH          | CAM BELT    | 0            | \$0.00           |                      |
| 250138   | NBH          | TIM BELT    | 0            | \$0.00           |                      |
| 250153   | NBH          | CAM BELT    | 0            | \$0.00           |                      |
| 250163   | NBH          | TIM BELT    | 0            | \$0.00           |                      |
| 250185   | NBH          | TIM BELT    | 0            | \$0.00           |                      |
| 250186   | NBH          | TIM BELT    | 0            | \$0.00           |                      |
| 250187   | NBH          | TIM BELT    | 0            | \$0.00           |                      |
| 250194   | NBH          | TIM BELT    | 0            | \$0.00           |                      |
| 25030300 | NBH          | V-BELT      | 0            | \$0.00           |                      |
| 25040233 | NBH          | V-BELT      | 0            | \$0.00           |                      |
| 25040270 | NBH          | V-BELT      | 0            | \$0.00           |                      |
| 25040275 | NBH          | V-BELT      | 0            | \$0.00           |                      |
| 25040345 | NBH          | V-BELT      | 0            | \$0.00           |                      |

| 2 | Type the + or – adjustment in the <b>Adjust Qty</b> (Quantity) field of  |
|---|--|
|   | the item to be changed.  |
| 3 | Click the Save button, and the queried items list displays.  |
|   | <i>Note:</i> If you were to go back in to adjust the on-hand quantities, you would notice your changed quantity displayed in the <b>On Hand Qty</b> field. |

#### How To To update found items on TAMS, perform the following steps:

| Action  |
|---|
| Verify that your modem is connected to your PC and functioning  |
| properly.   |
| Click the <b>Update</b> button on the list of items you just queried, and your searched items will be updated in the TAMS system. |
| 1   |

#### **How To** To delete specific items from your search, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click to select the item to be removed from the list. |
| 2    | Click the <b>Unfind</b> button.                       |

# **How To** To view all items upon completion of working with the queried items, perform the following step:

| Step | Action  |
|------|---|
| 1    |   |
|      | Click the <b>Work with Items</b> icon , and all of the items redisplay. |

**Parts Fast !** Many parts that you enter have common fields, such as manufacturer / line code, vendor, or category.

The **Parts Fast !** feature allows you to enter many new items quickly by creating a template for these common items.

How To To enter items using **Parts Fast !**, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click the Item button in the Lists box, and the All Items list |
|      | displays.  |

| 240          | Descretion C          | 10             | Lat Cangoy | Cast    | Use Aug Cod | Ten Alternale Part Ten Scor | Se Ster                    |
|--------------|-----------------------|----------------|------------|---------|-------------|-----------------------------|----------------------------|
| 19525-2      | PEREN                 |                | \$5.10     | \$1.4%  |             |                             |                            |
| 00506        | FUEL IN CLEANER       | NCB            | \$1.00     | \$3.99  | <b>C</b>    | E.                          | > ER                       |
| 00615        | e DISC                | MMM            | 42.49      | \$7.61  |             | <u>r</u>                    | Q. 5%                      |
| 2011001      | COCA-COLA DLASSIC     | CC             | \$3.20     | \$1.19  | _ <u>C</u>  | <b>C</b>                    |                            |
| 011011       | LPR01E                | CC             | \$1.50     | 机铁      | <u> </u>    | F                           | + Conv                     |
| 0280011      | TIMING BELTS          | 84             | 196.29     | \$2.67  |             | C                           |                            |
| 100019       | SHEETS                | MMM            | \$2.61     | \$2.00  |             | F                           | X Delete                   |
| 00572        | SCOTON                | MMM            | \$11.25    | \$5.73  | - C         | <b>F</b>                    | EwisFanti                  |
| 0063406      | VAL COVER GASKET SET  | BA .           | \$46.07    | \$23.79 |             | C                           |                            |
| 12.605       | DO NOT SELL THIS      | HAV            | \$25.49    | \$3.50  |             | <u> </u>                    | Unfed                      |
| 20104010     | HANFOLD GASKETS       | BA<br>BA<br>BA | \$9.00     | \$2.05  |             | <u>_</u>                    | Quege Al                   |
| 0294007      |                       | BA .           | \$2.95     | \$5.30  | - C         | 5                           | The decis                  |
| 00194108     | elast.                | -84            | \$4.12     | \$214   |             | r<br>r                      | 5.6vrt                     |
| 2450309      | PLIER                 | BA             | \$18.07    | \$5.32  | 0           |                             | 1000                       |
| 05100        | HOTHERS               | NCB            | \$4.25     | \$3.99  |             | 0                           | Upday                      |
| 2514211      | BALL ROLLER BEARINGS  | BA .           | \$5310     | \$48.20 |             | r .                         | - The Honey                |
| Wale R       | OIL SEALS             | 8A             | \$15.72    | \$1.05  | - C         | 5                           | and a second second second |
| 083          | CLEANER               | VAL            | \$4.69     | 12.50   |             | r.                          | PD Hotory                  |
| 17.6         | SYMPWRING CHL BRK CLN | VAL            | \$5.60     | \$2.45  |             | <u> </u>                    | Get Que                    |
| 08000        | GLAZE                 | MMM            | \$25.06    | \$13.46 | -           | 5                           |                            |
| ogen<br>ogen | TAPE                  | MMM            | \$5.79     | \$4.00  |             | 2                           | 7.04                       |
| 16(14)       | TAPE                  | 100404         | \$2.98     | 15.63   |             | -                           | L Die                      |

| 2 | Click the Parts Fast ! button, and the Fast Parts ! Entry form |
|---|--|
|   | displays.  |

#### How To (continued)

| 📟 Fast Parts ! Entry |                          |          |             |         |
|----------------------|--------------------------|----------|-------------|---------|
| Template values      |                          |          |             | Save    |
|                      | Manufacturer / Line Code | Vendor   | Category    | XCancel |
|                      |                          | J        |             |         |
| Item Mfg             | ) Vendor                 | Category | Description |         |
|                      |                          |          |             |         |
|                      |                          |          |             |         |
|                      |                          |          |             |         |
|                      |                          |          |             |         |
|                      |                          |          |             |         |
|                      |                          |          |             |         |
|                      |                          |          |             |         |
|                      |                          |          |             |         |
|                      |                          |          |             |         |
|                      |                          |          |             |         |
|                      |                          |          |             |         |
|                      |                          |          |             | •       |
| •                    |                          |          |             |         |

| Step | Action  |  |  |  |  |
|------|---|--|--|--|--|
| 3    | Scroll down to select from the available choices in the following             |  |  |  |  |
|      | fields:   |  |  |  |  |
|      | Manufacturer / Line Code  |  |  |  |  |
|      | • Vendor  |  |  |  |  |
|      | Category  |  |  |  |  |
|      | <i>Note:</i> These choices will default in the corresponding columns          |  |  |  |  |
|      | below the fields <i>after</i> you type the first character in the Item field. |  |  |  |  |
|      | You can leave a field blank if desired.                                       |  |  |  |  |
| 4    | Type the first item number in the <b>Item</b> field.                          |  |  |  |  |
| 5    | Type a description of the item in the <b>Description</b> field.               |  |  |  |  |

#### How To (continued)

| Step | Action   |
|------|--|
| 6    | Press the <b>Tab</b> key to open the second row if you would like to   |
|      | enter another item.  |
| 7    | Repeat steps four through six until you have entered all items.  |
|      | <i>Note:</i> You can change the default entries for the next item by selecting a different choice from the fields at the top of the <b>Fast Parts ! Entry</b> form, or you can select a different choice by clicking on a cell (a box within a row of line information) instead of typing. A drop-down menu displays allowing you to select choices for individual items if necessary. |

| Item   | Mfg | Vendor      | Category | Description |
|--------|-----|-------------|----------|-------------|
| 1010   | FIL | Napa Jobber | oil      | oil filter  |
| 1002   | FIL | Napa Jobber | oil      |             |
| 1550   | FIL | Napa Jobber | oil      |             |
| * 1541 | FIL | Napa Jobber | exhaust  | <b>•</b>    |
|        |     |             | HVAC     |             |
|        |     |             | brakes   |             |
|        |     |             | exhaust  |             |
|        |     |             | oil      |             |
|        |     |             | tires    |             |

| 8 | Click the <b>Save</b> button, and the items will display on your selected item list in order of item number. |
|---|--|
| 9 | Click the <b>Done</b> button, and the <b>Lists</b> box displays.   |

**How To** To add sub items to Items in a Find Result set, perform the following steps:

| Step | Action                       |
|------|------------------------------|
| 1    | Return to the Item List.     |
| 2    | Click the <b>Find</b> button |

| NO .           | Descretion  | 199         |             | Hand DriDide Will | Calegory | Celt    | lanking Car | Se Br    |
|----------------|---|-------------|-------------|-------------------|----------|---------|-------------|----------|
| 06252<br>00506 | FUEL BUICLEANER   | NCT NCT     | \$5.10      |                   |          | \$1.99  |             | 1 60     |
| 00515          | 6 DISC  | MINIM       | 12.49       |                   |          | \$1.63  | E I         | _        |
| do tabl        | COCA EDLA DLASSE  | CC          | \$1.20      |                   |          | \$1.19  | E I         | 9.5      |
| 011011         | 1PROTE  | CC          | 11.20       |                   |          | \$1.19  | E I         | 1        |
| 0011013        | TIMING BELTS  | 54          | 18.2        |                   |          | \$52.67 | E I         | - Ca     |
| 00079          | SHEETS  | Lines       | \$3.67      |                   |          | \$2.90  | r I         | X De     |
| 00672          | SCOTON  | MMM         | \$11.25     |                   |          | \$0.73  | E           |          |
| 0061606        | VAL COVER GASKET SET  | 64          | \$45.07     |                   |          | \$23.79 | E I         | BetsFa   |
| 1805           | DO NOT SELL THIS  | HAV.        | \$21.49     |                   |          | \$9.50  | E           | UnFee    |
| and and        | MANAFOLD GASKETS  | SA.         | \$9.00      |                   |          | \$315   | Г           | -        |
| 0264002        |   | BA<br>BA    | \$2.95      |                   |          | \$1.33  | F           | Diarge   |
| 094108         | No. of the second se | 84          | \$412       |                   |          | \$2.14  | F           | 6.6w     |
| 450.009        | FILTER  | BA          | \$18.07     |                   |          | \$9.30  | Г           | Drawn    |
| 91100          | MOTHERS   | NCE         | \$4.39      |                   |          | \$1.99  | Г           | -/ Upde  |
| 0514510        | BALL ROLLER BEARINGS  | BA          | \$59.10     |                   |          | \$48.23 | F -1        | THEFT    |
| 1              |   |             |             |                   |          |         | 5           | 11 March |
| d. Tarray      |   |             |             |                   |          |         |             | ( PDH    |
| Ige Sec.       | Oversighter Mig 100 Cost Lat 10   | angoy Confl | ter Locator |                   |          |         |             | Guilt    |
| 1991           | percent in the provide the  |             | -           |                   |          |         | -1          | Get Qy   |
|                |   |             |             | -                 |          |         | 1           | -        |
|                |   |             |             |                   |          |         | 1.1         | 2 84     |

| 3 | The Find Item screen will appear |
|---|----------------------------------|
|---|----------------------------------|

| How To (continued) | How | То | (continue | d) |
|--------------------|-----|----|-----------|----|
|--------------------|-----|----|-----------|----|

| 🤓 Find Item  |  | ×                                   |
|--|--|-------------------------------------|
| Type Item  | Charge Use Charge Feature Charge Item Cost Description List                                      | ★ Done ★ Eind ★ Eind ★ Clear ★ Help |
| Category Rate Cost List Location Unit of Measure Per Car Quantity Minimum Qty. Maximum Qty | Sales Use Sales Feature Quantity Start Date (inclusive) 7/13/2000 End Date (inclusive) 7/13/2000 |                                     |
| Asset Account Cost Account Sales Account   | Quantities<br>Use Quantity Feature<br>W/P On Order<br>On Hand                                    |                                     |

| 4 | Enter your search criteria.  |
|---|--|
| 5 | Click the <b>Find</b> button, and the Find Item Result screen appears. |

#### How To (continued)

| ten Desagen   | 1         | at the        | -      | Derkegte | Citer Aleride P | 1 1 to 1 to 1 | (梁)      |
|---|-----------|---------------|--------|----------|-----------------|---------------|----------|
| ON COOLER LINES DIS COOLER LINES                                  | - 15 Berl | - 1. C. C. C. |        |          | C               |               | 22.81    |
| CILLOF DILLOF STANDARD<br>SILOF WIN STANDARD SYNTHETIC DIL DHAMAE |           | \$2.00        | \$1.00 | 5        | C.              |               | Q.F      |
| AND A DESCRIPTION OF THE OF DWINDE                                |           | \$5.60 OL     |        | - N      | 10.1            | -             | 1000     |
|   |           |               |        |          |                 |               | _        |
|   |           |               |        |          |                 |               | X 14     |
|   |           |               |        |          |                 |               | : Entire |
|   |           |               |        |          |                 |               | Unite    |
|   |           |               |        |          |                 |               |          |
|   |           |               |        |          |                 |               | Dwa      |
|   |           |               |        |          |                 |               | . 640    |
|   |           |               |        |          |                 |               | lipte    |
|   |           |               |        |          |                 |               | 1 NO IN  |
|   |           |               |        |          |                 |               | OP2H     |
|   |           |               |        |          |                 |               |          |
|   |           |               |        |          |                 |               | ON D     |
|   |           |               |        |          |                 |               |          |

| 8 | Click the Change All button. The Change All Found Items screen |
|---|--|
|   | appears.   |

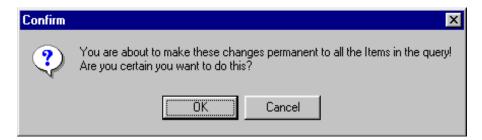
| Description  |                    | Accounts                        | XD   |
|--|--------------------|---------------------------------|------|
|  | e                  | Saim Account                    | Ved3 |
| PerCarDy UOM   | Marilley Play Doc  |                                 |      |
| 7 Lock Description 17 L  |                    | 17 Active<br>17 Use Average Cot |      |
| 7 Never Tax (7 L<br>7 Lock Desceptors (7 L<br>Role<br>Sab Thes Changes |                    | P Use Average Cott              |      |
| 7 Lock Desception 17 L<br>Rote   | ack.Con 🕫 Look.Lot | P Use Average Cott              |      |

#### How To (continued)

| 10 | Click the Add SubItem button.                                     |
|----|---|
| 10 | The Add New Sub Item screen will appear. Enter the new            |
|    | information or charges that need to be added for the items listed |
|    | earlier.  |

| Item Type   | ltem      | Qty      | 🚽 Save  |
|-------------|-----------|----------|---------|
| Description |           |          | X Cance |
|             |           |          | ? Help  |
| Młg         | Category  | Cost     |         |
| Location    | Condition | List     |         |
| Locatori    |           | <b>T</b> |         |
| Note        |           |          |         |
|             |           |          | -       |
|             |           |          |         |
|             |           |          |         |

| 11 | Click the <b>Save</b> button to save your changes.                   |
|----|--|
| 12 | The Change All Found Items window is displayed again. Click the      |
|    | Save button and this will save the change to all items in the find   |
|    | results.   |
| 13 | The confirm message below is displayed after clicking the Save       |
|    | button. After verifying that you are certain, click the OK button to |
|    | save the changes. The changes made to the items selected will now    |
|    | be saved.  |



| Adding Items | You can add items to a work order by using the <b>Find Items</b> feature. |
|--------------|---|
| to a Work    |   |
| Order        |   |

**How To** To add an item to a work order, perform the following steps:

| Step | Action  |
|------|---|
| 1    | With a work order open, right click on the yellow arrow to the left |
|      | of the list of parts and choose Find Item.                          |

| Repair Order #1659 - LUTTRELL, JON   | and the second   | - IDI ×    |
|--|--|------------|
| Summary Worksheet   Detail   Totals  |  | Save       |
| Customer   | Work Order   | -          |
| * Name UJTTRELL, JON   | Repai Order * 0  | Cancel     |
| Day # 770-050-1212 . Evening # 670-555-1212 CELL .   | and the second se  | Preview    |
| •Vehicle 1996 Chevrolet Lumina 1890 3.1Liter V6  |  | Bint       |
| The second se  | Promised   | ob Ticker  |
| License F22 499 VIN 1234567890 Teets .   | 09/09/2005.5-00 PM · ·   | Pyrchase   |
| Type Item Description Dir I  |  | -          |
|  | Rate Price Total Tax Note  | Bec Serv   |
| Part 1301400 WTR PUMP 1  |  | v. History |
| New Here   | NO RATE \$10.76 \$10.76 T LUBE OIL AND   | History    |
| Edit Item  |  | Pagent     |
| Find Dem   |  |            |
| Them Profit  | 10   | PDIE       |
| Item Quantities<br>Delete Item from RO   |  |            |
| Flatrate Estimating  | 80   | Cystomes   |
| NAPA Catalog   | 20   | Sew Cur    |
| New Recommended Service  |  |            |
| Move Items to Recommended Service<br>Show Average Cost Calculation   |  | Ngiii Veh  |
| and the second distance of the second distanc |  | Yehicle    |
| Show Cost in Item List<br>Show Tire Fields in Item List  |  | Inspect    |
| Show The Public Prices   | and the second s | Help       |
|  |  | map        |
| And Colors Symptom List ABS LIGHT  |  |            |
| WATER PUMP<br>* CUSTOMER STATES THAT THEY SEE COOLANT LEAKING FROM THE CAR   |  |            |
|  | Tax \$3.57   |            |
|  | -1 Total \$140.25  |            |
| 1.   |  |            |

#### How To (continued)

2 Enter your search criteria and click **Find**. If your item is a tire, be sure to check the **Part is Tire** box. If you wish to use Multi-Level pricing for a tire, be sure to click the **Use Multi-Level Pricing** box.

| Find Item   | of the second line of the second  | the second s  | -          |
|---|---|---|------------|
| Type<br>Pat <u>*</u><br>Description                         | ltem  | Sub-Item Use Sub-Item Feature Sub-Item Feature  | Dow<br>End |
| Manufacturer<br>Category                                    | Vendox<br>Rate  | Description   | ? Het      |
| Cost<br>Cost<br>Cost Cost<br>Unit of Measure<br>Minimum Qty | Lint Location<br>I7 Lock List I7 Use Avera<br>Per Car Quantity<br>Maximum Qty       | Sales   |            |
| Anter Account   | Cost Account Sales Acc<br>Sales Acc<br>Lock Description<br>Ac Supplies IP Never Tax | Count  Cuantities  Cuantities |            |
| Tres<br>F Patis Tree  | *   | Albemate Part #   |            |

How To (continued)

3 Highlight the desired item from the list and click **Copy**.

| Labox Parts | Sublet Notes Charges All Berns |                |               |         |             | 1                             | X Dore                                |
|-------------|--------------------------------|----------------|---------------|---------|-------------|-------------------------------|---------------------------------------|
| Dect.       | Desception                     | 244            | Liff Celegory | Cost 8  | Ine Ang Cor | (Tee Alternate Plat Ten Son # | ( See                                 |
| 99254       | OBCER                          | NC8            | \$5,10        | \$3.49  | P           |                               |                                       |
| 00506       | FUEL INFOLEANER                | NCB            | \$0.00        | \$1.99  | - C         | <u>C</u>                      | > E0                                  |
| 00575       | 6 DISC                         | MM             | \$2.49        | \$1.61  | - E         | F                             | Q Ent                                 |
| 011001      | COCA COLA CLASSIC              | 20             | \$1.20        | \$1.19  | C .         | <u>C</u>                      |                                       |
| ONITOE 1    | SPRITE                         | 00             | \$1.20        | \$1.35  | - E         | C                             | O Cay                                 |
| 0.0101313   | TIMING BELTS                   | 84             | \$96.29       | \$52.67 | - E         | 5                             |                                       |
| 0.019       | SHEETS                         | NMM            | \$3.81        | \$2.80  | 0           | E                             | X Deinte                              |
| 0.1672      | 50010H                         | (MARK)         | 411.25        | 10.72   |             |                               | Pats Fart1                            |
| 0061506     | WAL COVER GASKET SET           | BA ·           | \$46.67       | \$23.78 | 0           | 5                             |                                       |
| 41.16       | DO NOT SELL THIS               | 1440/          | \$21.40       | \$3.50  | E           | r.                            | Unfind                                |
| 01/40/10    | HAMBFOLD GASKETS               | 84             | \$5.00        | 10.05   | <u> </u>    | 5                             | Durot 4                               |
| 0214007     |                                | BA<br>BA<br>BA | \$2.95        | \$1.33  | <u> </u>    | 1                             | - Drander-va                          |
| 0.94101     | - C2 Sa C                      | BA .           | \$4.12        | \$2.14  | - C         | D                             | 66.0                                  |
| 0450301     | FLIER                          |                | \$16.07       | \$5.33  | - E - I     | E                             |                                       |
| 05100       | MOTHERS                        | NCB            | \$4.39        | \$3.99  | C           | E.                            | Update                                |
| 0014111     | BALL FOLLER REARINGS           | BA             | \$59.10       | \$48.23 | 0           | <b>C</b>                      | TWO Hamay                             |
| 14-9650     | OIL SEALS                      | 6A             | \$15.72       | \$8.05  | 0           | C                             |                                       |
| (A)         | CLEANER                        | VINE.          | \$4.69        | \$2.50  | - C         | E.                            | (JP2 Honey                            |
| 200         | SYNPWR NO CHLERK CLN           | VAL            | \$548         | \$2.45  | <u> </u>    | <u> </u>                      | Sei ges                               |
| 05998       | GLADE                          | 1004           | \$25.06       | \$19.46 | _ <u>C</u>  | C                             | 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 |
| 06130       | TAPE                           | MMM            | \$5.79        | \$4.00  | 5           | r -                           | 11001000                              |
| 26143       | TAPE                           | 240404         | \$7.90        | \$5.65  | C           | ा<br>भ                        | 7.5%                                  |

| 4 | If your part was a tire and you chose to use Multi-Level Pricing, a |
|---|---|
|   | new window will appear. Choose the price level and quantity from    |
|   | the matrix to get the appropriate overall price.                    |
| 5 | Checking the Show Pricing Formulas box will display the             |
|   | formula as well as the overall price. There is more information     |
|   | about changing these formulas in the "All Items" section.           |

| Tire Oty | Price 1  | Price 2  | Price 3  | Price 4  | Price 5  |
|----------|----------|----------|----------|----------|----------|
| 1        | \$6212   | \$55.45  | \$52.49  | \$49.99  | \$45,99  |
| 2        | \$124.24 | \$110.90 | \$104.90 | \$99.90  | \$91.90  |
| 3        | \$105.36 | \$166.35 | \$157.47 | \$149.97 | \$137.97 |
| 4        | \$249.40 | \$221.00 | \$209.96 | \$199.96 | \$183.96 |

#### How To (continued)

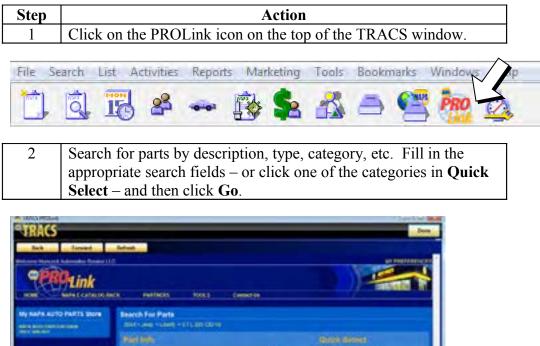
5 The new item will appear on the work order, along with any associated Sub Items. Click **Save** to save the altered work order.

| 101.05                |                       |   | %-555-1212 CELL   | 2            | Work De<br>Status<br>Repar C |                    | Odome                       | iter in<br>C | -            |                                   |
|-----------------------|-----------------------|---|---|--------------|------------------------------|--------------------|-----------------------------|--------------|--------------|-----------------------------------|
| /ehicle               | 1996 Chevrolet Lu     | Evening # [6]<br>umma 1890] 3.1L/er V6<br>VIN [1234567890 | Pleets  |              | Promise                      | 5 10:57 AM         | Techr                       | ician        | -            | -ite<br>-iteb                     |
| Type<br>Labor<br>Part | GUIDE<br>1301490      | Description<br>WATER PUMP - RER<br>WTR PUMP               |   | lty R<br>1 D | ale<br>EFAULT                | Price              | fotal<br>\$72.00<br>\$50.38 | Г            | Note         | -                                 |
| Labor<br>Part         | LOF<br>31X10.5R15 L   | LUBE OIL AND FILTER                                       | and the second se | 1 N<br>2     | 0 RATE                       | \$10.76<br>\$63.00 | \$10.76<br>\$126.00         | P            | LUBE OIL AND | Jtem H                            |
|                       | ROAD<br>TIRE DISPOSAL | ROAD HAZARD<br>TIRE DISPOSAL FEE                          |   | 2            |                              | \$9.99<br>\$3.00   | \$19.98<br>\$6.00           |              |              | 3Pay                              |
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### PROLink

PROLink<br/>Catalog<br/>IntegrationAnother way to search for and add items to work orders in TRACS is by<br/>directly accessing the PROLink catalog.Note:The optimal screen resolution for using the PROLink catalog is<br/>1024x768.

**How To** To access and use the PROLink catalog, perform the following steps:



# PROLink, Continued

#### How To (continued)

| Step | Action   |
|------|--|
| 3    | The results list will allow you to see the available quantity for both |
|      | TRACS and for your store.  |
| 4    | When you find your desired part, click Transfer underneath the         |
|      | quantity, and the part will automatically transfer to an open work     |
|      | order.   |

| Each Jarmard  | Refresh  |                  |       |  |        |
|---|--|------------------|-------|--|--------|
|   | Brank Witter Davids Director Salesten  | ¥4.              |       |  | OMPHRE |
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| an allow Date -   | Citrac Gen   | P8.1518          | 1     | Lat. II fir                              |        |

# Chapter 6: Customer Basics

\_\_\_\_\_

### Overview

| Process of<br>Working with<br>Estimates | Each time a customer comes into your business<br>for service, you will usually perform the<br>following basic activities in the system:   | Schedule Appointment                  |
|---|---|---------------------------------------|
|   | 1. First, view the day's schedule to see how busy your shop is. Then begin a new estimate so that you can give your customer an idea of the   | Create Estimate                       |
|   | expected repair cost. In order to do that, you<br>will need to add a new customer to the<br>system, or, if this is a repeat customer, the   | Work with Customers                   |
|   | <ol> <li>name should already be in the system.</li> <li>Verify the customer's vehicle or add a new</li> </ol>   | Work with Vehicles                    |
|   | <ul><li>vehicle for that customer.</li><li>3. Listen to the customer's description of the problem and document any repair notes for</li></ul>   | Create Repair Notes                   |
|   | <ul><li>the technician.</li><li>4. Add specific items to the estimate. You can obtain these items in several ways, such as</li></ul>  |                                       |
|   | <ul><li>Pick from a list of items</li><li>Enter new items not listed</li></ul>  | Work with Items                       |
|   | <ul> <li>Choose from items in the Parts<br/>Catalog</li> <li>Select labor estimates from the<br/>Mitchell's Mechanical Labor<br/>Estimating guide</li> <li>Use a barcode scanner</li> </ul> | Purchase Items                        |
|   |   | Assign Technician                     |
|   | <ol> <li>Purchase any parts that you don't currently<br/>have available, if necessary.</li> <li>Assign a technician to the repair, if a</li> </ol>  | Print Job Ticket                      |
|   | technician has not already been set up for an item.   | Actuals                               |
|   | <ol> <li>Move the customer's vehicle to the<br/>technician's bay for service. Print the job<br/>ticket to pass to the technician.</li> </ol>  | · · · · · · · · · · · · · · · · · · · |
|   | 8. Verify who the technician was that performed the service and enter the actual hours the technician spent on the service.   |                                       |
|   |   |                                       |

**This Chapter** This chapter of the user's guide will focus on how to perform these basic customer activities. You can access more detailed information from the Online Help feature.

### Scheduling

| Scheduling an<br>Appointment<br>for a Repair | When a customer indicates that he or she would like to have service<br>performed on a vehicle, you can create an appointment for that customer.  |
|--|--|
|  | You can perform service without an appointment; however, by setting<br>appointments, you can see how much work you have scheduled for each day.<br>If you know that one day is particularly heavy, you can set appointments for<br>other days to balance your work flow. |

**How To** To schedule an appointment, perform the following steps:

| Step | Action   |
|------|--|
| 1    |  |
|      | Click the <b>Open the Schedule</b> icon , and the <b>Schedule</b> form |
|      | displays with the <b>Day</b> folder active;                            |

| to Schedule                            |                                       |            |                     |                        |   |  | LE       |
|--|---------------------------------------|------------|---------------------|------------------------|---|--|----------|
| Day Month                              |                                       |            |                     |                        |   |  | XDore    |
| P Include Open Wolk On                 | idea have the past . 17 de            | pi:        |                     |                        |   |  | 30-      |
| Scheduled Date<br>5/5/2008 5:00 00 Jak | Duration Customer<br>1 Andiesian Anna |            | Clatur<br>Extension | Diey Phone<br>593-3234 | Vehicle<br>1999 Dodge Touth Rian 2001 3/4 Ton - Plato | Technician Contact Name Contact Phone Provide 5/5/2008 5 (20102) | 2 Ea     |
|  |                                       |            |                     |                        |   |  | ed Pagar |
|  |                                       |            |                     |                        |   |  | - Mone   |
|  |                                       |            |                     |                        |   |  | 2 Heles  |
|  |                                       |            |                     |                        |   |  | 1 04     |
| 4 lai                                  |                                       |            |                     |                        |   |  |          |
| + + May 2, 2008                        | and I like I has I had I              | Rypue Note |                     |                        |   |  |          |
| , 112<br>, 112                         |                                       |            |                     |                        |   |  |          |

**Note:** You can also print off all of the job tickets for the day from the schedule, as well as access work order reports, using the **All JT's** and **WO Reps** buttons to the right.

#### How To (continued)

| Step | Action   |
|------|--|
| 2    | To better visualize the appointments already scheduled, you can          |
|      | sort by any of the column titles. For example, click on <b>Scheduled</b> |
|      | <b>Date</b> to list the appointments in order of day and time. Click on  |
|      | the same title again to sort them in reverse order. Order the data       |
|      | columns in a way that will best suit your business needs, and            |
|      | TRACS will remember for the next time that you open the                  |
|      | Scheduling window.   |
| 3    | To schedule a new appointment, click the New button, and the             |
|      | New Estimate form displays with the Detail folder and the                |
|      | Appointment subfolder active;  |

# Scheduling, Continued

How To (continued)

| Rew Estimate  |                              |
|---|------------------------------|
| Summary Worksheet Detail Totals                               | <mark>√</mark> Save          |
| Additional Information Appointment Report Format Options      | X Cancel                     |
| Customer  | 68 Preview                   |
| Name Cash Customer  | <u>P</u> rint                |
| Daytime # Evening #   | Job Ticket                   |
| Vehicle No Vehicle  | Purchase                     |
| License VIN Fleet#  | 🗻 –                          |
|   | Serv. <u>H</u> istory        |
| Appointment Appointment Date and Time Service Writer Duration | Item History                 |
| 2/7/2001 8:00 AM  |                              |
| Promised Date and Time Bay Techician                          | <b>V</b> • <b>G</b> <u>T</u> |
| 2/7/2001 5:00 PM  | a C <u>u</u> stomer          |
|   |                              |
| Repair Note   | <u>N</u> ew Cust             |
|   | 🌦 <u>N</u> ew Veh            |
|   | <b>ehicle ⊻ehicle</b>        |
|   | ? <u>H</u> elp               |

| 3 | Click to select from the appropriate fields;  |
|---|---|
| 4 | The Duration field activates a daily schedule total. It shows the total number of jobs for each day and a total estimated time. |
| 5 | Click <b>Save</b> and the new appointment displays on the Schedule  |
|   | form.   |
| 6 | Click the <b>Month</b> folder to display all appointments for a desired   |
|   | month.  |

## Scheduling, Continued

| Bigging Schedule |                    |     |                    |                 |          |  | _ 🗆 ×                      |
|------------------|--------------------|-----|--------------------|-----------------|----------|--|----------------------------|
| February         | 7, 2001            |     | February           |                 | 2001 🛫 📢 | <b>(                                    </b> | * <u>:</u> <u>N</u> ew     |
| Sun              | Mon                | Tue | Wed                | Thu             | Fri      | Sat  | <u>≧</u> dit<br>6ð Pre⊻iew |
|                  |                    |     |                    | 1               | 2        | 3  | <u> </u>                   |
| 4                | 5                  | 6   | 7                  | 8               | 9        | 10   | <u>?</u> <u>H</u> elp      |
| 11               | 12                 | 13  | 2 WO,2.75 Hr<br>14 | 15              | 16       | 17   |                            |
| 18               | 19                 | 20  | 21                 | 3 WO,5 Hr<br>22 | 23       | 24   |                            |
| 25               | 2 WO,5.5 Hr<br>2.6 | 27  | 28                 |                 |          | -  |                            |
|                  |                    |     |                    |                 |          |  |                            |

| 7 | Above is an example of schedule totals.  |
|---|--|
| 8 | Click <b>Done</b> to exit the scheduler. |

## **Creating Estimates**

Entering a NewThe most common method of beginning an estimate for a customer is to use<br/>the New Estimate form.

From this form, you can access all of the forms necessary to perform the activities discussed in this chapter. (You can also access these forms from other logical places in the application.)

**How To** To access the **New Estimate** form, perform the following steps:

| Step | Action   |
|------|--|
| 1    | <b>***</b> *   |
|      | Click the <b>Create a new Estimate</b> icon , and the <b>New</b> |
|      | Estimate form displays with the Summary folder active.           |

| Summary Woksheet   D     | etal   Totals |           |                                |                         | VSme.                              |
|--------------------------|---------------|-----------|--------------------------------|-------------------------|------------------------------------|
| Customer                 |               |           | Work Order<br>Status           | Odometes In             | XCarcel                            |
| Hame Division            |               | -         | New +                          |                         | 64 Peres                           |
| Day#                     | Evening #     | 2         | Created                        | Technician              | Dev                                |
| Vehicle No Vehicle       |               | -         | 6/18/2007 12 44 PM             |                         | -Job Ticky                         |
| License V                | Fier          | -         | Ptomised<br>06/18/2007 5 00 PM | -1                      |                                    |
|                          | an second     | 1         | N                              | -                       | a Charme                           |
| Type Item C              | Peaception    | Qty R     | ate Price Tot                  | al Tax Note             | Bec Ser                            |
|                          |               |           |                                |                         | Serv. History                      |
|                          |               |           |                                |                         | Jien History                       |
|                          |               |           |                                |                         | P toger                            |
|                          |               |           |                                |                         | COPED                              |
|                          |               |           |                                |                         |                                    |
|                          |               |           |                                |                         | 2 Cystone                          |
|                          |               |           |                                |                         |                                    |
|                          |               |           |                                |                         | A New Car                          |
|                          |               |           |                                |                         | Stew Cur                           |
|                          |               |           |                                |                         | · Network                          |
| Manufacture and a second |               |           |                                |                         | 🛶 Ngw Vel                          |
| Ilecar Note              | Symptom Lat   | APS LIGHT | E                              |                         | · Ngw Vet                          |
| PARTICIPATION PROVIDENTS | Symptom List  | APS UGHT  | 1                              | SubTotal                | → Ngw Vet<br>→ Xehicle<br>→ Nepeij |
| PARTICIPATION PROVIDENTS | Sympton List  | ABS UGHT  |                                | SubTotal<br>Tat         | → Ngw Vet<br>→ Xehicle<br>→ Nepeij |
| PARTICIPATION PROVIDENTS | Symptom Lat   | ABS UGHT  |                                | No. of Concession, Name | → Ngw Vet<br>→ Xehicle<br>→ Ngest  |

| Summary | The <b>Summary</b> folder provides you with the opportunity to work with   |
|---------|--|
| Folder  | estimate summary information. As you create new estimates, you can use the |
|         | Summary folder as your base to perform many related tasks.                 |

## Working with Customers

| Identify Your<br>Customer | As you create new estimates, the first activity you will undertake is to identify your customer. You will need to perform one of the following tasks:   |
|---------------------------|---|
|                           | <ul><li>Select a customer from a list of existing customers; or</li><li>Enter a new customer into the system.</li></ul>   |
|                           | <i>Note</i> : If the customer has already had service done at your business, the name should already be in the system. Check to see if the customer is listed so that you don't create multiple listings for the same customer.   |
|                           | The letters you type must match the case of the letters in the database or you will not locate the customer. For example: If a customer was originally entered as SMITH in the database and you search for the name Smith, the customer will not display. You might assume SMITH is not a customer, create a new customer record, and end up with two records for the same customer. This could cause a problem later processing Mr. Smith's account. |
| How To                    | To select a customer from a list of existing customers in a new work order, perform the following steps:  |

| Step | Action  |
|------|---|
| 1    | Click the down arrow in the <b>Name</b> field to display a list of existing customers,  |
|      | OR  |
|      | type the first few letters of the customer's last name in the <b>Name</b> field, and the list of existing customers displays. |
|      | <i>Note:</i> Remember that entries are case sensitive.  |
| 2    | Click to select the appropriate customer from the list, and the form for that customer displays.                              |

# Working with Customers, Continued

**How To** To create a new customer, perform the following steps:

| Step | Action   |
|------|--|
| 1    | From a new work order, either click the New Cust button on the       |
|      | right, or type in the name of the customer and click "Yes" when      |
|      | prompted. If you enter a last name, it will be carried over into the |
|      | new customer window.   |

| Cuitomér  | with, Bobby<br>No Vehicle | Denal   Totals  <br>Evening #  <br>VIII] | ب<br>ب<br>Peets ب   | Work Dider<br>Status<br>New<br>Created<br>T0/06/2010 11 34 P<br>Promised<br>10/06/2010 5 00 Ph | Pole        |       | e vice Wide |   | Save<br>Canoel<br>Berry<br>Hoto Tech |
|-----------|---------------------------|--|---|--|-------------|-------|-------------|---|--------------------------------------|
| Type      | Ren                       | Description                              |   | Qty Bate   | Price       | Total | Tox Note    | - | A Bet Set                            |
|           |                           |  |   |  |             |       |             |   | Serv Hotor                           |
|           |                           |  | Confirm   |  | -           | II.   |             |   | J Pager                              |
|           |                           |  | En al an  | ustomer not found  | in Ref. Add | fwon  |             |   | (iPD)                                |
|           |                           |  | 0   |  |             |       |             |   | Curton                               |
|           |                           |  |   | Yes C  | ancel       |       |             |   | BlevCu                               |
|           |                           |  | L   |  | _           |       |             |   | Nov Ve                               |
|           |                           |  |   |  |             |       |             | 1 | . Vehicle                            |
| • 🗐       |                           |  | and the second se |  |             |       |             |   | tt Inspect                           |
| Repar Not | . 2                       | 5  | Jespfore Ligt ABS LIGHT   |  | SubTota     | 34    |             |   | 7 Heb                                |

| Step | Action  |
|------|---|
| 2    | Fill in the appropriate information for the customer. Note that the |
|      | E-Mail Address field is on this page. If you do not enter an        |
|      | e-mail address for a customer, TRACS will prompt you.               |
| 4    | Click Save to go back to the New Estimate form. You have now        |
|      | entered a new customer.   |

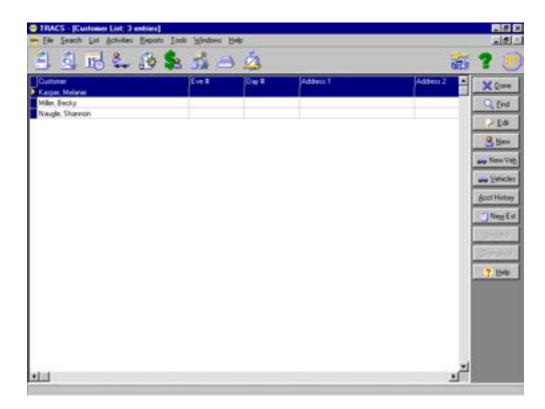
| Summary Wolksheet Deta | 🖶 New Customer  | 1 12      | J Save       |
|------------------------|---|-----------|--------------|
| Name Seith Bobby       | Last Name Part Name   | 1 Save    | X Cancel     |
| Day #                  | South   | X Cancel  | 68 Peve      |
| Vehicle No Vehicle     | Company   | As See 1  | -Bint        |
| License VIII           | General Billing Info   Accounts   Note  | Nest Page | - Job Tick   |
| Type Res Des           |   | ? Heio    | Bet Set      |
|                        | Individual •  |           | Sev Hino     |
|                        | Day Number Evening Number Cell Number mail/dd/yspy  |           | June History |
|                        | A second s |           | J Pager      |
|                        | FAX Number Additional Number 1 Additional Number 2 Table 2010   |           | (SPD)        |
|                        | Contact Name Contact Number Last Service  |           | 1.1.1        |
|                        | 9 gotve   |           | 2 Curron     |
|                        | E Mal Addens Las Reminde  |           | 3 New Cu     |
|                        | Address Lait Thesk You  |           | Ngw Ve       |
|                        | Stinet  |           | -Vehicle     |
| 0                      |   |           | TE hapect    |
| Niglair Note 🛃         | Additional  |           | ? Hep        |
|                        | Zo Cude Cay State/Prov  |           |              |
|                        |   |           |              |
|                        |   | 1000      |              |

Editing Customer Account Information Informatio Information Inform

| ast Name F                             | irst Name   | Save   |
|--|---|--|
| 121017007                              | Inst Name   | 1  |
|  |   | X Cance  |
| ompany                                 |   | Sa Merge   |
| RACS Test Company.                     |   | and the second sec |
| neral Billing Info Accounts Note       |   | <u>N</u> ext Page  |
| neral   billing thro. Accounts   Note  |   | ( ? Help   |
| AR Account                             |   |  |
| Accounts Receivable                    | The second se |  |
| Processies and a residence             |   |  |
| Eull Payment Required                  | Tax   |  |
|  | T Iax Exempt  |  |
| Credit Limit                           | Exemption ID  |  |
| , ,                                    |   |  |
| Payment Due Days                       | Tax Classification  |  |
| 15                                     | Default   |  |
| Pricing Profile                        | 1   |  |
| Default Pricing                        | Finance Charges   |  |
|  |   |  |
| ☐ Print Zero Balance Statement         | Grace Days  |  |
| T PO Required                          | 30  |  |
| ✓ Charge Shop Supplies                 |   |  |
| ······································ |   |  |

## Working with Customers, Continued

Reading the<br/>Customer ListOn the Customer List form, the most recent name entered, in this caseMelanie Kasper, appears as a highlighted name and is automatically placed<br/>alphabetically in the list.



# Working with Vehicles

| Entering a<br>Vehicle  | After you have entered a customer into the system, you will want to specify what type of vehicle or vehicles the customer owns.  |
|------------------------|--|
|                        | You can either enter a vehicle manually, or you can use the <b>Pick List</b> feature to select the vehicle from an existing list. Using the <b>Pick List</b> feature saves time because it links to existing information within the NAPA electronic catalog. |
|                        | If you know the vehicle's VIN number, you can also use the <b>VIN Decoder</b> to automatically display the vehicle's information.  |
|                        | Enter vehicle information manually only for non-cataloged vehicles such as generators or garden tractors.  |
| Using the Pick<br>List | If you have registered the NAPA Parts Catalog, the pick list should display<br>the available vehicles from which to choose. This saves time when entering<br>new vehicle information.  |
|                        | When a check mark appears in the <b>Use Pick List</b> box, the remaining vehicle information is entered automatically once you select the vehicle year, make, and model.   |
| How To                 | To use the Pick List, perform the following steps:   |

| Step | Action  |
|------|---|
| 1    | Click the New Veh button, and the New Vehicle form displays |
|      | with the Use Pick List field selected.                      |

## Working with Vehicles, Continued

How To (continued)

| New Vehicle                     |  |  |
|---------------------------------|--|--|
| Customer                        |  |  |
| Wingate, Christopher            |  | 🔀 <u>C</u> anc   |
| Year, Make, Model, Engine       |  | 🔔 Chg <u>O</u> w   |
| Vise Pick List <u>P</u> ick     |  | And the second s |
| Year Make                       | Model                                  |  |
|                                 |  | <u>?</u> <u>H</u> e  |
| Engine                          | Engine Serial No.                      |  |
| 1                               |  |  |
|                                 |  |  |
| Color VIN                       | License Tag State Mfg Date             |  |
|                                 |  |  |
| Initial Contact Most Recent     | Last Service Fleet Driver Fleet Number |  |
| Odometer Odometer 0             | Odometer                               |  |
|                                 | Notes M                                |  |
| Date Date 3/2/2001 ▼ 3/2/2001 ▼ | Date                                   |  |
|                                 | Last Reminder                          |  |
| Pricing Profile                 |  |  |
| Default Pricing                 |  |  |
| Location                        | Est. Daily Mileage                     |  |
| T                               |  |  |
|                                 |  |  |

| Step | Action  |
|------|---|
| 2    | Click the <b>Pick</b> button, and the <b>Select Vehicle Year</b> , <b>Make</b> , <b>Model</b> |
|      | and Engine form displays with the Year folder active.   |

| 🤓 Select Vehicle Year, Make, Model and Engine |                          | _ 🗆 🗵    |
|---|--------------------------|----------|
| Year Make Model Engine                        | Year                     | 🖌 ОК     |
| Year  | 1999                     |          |
| 1999  |                          | 🗙 Cancel |
| 1998  | Make                     |          |
| 1997  | Chevrolet Truck          |          |
| 1996  | Model                    |          |
| 1995  | Pickup C10/C1500 1/2 Ton |          |
| 1994  | Pickup cro/croot //2 ron |          |
| 1993  | Engine                   |          |
| 1992  | 262Cl 4.3Liter V6        |          |
| 1991  |                          |          |
| 1990  |                          |          |
| 1989  |                          |          |
| 1988  |                          |          |
| 1987  |                          |          |
| 1986  |                          |          |
| 1985  |                          |          |
| 1984  |                          |          |
| 1983  |                          |          |
| 1982  |                          |          |
| 1981  |                          |          |
| 1980  |                          |          |
| 1979  |                          |          |
| 1978  |                          |          |
| 1977  |                          |          |
| 1976  |                          |          |
| ■ 1373<br>▼                                   |                          |          |

| Step | Action   |
|------|--|
| 3    | Double-click to select a year from the <b>Year</b> list, and the <b>Make</b> folder displays the available makes for the year you have identified. |

| Year        | Make       | Model | Engine |
|-------------|------------|-------|--------|
| Mak         | e          |       |        |
| 🕨 Chev      | vrolet Tru | ck    |        |
| Chry        | sler       |       |        |
| GMC         | Truck      |       |        |
| Lexu        | ıs         |       |        |
| Maz         | da         |       |        |
| Merc        | edes Be    | nz    |        |
| Merce Merce | sury       |       |        |
| Mits:       | ubishi     |       |        |
| 📕 Olds      | mobile     |       |        |
| Plym        | outh       |       |        |
| Pont        | iac        |       |        |
| Saat        | )          |       |        |
| Sub-        | aru        |       |        |
| 📕 Тоус      | ota        |       |        |

| Step | Action  |
|------|---|
| 4    | Double-click to select a make, and the <b>Model</b> folder displays the |
|      | available models for the make you have selected.                        |

| Y | ear Make Model Engine      |
|---|----------------------------|
| Г | Model 🔼                    |
| Þ | Pickup C15/C1500-1/2 Ton   |
|   | Pickup C25/C2500-3/4 Ton   |
|   | Pickup C35/C3500-1 Ton     |
|   | Pickup K15/K1500-1/2 Ton   |
|   | Pickup K25/K2500-3/4 Ton   |
|   | Pickup K35/K3500-1 Ton     |
|   | Suburban C10/C1500-1/2 Ton |
|   | Suburban C20/C2500-3/4 Ton |
|   | Suburban K10/K1500-1/2 Ton |
|   | Suburban K20/K2500-3/4 Ton |
|   | Yukon                      |

| Step | Action  |
|------|---|
| 5    | Double-click to select a model, and the <b>Engine</b> folder displays the |
|      | available engines for the model you have selected.                        |

| Year Make Model Engine |          |
|------------------------|----------|
| Engine                 | <b>▲</b> |
| 262CI 4.3Liter V6      |          |
| 305Cl 5.0Liter V8      |          |
| 350Cl 5.7Liter V8      |          |

| 6 | Double-click to select the desired engine, and the New Vehicle |
|---|--|
|   | form displays the settings you have selected.                  |

| New Vehicle                       |                           |              |                      |
|-----------------------------------|---------------------------|--------------|----------------------|
| Customer                          |                           |              | <u>S</u> ave         |
| Wingate, Christopher              |                           |              | X Canc               |
| Year, Make, Model, Engine         |                           |              | 🔔 Chg <u>O</u> v     |
| ☑ Use Pick List                   |                           |              |                      |
| Year Make                         | Model                     |              | Arrest Merg          |
| 1999 Chevrolet Truck              | Pickup C10/C1500 1/2 To   | n            | <u>?</u> <u>H</u> el |
| Engine                            | Engine Serial No.         |              |                      |
| 262Cl 4.3Liter V6                 |                           |              |                      |
|                                   |                           |              |                      |
| olor VIN                          | License Tag State Mfg Da  |              |                      |
|                                   |                           | ☑ Active     |                      |
| Initial Contact Most Recent       | Last Service Fleet Driver | Fleet Number |                      |
| Odometer Odometer                 | Odometer                  |              |                      |
|                                   | Notes 🚮                   |              |                      |
| Date Date                         | Date                      | A            |                      |
| 3/2/2001 💌                        |                           |              |                      |
|                                   | Last Reminder             |              |                      |
| ricing Profile<br>Default Pricing |                           |              |                      |
|                                   |                           |              |                      |
| .ocation                          | Est. Daily Mileage        |              |                      |
|                                   |                           | <b>V</b>     |                      |

| Step | Action  |  |  |
|------|---|--|--|
| 7    | Add additional information to fields as needed.   |  |  |
| 8    | Click the <b>Save</b> button. You have now entered a new vehicle using the <b>Pick List</b> feature.  |  |  |
|      | <b>Note:</b> When you add a new vehicle, recommended services appropriate that that vehicle will automatically be added. You can access a list of these services by clicking the <b>Rec Serv</b> button in the vehicle window. There is more information about Recommended Services in Chapter Seven. |  |  |

| Websile Recom  | mended Service   |         |          |
|--|--|---------|----------|
| Customer: FDSTER, JAMES-MARY<br>Vehicle: 2001 Acies Integre 1934CC 1 SLaw L4         |  | X Dove  |          |
| LEVEL3<br>LEVEL3<br>LEVEL3<br>LEVEL4<br>LOF<br>STATEINSPECTI<br>LEVEL2<br>BRAKEPLUSH | Declassi<br>FOUR WHEEL ALSOMENT<br>NAPA AUTOCAPE CENTER PM PROGRAM<br>NAPA AUTOCAPE CENTER PM PROGRAM<br>LUBE OLL AND RUTER<br>ON STATE EMISSION INSPECTION<br>NAPA AUTOCAPE CENTER PM PROGRAM<br>PLUSH BRAKES | Due Due | Editoria |
|  |  |         | -        |

Using the VIN NAPA TRACS LINK and NET now provide an online VIN Decoder. This provides VIN information that is always current and up to date and does not require you to load or update VIN data. The decoder is integrated into the system.

When decoding the VIN on a new vehicle, the decoder will provide the **Year**, **Make**, **Model** and **Engine** information for you . The additional vehicle VIN information is stored in the TRACS database along with the vehicle for viewing at any time.

VIN Information can be accessed from multiple locations in TRACS: Vehicle Edit, NAPA Catalog, Work Order.

**How To** To use the VIN Decoder, perform the following steps:

| Step | Action  |
|------|---|
| 1    | If you are either adding a new vehicle from scratch or from a           |
|      | Work Order, you can use the VIN Decoder to pull up the                  |
|      | vehicle's information. From a <b>Work Order</b> , to add a new vehicle, |
|      | choose New Veh from the right menu.                                     |

| Report.                     | Coder #1100                   | LOCKING, MAINE             |                          |                          |                          | Ola.         |
|-----------------------------|-------------------------------|----------------------------|--------------------------|--------------------------|--------------------------|--------------|
| -                           | - Sections                    | Deal Task                  |                          |                          |                          | 11-          |
| Cuize                       |                               |                            | 1.17                     | Work Onder               | Different to             | Xim          |
| • Hana                      | LOOUNG, WA                    | NC                         | 2                        | Freese Croke             |                          |              |
| Date                        | -                             | + Exercit                  |                          | Created                  | Tashailar .              | Od Par       |
| (and a local                | _                             |                            |                          | 3/04/0003 8:55.464       | and and a second second  |              |
| 0.000                       | 122                           |                            | The second second second | Former                   | Line -                   |              |
| (statistic                  | -                             | 5 vev)                     | - Foot -                 | ELGACERS 5 78 PM         | •                        | 01/0         |
| Int                         | item.                         | Description                | Gr 1                     | eta Pice I               | Intel Inc. 1             | - • At-1     |
| Pat                         | 3695128                       | 1 HO END                   | 2                        | \$118.40                 | KTHE BE P                |              |
| Pat                         | 0653                          | <b>Upper Radiator Head</b> | 1                        | \$22.40                  | \$22.49                  | Ser Br       |
| Part.                       | 9654                          | Lowo Radiator Hour         | 1                        | \$22.19                  | \$22.15                  | Benitis      |
| Part                        | 256                           | THE RIMOLT                 | 1                        | \$13.38                  | \$13.38 17               | 3740         |
| Pat                         | 1761778                       | Water Parap New            |                          | \$65.18                  | 845.18 P                 | 1100000      |
| Pat                         | SUBRES                        | WATER PUMP - PUR           |                          | 555.40<br>EFAULT \$10.00 | \$55.40 S7<br>\$312.00 C | -0/2         |
|                             |                               |                            |                          |                          |                          |              |
| 11                          |                               |                            |                          |                          |                          | 2 2-         |
| Price To                    | - 21                          | 1.64                       | ALL LIN ALL UGHT         |                          |                          |              |
| CA BRUN<br>ROTATE<br>NEW TR | IES<br>I MARL<br>BELTS ARE SO |                            | ann an 19                |                          | Tar<br>Total             | ENCY<br>ENCY |

# Working with Vehicles, Continued

#### How To (continued)

| Step | Action  |
|------|---|
| 2    | From the New Vehicle window, be sure that Use Pick List is    |
|      | checked, and then enter the VIN number into the VIN text box. |
|      | Then click the <b>Decode VIN</b> button.                      |

| Customer   |  |                   | 15        |
|--|--|-------------------|-----------|
| LOCKING, WWYNE   |  |                   | Xo        |
| Value Identification   | 1/mi   |                   | 3.0e(     |
| P Der Pick Lat   | Bok TYMOU0246KB673154  | Decode VIN        | 3.0       |
| Yes Make   | the the second second second   | Hodal             | 10.100    |
| 1  |  | 1                 | 100       |
| Engine   |  | Engine Serial No. | 7.8       |
| 1.   |  |                   |           |
|  |  |                   |           |
| Color Linema   | Tan Date MiriDate  | Buthing Bu        | a Martin  |
| ida Lorna  | Tag State MigDute  | Flast Driver Par  | et Number |
| -  | P bow  |                   | e Nation  |
| And a second sec |  | ce Nobel 🛃        |           |
| 2 Initial Contact  | Mod Recent Lad Serve   | ce Nobel 🛃        | e hape    |
| Total Contact<br>Outwarter<br>Date   | Mod Recert<br>Date Date Date Date Date Date Date Date  | ce Nobel 🛃        |           |
| Total Contact<br>Odimenter<br>0  | Mod Recent Last Serve<br>Delored Delored |                   |           |
| Deter<br>Oderety<br>Deter<br>T1/25/2007  | Mod Recert<br>Date Date Date Date Date Date Date Date  |                   |           |
|  | Add Record     Date     D        |                   |           |
| Initial Contact<br>Odimeter<br>Date  | Addressee  |                   |           |

3 A window of vehicle information will pop up. Click **Save.** 

## Working with Vehicles, Continued



| 4 | Remember to click <b>Save</b> in the new vehicle window after the decoder has provided the appropriate vehicle information. |
|---|---|
|   |   |
| 5 | You can view the full VIN information at any time by clicking on  |
| - |   |
|   | the <b>VIN Info</b> button on any <b>Edit Vehicle</b> window. You can also  |
|   | use the VIN decoder for an existing vehicle at any time from the  |
|   | use the vin decoder for an existing venicle at any time from the  |
|   | Edit Vehicle window.  |
|   |   |
|   | The <b>VIN Info</b> buttons will only be active if the VIN number for   |
|   | 5   |
|   | the vehicle has been decoded by clicking on the <b>VIN Decode</b>   |
|   | button in the Edit Vehicle window.  |
|   | Dutton in the Luit Venicle window.  |

| P Un Pokut _ DA  | VIN<br>THAOUSTAIKINT215  | Percent Unit   | 3,00      |
|--|--|----------------|-----------|
| and the second s |  |                |           |
| Year Hate  | for an and a second sec |                | Current I |
| Vea Has<br>388 Fod Tuck  | Ecop   | •              |           |
| Engine<br>[181.287702 VEDCHC 28 Value  | Ergna Sain   | d14s           | _ /       |
| THE 287CE VEDGE 28 VAN   |  |                |           |
|  |  |                |           |
| der License Tag litele   | MaDav  | Flat Diret The | (Nadar    |
| 3  | P how  |                |           |
| Hid Covar  | Latiever   | Annes 🛃        |           |
| Dáseme Dáseme  | Oderates   |                | 2         |
|  | . Contraction  |                |           |
| Date Date  | Des  |                |           |
|  |  |                |           |
| 11/20/2007   | and the second s |                |           |
| in cardao. T   | Lachmode   |                |           |

# **Viewing Service History**

| The Service<br>History Feature | The <b>Service History</b> feature allows you to view or print information about services that have been performed on a particular vehicle.               |
|--------------------------------|---|
|                                | The Service History button, located on an open repair order and over the Selected Vehicle form, accesses the Service History feature.                     |
| How To                         | To view service histories for a particular vehicle from either the <b>Selected Vehicles</b> form or from an open work order, perform the following steps: |

| Step | Action  |
|------|---|
| 1    | Click to select the vehicle for which you would like to see the |
|      | service history.  |

| Fie Seach List Activities Beports Icoli Windows Holp  |   | اهلير  |
|---|---|--|
| 4 9 18 端 🚯 🛸 🍰 🔿 🧕 🦳  | 🏭 🕇   |  |
| Eng         State         Vehicle         Custome           GFT546         GA         1991 Chevrolet Convette 350CI 5 7Liker V8         Genard, Mark           KMV156         GA         1994 Buck Regal 231CI 3 8Liker V6         Genard, Mark           KMV158         GA         1994 Buck Regal 231CI 3 8Liker V6         Genard, Mark           KMV188         AR         1994 Buck Regal 231CI 3 8Liker V6         Genard, Mark | Cstor VIII -<br>She 4356<br>Yelow JHU<br>She 5783 | Done     End     End     Edd     Serv Eddo     Serv Eddo     DrageA     Preb |
|   | ,<br>A  | 1  |

## Viewing Service History, Continued

How To (continued)

| Step | Action   |
|------|--|
|      | Click the Serv. History (Service History) button and the Vehicle |
|      | History Search window displays with the All listed fields field  |
|      | selected.  |

| Vehicle History Search  |              | ×                             |
|---|--------------|-------------------------------|
| Search Repair Orders Us<br>All listed fields<br>Selected fields | sing         | <u>≥</u> one<br><u>∺</u> Eind |
| Search for  | Invoice Date | <u>Cl</u> ear                 |
| R.O. Reference  | R.O. Note    |                               |
| ltem  | Item Type    |                               |
| Category  | Manufacturer |                               |
| Description   | Item Note    |                               |

3 Refer to the following table to determine your next step:

**IF...** you do not want to use specific criteria to search for a vehicle's service history, you do want to use specific criteria to search for a vehicle's service history,

#### THEN...

skip to Step 4.

type search criteria in the desired field or fields.

## Viewing Service History, Continued

| Step | Action   |
|------|--|
| 4    | Click the <b>Find</b> button, and the <b>Vehicle History</b> form displays all |
|      | the service histories for a particular vehicle.                                |

| TRACS - Wehicle H               |      |         |                       | 4                       |                        |          |                      |       |        |
|---------------------------------|------|---------|-----------------------|-------------------------|------------------------|----------|----------------------|-------|--------|
| 9 9 18                          | 2. 3 | \$ 5    | 3 0                   |                         |                        |          | 1                    | ?     | ۲      |
| RD Number Status<br>163 Invoice | Note | Created | Ponvied<br>01/13/1999 | Completed<br>05/26/1999 | Invoiced<br>05/26/1999 | Canceled | Author<br>Store Dyne | See 2 | X Done |
|                                 |      |         |                       |                         |                        |          |                      |       | Edit   |
|                                 |      |         |                       |                         |                        |          |                      |       | Fodney |
|                                 |      |         |                       |                         |                        |          |                      |       |        |
|                                 |      |         |                       |                         |                        |          |                      |       |        |
|                                 |      |         |                       |                         |                        |          |                      |       |        |
|                                 |      |         |                       |                         |                        |          |                      |       |        |
|                                 |      |         |                       |                         |                        |          |                      |       |        |
|                                 |      |         |                       |                         |                        |          |                      |       |        |
|                                 |      |         |                       |                         |                        |          |                      |       |        |
|                                 |      |         |                       |                         |                        |          |                      | 11    |        |
|                                 |      |         |                       |                         |                        |          |                      |       |        |
|                                 |      |         |                       |                         |                        |          |                      | لتر   |        |
|                                 |      | _       | _                     | _                       | _                      | _        |                      | 1     |        |

## **Creating Repair Notes**

- **Repair Notes** Once you have entered a customer and vehicle, you can describe the customer's comments in the **Repair Note** field. Typing these notes will help the technician when servicing the vehicle. You can also choose from a list of pre-defined symptoms to add to your notes. The comments entered here only appear on the job ticket.
- **How To** To enter repair notes, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click the Summary folder On the New Estimates form to verify       |
|      | that it is active.   |
| 2    | Click in the <b>Repair Note</b> field to activate the field.       |
| 3    | Type your description of the problem or any other appropriate note |
|      | to the service technician in the <b>Repair Note</b> field.         |

| ummary   | • Workshe                  | et Detail Tot           | ale   |     |                   |              |         |                |                       | 18                        |
|--|----------------------------|-------------------------|---|-----|-------------------|--------------|---------|----------------|-----------------------|---------------------------|
| untomer  | CITY POWER DOLLARS         |                         |   | -   | Work Or<br>Status | der          | 0.6om   | and to         |                       | XC                        |
| Name   | WITCHER,                   | 10M                     |   |     | Repair            | Inder 1      | -       |                | 6                     | _                         |
| Day#   | 535 5355                   | • 6                     | Evening #   | *   | Created           | 1000         | Techn   | -              |                       | od Pe                     |
| - Andre I  | No Vehicle                 |                         | 10000 C   | •   |                   | 5 10.57 AM   | 100.00  | 10, 10 T       | -                     |                           |
| enicie   | 1 HO VENCE                 |                         |   |     | Promis            |              | -       |                | -                     | -1100                     |
| cense  |                            | - VIN                   | · Fleet   | a 📃 |                   | 2005 5 00 PM |         |                |                       | 1394                      |
| -  | 0                          | -                       |   | -   | I commenter       | -            | -       | -              | 10 more               | and the second            |
|  | GLIDE                      | Description<br>WATER PS |   |     | Tote<br>DEFAULT   | \$72.00      | \$72.00 | Tex.           | Note                  | A Salah                   |
| Part   | 1301480                    | WTR PUM                 | Contraction of the second s | 1   | ET MOLT           | \$39.99      | \$39.99 | R              | and the second second | Serv.B                    |
| and the second se  | A NUMBER OF TAXABLE PARTY. |                         | AND FILTER  |     | ID RATE           | \$10.76      | \$10,76 | Г              | LUBE OIL AN           | a Ben Hi                  |
| Part   |                            |                         | ALC: NOT THE OWNER  |     |                   | \$8.10       | \$8.10  | R              |                       | Contraction of the second |
|  | 0374810                    | MANIFOLD                | GASKETS   | 1   |                   |              |         |                |                       | 1000                      |
| Part   | 0574010                    | TAPE                    | GASKETS   | 1   |                   | \$5.21       | \$5.21  | and the second |                       | 3 Pay<br>13 P             |
| Conception of the local division of the loca |                            |                         | GASKETS   |     |                   |              |         | and the second |                       | -                         |
| Conception of the local division of the loca |                            |                         |   | 1   |                   |              |         | and the second |                       |                           |
| Part   | 06133                      |                         |   | 1   |                   |              | \$5.21  | and the second | <u>.</u>              |                           |
| Part   |                            |                         | Symptom Lat   | 1   |                   | \$5.21       | \$5.21  | 4              | 1 201                 |                           |
| Part   | 06133                      |                         |   | 1   |                   | \$5.21       | \$5.21  | R .            | \$129.0               |                           |
| Part   | 06133                      |                         |   | 1   |                   | \$5.21       | \$5.21  | 4              |                       |                           |
| Part   | 06133                      |                         |   | 1   |                   | \$5.21       | \$5.21  | R .            | \$129.0               |                           |

| Step | Action  |
|------|---|
| 4    | To add a note about a common symptom from the pre-defined list,   |
|      | click on the Symptom List drop-down menu.                         |
| 5    | Choose one of the symptoms to add it to the list. The description |
|      | then becomes part of your notes.                                  |

| ummary   | Y Wokshi   | eet Detail Tokels   |  |  |                    |                    |  |  |  |                        | 150   |                           |
|----------|--|---|--|--|--------------------|--------------------|--|--|--|------------------------|---|---------------------------|
| Customer |  | and the state   |  | 1  | Wark Ox            | der                |  | -  |  | -                      | XCan  | cel la                    |
| Name     | WYCHOR.  | том   |  |  | Status<br>Repair 0 | Dates              | • Ddone  | D  |  |                        |   | - 1000                    |
| Dave     | 955-9555   | · Evenir  | 10.#   | -  | Concession of      |                    | - Colores  |  |  |                        | od Pav  | T.                        |
|          | and a second sec |   | 301  |  | Created            | 5 10.57 AM         | Tech   | nician   | -  |                        | Be  | *                         |
| Vehicle  | No Vehicle   |   |  | -  | Promise            |                    |  |  | 1  |                        | -Liob T)  | cker                      |
| icense   | -  | YIN VIN   | ¥ Fieedl   |  |                    | eg<br>2005 5:00 PM | -  |  |  |                        | - Pyrch   | -                         |
| Type     |  | Distance of the local | 120-22   |  | - Andrews          | Concentration of   |  | Tex  | Nette  | •                      |   |                           |
| _        | GUIDE  | WATER PUMP  | BIB  |  | FAULT              | \$72.00            | \$72.00  |  |  |                        | And Deriv   |                           |
| Part     | 1301480  | WTR PUMP  |  | 1  | a faire a          | \$39.99            | \$39.99  |  | Last to any                                    |                        | Sev His   | tory .                    |
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| Part     | 0374810  | MANIFOLD GAS  | KETS   | 1  |                    | \$8.10             | \$8.10   | P  | -  |                        |   |                           |
| -        | I show an an annual  | E THE & LOD OF  |  | 1  |                    | \$5.21             | \$5.21   |  |  | _                      |   |                           |
| Part     | 06133  | TAPE  |  |  |                    | 15.21              | 43.01  |  |  | 1                      | 3 Page<br>(3 PD<br>B Cynt   | 2                         |
|          | 06133  | TAPE  |  |  |                    | 15.21              | \$3.21   | r  |  | 1                      | (192)   | ner<br>Cuth               |
| 4        |  | TAPE  |  |  |                    |                    | - 4-   | P.   |  | 1                      | Carto<br>Carto<br>Barrow<br>Salary<br>Cartop  | e<br>Dat<br>Veb           |
| 4        | of 31  | TAPE  | Symptom Lat  | 3020   |                    |                    | 3  |  |  | 1<br>1                 | Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto<br>Curto | e<br>Dat<br>Veb           |
| 4        |  | TAPE  | 57   | SIDEDI<br>MFTOM  |                    |                    | DESCRIPT   | ION  | \$ DM  | 1<br>2 <sup>1</sup>    | Carto<br>Carto<br>Barrow<br>Salary<br>Cartop  | e<br>Dat<br>Veb           |
| 4        |  | TAPE  | 51   | 3020   |                    |                    | DESCRIPT<br>MIS LIGHT  | ION  | S ON<br>KE IS NOT C                            |                        | Ci PD<br>Ci PD<br>Ci pto<br>Ci p  |                           |
| 4        |  |   | ST<br>AU   | STUSCH<br>MPTOM  |                    |                    | DESCRIPT<br>MIS LIGHT  | ION  | NE IS NOT C                                    |                        | Ci PD<br>Ci PD<br>Ci pto<br>Ci p  |                           |
| 4        |  |   | AL<br>AL   | STURCH<br>MPTOM<br>HEGGIN<br>NOT COOL  |                    |                    | DESCRIPT<br>MIS LINK<br>AIR CONDI<br>ENGINE ID   | ION<br>TIONE   | NE IS NOT C                                    | DOLING                 | Ci PD<br>Ci PD<br>Ci pto<br>Ci p  |                           |
| Repar No | ote 🛐  |   | 57<br>44<br>04<br>84   | ELUSINI<br>METOM<br>SECON<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODIE<br>CODI 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| Repair Note              | Symptom List ROOLANT LEAS           | *  | -        |         |
|--------------------------|-------------------------------------|----|----------|---------|
| * ABS LIGHT STAYS ON     | Y CEE COOL ANT LEAKING FROM THE CAR | 2  | SubTotal | \$25.93 |
| CUSTOMER STATES THAT THE | Y SEE COOLANT LEAKING FROM THE CAR  |    | Tax      | to ai   |
|                          |                                     | -1 | Total    | \$26.04 |

# Working with Items

| Items  | In order to complete your estimate, you will need to be able to locate certain items. You can obtain these items in several ways, including the following:   |
|--|--|
|  | <ul> <li>picking from a list of items;</li> <li>entering new items not listed;</li> <li>choosing from items in the Parts Catalog;</li> <li>selecting labor estimates from the Mitchell's Mechanical Labor Estimating Guide;</li> <li>choosing parts that correspond with an unknown manufacturer</li> <li>dialing in to a store to check an item</li> <li>using a barcode scanner</li> </ul> |
|  | For more information on how to work with items, see the "Items" section in<br>"Chapter 2: Setting Up Preferences." You can also obtain detailed<br>information on working with items from the Online Help feature.   |
| Right-Click<br>Functions                                     | As you work with items, you have the following shortcut functions available to you by right-clicking on an item:   |
|  | <ul> <li>New Item</li> <li>Edit Item</li> <li>Delete Item</li> <li>Sort By</li> </ul>  |
|  | <i>Note:</i> This is the only method of deleting an item from your item listing. If you perform this function, the active field for that item becomes inactive. If you want to add the item back into your items list, you can select the active field again.  |
| <u>N</u> ew Item<br><u>E</u> dit Item<br><u>D</u> elete Item |  |
| <u>S</u> ort By ►  |  |
|  |  |

## Working with Items, Continued

| Using the | One way to look up information about parts is to use the NAPA Parts |
|-----------|---|
| Catalog   | Catalog.  |

**How To** To look up parts using the NAPA Parts Catalog, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click the <b>Open Napa Parts Catalog</b> icon, and the NAPA Parts Catalog displays. The first screen displayed gives an overview of the catalog and its functions. |

| MAPA PartsPRO Catalog  |                         |
|--|-------------------------|
| Vehicle Search Parts Detail  | Done                    |
| NAPA PartsPRD Catalog in TRACS   | 0                       |
| Menu buttons (down the right side)   | Q_Job                   |
| Done   | Category                |
| Close the PartsPRO Catalog form.   | Q Subcategory           |
| Copy<br>Copy the selected part to the current work order:  | Part Number             |
| Live Access  |                         |
| Live Access<br>Show the parts found in the PartsPRO Catalog in the Live Access form where they can be updated with information from a<br>NAPA jobber.  | C Keyword               |
| Job  | Cross Ref               |
| Job is a function that allows users to search for multiple parts pertaining to a specific type of repair. After<br>selecting Job Type, select year, make, and model of the vehicle. PartsPRO Catalog will then provide a list of the most  | Q_ <u>B</u> uyers Guide |
| frequently performed maintenance jobs for that vehicle. By selecting one of them, users will be given a list of components<br>that are commonly needed for performing the selected type of maintenance. By simply checking the boxes of the necessary<br>items, PartsPRO Catalog will display a list of all parts needed to perform that job.                              | <u>E</u> xhaust         |
| Category   | 1.4 <u>0</u>            |
| The Category option is the first step in initiating a parts search. Simply click on the category of the part being<br>searched for. PartsPRO Catalog will then automatically scroll to the next step, the subcategory menu.  | = = +1.2a               |
| Subcategory  |                         |
| Much like the category list, subcategory further define the search for parts. To further define the search, simply<br>select the subcategory of the part being searched for. Also, if a search has already been done in one subcategory, and the<br>user wishes to look for other parts in the same category, but in a different subcategory, they may simply click on the | Ciear                   |
| subcategory link to select a new subcategory for the search. If no vehicle has been previously defined, after selecting a  | ✓ Version               |

| Step | Action   |
|------|--|
| 2    | You can search by <b>Part Number</b> or using a <b>Key Word</b> by clicking<br>on the corresponding box on the right hand side, and then<br>entering the appropriate text. |

| 🗰 laka Ashtañar Calalog   |  |   | _ 🗆 ×                                |
|---|--|---|--------------------------------------|
| Vehicle Search Parts Detail   |  |   | 🔀 <u>D</u> one                       |
| NAPA PartsPRO Catalog in TRACS  |  |   | -                                    |
| Menu buttons (down the right side)<br>Done<br>Close the PartsPRO Catalog form.<br>Copy  | Part Number  |   | Q Job<br>Q Category<br>Q Subcategory |
| Copy the selected part to the current work order.<br>Live Access<br>Show the parts found in the PartsPRO Catalog in the L<br>NAPA jobber.   | Line Code  | mation from   |                                      |
| Job<br>Job is a function that allows users to search for multiple-<br>selecting Job Type, select year, make, and model of the<br>frequently performed maintenance jobs for that vehicle.<br>that are commonly needed for performing the selected ty<br>items, PartsPRO Catalog will display a list of all parts nee       | vehicle. PartsPRD Catalog will<br>By selecting one of them, users<br>upe of maintenance. By simply c       | then provide a list of the most<br>will be given a list of component: |                                      |
| Category<br>The Category option is the first step in initiating a parts s<br>searched for. PartsPRO Catalog will then automatically s   |  |   | Clear<br>Version                     |
| Subcategory<br>Much like the category list, subcategory further define th<br>select the subcategory of the part being searched for. A<br>user wishes to look for other parts in the same category,<br>subcategory link to select a new subcategory for the se-<br>subcategory. PartsPRO Catalog automatically defaults to | lso, if a search has already beer<br>but in a different subcategory, I<br>arch. If no vehicle has been pro | n done in one subcategory, and I<br>they may simply click on the      |                                      |

| Step | Action  |
|------|---|
| 3    | To find a part starting from a general category and finding the specific part for a specific car, first double-click on the <b>Category</b> button. |

| tegory  |   |
|---|---|
| Category                                      |   |
| Air Conditioning Systems                      |   |
| Belts & Hoses                                 |   |
| Brake Systems                                 |   |
| Drivetrain                                    | Q Part <u>N</u> u   |
| Electrical Systems                            | O listente  |
| Engine Kits                                   | QIntercha   |
| Engine Kits - Performance                     | Q Keyword   |
| Engine Parts & Gaskets                        | The second se |
| Exhaust Systems                               | Exhaus  |
| Fuel & Emission Systems                       |   |
| Heating & Cooling - Eng/Trans                 | Cor   |
| Ignition Parts & Filters                      | Live Ace  |
| Promotional Items                             |   |
| Relays, Sensors & Switches                    | C Cle   |
| Steering & Suspension                         |   |
| Vision, Safety & Misc Interior/Exterior Parts | Version   |
|   | ? <u>H</u> e  |
|   |   |
|   |   |
|   |   |

## Working with Items, Continued

| Step | Action                                    |  |
|------|---|--|
| 4    | Double-click on the appropriate category. |  |



| _ |  |
|---|--|
| 5 | Double-click the appropriate sub-category. |
| 5 | Bouble click the appropriate sub category. |

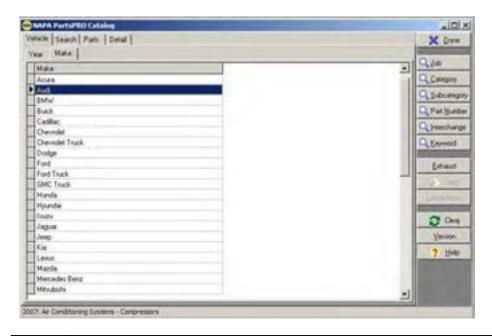
| NAPA PartsPRO Catalog         | نعلد          |
|-------------------------------|---------------|
| Winter Search   Parts   Datal | X Dore        |
| for Nate Note                 |               |
| Vas                           | - Q.10        |
| 2907                          | Calmoniy      |
| 2006                          | Q Subcomp     |
| 2005                          | Q Part Burd   |
| 2000                          |               |
| 2002                          | Q (Herdian)   |
| 2007                          | QEnvoid       |
| 800                           |               |
| 1999                          | Edward        |
| 1990                          | Contract Cont |
| 1996                          |               |
| 1996<br>1986<br>1994          | 102/without   |
| 1994                          | C One         |
| 1990                          |               |
| 1992<br>1991                  | Neuro         |
| 1390                          | 7 Help        |
| 1909                          |               |
| 1508<br>1187                  |               |
| 1 (67)                        | 1             |

## Working with Items, Continued

How To (continued)

7

| Step | Action                                |  |
|------|---------------------------------------|--|
| 6    | Double-click the year of the vehicle. |  |



Double-click the make of the vehicle.

| NAPA PartsPRO Catalog  |   |
|--|---|
| /whiche Search Parts   Detail                                    | X Dow   |
| Year Make Model Engine   | and the second se |
| Hodel  | - <u>Q.20</u>   |
| A  | Q Calegory  |
| 46<br>40<br>54   | Q Subcates  |
| 40   |   |
| 54   | Q. Part Bar   |
| 5m   | Qinterha  |
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| 00 Aud TT 1.81 1781 CC L4: Ar Conditioning Systems - Congressors |   |

| Step | Action                                 |
|------|--|
| 8    | Double-click the model of the vehicle. |

| X        | lone  |
|----------|---|
|          |   |
|          | _   |
| Q Calog  | pory .  |
| Q Subci  | alegor  |
| Q Part N | lumbe   |
| C Interc | hange   |
| QKeyw    | ord   |
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| ÷ 0      | iopy .  |
| Live Ac  | xess  |
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| ? 1      | jeb   |
|          |   |
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|          | Loo     Loo     Live Av     Live Av |

| 9 | Double-click the vehicle's engine. |  |
|---|------------------------------------|--|

| Step | Action   |
|------|--|
| 10   | The NAPA Parts Catalog srceen displays the parts.  |
|      | <i>Note</i> : If the parts are not found, a message box displays. Click <b>OK</b> to close this box. and begin searching for another part. |

| Line Part Number         | Description  | List     |         | Per | Comment                                | Q. Job                         |
|--------------------------|--|----------|---------|-----|--|--------------------------------|
| TEM 254409<br>TEM 274606 | A/C Compressor w/ Clutch - Remfd<br>A/C Compressor w/ Clutch - New | \$770.58 | \$60.00 | -1  | w/ SD7V16 A/C Cor<br>w/ SD7V16 A/C Cor | The state of the second second |
| NCC 3618554              | A/C Compressor w/ Clutch - New                                     | \$605.26 | \$0.00  | 1   | W/ SDIVIONOC CO                        |                                |
| NCC 3638543              | A/C Compressor w/ Clutch - New                                     | \$0.00   | \$0.00  | -   |  | Q Subcatego                    |
|                          |  |          |         |     |  | Q Part Numb                    |
|                          |  |          |         |     |  | Q Interchang                   |
|                          |  |          |         |     |  | Q Keyword                      |
|                          |  |          |         |     |  | Exhaust                        |
|                          |  |          |         |     |  | Copy                           |
|                          |  |          |         |     |  | Live Access                    |
|                          |  |          |         |     |  | C Clear                        |
|                          |  |          |         |     |  | Version                        |
|                          |  |          |         |     |  | ? Help                         |
|                          |  |          |         |     | -                                      |                                |
|                          |  |          |         |     |  |                                |

| 11 | Click the <b>Copy</b> button to transfer the part information to an open |
|----|--|
|    | work order if desired. You have now located parts using the              |
|    | NAPA Parts Catalog.  |

## Working with Items, Continued

| Interchange<br>Feature | The <b>Interchange</b> feature allows you to search the NAPA Parts Catalog for NAPA parts that correspond with a part from an unknown manufacturer. |
|------------------------|---|
| How To                 | To access and use the Interchange feature, perform the following steps:   |

| Step | Action  |
|------|---|
| 1    | Click the Open Napa Parts Catalog icon to open the NAPA Parts |
|      | Catalog.  |
| 2    | Click the Interchange button on the NAPA Parts Catalog form,  |
|      | and the OEM to NAPA Interchange (Original Equipment           |
|      | Manufacturer to NAPA Interchange) form displays.              |

## Working with Items, Continued

How To (continued)

| TRACS - [DEM to NAPA Interchange]  |          |               |
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| Enter DEM Part                     |          | Q End         |
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|                                    |          |               |
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|                                    |          |               |
|                                    |          |               |
|                                    |          |               |
|                                    |          |               |
|                                    |          |               |
|                                    |          |               |

| 3 | Type the unknown manufacturer part number in the Enter OEM |
|---|--|
|   | Part (Enter Original Equipment Manufacturer Part) field.   |

| Step | Action  |
|------|---|
| 4    | Click the <b>Find</b> button, and a list of NAPA parts matching the |
|      | unknown manufacturer part number displays.                          |

| 1 I I I I I     | 1- 🔅 🛸 🚮              |                  | 🏭 🎖 😕     |   |                 |         |
|-----------------|-----------------------|------------------|-----------|---|-----------------|---------|
| river DEM Plant |                       |                  |           |   |                 | 9       |
| 25              | 8                     |                  |           | X                                       |                 |         |
| Ciregay         | SubCalegoo            | Lee              | Pathanber | Description                             | Cost List       | -       |
| MORAN           | BALKAMP-WALLE LINE    | 100 million (100 | 7101058   | 5 m 1 m 1 m 1 m 1 m 1 m 1 m 1 m 1 m 1 m | N/A N/A         |         |
| NICKSON         | BALKAMP               | BK.              | 7334178   |   | N/A \$0.99      | Live Ad |
| AUTOLITE        | CHAMPION SPARK PLU    | DHA              | 802       |   | N/A 16.62       |         |
| MALLORY         | ECHLIN IGNITION & ELE | ECH .            | C\$720A   |   | \$10.52 \$10.52 |         |
| ATLAS           | NAPA AUTO, TRANS P    | ATP              | 15123     |   | \$10.21 \$10.21 |         |
| FAG             | NAPA BEARINGS (CR)    | BRG              | 62070     |   | \$24.00 \$24.00 |         |
| FAG (CANADA)    | NAPA BEARINGS (CR)    | BRG              | 6207J     |   | \$24.00 \$24.00 |         |
| FRUEHAUF        | NAPA BEARINGS (CR)    | BRG              | BR560     |   | N/A \$54.64     |         |
| FRESHSTART      | NAPA BELTS AND HOS    | NEH              | 7369      |   | \$16.5( \$16.5) |         |
| MIGHTY          | NAPA BELTS AND HOS    | NEH              | 7368      |   | \$16.52 \$16.55 |         |
| SERVICE KING    | NAPA BELTS AND HOS    | NEH              | 2528437   |   | N/A \$25.05     |         |
| TEXACO          | NAPA BELTS AND HOS    | NEH              | FF224     |   | \$11.62 \$11.65 |         |
| UNKNOWN         | NAPA BELTS AND HOS    | NEH              | 51.390    |   | \$10.56 \$10.56 |         |
| FACET AUTO      | NAPA FILTERS          | FIL              | 2084      |   | \$11.35 \$11.35 |         |
| MR. GASKET      | NAPA GASKETS          | NGA              | M512279   |   | \$7.90 \$7.90   |         |
| AQUA POWER      | INAPA SMALL ENGINE    | SME              | 187006    |   | N/A \$4.61      |         |
| 08H             | NAPA U JOINTS         | NUJ              | 4430      |   | \$14.0(\$14.0)  |         |
| AUTOUTE         | NGK SPARK PLUGS       | NGK.             | 4367      |   | N/A \$4.09      |         |
| HASTINGS        | PERFECT ORCLE         | PC               | 5823      |   | N/04 \$55.94    |         |
| PAPEL AUTOMOTI  | RAVLOC                | RAY'             | 426403    |   | \$83.90 \$83.90 |         |
| R B. REBUILDER  | RAVLOC                | RAY              | W139      |   | N/A \$81.30     |         |
| VAN ALLEN       | RAVLOC                | BAY              | W139      |   | N/A \$81.30     |         |

| Step | Step Action  |  |  |  |
|------|--|--|--|--|
| 5    | Click to highlight the appropriate NAPA part number. |  |  |  |

|                | 🚣 🔅 🛸 🚮             | 0      | 🙇 📃       |                | 1                 | 5 ? 🥑  |
|----------------|---------------------|--------|-----------|----------------|-------------------|--|
| Error DEM Part |                     |        |           |                |                   | Q.B  |
| 135            | 1                   |        |           |                |                   | Xp   |
| Caregory       | SubCalegoy          | Line   | PatNunber | Description    | Cost List         | Co   |
| MORAN          | BALKAMP-WALUE LINE  | BK:    | 7101058   | Steel 222, 111 | N/A N/A           | All and a second se |
| NICKSON        | BALKAMP             | BK.    | 7334178   |                | N.0A \$0.99       | Live Acc   |
| AUTOLITE       | CHAMPION SPARK PLU  | F.CHA  | 802       |                | N/A \$5.62        |  |
| MALLORY        | ECHUN IGNITION & EU | HO33   | C\$720A   |                | \$10.52 \$10.52   |  |
| ATLAS          | NAPA AUTO, TRANS P  | ATP    | 15123     |                | \$10.25 \$10.25   |  |
| FAG            | NAPA BEARINGS (CR)  | BRG    | 62070     |                | \$24.00 \$24.00   |  |
| FAG (CANADA)   | NAPA BEARINGS (CR)  | BRG    | 6207J     |                | \$24.00 \$24.00   |  |
| FRUEHAUF       | NAPA BEARINGS (CR)  | BRG    | BR560     |                | N/A \$54.64       |  |
| FRESHSTART     | NAPA BELTS AND HOS  | 1 ND14 | 7369      |                | \$16.51 \$16.50   |  |
| MIGHTY         | NAPA BELTS AND HOS  | I NEH  | 7368      |                | \$16.55 \$16.55   |  |
| SERVICE KING   | NAPA BELTS AND HOS  | I NEH  | 2528437   |                | N/04 \$25.05      |  |
| TEVACO         | NAPA BELTS AND HOS  | ENEH   | FF224     |                | \$11.65 \$11.65   | 1.00   |
| UNKNOWN        | NAPA BELTS AND HOS  | E NEH  | 51,390    | 1              | \$10.55 \$10.55   |  |
| FACET AUTO     | NAPA FILTERS        | FIL    | 2084      |                | \$11.35 \$11.37   |  |
| MR. GASKET     | NAPA GASKETS        | NGA    | MS12279   |                | \$7.90 \$7.90     |  |
| AQUA POWER     | NAPA SMALL ENGINE   | SME    | 187006    |                | N/A \$4.61        |  |
| DEH            | NAPA U-JOINTS       | NUU    | 4430      |                | \$14.0(\$14.0)    |  |
| AUTOUTE        | NGK SPARK PLUGS     | NGK.   | 4367      |                | N/04 \$4.09       |  |
| HASTINGS       | PERFECT ORCLE       | PC     | 5823      |                | N/04 155.94       |  |
| PAPEL AUTOMOTI | RAVLOC              | RAY    | 426403    |                | \$83.90 \$83.90   |  |
| R.B. REBUILDER | R4/1.0C             | RAY    | W129      |                | N./A \$81.30      |  |
| VAN ALLEN      | RAVLOC              | RAY    | W129      |                | N/A \$81.30       |  |
| IPI            | UNITED              | UP     | 85873     |                | \$82.56 \$82.56   | 1.00   |
|                | 12471422            |        |           |                | a second a second | *  |

| 6 | Click the <b>Copy</b> button to copy the NAPA part number to an open |
|---|--|
|   | work order.  |
| 7 | Click the <b>Done</b> button to return to the Parts Catalog.         |

## Working with Items, Continued

| Cross<br>Reference<br>Feature | The <b>Cross Reference</b> feature allows you to search the NAPA Parts Catalog to find a competitor's part number that corresponds to a NAPA part number. This feature is essentially a reverse <b>Interchange</b> . |
|-------------------------------|--|
| Feature                       | This feature is essentially a reverse <b>Interchange</b> .   |

**Note:** It is your responsibility to verify the accuracy of any cross referenced part before it is installed upon any vehicle!

**How To** To access and use the **Cross Reference** feature, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click the <b>Open Napa Parts Catalog</b> icon to open the NAPA Parts |
|      | Catalog.   |
| 2    | Click the <b>Cross Ref</b> button on the menu to the right.          |

| MARA PartsPRO Catalog  |                       |
|--|-----------------------|
| Vehicle Search Parts Detail  | 🗙 Done                |
| NAPA PartsPRD Catalog in TRACS   |                       |
| Menu buttons (down the right side)   | Q job                 |
| Done   | Q Category            |
| Close the PartsPRO Catalog form.   | Q Subcategory         |
| Copy<br>Copy the selected part to the current work order.  | Q Part <u>N</u> umber |
|  | Q Interchange         |
| Non-the parts found in the PartsPRO Catalog in the Live Access form where they can be updated with information from a NAPA jobber.   | Keyword               |
|  | Cross Ref             |
| Tob is a function that allows users to search for multiple parts pertaining to a specific type of repair. After<br>selecting Job Type, select year, make, and model of the vehicle. PartsPRD Catalog will then provide a list of the most  | Q Buyers Guid         |
| requently performed maintenance jobs for that vehicle. By selecting one of them, users will be given a list of components<br>hat are commonly needed for performing the selected type of maintenance. By simply checking the boxes of the necessary<br>tems, PartsPRD Catalog will display a list of all parts needed to perform that job. | <u>E</u> xhaust       |
|  | and they              |
| Category<br>The Category option is the first step in initiating a parts search. Simply click on the category of the part being<br>searched for, PartsPRO Catalog will then automatically scroll to the next step, the subcategory menu.  | LIVEACLES             |
|  | - 5道1/0710 à          |
| Subcategory<br>Much like the category list, subcategory further define the search for parts. To further define the search, simply  | 55 Fluid Capel        |
| select the subcategory of the part being searched for. Also, if a search has already been done in one subcategory, and the<br>user wishes to look for other parts in the same category, but in a different subcategory, they may simply click on the   | Clear                 |
| subcategory link to select a new subcategory for the search. If no vehicle has been previously defined, after selecting a 🔫  | Version               |

| Step | Action  |
|------|---|
| 3    | Type the known part number in the NAPA Part Number field.     |
|      | The NAPA Line Code is optional, but providing a line code may |
|      | give you more precise results.                                |
| 4    | Note that the cross reference feature is for part number      |
|      | identification only. Read this notice and click I Accept.     |

| This Cross Reference Guide contains part number informati supplied by the NAPA Part Manufacturers.   |     |
|--|-----|
| The items identified in this cross reference are for part num<br>identification only. You will need to check with the servicin<br>retailer of this product to ensure the correct vehicle<br>application prior to installation. | ber |

| Step | Action  |
|------|---|
| 5    | Click to highlight the appropriate part number. |

| hicle Search   | 1               |  | 6.000   | X Don           |
|--|-----------------|--|---|-----------------|
| Manufacturer   |                 | NAPA Equivalent Description  | Comment   | Q Job           |
| a company of the second se | PF2             | Oil Filter (Gold)  | Manufacturer: AC Delco                                  |                 |
| AC Delco   | PF2CL           | Oil Filter (Gold)  | Manufacturer: AC Delco                                  | Category        |
|  | PF32            | Oil Filter (Gold)  | Manufacturer: AC Delco                                  | Q Subcate       |
|  | PFL1A           | Oil Filter (Gold)  | Manufacturer: AC Delco                                  |                 |
|  | PFL1ACL<br>UPF2 | Oil Filter (Gold)  | Manufacturer: AC Delco                                  | Q Part Num      |
| THE REPORT   | X14             | Oil Filter (Gold)  | Manufacturer: AC Delco<br>Manufacturer: AC Delco        | Q Interchar     |
| AL Delco   | 186103          | Oil Filter (Gold)  | Manufacturer: AC Delco                                  | Interchar       |
| AL Delco   | 4506322         | Wheel Cylinder Kit - Rear<br>Power Take-Off (PTO) End Yoke                       | Manufacturer: AC Delco                                  | <u>K</u> eyword |
| AC Deico   | 8514004         | ng sprintering, dependence megh i may group out git out a taken of charge series | Manufacturer: AC Deico                                  | Cross Re        |
| Advance A  | 201112000       | Wheel Cylinder Kit - Rear  | 00000000000000000000000000000000000000                  | CIOSS HE        |
|  | 70237000        | Oil Filter (Gold)  | Manufacturer: Advance Auto Parts                        | <b>Buyers</b> G |
| Agco   | 70237000        | Oil Filter (Gold)  | Manufacturer: Agco                                      | -               |
| Agco   | 74910810        | Oil Filter (Gold)  | Manufacturer: Agco                                      | <u>E</u> xhaust |
| Agco<br>Air Refiner  |                 | Oil Filter (Gold)  | Manufacturer: Agco<br>Manufacturer: Air Befiner         | Dop             |
| All Henner<br>Alaska Die:  |                 | Oil Filter (Gold)  |   | - Cop           |
| 2  | 105000603000    | Oil Filter (Gold)  | Manufacturer: Alaska Diesel<br>Manufacturer: Alfa Romeo | Live Acce       |
|  | 1060000603000   | Oil Filter (Gold)  | Manufacturer: Alfa Romeo                                | Eavin In        |
| Partner of Active St   | 106000603002    | Oil Filter (Gold)<br>Oil Filter (Gold)   | Manufacturer: Alfa Romeo                                |                 |
| Alfa Romeo   | 7335533253326   | Oil Filter (Gold)  | Manufacturer: Alfa Romeo                                | Sa Fluid Car    |
|  | 37004000        |  | * *   |                 |
| lal.   |                 |  | •   | 🔁 Clea          |

| 6 | Click the <b>Copy</b> button to copy the NAPA part number to an open work order. |
|---|--|
| 7 | Click the <b>Done</b> button to return to the Parts Catalog.                     |

### Working with Items, Continued

Buyer's GuideThe Buyer's Guide feature can assist you in finding particular items (parts or<br/>vehicles).

The **Buyer's Guide** feature allows you to type in any NAPA Part number. You will be presented with a list of all vehicles that the item fits, including Make, Model, Engine, Year Range, and Vehicle Type.

| Part Number | 🗸 ок     |
|-------------|----------|
|             | X Cancel |
| Line Code   |          |
|             |          |

| hicle Search   | Parts   Detail |                         |             |                         | X Dor                |
|----------------|----------------|-------------------------|-------------|-------------------------|----------------------|
|                |                | ,                       |             |                         | -1 Q Job             |
| Make           | Model          | Engine                  | Year Range  | Vehicle Type            | `    <del></del>     |
| Chrysler       | New Yorker     | 5.8 L 354 CID V8        | 1956 - 1956 | Automobile/Light Trucks | Q Category           |
| Chrysler       | New Yorker     | 6.8 L 413 CID V8        | 1959 - 1970 | Automobile/Light Trucks | Q Subcate            |
| Chrysler       | New Yorker     | 6.8 L 413 CID V8        | 1959 - 1956 | Automobile/Light Trucks |                      |
| Chrysler       | New Yorker     | 7.2 L 440 CID V8        | 1966 - 1969 | Automobile/Light Trucks | 🛛 🔍 Part <u>N</u> un |
| DeTomaso       | Mangusta       | 5.0 L 302 CID V8 OHV (F | 1970 - 1970 | Automobile/Light Trucks |                      |
| Desoto         | Adventurer     | 6.3 L 383 CID V8        | 1959 - 1960 | Automobile/Light Trucks | Q Intercha           |
| Desoto         | Desoto         | 5.9 L 361 CID V8        | 1961 - 1961 | Automobile/Light Trucks | Keyword              |
| Desoto         | Firedome       | 5.9 L 361 CID V8        | 1958 - 1958 | Automobile/Light Trucks |                      |
| Desoto         | Firedome       | 6.3 L 383 CID V8        | 1959 - 1959 | Automobile/Light Trucks | Cross <u>R</u> e     |
| Desoto         | Fireflite      | 5.9 L 361 CID V8        | 1960 - 1960 | Automobile/Light Trucks | Q Buyers 6           |
| Desoto         | Fireflite      | 5.9 L 361 CID V8        | 1958 - 1958 | Automobile/Light Trucks |                      |
| Desoto         | Fireflite      | 6.3 L 383 CID V8        | 1959 - 1960 | Automobile/Light Trucks | Exhaus               |
| Desoto         | Firesweep      | 5.7 L 350 CID V8        | 1958 - 1958 | Automobile/Light Trucks |                      |
| Desoto         | Firesweep      | 5.9 L 361 CID V8        | 1959 - 1959 | Automobile/Light Trucks | 🚽 🎝 Cop              |
| Deutz Allis Tr | a 5230         | 1.4 L 87 CID L3 Toyosha | 1987 - 1987 | Tractors / Agricultural | Live Acce            |
| Deutz Allis Tr | a 5230         | 1.5 L 92 CID L3 Toyosha | 1986 - 1986 | Tractors / Agricultural | Live Acce            |
| Deutz Allis Tr | a 5230         | 1.5 L 92 CID L3 Toyosha | 1988 - 1991 | Tractors / Agricultural | 5a VIN In            |
| Dodge          | 330            | 3.7 L 225 CID L6        | 1963 - 1964 | Automobile/Light Trucks |                      |
| Dodge          | 330            | 5.2 L 318 CID V8        | 1963 - 1964 | Automobile/Light Trucks |                      |
| Dodge          | 330            | 6.3 L 383 CID V8        | 1963 - 1964 | Automobile/Light Trucks |                      |
| Dodge          | 330            | 7.0 L 426 CID V8 Hemi   | 1964 - 1964 | Automobile/Light Trucks | . Version            |

# Working with Items, Continued

| Live Access<br>Feature | The <b>Live Access</b> feature allows you to locate a particular part and its current price at a selected NAPA store by dialing in to the store to check availability. You can then create a PO from the screen if needed. |
|------------------------|--|
|                        | <i>Note</i> : You can only use the <b>Live Access</b> feature after you have chosen a specific part.   |
| How To                 | To access and use the TRACS Live Access feature, perform the following steps:  |

| Step | Action  |
|------|---|
| 1    | Click the Live Access button on the Parts Catalog form, and the |
|      | Venders with NAPA Access window displays.                       |

| Vendor          | Primary | ▲ 🗳 Use |
|-----------------|---------|---------|
| Johnson Machine | M       |         |
| NAPA J and M    | E       | X Cance |
| NAPA LONGPRARIE | F       |         |
| NAPA MARIETTA   |         |         |
|                 |         |         |
|                 |         |         |

2 Click to highlight the store to be dialed.

| Step | Action  |
|------|---|
| 3    | Click the <b>Use</b> button and the modem dials the store.  |
|      | <i>Note</i> : The status of your connection will display on the status bar.<br>It may take a few moments for a connection to be established.<br>Once a connection is made, the <b>Live NAPA Access</b> window displays. |

| ated | -        | any. | Description   | Dider<br>Dis | On       | 8. | we | 2004   | Let      | Set 25  | Marrage Los Alcen | - >      | 60    |
|------|----------|------|---|--------------|----------|----|----|--------|----------|---------|-------------------|----------|-------|
| 2    | AETSIKAM | UP   | Budie Pada - Front, AE Hondic   | Ó            |          |    | 1  | 2      | 152.44   | 0       |                   | - Person | (inde |
| F.   | 900096   | UP   | Build Rotor Only - Front - Supplied In Name 1                               | 0            |          |    |    | 0      | \$57.20  |         |                   | 1        | _     |
| P    | 89330349 | 895  | Hub Assy - Free Wheel   | 0            | <u> </u> | _  |    | 0      | \$175.70 | 5       |                   | 000      | Crew  |
| 11   | 057      | VML  | Boke Fluid- DOT 4 Validine - 12 st.<br>Brake Fluid- DOT 4 Validine - 32 st. |              |          |    |    | 0<br>0 | \$3.74   |         |                   |          |       |
|      | 414      |      | Trans Lots of Array and a second  |              | -        | -  | -  |        |          | · · · · |                   | 1        | 11    |
|      |          |      |   |              |          |    |    |        |          |         |                   | - 194    | PH.3  |
|      |          |      |   |              |          |    |    |        |          |         |                   | parents. |       |
|      |          |      |   |              |          |    |    |        |          |         |                   | 124      | - 14  |
|      |          |      |   |              |          |    |    |        |          |         |                   |          |       |
|      |          |      |   |              |          |    |    |        |          |         |                   |          |       |
|      |          |      |   |              |          |    |    |        |          |         |                   |          |       |
|      |          |      |   |              |          |    |    |        |          |         |                   |          |       |
|      |          |      |   |              |          |    |    |        |          |         |                   |          |       |
|      |          |      |   |              |          |    |    |        |          |         |                   | 100      |       |
|      |          |      |   |              |          |    |    |        |          |         |                   |          |       |
|      |          |      |   |              |          |    |    |        |          |         |                   |          |       |
|      |          |      |   |              |          |    |    |        |          |         |                   |          |       |
|      |          |      |   |              |          |    |    |        |          |         |                   |          |       |
|      |          |      |   |              |          |    |    |        |          |         |                   |          |       |
|      |          |      |   |              |          |    |    |        |          |         |                   |          |       |
|      |          |      |   |              |          |    |    |        |          |         |                   |          |       |
|      |          |      |   |              |          |    |    |        |          |         |                   |          |       |
|      |          |      |   |              |          |    |    |        |          |         |                   |          |       |
|      |          |      |   |              |          |    |    |        |          |         |                   |          |       |
|      |          |      |   |              |          |    |    |        |          |         |                   |          |       |
|      |          |      |   |              |          |    |    |        |          |         |                   |          |       |
|      |          |      |   |              |          |    |    |        |          |         |                   |          |       |
|      |          |      |   |              |          |    |    |        |          |         |                   | 2        |       |
| 1    |          |      |   |              |          |    |    |        |          |         |                   | 1.00     |       |

| 4 | Double-click to place a checkmark in the Marked field for each |  |
|---|--|--|
|   | part on which you want to check availibility.                  |  |

| Step | Action   |
|------|--|
| 5    | Click the <b>Update</b> button, and the quantity available displays in the |
|      | Store Avail (Store Availability) field.                                    |

| Marked | Panti. | Mig  | Description            | 0 der | Local | Shoot<br>Armi | List    | Message from Access | × Caro    |
|--------|--------|------|------------------------|-------|-------|---------------|---------|---------------------|-----------|
| R.     | 21036  | SR   | Dil Filter - Vin K     |       | 6     |               | \$3.49  |                     | -         |
| R      | 1006   | FIL  | Oil Filter - Vin K.    |       | 2     | 1000          | \$8.29  |                     | Update    |
| 1      | 1836MP | FIL  | Oil Filter - Vin K     |       | 0     | 0             | \$0.00  | Part Not Stocked    | O Cesto   |
| Г      | 22090  | SR   | Au Film                |       |       |               | \$4.69  |                     | Create .  |
| Γ.     | 2090   | FIL. | Air Filter             |       |       |               | \$10.92 |                     | NAPA Sto  |
| Г      | 2000MP | FIL  | Aa Filter              |       |       |               | \$10.16 |                     | _         |
| Г      | 23481  | SFL  | Gas Filter             |       |       |               | \$7.99  |                     | dian 1912 |
| Γ.     | 3481   | FIL  | Gas Filter             |       |       |               | \$19.96 |                     | 1 10 A 10 |
| Г      | 34818P | FIL  | Gai Filer              |       |       |               | \$19.96 |                     | Callabog  |
| Г      | 3481MP | FIL  | Gai Filer              |       |       |               | \$16.88 |                     |           |
| Г      | 2995   | FIL  | Cr. Case Veril Bithr   |       |       |               | \$3.60  |                     |           |
| Г      | 29958P | FIL  | Cr. Case Veril, Brilly |       |       |               | \$3.60  |                     |           |
|        |        |      |                        |       |       |               |         | 1                   |           |

| 6 | Type the number to be ordered in the <b>Order Qty</b> (Order Quantity) field. |
|---|---|
|---|---|

# Working with Items, Continued

#### How To (continued)

| Step | Action   |
|------|--|
| 7    | Click the <b>Create PO</b> button, and the <b>Edit Purchase Order</b> screen displays. |

|   | a la plate de la companya de la comp | jeposts Iools Windows                        | the second s |   |        | 101                        |
|---|---|--|--|---|--------|----------------------------|
|   | 3 - 1   | 🔅 🛸 🚮 d                                      | 🗏 🙇 📃  |   | 🏭 🐔 📍  |                            |
| Venda<br>Alt, Test<br>Type<br>Puchase Octor | 2   | Purchare Order<br>Number 1663<br>Status Open | Date Created : 8/24/99 8:25<br>PO Total: \$8:29  | ITDAM                                     |        | Save<br>Carce              |
| Print on plain pape                         | x (no pre-prime   | d keterhenad)                                | For Wak Order #  |   |        | - Det                      |
| Type Ren<br>Par 1036                        | Hilg<br>FiL   | Decoption<br>OB, FILTER                      | Diske Diy UDM U<br>1 EACH  | it Cost   Total Cost Ave<br>8.29   \$8.29 | 2<br>2 | Lipdate<br>Icound<br>? Heb |
| 1-1   |   |  |  |   | لتر    |                            |
| CILCUMPTER STREET                           | enal note for yo  | ur use. It is not perited on 1               | he PO or transmitted to the NA   | PA Store (                                |        |                            |
|   |   |  |  |   |        |                            |
| and a first of a data                       |   |  |  |   |        |                            |

| Step | Action  |
|------|---|
| 8    | Click the <b>Transmit</b> button, and the <b>Please wait ordering parts</b> window displays.    |
|      | <i>Note</i> : Once the order has transmitted, check the order for accuracy and for error codes. |

| E & B & 1   | 🔄 🛸 🔿 🙇 💻  | <b># ?</b> 🔊   |
|---|--|--|
| Vendar<br>Inflit Teel<br>Type<br>Pachare Order<br>P Print on plain paper (no pre-printe<br>Sport Deen<br>Part 1036 PL | Purchase Order<br>Number: 1670 Date Cested: 5/24/99.8.3213.AM<br>Status: Open PO Total: \$8.29 | Consul Day EAAHS Message EV     Cancel     Consul Day EAAHS Message EV     Cancel     Consul Day     Consult     Consult |
| Notes (This is an internal note for yo  | ar use. It is not parted on the PO or transmitted to the NAPA Store (                          | تر<br>د<br>د   |

# Working with Items, Continued

| Step | Action  |
|------|---|
| 9    | Click the <b>Done</b> button, and the <b>NAPA Parts Catalog</b> redisplays. |

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|-----------------------|---------------------------|---|---|
| takig Selection Ca    | lalog Repults             |   | X   |
| Line Particular       | Description               | List  | 2   |
| SF1 21036             | Oil Filter - Vin K        | \$3.49  |   |
| FIL 1036              | Oil Filter - Vin K        | \$8.29  |   |
| FIL 1036MP            | Oil Filter - Vin K        | \$7.90  |   |
| SF1 22098             | Air Filter                | \$4.69  | Live Ac   |
| FIL 2098              | Air Filter                | \$10.92   | A lense   |
| FIL 2098MP            | Aix Filter                | \$10.16   | CA Inter  |
| SFI 23481<br>FIL 3481 | Gas Filter<br>Gas Filter  | \$7.99  | ? 5   |
| FIL 34818P            | Gas Filter                | \$19.06   | and the second se |
| FIL 3401MP            | Gas Filter                | \$16.00   |   |
| FIL 2995              | Cr. Case Veet. Bithr      | \$3.60  |   |
| Fil. 29958P           | Cr. Case Vent. Bithr      | \$3.60  |   |
|                       |                           |   | Į.  |
| ce Source Legend      | - Item file - Pixing Disk | - Mig. List of Note - Copied  |   |
| Comment               |                           | Cose \$2.00   |   |
|                       |                           | Per Cer Dy 1  |   |
| Foot Note             |                           | and the second se |   |

| 10 | Click the <b>Done</b> button again to exit and return to TRACS. You |
|----|---|
|    | have now completed the procedure for using the TRACS Live           |
|    | Access feature.   |

### Working with Items, Continued

**How To** To use the barcode scanner to input items into TRACS:

| Step | Action  |
|------|---|
| 1    | The barcode scanner plugs into the USB port of your computer.                   |
|      | To scan, press the yellow button and move the red light over the                |
|      | barcode.  |
| 2    | Make sure that you have chose the appropriate distribution center               |
|      | when you set up TRACS. Go to Setup, then click Barcodes, then                   |
|      | Select Distribution Center.   |
| 3    | If your correct distribution center does not appear, click Select               |
|      | <b>Distribution Center</b> . Select the correct city and click <b>OK</b> . Then |
|      | click Save. You only need to do this once.                                      |



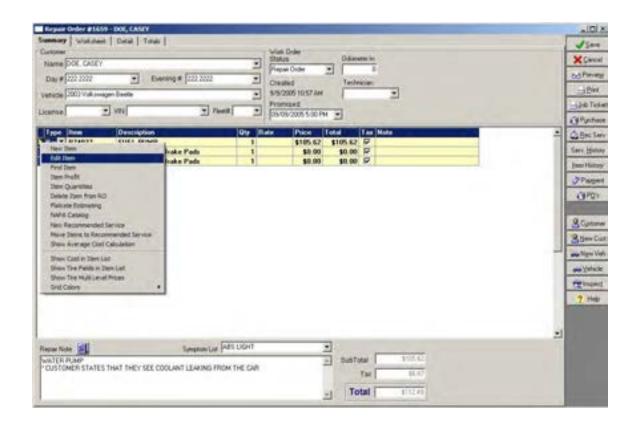
| Step | Action  |
|------|---|
| 4    | You can scan an item directly into a work order. Just open up a       |
|      | work order, and use the scanner to scan the barcode on the            |
|      | appropriate part.   |
| 5    | If the part is already in the barcode database, it will automatically |
|      | be added to the work order, and you are done with the scan. You       |
|      | can scan as many barcodes as you need.                                |

| Repair Order #1459 - 6           |                               |  | -                                       |                       |   |  | 101      |
|----------------------------------|-------------------------------|--|---|-----------------------|---|--|----------|
| Europer Volument                 | Detail.   Totaly              |  | Wat Order<br>Datus                      |                       |   | 1  | Sen      |
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|                                  |                               |  | -                                       | Total                 | 102.0   | _  |          |

| Step | Action  |
|------|---|
| 6    | If the barcode is not in the database, the <b>New Item</b> window will  |
|      | appear. The item number will appear in the <b>Item</b> field, but you will need to type in the rest of the information - description, cost, |
|      | etc.  |
| 7    | When you are done entering information about the part, click  |
|      | Save.   |

| New Item               |   |   | 1             |
|------------------------|---|---|---------------|
| Type Item              | Der   | cription                                    | J Save        |
| Pat AE 7532M           | 10  |   | X Cancel      |
| Mig. Vendor            | Cost  | List Per Car Qty Unit of Measure            | Set QOH       |
| 1                      | -   |   | Add Sub-liter |
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| Part Sales 💌           | Mannan Moundar  | File Sile                                   | ? Hep         |
| Cost Account           | Quantity On Hand  |   | 1 24          |
| Cost of Parts Sold     |   | Allennie Poli Nutrian                       | 10            |
| Asset Account          | Quantity On Order   |   |               |
| Inventory 💻            | WIP quantity :  | to Get Multitevet Prices                    |               |
| iub Ilena              |   | Note 🛃                                      |               |
| Type Item D            | escription Div Mis  |   |               |
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|                        |   |   |               |
|                        | <u>.</u>  |   | 8             |

| Step | Action  |  |
|------|---|--|
| 8    | After you add the new item, it will appear in the work order. If  |  |
|      | you scan the same barcode later, the item will automatically      |  |
|      | appear. You can edit any of the items by right clicking on the    |  |
|      | arrow to their right and choosing Edit Item.                      |  |
| 9    | When you are done scanning items into the work order, click Save. |  |



### Working with Items, Continued

| Barcode<br>Printing | You can also print barcodes from existing items. |
|---------------------|--|
| -                   |  |

**How To** Print barcodes from items already in TRACS:

| Step | Action  |
|------|---|
| 1    | Chose Item & Inventory from the Reports option on the top |
|      | menu bar of TRACS.  |

| Accounts Receiva   |       |
|--------------------|-------|
| Customer           | _     |
| Item & Inventory   |       |
| Purchasing         |       |
| Recommended Se     | rvice |
| Sales & Productivi | ty    |
| Service History    |       |
| Work Order         |       |
| Inspections        | ,     |
| Financial Profile  |       |
| Lists              |       |

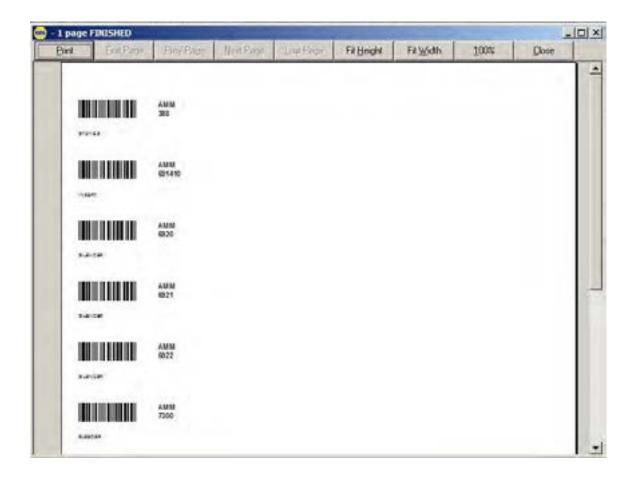
| Step | Action   |
|------|--|
| 2    | Enter the search criteria for the items whose barcodes you wish to |
|      | print. In the example below, we are searching for all items with a |
|      | specific manufacturer.   |
| 3    | Click Find.  |

| Type litem   |                           | Sub-Item   | × Doux                |
|--|---------------------------|--|-----------------------|
| +  |                           | Use Sub-Item Feature   | and the second second |
| tot opposite the second s |                           | Sub-Nam Rem Type Sub-Ham Nem   | End                   |
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| AMM  |                           |  |                       |
| ANC  | Location                  |  |                       |
| ARI  |                           | Sales Stat Dive (massive)  |                       |
| ASP  | k List 🖓 Use Average Cost | Use Sales Feature 4/13/2006 *  |                       |
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|  | *                         |  |                       |
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| Active I7 Stocked  | P Lock Description        | and the second se  |                       |
| -  | P Lock Description        | T Use Quantity Feature   |                       |
| Active I7 Stocked     I7 Calc Supples  | P Lock Description        | T Use Quantity Feature   |                       |
| Active IT Stocked<br>IT Calc Supplies<br>Note  | P Lock Description        | T Use Quantity Feature   |                       |
| Active I7 Stocked     I7 Calc Supples  | P Lock Description        | C Use Quantity Feature   |                       |

| Step | Action   |  |
|------|--|--|
| 4    | Select Item Barcodes from the reports list.                            |  |
| 5    | You can click <b>Print</b> from here to print the barcodes, or you can |  |
|      | click <b>Preview</b> to preview them first.                            |  |

| tem & Inventory Reports           | 10         |
|-----------------------------------|------------|
| Select a Report                   | × Done     |
| C Invertion Movement Report       | og Pinjer  |
| C has Quantity                    | - COLINGIA |
| C Nem Sales                       | Det        |
| Pen Valuation                     |            |
| C Part Yaker By Vendor & Mig.     |            |
| C On Hand                         |            |
| C On Hand (sorted by Qescription) |            |
| (* Etysical Inventory             |            |
| C Stocked Ren                     |            |
| C Stocking Level By Quarter       |            |
| C Pice Sheet                      |            |
| C free Boloy                      |            |
| C Part Manyfacturer History       |            |
| /# frem [acodes                   |            |
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|                                   |            |

| Step | Action   |
|------|--|
| 6    | From the preview window, click <b>Print</b> to print the barcode page.           |
|      | <b>Note:</b> The report created fits an Avery #5160 label for printing purposes. |
| 7    | Click <b>Close</b> to close the preview window and return to the reports list.   |



### Working with Items, Continued

Calculating<br/>ProfitabilityOnce items are included in a work order, you are able to manually adjust<br/>pricing (including overriding pricing rules) and view the profitability for each<br/>item.

For more information about pricing rules, see Chapter 3: Setting Up Lists.

In a work order **Worksheet** under the **Profitability** tab, you will see the profit for each item in the order, based on cost and price. As noted at the bottom of the window, the item turns orange if the profit percentage does not match the basis percentage designated by pricing rules or set in the work order configuration. This may happen either if you manually override the price here, or if the prices change after an update.

TRACS will automatically change the price after an update unless you have **Price Override** selected. You can choose in the **Work Order Configuration** (See Chapter 2: Setting Up Preferences) whether you want to automatically lock the price when you change the basis percentage (**Basis Pct**).

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If you uncheck **Price Override**, the price will change so that your profit matches your basis.

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| art .     | 1528784    | WATER PUMP  | 55.0   | Mahia | 55                    | 63.418 | \$53.41   | \$118.50 | \$754.24              | 1  | \$154.24              | \$8.00                | - F                   | E .   |   |

# Using TRACS OnDemand

| Mitchell1                          | Note: You must be a Mitchell customer to use these features.   |
|------------------------------------|--|
|                                    | TRACS OnDemand gives you instant access to Mitchell1 schematics, repair information, TSBs, and more. You can also add labor and parts directly to work orders. |
| The TRACS<br>OnDemand<br>Interface | While working with a repair order, you can access the TRACS OnDemand Interface, where you can:   |
|                                    | • Copy Mitchell1 labor and OEM (original equipment manufacturer) parts to the order  |
|                                    | • See maintenance intervals and fluid capacities   |
|                                    | • See Mitchell1 repair information   |
|                                    | • See Technical Service and Recall Bulletins (TSBs) for vehicles   |
|                                    | OnDemand Search List Activities Reports Marketing 1  |
|                                    | Labor & OEM Parts  |
|                                    | Maintenance & Fluid Capacity   |
|                                    | Repair (View Only)   |
|                                    | Technical Service and Recall Bulletins (View Only)   |

| Accessing<br>Labor & OEM<br>Parts | Using TRACS OnDemand, you can look up Mitchell1 labor and OEM parts<br>by vehicle, and copy them directly into the work order. |
|-----------------------------------|--|
| How To                            | To access and use OnDemand labor or OEM parts, perform the following steps:  |

| Step | Action  |
|------|---|
| 1    | From an open work order, choose <b>OnDemand</b> from the top menu |
|      | bar, and then choose Labor and OEM Parts.                         |

| Repar Coler #1000 - D               | ten John   |  | Let 19   | -         |
|-------------------------------------|--|--|--|-----------|
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| and the second second second second |  | Promised Server                        |  | to Taker  |
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| Labor BRAZES                        | WHEEL ALIGNMENT<br>BRAKE INSPECTION  | 1 NO BATE \$85.95<br>1 DEFAULT \$95.00 |  | Batay     |
| Part 1520704                        | WATER PSIMP  | 1 DEFAULT 195.00                       |  | Hubay     |
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|                                     |  |  | - 81   | jee Car   |
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| Step | Action   |
|------|--|
| 2    | The OnDemand interface will open in a separate window. You         |
|      | may be prompted for your username/password.                        |
| 3    | If OnDemand needs more information about the vehicle, a menu       |
|      | will appear on the lefthand side of the screen. User the drop-down |
|      | lists to choose the appropriate year/make/model.                   |

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#### How To (continued)

| Step | Action  |
|------|---|
| 4    | Use the <b>Search</b> field or navigate using the menu on the lefthand  |
|      | side of the window. Labor components appear on the top, and             |
|      | OEM parts on the bottom.  |
| 5    | Click on the check box next to a component to select it. Click          |
|      | <b>Transfer</b> in the upper righthand corner of the window to copy the |
|      | selected components to the open work order.                             |

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| eters.   | MERICALINE INT'LL LENGTHER   |                                | Raincon & Replace  |   |
| C R. AUR. #1   |  |                                |  |   |
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| And Leasers & Peters<br>Mile<br>Tensore  | ACCORD/1999 & UP)<br>at TEMATOR ACCORD F   | 107,2 2 108                    | tes 1  | many and a many solar show  |
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| And Leasers & Peters<br>Mile<br>Tensore  | ACCORD (HINE & UP)<br>ALTINATINA ASSISTED F  | 407,54718                      |  | 20166-001-001-001-001-001-001-001-001-001   |
| And Leasers & Peters<br>Mile<br>Tensore  | ADDOMD (HINK & LIM)<br>ALTERNATION AS LEMIN P<br>C 3.6. Trug<br>C 3.6. Trug<br>D 3.6. Trug<br>M. ANNEL   | angauna                        | how 4,1  | 2014 00 100 000 100<br>21160 00 00 100 100 1<br>21160 00 000 100 100 1<br>21160 0000  |
| And Leasers & Peters<br>Mile<br>Tensore  | ADDOND (HINK & LIP)<br>ALTERNATION AS LEMMA F<br>C 3.4.5 mg<br>(T 3.6.5 mg<br>(Munimu)<br>(Munimu)   | amporta                        | han 1.1<br>han 1   | MART IN:         MART INITIA         PERMIT           27108 AVA.422         296 AU         1           27108 AVA.422         296 AU         1           27108 AVA.423         296 AU         1           27108 AVA.424         296 AU         1           27108 AVA.425         296 AU         1           27108 AVA.425         296 AU         1           27108 AVA.425         296 AU         1  |
| And Leasers & Peters<br>Mile<br>Tensore  | ADDOMD (1999 & UP)<br>AUTOMOTION ACTION P<br>C 3ALTING<br>C 100 Line<br>Marcin watches<br>Marcin watches   | 407,547108                     | han 4.1<br>han 1   | Addr Max Penne West and Argen<br>271069-021-021 201-02 1<br>271069-021-021 101 101<br>20100-0210-021 2010<br>20100-02000<br>20100-02000<br>20100-02000  |
| And Leasers & Peters<br>Mile<br>Tensore  | ADDORE (1999 & LIP)<br>ALTERNATION AS LEMMA P<br>C 3.4.5 mg<br>D 3.6.5 mg<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME,<br>MAXAME   | ampaurus                       | =  | ner no mo casa rive<br>1146 ALACI De A 1<br>1146 ALACI |
| And Leasers & Peters<br>Mile<br>Tensore  | ADDOMD (1999 & UP)<br>AUTOMOTION ACTION P<br>C 3ALTING<br>C 100 Line<br>Marcin watches<br>Marcin watches   | ***                            | han 4.1<br>han 1   | AND THE MEDIA CAN BE AND A SAME A  |
| And Landson & Palarty<br>Mile<br>Integrate   | ADDORED (1999 & LAP)<br>ALTERNATION AS LEMEN P<br>C J.A. Stag<br>C J.B. Stag<br>Microsomic<br>Billiptic recurster<br>ADDORE<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR   | 401,24718                      | Sec 1.1<br>Sec 1<br>Sec 1<br>Sec 1<br>Sec 1                            | ner no mo casa rive<br>1146 ALACI De A 1<br>1146 ALACI |
| And Landson & Palarty<br>Mile<br>Integrate   | ADDORED (1999 & LIP)<br>ALTERNATION AS LEVEN F<br>C 2.6.1 km<br>T 19. 5 m<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>MARKEL<br>M   | amjaunus                       | Sector<br>Sector<br>Sector<br>Sector<br>Sector                         | AND THE AND THE PARTY OF AN AND THE AN  |
| And Lease a Palarty<br>MIR<br>Intelactor   | ADDORED (1999 & LIP)<br>ALTERNATION AS LEMM P<br>C JAL Stag<br>C JAL Stag<br>C JAL Stag<br>Munimum<br>Billed of watch RA<br>Without RA<br>MOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR<br>NOTOR    | 407,549708                     | Ben ()<br>Ben ()<br>Ben ()<br>Ben ()<br>Ben ()<br>Ben ()               | AND THE MEDICAL POINT OF THE STATE OF THE ST  |
| And Lease a Palarty<br>MIR<br>Intelactor   | ADDOME (1999 & LAP)<br>AUTOMATINA ALVERTO P<br>C 3.6.1%<br>C 3.6.1%<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,<br>MAXWW,  | angauna                        | Sector<br>Sector<br>Sector<br>Sector<br>Sector                         | AND THE AND THE PARTY OF AN AND THE AN  |
| Del Landig a Palero<br>Mile<br>Innigne   | ADDORECTINE A LIPE<br>ALTERNATION AS LIPE<br>C. 2.4.1 Teg<br>T. 2.4.1 Teg<br>Marcel was been<br>marcel was been<br>compared by<br>compared  | ANIFORM                        | hen 6,3<br>hen 3<br>hen 1<br>hen 1<br>hen 1<br>hen 1<br>hen 1          | AND THE MEDIA OF AND  |
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| Step | Action   |
|------|--|
| 6    | The OnDemand component will appear in the work order along |
|      | with any existing parts and labor.                         |

| Summary Workshe  | eet Detail Totals                         | √ Save                                  |
|--|---|---|
| Customer   |   | Work Order<br>Status Odometer In XCance |
| Name Doe, John   |   | Repar Order  0 63 Preview               |
| Day# 555-5555  |   | * Created Tachnician                    |
| Vehicle 2006 Honda   | Accord 2.4 L 2354 CE L4 DOHC 16V / VTEC   |   |
|  | • VIN • Fieet#                            | Promised Service Writer migob Tick      |
| License Jamma  | T veri                                    | - 11/06/2009 5:00 PM - 1 - OPurchas     |
| Type Item  | Description                               | Qty Rate Price Total Tax - ABecSe       |
| Labor 💌 OnDer  |   | 0.9 DEFAULT \$99.00 \$89.10 V           |
| Labor 4W   | WHEEL ALIGNMENT<br>BRAKE INSPECTION       | 1 NO RATE \$89.95 \$89.95 7             |
| Part 152   | WATER PUMP                                | \$3.00 \$3.00 \$7                       |
|  |   | 2 Payner                                |
|  |   | -C3 P2+                                 |
|  |   |   |
|  |   | Custon                                  |
| N 681  |   | - 3 New Cu                              |
| · •  | Second and a second second                | 1 See New Vi                            |
| Repair Note  | Symptom List ABS LIGH                     |   |
| Contraction of the second s  | CE TIRES PROVIDED BY CUSTOMER WITH ALIGNM | INT subTotal \$283.86                   |
| MOUNT AND BALAN  | UN  | Tax \$19.07                             |
| and so in the second se |   |   |
| MOUNT AND BALAN  |   | - Total \$202.72                        |

| Accessing                  | Using TRACS OnDemand, you can access maintenance intervals and fluid                    |
|----------------------------|---|
| Maintenance<br>Intervals & | capacities for a specific vehicle and copy the associated repair notes to a work order. |
| Fluid<br>Capacities        |   |

**How To** To access and use OnDemand maintenance intervals and fluid capacities, perform the following steps:

| Step | Action  |
|------|---|
| 1    | From an open work order, choose <b>OnDemand</b> from the top menu |
|      | bar, and then choose Maintenance and Fluid Capacity.              |

| De S De Leve N. Coll Fact Capacity<br>1. Repair Online FUSIOR - Date Labor<br>1. Repair Online FUSIOR - Date Labor   | Intera (New Delg)  | <b>.</b>   |
|--|--|--|
| provide and a second se | Charles and Control of the second sec   | Save<br>X Lover<br>60 Paring<br>10 Dat<br>10 Dat<br>10 Dat<br>10 Data  |
| Type Inn Decomption<br>Prof. WALL ALLANSENT<br>Labor BRACE OPACE ALLANSENT<br>Part ISSUE WALLS POMP  | Op/         Price         Final         Tax Number           1         NO DATE         S01 26         COMPUTE INCLUME ALLOANEENT INCLUME           1         DOTALES         S01 26         Dockelog         Dockelog <th>A Sec Sec<br/>Sec Sec<br/>Sec Sec<br/>Sec Sec<br/>Sectors<br/>A Path<br/>A Path<br/>A</th> | A Sec Sec<br>Sec Sec<br>Sec Sec<br>Sec Sec<br>Sectors<br>A Path<br>A |
| *  |  |  |

| Step | Action  |
|------|---|
| 2    | The OnDemand interface will open in a separate window. You        |
|      | may be prompted for your username/password.                       |
| 3    | To work with fluid capacities, choose Fluids from the top menu.   |
| 4    | Click on the check box next to the fluid type to select it. Click |
|      | Transfer in the upper righthand corner of the window to copy the  |
|      | associated repair notes to the open work order.                   |

| en bides  |  |                            |  |  |  |  |  |
|---|--|----------------------------|--|--|--|--|--|
| and face  |  | ×                          |  |  |  |  |  |
| AND DESCRIPTION OF A PROMPT OF A                        | tions - + industry - + Additional  | Print III 1 Transfer 1 184 |  |  |  |  |  |
| FLUD CAPACITES  |  | •                          |  |  |  |  |  |
| (hand house) As Card Rollypoint                         |  |                            |  |  |  |  |  |
| APRICATION  |  |                            |  |  |  |  |  |
| T All Applicates Reserve                                | Not Analytic   |                            |  |  |  |  |  |
| Righted R-Oda   |  |                            |  |  |  |  |  |
| Palme the Mandattane's Instantiant for A                | a mouth gas.   |                            |  |  |  |  |  |
| Automatic Transmission Field                            |  |                            |  |  |  |  |  |
| articlation   | 11.00  |                            |  |  |  |  |  |
| C 15 he here fill                                       | 7.6925 (7.6.)  |                            |  |  |  |  |  |
| WOLASSINGING Automatic Transmission                     |  |                            |  |  |  |  |  |
| Likeling Mind (1) is to calcing and                     |  |                            |  |  |  |  |  |
| P 18 for for 18   | LINUS (LA.)  |                            |  |  |  |  |  |
| Water field Vice a trade of the Automatic Proceeding in |  |                            |  |  |  |  |  |
| Children Mang (see fit) a list inference and            | Title regime whe repair  |                            |  |  |  |  |  |
| Budge Flore   |  |                            |  |  |  |  |  |
| APPLEATEN   | 1.8  |                            |  |  |  |  |  |
| W All Application Backets                               | Tag-10 for Reserved  |                            |  |  |  |  |  |
| INCE 4 Broke Fluid                                      |  |                            |  |  |  |  |  |
| The instance "shar" and "boat" lines on one             |  |                            |  |  |  |  |  |
| English Contains  |  |                            |  |  |  |  |  |
| 47544768  |  |                            |  |  |  |  |  |
| T 28.0m   | 89875 (88.)  |                            |  |  |  |  |  |
| Phosphate has Cantast & HUAW A4                         | and the second  |                            |  |  |  |  |  |
| C 18 fee  | NAMETA (TAX)   |                            |  |  |  |  |  |
| Photogenetic Row Conduct G MU AM 44                     |  |                            |  |  |  |  |  |
|   |  |                            |  |  |  |  |  |
| Engine DR   |  |                            |  |  |  |  |  |
| APPLICATION   | HE AND   |                            |  |  |  |  |  |
| T 18 log of iter  | #3M076 (430.)  |                            |  |  |  |  |  |
| Deadling largest of car course motion \$20              | The periodices in specificity based with earling the following regursements; WF 201 ML and an Even sealibility and parts (NL 201 ML 201 |                            |  |  |  |  |  |
| could paper temapolalistic of the holicolite            |  | and the second second      |  |  |  |  |  |
| 1" ISLing affiler                                       | 5.00(215.1) 5  |                            |  |  |  |  |  |
| the petrohes as synthetic based allo a                  | The pathology or spectrum have a spectrum of the balance of the balance of the spectrum of the |                            |  |  |  |  |  |
|   | To the transition the Degler General Wesley (COUL 2010: To present methods and approx) 24 hour has capable, shall regime and list is no until organs upon<br>at approx 2 min, check-departs, mar With MAX, Tubbio DNGHES UNCY. After changing of and this, that and not angles at dis until of pressure light gas<br>get   |                            |  |  |  |  |  |
| Fast Taxe   |  |                            |  |  |  |  |  |
| APPLICATION   |  |                            |  |  |  |  |  |
| C All Applicable Bullets                                | NAMES (MAL)  |                            |  |  |  |  |  |
| Benaria fare casarity 1.8 per minute of                 |  |                            |  |  |  |  |  |
| Manual Transmission Field                               |  |                            |  |  |  |  |  |
| 4490,0,0,000  |  |                            |  |  |  |  |  |
| A CONTRACTOR OF A CONTRACT                              | Constant Land L  |                            |  |  |  |  |  |

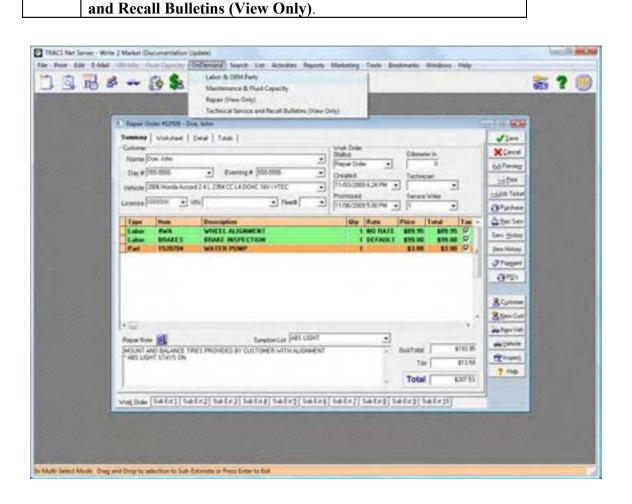
| Step | Action  |
|------|---|
| 5    | To work with maintenance intervals, choose Mileage from the top       |
|      | menu. Then choose the appropriate mileage from the menu on the        |
|      | left.   |
| 6    | Click on the check box next to the maintenance interval to select it. |
|      | Click <b>Transfer</b> in the upper righthand corner of the window to  |
|      | copy the associated repair notes to the open work order.              |



| Step | Action  |
|------|---|
| 7    | The OnDemand notes will appear in the work order. |

| and the second second   | Worksheet   D   | etal   Totaly   |                   |              |          |          |          |  | 1500                  |
|---|---|---|-------------------|--------------|----------|----------|----------|--|-----------------------|
| DeviceMent  |   |   | Work De<br>Status | der          | Ddonet   | a lat.   |          |  | XCancel               |
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| Day # 2   | 5-5555  | • Evening # 555 5555 •  | Created           | -            | Technic  | in       |          |  |                       |
| interior IX   | YE Hunda Annual   | 24L284CCL4DOHC NV VTEC .  | 11/03/2           | 009624PM     | -        |          |          |  | - Bet                 |
| 0.000   |   |   | Promis            | ed           | Serice   | when .   |          |  | - Att Tel             |
| icense 10   | 0000( - 10  | 4 Plaints ·   | 11/06/2           | 1009 5 00 PM | - 1      |          |          |  | () Pycha              |
| Tupe  | line  | Description   | 0                 | r Rate       | Price    | Tutul    | Tes      | Note   | Alex Se               |
|   | 0nDemand  | TIBES   | -                 | 1            | \$0.00   | -        | Γ.       | ROTATE (Plotate losed to reval. ]  | Serv Hide             |
| Note  | OnDemand  | SERVICE INTERVAL INDICATOR/DISPLA   | W                 | 1            | \$0.00   |          | Г.       | RESET [Where applicable ]  | sax Dev               |
| Note  | OnD-mand  | ENGINE OIL FILTER   |                   | 1            | \$0.00   |          | -        | REPLACE  | 7ets Hills            |
| Note  | OnDemand<br>OnDemand  | ENGINE OIL<br>WIFEB BLADES  |                   | 1            | \$0.00   |          | 5        | REPLACE INSPECT ICheck condition. ]  | STAD                  |
| Note  | OnDemand  | WINDSHIELD WIPER & WASHER SYSTE   | HC I              | 1            | \$0.00   |          | 10       | INSPECT [Check candition.]<br>INSPECT [Check cleaning nozzle funct   |                       |
| Mote  | OnDemand  | TIRES/SPARE TIRE  |                   | 1            | \$0.00   |          | r.       | INSPECT [Check tread depth, conditio   | _ <b>G</b> PR)        |
| Note  | OnDemand  | HEADLIGHTS  |                   | 1            | \$0.00   |          | 17       | INSPECT [Direck cleaning notifie funct   | Propher of            |
| Note  | OnDemand  | BRAKE SYSTEM  |                   | 1            | \$0.00   |          | <b>r</b> | INSPECT [Direck for damage/leaks, br   | Stim                  |
| Note  | <b>OnDemand</b>   | REAR WINDOW   |                   | 1            | \$0.00   |          | Г.       | CHECK [Check cleaning nazzle functio   | and the second second |
| Note  | OnDemand  | BATTERY   | -                 | 1            | \$0.00   |          | <b>F</b> | CHECK Second Battery [II equipped.]  | 3 See C               |
| Note  | OnDemand<br>(WA   | BATTERY<br>WHEEL ALIGNMENT  |                   | 1 NO BATE    | \$0.00   | -        | P        | CHECK  | - Nov V               |
| Labor   | BRAKES  | BRAKE INSPECTION  |                   | 1 DEFAULT    | \$93.00  | \$193.05 |          | COMPUTERIZED ALIGNMENT INCLUDI<br>Includes: Dismount time and inspect beat                                       | www.Vehic             |
| Pad   | 1520204   | WATER PUMP  |                   | 1            | \$1.00   | \$3.00   |          | inclusive orthogen tand and inspect bear   |                       |
|   |   |   |                   |              |          |          |          |  | the income            |
|   |   |   |                   |              |          |          |          |  | 2 Hel                 |
|   |   |   |                   |              |          |          |          |  |                       |
|   |   |   |                   |              |          |          |          |  |                       |
| 100   |   |   |                   |              |          |          |          |  |                       |
|   | GRI   | Sprighters Last ABS LIGHT   |                   | 100          |          |          |          |  |                       |
| Teper Note  | 1000 M  |   |                   |              | C. Carlo | -        | 181.04   |  |                       |
|   | ID BALANCE TIRE<br>IT STAYS ON  | IS PROVIDED BY CUSTOMER WITH ALIGNMENT  |                   | 1            | SusTotal |          | 100.00   |  |                       |
| BATTERO   | CHECK   |   |                   | - 24         | Tar      |          | 61348    | 15.5   |                       |
| BEAR W  | CHECK Second Check Second Check Second Check Second Sec | nd Battery (if equipped )<br>(Dreck clearing rocate functionality (if applicable) | 10                |              | Taket    | -        |          | El Contra de |                       |
| Concerns of the local sectors | THE STREET  | frames room of service means in where sold  |                   | (m)          | Total    | 1 2      | 202.51   |  |                       |

| Viewing<br>Informa<br>and TSI | for specific venicles and recification bervice Danetins (15D5).                              |                |
|-------------------------------|--|----------------|
|                               | Note that OnDemand repair information and TSBs are recannot be transferred into work orders. | ead-only, and  |
| How To                        | To view read-only repair information or TSBs in OnDemand following steps:                    | l, perform the |
| Step                          | Action   |                |
| 1                             | From an open work order, choose <b>OnDemand</b> from the top menu                            |                |
|                               | bar, and then choose <b>Repair (View Only)</b> or <b>Technical Service</b>                   |                |



| Step | Action  |
|------|---|
| 2    | The OnDemand interface will open in a separate window. You  |
|      | may be prompted for your username/password.   |
| 3    | For both repair information and TSBs, you have the option to  |
|      | search using the OnDemand5.com search window or to navigate<br>using the menu on the lefthand side of the screen. |

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# **Purchasing Items**

| Purchasing<br>Items                 | As you create a work order for a vehicle, you may have the items that you need in stock. Other items, however, may need to be ordered. In order to purchase items, you will need to create purchase orders (POs).  |  |
|-------------------------------------|--|--|
|                                     | For each item in your work order, you should already have a vendor attached<br>to that item. When you select the purchase order option, the system will<br>generate one PO per vendor represented on your work order.  |  |
|                                     | POs also allow you to know your available quantity for items.  |  |
| Categories of<br>Purchase<br>Orders | When you first create a purchase order, it is identified as new. You then have to order the part. Next, the order has to be transmitted. Open POs fall into the following three categories:  |  |
|                                     | <ul> <li>POs using the TAMS system through your local NAPA Auto Parts Store</li> <li>POs through another vendor</li> <li>POs through another business location.</li> </ul>   |  |
| Accessing<br>Purchase<br>Orders     | In order to purchase items, you can use the Purchasing and Purchase Orders<br>icon located at the top of the TRACS main screen. However, if you<br>access POs from the <b>Edit</b> button on a work order, the system will<br>automatically display only the POs related to that work order. |  |

| Repair Order<br>Numbers | For your convenience, your local NAPA Auto Parts Store will automatically<br>put your repair order number on the top of your purchase order to help you<br>locate the related repair order.                           |
|-------------------------|---|
| Purchase Order<br>Notes | You can easily attach a note to an item for your NAPA Auto Parts Store to view. For example, if you need a part immediately, you can add a note for the vendor to call you if the part will not be available by 4:00. |
|                         | <i>Note</i> : These notes are typed into the <b>TAMS Message 1</b> and <b>TAMS Message 2</b> fields on the <b>Edit Purchase Order</b> form.   |
| How To                  | To purchase items for a work order, perform the following steps:  |

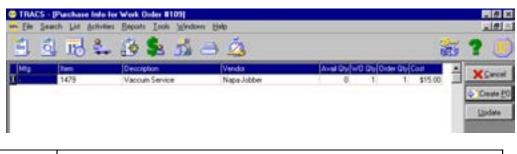
| Step | Action   |  |
|------|--|--|
| 1    | Click the <b>Find Work Orders</b> icon from the TRACS main menu, and the <b>Work Orders</b> form displays. |  |

|                                       | 8 5 3 3 3 3                               |   | -                  | aus = 🕓        |
|---------------------------------------|---|---|--------------------|----------------|
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| 169 Love, Joe                         | 1997 Ford Contour 254000 2.5              | Jiter VE Repair Dider   | 5/27/5             | 9 11 38 06 AM  |

| Step | Action  |
|------|---|
| 2    | Click one of the following folders to select from the type of Work  |
|      | Orders:   |
|      | <ul> <li>Estimates</li> <li>Repair Orders</li> <li>Complete</li> <li>Invoices</li> <li>Canceled</li> <li>All</li> </ul> |
|      | and the available work orders of that type display.   |
| 3    | Click to select the work order from which the PO is to be   |
|      | generated.  |
| 4    | Click the <b>Edit</b> button and the work order displays with the   |
|      | Summary folder active.  |

| TRACS - [Repair Order #171 - AA Fleet Services File Diet Edit. Search Luit Activities Beport | 1. C. |
|--|---|
| 3 3 18 2 3 2 3   | 🏭 <b>?</b> 🥑                              |
| Summary Worksheet Detail Totals  | Jim                                       |
| Name AA Peet Service   | tatus XCancel                             |
| Day # 665-435-6736   | Repar Order                               |
| Vehicle 1995 Chevislet Truck Pickup C10/C1500 1/2  | /20/99111129AM                            |
| Litense FLT106 . Ven (R67U347643963169   | Tomised                                   |
| Type Item Description  | Price Total Tax Note A                    |
| 6651614 W/shield Washer Pun  | \$16.90 \$16.90 P                         |
| Part CS720A<br>Part 4367   | \$3.65 \$27.84 \$7                        |
| Part 85873   | \$78.25 \$156.50 17                       |

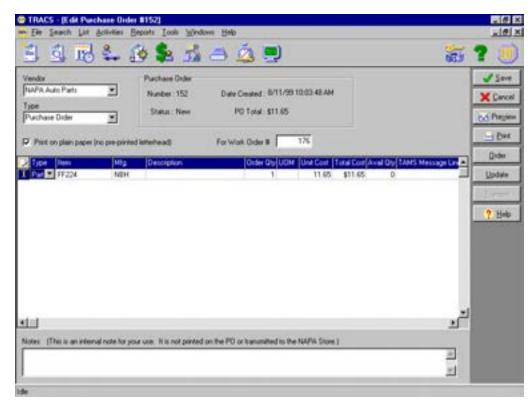
| 5 | Click the <b>Purchase</b> button, and the <b>Purchase Info for Work</b><br><b>Order</b> form displays.  |
|---|---|
|   | <i>Note</i> : At this point, you can view the available quantity to determine if you need to order additional parts. If you don't need to purchase any items, you can click the <b>Cancel</b> button. |



| Step | Action   |
|------|--|
| 6    | Click the <b>Create PO</b> button if you want to purchase additional |
|      | items, and the Purchase Orders for Work Order form displays.         |

| TRACS - (Purchase Orders for Work Order<br>Ele Search List Activities Beposts Tool |   |   |
|--|---|---|
| 1 1 18 th 19 1   |   | <b># ?</b> 🦉                            |
| Number Status Vendor<br>103 New Napa Jobber  | Amount (Necessed (Ceeded<br>\$15.00) \$0.00(11/23/98.5.44.39.PM | Edit<br>Oct Prepara<br>                 |
|  |   | Beceive<br>Ubdate<br>Isanová<br>Evejete |
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| <b>.</b>   |   | 2                                       |

| Step | Action   |  |
|------|--|--|
| 7    | Click the <b>Edit</b> button if you want to edit the PO, and the <b>Edit</b> |  |
|      | Purchase Order form displays.  |  |
| 8    | Click to select an item on the PO, and a yellow arrow displays to            |  |
|      | the left of the item type.   |  |



### How To (continued)

| Step | Action   |
|------|--|
| 9    | Double-click the yellow arrow, and the PO Item Record View |
|      | window displays.   |

| PO Item Record View |                       |  |  |
|---------------------|-----------------------|--|--|
|                     | →                     |  |  |
| Item Type           | Part 💌                |  |  |
| Item                | FF224 💌               |  |  |
| Manufacturer        | NBH                   |  |  |
| Description         |                       |  |  |
| Order Qty           | 1                     |  |  |
| UOM                 |                       |  |  |
| Unit Cost           | 11.65                 |  |  |
| Total Cost          | \$11.65               |  |  |
| Avail Qty           | 0                     |  |  |
| TAMS Message Line 1 |                       |  |  |
| TAMS Message Line 2 |                       |  |  |
| 1                   |                       |  |  |
|                     | 🗸 <u>O</u> K 🗶 Cancel |  |  |

| 10 | Add or modify information as necessary.                                   |
|----|---|
| 11 | Click the <b>OK</b> button, and the <b>Edit Purchase Order</b> screen     |
|    | redisplays.   |
| 12 | Click the <b>Order</b> button, and the <b>Order Date</b> column populates |
|    | with the current date and time, and the <b>Status</b> column changes      |
|    | from "New" to "Open."   |

**How To** To copy additional charges onto a purchase order, perform the following step from the **Purchase Order for Work Order** form:

| Step | Action  |
|------|---|
| 1    | From the main TRACS screen, choose the option labeled |
|      | Activities from the menu at the top of the screen.    |

<u>File Search List Activities Reports Tools Windows Help</u>

| 2. | A drop menu will appear. Select Charge Options.  |
|----|--|
| 3. | A screen titled Edit Charge Options will appear. |

| छ Edit Charge | e Options          |              | _ 🗆 ×            |
|---------------|--------------------|--------------|------------------|
| Charge        | Description        | Copy To PO 🔺 | ✓ Save           |
| CORE          | Core Charge        |              | <u> </u>         |
| FET           | Federal Excise Tax |              | 🔀 <u>C</u> ancel |
|               |                    |              |                  |

| 4. | Various charges that can be applied to a purchase order will be           |  |  |
|----|---|--|--|
|    | shown. Charges that you do not want to be copied to a                     |  |  |
|    | purchase order require that the check be removed from each                |  |  |
|    | charge under the area titled Copy To PO. To remove the check              |  |  |
|    | and the charge, double click the check(s) you wish to remove.             |  |  |
| 5. | Once all charges have been adjusted, click the <b>Save</b> button to exit |  |  |

**How To** To preview your purchase order, perform the following step from the **Purchase Order for Work Order** form:

| Step | Action   |
|------|--|
| 1    | Click the <b>Preview</b> button, and the purchase order displays on your |
|      | monitor.   |

| TRACS - [TRACS Purchase Order 106]          |                         |                   |   | _ B ×   |
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| Fit 100 Pg << < > >> P? P                   | Done                    |                   |   |   |
|   | ABC Company             |                   |   |   |
|   | 111-234-5678            |                   |   |   |
| 11/30/1998 4:01 pm                          |                         |                   | page 1<br>Purchase Order: 106                             |   |
|   |                         |                   |   |   |
| Napa Jobber                                 |                         |                   |   |   |
|   |                         |                   | -fold here -  |   |
| ltern Mfg Part Num be<br>1 FIL 1036         | r DESCRIPTION<br>OILFIL | Qty UOM<br>1 EACH | UnitCost Extended Cost<br>\$0.00 \$0.00<br>Total : \$0.00 |   |
|   |                         |                   | Page 1 of 1   |   |
|   |                         |                   |   |   |

| Placing the<br>Order         | Depending on your relationship with your vendor, you might call or fax your vendor to place your order.                |
|------------------------------|--|
| Printing a<br>Purchase Order | There might be times when you want to print a PO. This can be done from the <b>Purchase Order for Work Order</b> form. |

**How To** To print your purchase order, perform the following step:

| Step | Action  |
|------|---|
| 1    | Click the <b>Print</b> button, and the purchase order is sent to your |
|      | default printer.  |

# **How To** To transmit a NAPA order to your local NAPA Auto Parts Store, perform the following step from the **Purchase Order for Work Order** form:

| Step | Action   |
|------|--|
| 1    | Click the <b>Transmit</b> button, and the order is processed at your     |
|      | NAPA store. The <b>Transmitted</b> column displays a <b>Y</b> indicating |
|      | that the purchase order has been transmitted successfully.               |
|      |  |
|      | <i>Note</i> : Before you can transmit an order, you must have marked     |
|      | the items to be ordered using the <b>Order</b> button. (See the "How To  |
|      | Purchase Items for a Work Order" section.)                               |

# **Receipt of Parts** When you receive your parts, you will want to mark your PO that items have been received.

You can do this on the Purchase Orders for Work Order form:

**How To** To mark a PO with received parts, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click the <b>Purchasing and Purchase Orders</b> icon, and the |
|      | Purchase Order List screen displays.                          |

| C TRACS  |                           |  |            |        |
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|  |                           |  |            |        |
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| 2 | Click the <b>Open</b> tab.                         |
|---|--|
| 3 | Click to highlight the appropriate purchase order. |

#### How To (continued)

4 Click the **Receive** button., and the **Receive Purchase Order #2** screen displays.

| - | Beceive Purchase Order 1                  | 2   |            |
|---|---|---|------------|
| 0 | Number: 2<br>Status: Open                 | Payables / Credit Account<br>Accounts Payable | 1 Seve     |
|   | Vendor Napa Jobber<br>Type Purchase Order | Total Received: \$0.00                        | Heceive At |
|   | Notes                                     | Date Ordered 11/2/991.1751 PM                 | 2 Beb      |
|   |   |   |            |
|   | 1   |   |            |
|   | Balance Recy Dty Unit Cost                |   |            |
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|   |   |   |            |
| 1 | alal                                      |   | ·          |

#### How To (continued)

|   | Action  |  |  |  |  |  |
|---|---|--|--|--|--|--|
| 5 | Refer to the following table to de            | etermine your next step:   |  |  |  |  |
|   | IF  | THEN   |  |  |  |  |
|   | you received a partial order,                 | type the number of items you<br>received in the <b>Recv Qty</b><br>field.  |  |  |  |  |
|   | you received all of the items<br>you ordered, | click the <b>Receive All</b> button,<br>and the system will move the<br>quantity in the <b>Balance</b><br>column to the <b>Recv Qty</b><br>column. |  |  |  |  |
|   |   | <i>Note</i> : The item cost associated with the repair order will be updated.  |  |  |  |  |

**How To** To update prices for items in your work order without placing an order, perform the following steps:

| Step | Action  |  |  |  |
|------|---|--|--|--|
| 1    | Click the <b>Purchase</b> button while in a work order.   |  |  |  |
| 2    | Refer to the following table to det   | termine your next step:  |  |  |
|      | IF you have   | THEN   |  |  |
|      | multiple jobbers,   | <ol> <li>Click to select the<br/>appropriate jobber.</li> <li>Click the Use button.</li> </ol> |  |  |
|      | have a single jobber,   | go to the next step.   |  |  |
| 3    | Click the <b>Update</b> button from<br>the <b>Order for Work</b> form, and<br>the <b>Connecting to the NAPA</b><br><b>store</b> message displays if you<br>have a valid connection to your<br>modem and the correct<br>information setup for your<br>NAPA Auto Parts Store.<br>When you connect to the store,<br>the <b>TRACS logging in</b> message<br>displays. |  |  |  |

#### How To (continued)

| Step    | Action   |                            |  |  |  |
|---------|--|----------------------------|--|--|--|
| 3       | The system displays the <b>Please</b>  | Please wait updating parts |  |  |  |
| (cont.) | wait updating parts<br>message as the system updates<br>the prices on your work order.<br>When the update is complete,<br>your new prices display on the<br>NAPA Access Status for<br>Update form. | Cancel                     |  |  |  |

|   | Туре | ltem   | Description | Qty | Rate | Price  | Total  | Tax | Note |  |
|---|------|--------|-------------|-----|------|--------|--------|-----|------|--|
| Þ | Part | 1069 🗾 | OIL FIL     | 1   |      | \$8.60 | \$8.60 | V   |      |  |

| 4 | Click the <b>Done</b> button. You have now updated your prices for |
|---|--|
|   | items on your purchase order.                                      |

| Globally<br>Updating Your<br>Prices | You can update your NAPA prices to get the most current prices even when you are not purchasing items.  |
|-------------------------------------|---|
|                                     | For example, you might want to investigate current, updated prices of various oil filters without creating a new purchase order. You can search for all NAPA oil filters, and then update your prices globally for those filters. |

**How To** To update prices globally, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click the <b>Work with Items</b> icon, and the <b>Item List</b> form displays |
|      | with the <b>All Items</b> folder active.                                      |
| 2    | Click the <b>Find</b> button, and the <b>Find Item</b> form displays.         |
| 3    | Type the desired search criteria from the appropriate field, if               |
|      | necessary.  |
| 4    | Click the <b>Find</b> button, and all items matching your search criteria     |
|      | display.  |
| 5    | Click the <b>Update</b> button and the <b>Connecting to the NAPA store</b>    |
|      | message displays if you have a valid connection to your modem                 |
|      | and the correct information setup for your NAPA Auto Parts Store.             |
|      |   |
|      | <i>Note</i> : If you connect to the store, the TRACS logging in message       |
|      | displays.   |
| 6    | The system displays the <b>Please wait updating parts</b> message as          |
|      | the system updates the prices on your work order. When the                    |
|      | update is complete, your new prices display on the NAPA Access                |
|      | Status for Update form. You have now updated your prices                      |
|      | globally.   |

### Assigning a Technician

Entering a<br/>TechnicianThe Technicians folder allows you to assign a technician to each individual<br/>item in a work order. In order to assign a technician, you need to first add<br/>that item to your estimate or work order.

You may also assign a technician to the every item in the work order from the **Summary** tab.

**How To** To assign a technician to an item, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click to select the <b>Worksheet</b> folder.                              |
| 2    | Click to select the <b>Technicians</b> subfolder.                         |
| 3    | Click to select the <b>Tech</b> field or on the down arrow located in the |
|      | Tech field, and the drop-down list of employees displays.                 |

| Type   | han       | Description           | Tech | Rate | 0. | Total Cost | Pice   | Total  | Actual Head | D.Bed Hit:   |      | 66Pr   |
|--------|-----------|-----------------------|------|------|----|------------|--------|--------|-------------|--|------|--------|
| Part   | 00222     | AE STOP LEAK          | 15H  |      | 1  | \$37.99    |        |        |             | the state of the s | 1.04 |        |
| Pat    | HP10001   | HANGER PUMP ASSEMBI   | MGR  |      | 1  | \$235.71   |        |        |             |  |      |        |
| Sublet | MACHINE 5 | HO MACHINE SHOP LABOR |      |      | 1  | \$0.00     | \$0.00 | \$0.00 |             |  |      | = job  |
|        |           |                       |      |      |    |            |        |        |             |  |      | 0%     |
|        |           |                       |      |      |    |            |        |        |             |  |      | (AB+   |
|        |           |                       |      |      |    |            |        |        |             |  |      | Serv.3 |
|        |           |                       |      |      |    |            |        |        |             |  |      |        |
|        |           |                       |      |      |    |            |        |        |             |  |      | June H |
|        |           |                       |      |      |    |            |        |        |             |  |      | Q Pa   |
|        |           |                       |      |      |    |            |        |        |             |  |      | 0      |
|        |           |                       |      |      |    |            |        |        |             |  |      |        |
|        |           |                       |      |      |    |            |        |        |             |  |      | 80     |
|        |           |                       |      |      |    |            |        |        |             |  |      |        |
|        |           |                       |      |      |    |            |        |        |             |  | 100  | 350    |
|        |           |                       |      |      |    |            |        |        |             |  |      | an No  |
|        |           |                       |      |      |    |            |        |        |             |  |      |        |
|        |           |                       |      |      |    |            |        |        |             |  |      | the    |
|        |           |                       |      |      |    |            |        |        |             |  |      |        |
|        |           |                       |      |      |    |            |        |        |             |  |      |        |
|        |           |                       |      |      |    |            |        |        |             |  |      | - 7.1  |
|        |           |                       |      |      |    |            |        |        |             |  |      |        |
|        |           |                       |      |      |    |            |        |        |             |  | - 11 |        |

| 4 | Click to select a technician from the drop-down list, and the |
|---|---|
|   | technician's initials are entered in the Tech field.          |

### Assigning a Technician, Continued

**How To** To assign a technician to an entire work order, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click to select the <b>Summary</b> folder.  |
| 2    | Click to select the <b>Technician</b> field, and the drop-down list of employees displays.                                      |
| 3    | Click to select a technician from the drop-down list, and the technician's initials are entered in the <b>Technician</b> field. |
| 4    | Click Yes to confirm, and the technician will be applied to all work order items.   |

| Customer<br>Name 🖟<br>Day # | ohn, Dioe<br>009 Bugahi Vej | Denal   Totals       Evenin eon 16 4 8 0 L 8000 CC VRV |                    |        | Work Order<br>Status<br>Repar Order<br>Created<br>(05/15/2010 12<br>Promised<br>(05/15/2010 5.0 | Polit<br>EI PM • My P<br>Techy | ult Center<br>ician Sarvi | e Wil             | -                        | Save<br>Caroo<br>Sci Previe<br>Sci Previe<br>Sci Previe<br>Sci Previe |
|-----------------------------|-----------------------------|--|--------------------|--------|---|--------------------------------|---------------------------|-------------------|--------------------------|---|
| Type                        | Den                         | Description  |                    |        | Que Rate  |                                | Total                     | 1.000             | Note                     | ABec Se   |
| Part                        | 00222                       | AC STOP LEAK   |                    |        | 1   | \$99.7                         | \$10.7                    |                   |                          | Serv Histo  |
| Part<br>Sublet              | HP10001<br>MACHINE          | HANGER PUMP  |                    |        | 1   | \$413.5                        |                           |                   | Haness Tag VCD, VRY, VPN | Jen Hido  |
|                             |                             |  | -                  | den    |   |                                | H I                       |                   |                          | 3 Page  |
|                             |                             |  |                    |        | Apply Tech to Al  | Work Order Ber                 |                           |                   |                          | () P()  |
|                             |                             |  |                    | ÷.,    |   | 9235 - 97C                     |                           |                   | 1                        | 2 Cyclor  |
|                             |                             |  |                    | 8      | χes –   | No                             |                           |                   |                          | 3 Seve D  |
|                             |                             |  |                    |        | _   |                                |                           |                   |                          | Ngo V   |
|                             |                             |  |                    |        |   |                                |                           |                   |                          | - Yeke  |
| • Ini                       |                             |  | 0.00               |        |   |                                |                           |                   | *                        | 12 inpe   |
| Repair Note                 |                             |  | Symptom List ABS L | JGHT . |   |                                | 1                         |                   | -                        | 7 Hab   |
|                             |                             |  |                    |        |   | - SubTota<br>Ta                |                           | \$541.2<br>\$33.8 |                          |   |

### Working with Job Tickets

**Overview** A job ticket tells the technician what type of service to provide to a vehicle. You can preview or print a job ticket from an open work order.

**How To** To preview a job ticket for an open work order, perform the following steps:

| L | Step | Action  |
|---|------|---|
| ſ | 1    | Click to select <b>Print</b> on the TRACS main menu, and the <b>Print</b> |
|   |      | pull-down menu displays.  |

| Print         | <u>S</u> earch      | List   | Activi |  |  |  |
|---------------|---------------------|--------|--------|--|--|--|
| Pi            | re <u>v</u> iew     |        |        |  |  |  |
| <u>P</u> rint |                     |        |        |  |  |  |
| Pi            | review <u>J</u> oł  | b Tick | et     |  |  |  |
| Pi            | rint Job <u>T</u> i | cket   |        |  |  |  |

### Working with Job Tickets, Continued

#### How To (continued)

| Step | Action  |
|------|---|
| 2    | Click to select <b>Preview Job Ticket</b> , and the job ticket for the open |
|      | work order displays.  |

| 06/22/19  | 91200   |  |                 |  |   |                | page  |
|---|---|--|-----------------|--|---|----------------|-------|
| Vehicle<br>VIN<br>Fleet #<br>Created<br>Contact | 857 Money<br>Cesh Miller<br>1995 Cheve<br>2657U3476<br>105<br>5/2/99 9:04 | K732<br>Set Truck Prokup C10/C<br>43563Y65R              | Job Ticket #175 | Day Phone<br>Eve Phone<br>FAX Number<br>Tag/State<br>Color<br>Fleet Driver | - 665-435-8<br>204-678-3<br>968-234-6<br>FLT106 /<br>Gveen<br>Larry | 14:35<br>96:41 |       |
| Code  | Tech  | Detoration   | Libor           | D1 Tre   | Bat   | feen           | Next  |
| FBJ   |   | Det orpition<br>FRONT DRAVELJOB<br>Re floor mildt peper. | Labor           | Dit Time<br>1  | <u>Ret</u>  | feeh           | Heve: |

| 3 | Click the <b>Done</b> button when you have finished viewing the job |
|---|---|
|   | ticket. You have now previewed a job ticket for an open work        |
|   | order.  |

### Working with Job Tickets, Continued

**How To** There are two ways to print a job ticket: You may use the job ticket button from the Work Order screen or perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click to select <b>Print</b> on the TRACS main menu, and the <b>Print</b> |
|      | pull-down menu displays.  |

<u>Print</u> <u>Search</u> <u>List</u> <u>Activi</u> Pre<u>v</u>iew <u>P</u>rint Preview Job Ticket <u>Print Job Ticket</u>

| 2 | Click to select <b>Print Job Ticket</b> , and the job ticket for the open |
|---|---|
|   | work order is sent to your printer. You have now printed a job            |
|   | ticket for an open work order.  |

### **Working with Sub-Estimates**

**Sub-Estimates** Each Work Order has ten optional sub-estimates. Each can show a different repair scenario, having the features of a full Work Order.

Features of Sub-Estimates:

- Each sub-estimate will be automatically priced based upon the existing customer pricing profile
- Each sub-estimate has its own supplies charges and Total
- Each sub-estimate can be previewed or printed.
- Each sub-estimate can have its own discount

**How To** To add items to a sub-estimate, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click one of the <b>Sub Est</b> tabs at the bottom of the Estimate or |
|      | Work Order window.  |
| 2    | Add items to the estimate just as you would to a full Work Order.     |

| Estimate #1678 - BAILER  | Contraction of the local division of the loc |                       | -        |                            |        |         |                                       |   |       | Dia   |
|--|--|-----------------------|----------|----------------------------|--------|---------|---------------------------------------|---|-------|---|
| Customer   | Datel   Totals   |                       |          | FoA Order                  |        |         |                                       |   | _     | Vie   |
| ILENE DATH INMOOT  | i  |                       |          | tatop                      | - 14   | Distant | the.                                  |   |       | XCare   |
| Date   | - trees  | 20                    | - 11     | Contractor                 | 2      | 1       |                                       |   |       | 50 Pers   |
|  | may 2500 4.3. http://  |                       |          | Lanation<br>Principal task | en.    | Tertino |                                       | - |       |   |
| and the second second second   | -  | and the second second |          |                            |        | 100     |                                       | - |       | Saint   |
|  | The second se  | 2 percel              | - 1      | 0.102003                   | ID PHC | 2       |                                       |   |       | (Path   |
| Type Item  | Description  |                       | Qip Hate | Pier                       | 1 d    |         | an Nide                               |   | •     | Q Bec S   |
| ACT INCOME   |  |                       |          |                            |        | E       | 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 |   |       |   |
|  |  |                       |          |                            |        |         |                                       |   | - 11  | Servi Hol   |
|  |  |                       |          |                            |        |         |                                       |   |       | Serv Hol<br>Den Hon   |
|  |  |                       |          |                            |        |         |                                       |   |       |   |
|  |  |                       |          |                            |        |         |                                       |   |       | Jen.Hot   |
|  |  |                       |          |                            |        |         |                                       |   |       | Service<br>Service  |
|  |  |                       |          |                            |        |         |                                       |   |       | Service<br>Service  |
|  |  |                       |          |                            |        |         |                                       |   |       | Service<br>Service  |
|  |  |                       |          |                            |        |         |                                       |   |       | Sentia<br>Selara<br>Selara                                    |
|  |  |                       |          |                            |        |         |                                       |   | •     | Jan Hat<br>Jiran<br>Jiran<br>Jiran                            |
| 1.1  |  |                       |          |                            |        |         |                                       |   | 10    | Sen Hat<br>Million<br>Million<br>Million<br>Million           |
| LLI<br>Ingua Note St   |  | Spreption Las (PPES)  | 1900     |                            | 2      |         |                                       | - | 2     | Sen Hat<br>Shine<br>Shine<br>Shine<br>Shine<br>Shine<br>Shine |
| A REAL PROPERTY AND A REAL |  |                       | 2011     |                            | n n    | SubTata |                                       | 9 | 1<br> |   |
| A REAL PROPERTY AND A REAL |  |                       | 3041     |                            |        | Sustan  |                                       | 9 | 2     |   |

### Working with Sub-Estimates, Continued

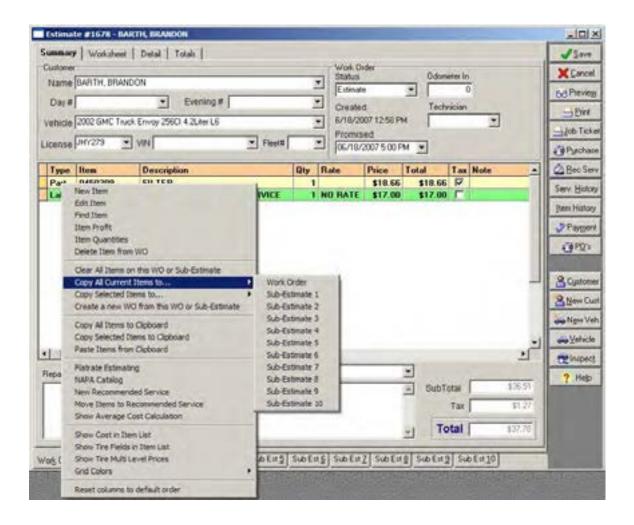
| Step | Action   |
|------|--|
| 3    | From a Work Order or Sub-Estimate window, you can also drag            |
|      | and drop items onto the Sub-Estimate tabs. Simply click on the         |
|      | item, and keeping the mouse button down, drag to a Sub-Estimate        |
|      | tab.   |
| 4    | You can drag and drop multiple items at a time by holding down         |
|      | the <b>Control</b> key on your keyboard to select the items first, and |
|      | then dragging.   |
| 5    | The Sub-Estimate tab will turn green when an item has been             |
|      | successfully dragged onto it.  |
| 6    | After dragging an item, when you open up the Sub-Estimate tab,         |
|      | that item will be listed there.  |

| and the second se | ARTH, BRANDON               |                   |        |                                   |          |                     |      |   | -1013  |
|---|-----------------------------|-------------------|--------|-----------------------------------|----------|---------------------|------|---|--|
| and the second se | t   Detail   Totals         |                   |        |                                   |          |                     |      |   | 1 Save   |
| Name BARTH, BRA   | NIVON                       |                   | -      | Work Dider<br>Status              | a        | Ddometer In         |      |   | XCance   |
| Contact on tensors  |                             |                   | -      | Estimate                          | *        | 0                   |      |   | Da Preview   |
| Day#  | Evening #                   |                   | 2      | Created                           |          | Technician          | -    |   | - Pint   |
| A REAL PROPERTY AND ADDRESS OF  | uck Envoy 256Cl 4.2Liter L6 |                   | -      | 6/18/2007 1<br>Promised           | 1258 PM  |                     | -    |   | -Job Tick  |
| icense (IHY279  |                             | FloetII           | *      | A share share have a second       | 75.00 PM | -                   |      |   | Puchas   |
| Type Item   | Description                 | 3                 | Qty B. | ate Pr                            | ice Tot  |                     | Note |   | A Hec Ser  |
| Part 0450309<br>Labor PLOF  | FILTER<br>PREMIUM OIL CHANG | E SERVICE         | 1      | these are presented in the second |          | \$18.66 F           |      | -1  | Serv. Histor   |
| Cabor r Cor   | THERE AND A DECIDENCE       | IC DENVICE        |        | S HALL A                          | 11.00    | 111.00              |      |   | Item History   |
|   |                             |                   |        |                                   |          |                     |      |   | 1000   |
|   |                             |                   |        |                                   |          |                     |      |   | Paymer   |
|   |                             |                   |        |                                   |          |                     |      |   |  |
|   |                             |                   |        |                                   |          |                     |      |   | Paymen   |
|   |                             |                   |        |                                   |          |                     |      |   | 400 PQ/s   |
|   |                             |                   |        |                                   |          |                     |      |   | Custom   |
|   |                             |                   |        |                                   |          |                     |      |   | Custom<br>S Custom<br>S New Cu                                 |
|   |                             |                   |        |                                   |          |                     |      |   | Custom<br>Custom<br>Rew Cu                                     |
| 4-4   |                             |                   |        |                                   |          |                     |      |   | Cyston<br>Cyston<br>New Cu<br>See New Ve                       |
|   | 5                           | ABS I             | UGHT   |                                   | ম        |                     |      | 1   | Cystom<br>Cystom<br>Mew Cu<br>Way New Ve<br>Co Yetek<br>Chapes |
|   | 59                          | epton List ABS I  | UGHT   |                                   | 2        | SubTotal [          |      | 1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1 | Cyston<br>Cyston<br>New Cu<br>See New Ve                       |
|   | 5,                          | motom List ABS 1  | цент   |                                   |          | SubTotal [<br>Tax [ |      |   | Cystom<br>Cystom<br>Mew Cu<br>Way New Ve<br>Co Yetek<br>Chapes |
| Kesuai Note   | 5,                          | enston List ABS 1 | UGHT   |                                   |          |                     |      | \$36,51   | Cystom<br>Cystom<br>Mew Cu<br>Way New Ve<br>Co Yetek<br>Chapes |

Continued on next page

### Working with Sub-Estimates, Continued

| Step | Action  |
|------|---|
| 7    | From a Work Order or Sub-Estimate window, you can also  |
|      | right-click on an item to send it to a different Sub-Estimate.  |
| 8    | Right click on an item and choose <b>Copy All Current Items To</b><br>and choose a Sub-Estimate from the list. This will put all of the<br>items listed in the current estimate into the Sub-Estimate that you<br>choose. |
| 9    | To copy only selected items rather than the entire list, right click<br>on an item and choose <b>Copy All Selected Items To</b> and choose a<br>Sub-Estimate from the list.   |



### Working with Sub-Estimates, Continued

| Step | Action  |
|------|---|
| 10   | Once a Sub-Estimate contains items, the tab is colored yellow.        |
| 11   | Hovering over a Sub-Estimate tab gives you information about the      |
|      | number of items and the current price of that estimate.               |
| 12   | Adding items to a Sub-Estimate automatically saves that Sub-          |
|      | Estimate for later retrieval. It will be there the next time that you |
|      | open the Work Order.  |

|               | + F + a l | C + F + 0 | C + C + 2 |        | C. L. F. J. F. | entroel |        | C. L. C. J. D. | C. 1. 5. 4. 5. | C & F alla |                 |
|---------------|-----------|-----------|-----------|--------|----------------|---------|--------|----------------|----------------|------------|-----------------|
| Work Order Si | UDERT     | SUDERS    | SUDERY    | SHOTIG | PRD F 0 5      | PROFILE | SUDERZ | PROFILE        | PAD FOR 3      | SUDERIU    | A second second |

### Saving a New Estimate

New EstimateWhen you create a new estimate, the estimate status defaults to New. This<br/>creates a temporary working environment for you to consider estimate<br/>variables. If you decide that you would like to save this estimate and return to<br/>it at a later time, you will need to change your status.

**How To** To change your new estimate status, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click to activate the <b>Summary</b> folder on the <b>New Estimates</b> form.                                  |
| 2    | Click the <b>Status</b> field in the <b>Work Order</b> box, and the work order status drop-down list displays. |
|      | <i>Note</i> : You cannot save a work order as new.   |

| Work Order<br>Status     |   |
|--------------------------|---|
| New 💌                    |   |
| Estimate<br>Repair Order |   |
| Invoice                  | l |
| Canceled                 | J |

3 Select the appropriate type of work order, and a **Confirm** message displays to verify your action.

| Confirm | ×  |
|---------|--|
| ?       | Changing the Status from 'New' to 'Estimate' requires the Work Order to be saved.<br>Do you wish to proceed? |
|         | Cancel   |
|         |  |
| 4       | Click the <b>OK</b> button.  |

### Saving a New Estimate, Continued

**How To** To save and close your work order, perform the following step:

| Step | Action   |
|------|--|
| 1    | Click the Save button on the New Estimates form. Your work |
|      | order will be saved and the TRACS main screen displays.    |

### **Opening an Existing Work Order**

- Existing Work<br/>OrdersOnce a work order has been saved, you can open it at any time for viewing or<br/>editing.
- **How To** To display work orders that have been saved, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click the <b>Find Work Orders</b> icon from the TRACS main screen, |
|      | and the Work Orders form displays.                                 |

| Coultomer         FID #         Status         Vehicle         Created         Appointment Date         Im           Cautomer         101 E stande         No Vehicle         5/30/98 10 37 45 44 5/30/98 8 00 00 4         Im         Im | stimates Repar Orders | Complete Invo  | sces Canceled Al |  | XR   |
|--|-----------------------|--|------------------|--|--|
| Inter-184         102: Estimate         1993 CadRac Eldorado 281Cl 4 6Laer. 11/13/98 1 07/06 Pl 11/13/98 8 00:00           Inith, Becky         103: Estimate         1999 Maxta Marta 1839CC 1 8Laer. L4 11/17/98 8 07.41 Al 11/17/98 8 00:00           Mer, Sue         104: Estimate         1999 Maxta Marta 1839CC 1 9Laer. L4 11/17/98 8 07.41 Al 11/17/98 8 00:00           Mer, Sue         104: Estimate         1996 Ford Taxwar 153Cl 2 Suite L4 11/17/98 8 13.40 Al 11/17/98 8 00:00           Kichaels. Thomas         108: Estimate         1999 Chevrolet Taxk Pickup K10/K11 11/17/98 8 24.20 Al 11/17/98 8 00:00  |                       |  |                  |  |  |
| Indh. Becky         103 Estimate         1999 Mapla Matta 18390C 1 8L4m L4 11/17/98 8.07.41 AI 11/17/98 8.00.00           Mer. Sum         104 Estimate         1996 Ford Taurus 15301 2 SLiter L4 11/17/98 8.13.40 AI 11/17/98 8.00.00           Kohaels         108 Estimate         1999 Obevisitet Track Pickup K10/K11 11/17/98 8.24.20 AI 11/17/98 8.00.00   |                       |  |                  | Colorado da construire Colorado da | 194  |
| Instrume         1999 Macha Mada 163502, 1 36,4m (4,11/17/98 810:41 (4,11/17/98 810:00)           Older, Sue         104 Extende         1996 Ford Taurus 15302, 2 52,ker (4, 4, 11/17/98 813:40),41 11/17/98 810:00           Op/Instrume         108 Extende         1999 Chevrolet Tauk Pickup K10/K11 11/17/98 82420,41 11/17/98 830:00  |                       |  |                  |  | 2.54   |
| fichaels, Thonas 108 Estimate 1999 Chevislet Truck Pickup K10/K11 11/17/98 8:24 20 Al 11/17/98 8:00:00   |                       |  |                  |  | and the second s |
|  |                       |  |                  |  | 00 <sup>Prey</sup>   |
| ang, Carl 109, Estenate 1996 Honda Prelude 21960, 22, Lier 11/17/96 10 02, 29 / 11/17/96 8:00:00   |                       | and the second sec |                  |  | 104  |
|  |                       |  |                  |  |  |

#### How To (continued)

| Step | Action   |
|------|--|
| 2    | Click one of the following folders to find the work order you want |
|      | to open:   |
|      |  |
|      | • Estimates  |
|      | Repair Orders  |
| 3    | Click to select a work order.                                      |

| Estimates Repair Orders Co | omplete | Í Invoic | es Canceled All                       | 1                   |                     |
|----------------------------|---------|----------|---------------------------------------|---------------------|---------------------|
| Customer                   | R0 #    | Status   | Vehicle                               | Created             | Appointment Date T🔺 |
| Cash Customer              | 101     | Estimate | No Vehicle                            | 9/30/98 10:37:45 Al | 9/30/98 8:00:00 /   |
| Jones, Bill                | 102     | Estimate | 1993 Cadillac Eldorado 281Cl 4.6Liter | 11/13/98 1:07:06 PI | 11/13/98 8:00:00    |
| Smith, Becky               | 103     | Estimate | 1999 Mazda Miata 1839CC 1.8Liter L4   | 11/17/98 8:07:41 Al | 11/17/98 8:00:00    |
| Miller, Sue                | 104     | Estimate | 1986 Ford Taurus 153Cl 2.5Liter L4    | 11/17/98 8:13:40 A  | 11/17/98 8:00:00    |
| Michaels, Thomas           | 108     | Estimate | 1999 Chevrolet Truck Pickup K10/K1    | 11/17/98 8:24:20 Al | 11/17/98 8:00:00    |
| 📕 Gray, Carl               | 109     | Estimate | 1998 Honda Prelude 2156CC 2.2Liter    | 11/17/98 10:02:29 / | 11/17/98 8:00:00    |

| 4 ( | Click the <b>Edit</b> button, and the selected work order displays. |
|-----|---|

### Opening an Existing Work Order, Continued

#### How To (continued)

| umsary Worksheet Detail Totals   |     |             | - Sav      |
|--|-----|-------------|------------|
| ditional Information Apportment Report Format Options                    |     |             | × Cano     |
| Gustanee   | 100 |             | 6d Pren    |
| Name WWWBBBBBBB  | -   |             | - Din      |
| Davtime # 555-5555 💌 Evening #   |     |             | Job Tic    |
| Vehicle No Vehicle   | •   |             | a Purch    |
| License VIN Fleett   | *   |             | L Hez S    |
|  |     |             | Serv. Hot  |
| Appointment<br>Appointment Date and Time Servere Writer Duration         |     |             | Jtem Histo |
| Appointment Date and Time Service Writer Duration                        |     |             | 3'Page     |
| Promised Date and Time Bay Technician                                    |     |             | 470 PD     |
| 9/9/2005 5:00 PM   | *   |             |            |
|  |     |             | 2 Cyste    |
| Repair Note Symptom List ABS LIGHT                                       |     | -           | 3 New      |
| WATER PUMP<br>CUSTOMER STATES THAT THEY SEE COOLANT LEAKING FROM THE CAR |     | 2           | New York   |
|  |     |             | as Vite    |
|  |     |             | te loop    |
|  |     | -           | ? He       |
|  |     | 195 - P. V. | 100        |
|  |     |             |            |
|  |     |             |            |

### Opening an Existing Work Order, Continued

FindingIf the work order number is available, you may search for an existing workExisting Workorder by that number.Orders byNumber

**How To** To find an existing work order by number, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click the Find button on the Work Orders screen, and the Find |
|      | Work Order by Numbers window displays.                        |

| 📟 Find Work Order by Numl | ber 💶 🗙             |
|---------------------------|---------------------|
| Work Order #              | <b>√</b> <u>о</u> к |
|                           | 🗙 <u>C</u> ancel    |
|                           |                     |
|                           |                     |

| 2 | Type the work order number in the <b>Work Order</b> # field.       |
|---|--|
| 3 | Click the <b>OK</b> button, and the requested work order displays. |

### **Documenting Technician Actuals**

| Technician | Once the technician has completed the service for the vehicle, you are ready |
|------------|--|
| Actuals    | to document who actually performed the service and the technician's actual   |
|            | hours.   |

**How To** To document technician information, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Open the work order as indicated in the "How to Find an Existing       |
|      | Work Order by Number" section.   |
| 2    | Click the <b>Worksheet</b> folder to display the following subfolders: |
|      |  |
|      | • General  |
|      | Profitability  |
|      | Technicians  |
|      | Purchasing   |
|      | • Accounts   |
| 3    | Click to select the <b>Technicians</b> subfolder.                      |
| 4    | Click the first row in the <b>Tech</b> column, and the drop-down list  |
|      | displays the available technicians.                                    |

#### How To (continued)

| -     | Vorksheet Datal | Carry [Puchasing] Accou | mt   |   |                               | X Care                             |
|-------|-----------------|-------------------------|--|---|-------------------------------|------------------------------------|
| Type  | Iten            | Description             | and the second division of the second divisio | the second se | Total Actual His Eded H       | too Pres                           |
| Labor | OIL CHANGE      | 10w30                   | 1 20   | 1 \$28.00   | \$28.00                       | 1 00 mg                            |
|       |                 |                         | Engkyee hu<br>2342   | John Snith  | Cetilication 8<br>23476453425 | - DV                               |
|       |                 |                         | 4563   | BillJohnson   | 437635478563                  | e Pyrch                            |
|       |                 |                         | 7744   | Mark Thompson   | 490622342                     | Becs                               |
|       |                 |                         |  |   |                               | Cypto<br>and States V<br>and Yorks |

| Step | Action   |
|------|--|
|      | Click to select the name of the technician who performed the |
|      | service on the vehicle.                                      |
| 6    | Click to select the first row in the Actual Hours column.    |

### Documenting Technician Actuals, Continued

#### How To (continued)

| Step | Action  |
|------|---|
| 7    | Type the actual number of hours that the technician spent             |
|      | performing the service.   |
|      |   |
|      | <i>Note:</i> Type partial hours as numeric values (for example, one   |
|      | hour and fifteen minutes would be entered as 1.25). This figure       |
|      | represents technician productivity reporting for labor gross profits. |

| Summary Worksheet Detail Totals |                      |   |            |          |        |         |         |            |            |
|---------------------------------|----------------------|---|------------|----------|--------|---------|---------|------------|------------|
| General P                       | rofitability Technic | ians Purchasing Acco  | ounts      |          |        |         |         |            |            |
| Туре                            | Item                 | Description   | Tech       | Rate     | Qty    | Price   | Total   | Actual Hrs | Billed H 🔺 |
| 🚺 Labor                         | OIL CHANGE           | 10¥30   |            | В        | 1      | \$28.00 | \$28.00 | 1.25       |            |
|                                 |                      |   |            |          |        |         |         |            |            |
| 8                               | Click the            | Save button.  | Your te    | chnici   | an inf | ormatic | n will  | be sav     | ed         |
| -                               |                      | Click the <b>Save</b> button. Your technician information will be saved<br>and the <b>Work Order</b> form will display the available work orders. |            |          |        |         |         |            |            |
|                                 |                      | VOLK OLUGI  | IOIIII WII | i displa | iy ine | availat | ne won  | k ofue     | 18.        |
|                                 |                      |   | 1.1        |          |        |         |         |            |            |

| 9 | Click the <b>Done</b> button, and the TRACS main screen displays. |  |
|---|---|--|
|---|---|--|

### Completing an Order

| Marking a                   | Once service has been performed on a vehicle, it should be marked as   |
|-----------------------------|--|
| Repair Örder<br>as Complete | complete so that it will display under the completed list of work orders. This is helpful when customers call to find out if their cars are ready to be picked up. You can also send an e-mail to the customer when their order is complete. |

**How To** To mark a repair order as complete, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click the <b>Detail</b> folder from an open repair order.  |
| 2    | Click the <b>Additional Information</b> subfolder if it is not already active.   |
| 3    | Click to place a checkmark in the <b>Complete</b> field in the <b>Work</b><br><b>Order Times</b> box.  |
|      | <i>Note:</i> This field is not available for estimates. Change the work order status to repair order, then perform this task. (See the "Changing Status and Saving a Work Order" section.) |

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### Completing an Order, Continued

#### How To (continued)

| Step | Action   |
|------|--|
| 4    | To send an e-mail to the customer informing them that the repair |
|      | order is complete, click the Send Ready E-Mail button.           |
| 5    | A preview of the e-mail will appear for you to edit or approve.  |
|      | Click <b>Send</b> to send the e-mail.                            |
| 6    | The Vehicle Ready E-Mail Sent box will now be checked.           |

| New Service (Apparent) Shirts  |  |   | 1                              |
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### Working with Invoices

Creating anWhen the customer comes in to pick up the car and pay for the service, youInvoicecan change the work order status to an invoice.

*Important*: Once you change a work order status to Invoice, it **cannot** be changed back. If additional services need to be added when the customer comes to pick up the vehicle, you will need to create a new work order if you have already invoiced the current one.

**How To** To apply a payment to an invoice, perform the following steps:

| Step | Action   |  |  |  |
|------|--|--|--|--|
| 1    | From an open invoice, click on the <b>Payment</b> button on the right. |  |  |  |

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|----------|-------------|------------------|------------|----------|--|------|-----------|----------|-----|---------------------|--------|--|
| Customer |             |                  |            | -        | Work Dr<br>Status                                    | dei  | Odone     | decile 1 |     |                     |        | X Cancel   |
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### Working with Invoices, Continued

#### How To (continued)

| Step | Action  |
|------|---|
| 2    | When the Accounts Receivable Transaction Entry window         |
|      | appears, enter the payment amount and transaction type, along |
|      | with any additional information and notes.                    |
| 3    | Click Save.   |

| Contact Name   | an Annual Res  | visite Transaction Entry                       |                        |                  | 1 2 1  | 6d Per                     |
|--|--|--|------------------------|------------------|--------|----------------------------|
| Customer PO #  | Custome<br>John Dow  |  | Palance<br>Dedit Linit | 172.45<br>\$0.00 | J Save |                            |
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The payment information will automatically appear in the **Details** tab of the invoice.

| Payment Inf | ormation     |
|-------------|--------------|
| 🔽 Paid      | Cash \$72.45 |
|             |              |

**Important:** Note that if payments are applied through the **Accounts Receivable** page rather than through the invoice itself, the payment information will not appear on the invoice.

### **Document Viewing**

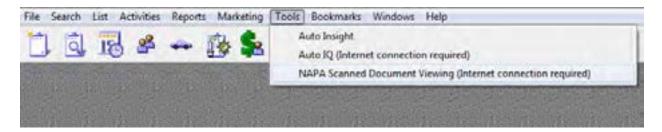
2

ViewingIt is possible to view all of your scanned NAPA store invoices online, using<br/>the Document Viewing feature.

Note: An Internet connection is required for this feature.

**How To** To view an invoice online, perform the following steps:

| Step | Action  |
|------|---|
| 1    | From the TRACS top menu bar, choose <b>Tools</b> and then <b>NAPA</b> |
|      | Scanned Document Viewing.   |



Search for a particular invoice using the search fields specified on the **Find NAPA Invoices** page and click **Submit**.

| TRACS<br>Document Viewing<br>Get The Good Stuff.   | Deer  |
|--|---|
| Fied NAPA Involves FOLAFIAL  Find NAPA Involves  Find Standard  Find Standard  Find Standard  Find Constant  Fi | CPC Company Owned Stores<br>You have supporting NAPA Auto Parts Stores that are<br>Genuine Parts Company owned<br>Genuine Parts Company adworth -<br>Genuine Parts Company -<br>Pleate log in to www.www.cou.or.new to view your documents<br>from the stores listed above.<br>If you so not have a login and paseword at<br>www.www.cou.or.new, use the Customer Login page to activate<br>your account. |

### Document Viewing, Continued

#### How To (continued)

| Step | Action   |
|------|--|
| 2    | You will see a list of invoices that matched your search criteria.   |
| 3    | To view an invoice, click on the link. Check the box to the left<br>and click <b>Print</b> to send it to your printer. |

| Document           | Viewing      |                  |        |           |          | Back Forward Refresh |
|--------------------|--------------|------------------|--------|-----------|----------|----------------------|
| NAPA               | Get T        | The Good St      | uff.   |           |          |                      |
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| E Select All       | PRINT        |                  |        |           |          |                      |
| Select To<br>Print | Invoice Date | levelce Norsber  | Amount | PO Number | Shore    |                      |
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|                    | 2010-09-17   | 244627           | 52.55  |           | 41001    |                      |
|                    | 2010-09-17   | 244610           | 34.04  |           | #1001-   |                      |
|                    | 2010-09-17   | 244599           | 8.32   | R         | AMIT-    |                      |
| -                  | 2010-09-17   | 244568           | 29.63  | #         | a test-  |                      |
|                    | 2010-08-15   | 244404           | 6.82   |           | a 1001   |                      |
| -                  | 2010-09-15   | 264383           | 18.91  |           | a test - |                      |
| 1.1                | 2010-09-15   |                  | 52.10  |           |          |                      |
|                    | 2010-09-15   | 244348           | 76.76  | 8         | a test-  |                      |
|                    | 2010-09-14   | 244210           |        |           | 4100     |                      |
|                    | 2010-00-14   | 244260           | 31.07  |           | a test-  |                      |
|                    | 2010-09-14   | 244240           | -146   |           | a lett-  |                      |
|                    | 2010-09-14   | 244239           | 206    |           | atest-   |                      |
|                    | 2010-09-14   | 244515           | 3.46   |           |          |                      |
|                    | 2010-09-14   | 244202           | 59.48  | PL.       | a test-  |                      |
| 1                  |              |                  |        |           |          |                      |
|                    | 2010-09-14   | 244154           | 44.44  | 1         | a test   |                      |
|                    |              |                  |        |           | atest    |                      |

### **Completing Customer Basics**

# **This Chapter** Congratulations! The customer basics are now complete! You have performed the following tasks:

- Scheduled appointments
- Entered customers
- Entered vehicles
- Worked with items
- Ordered parts
- Changed your work order status
- Worked with technician information
- Completed a repair order

# **What's Next** You might need to perform some administrative functions such as recommending services for selected vehicles or generating reports. These topics are discussed in "Chapter 7: Administrative Features."

### **Chapter 7: Administrative Features**

### **Recommended Services**

| Recommended<br>Services | You might anticipate that a specific service (such as a tune-up or an oil change) should be performed on a vehicle by a certain date or mileage. You can enter this into the system as a recommended service.   |
|-------------------------|---|
|                         | The <b>Recommended Services</b> feature can be helpful if you want to identify, for example, all customers that are due for an oil change next month. Your technician can specify recommended services when he or she works with an individual vehicle. You can also use <b>Recommended Services</b> to generate mailings or generate new business. |
|                         | When a customer comes in to have recommended services performed on a vehicle, you may copy that item directly to the current work order from the recommended service list.  |
|                         | <i>Note</i> : Items must exist in your items file to be placed on your recommended services list.   |
|                         | Automatic Recommended Services:<br>When a new vehicle is added to TRACS, a list of recommended services<br>appropriate to that vehicle are added automatically. For more information<br>about adding new vehicles, see Chapter Six.   |
| How To                  | To access the Vehicle Recommended Services form, perform the following steps:   |

| Step | Action  |
|------|---|
| 1    | Click the <b>Find Work Orders</b> icon from the TRACS LINK main |
|      | menu, and the Work Orders form displays.                        |

How To (continued)

| TRACS - [Work Ordern]<br>Elle Biel Search List ( | Activities Exports Is | ols <u>Windows</u> Belo                |   | <br>   |
|--|-----------------------|--|---|--|
| i i i i i i i i i i i i i i i i i i i            | . 🚯 🛸 🛓               | 1 a 🖄                                  |   | 17 .   |
| Estimates   Repar Order                          |                       | Invoces Canceled Al                    |   | X Done   |
| Customer   | RO # Statu            |  | Deated Appointment Date                 | 1 New  |
| Cash Customer                                    | 101 Estes             |  | 3/30/98 10 37 45 AJ 5/30/98 8 00:00 /   | Contraction of Contra |
| Jones, 84  | 102 Exten             |  |   | 2 6.9  |
| Miller, Sue                                      | 103 Estes             | ale 1996 Ford Taurus 153CI 2.5Liter L4 | 11/17/98 8:07:41 AJ 11/17/98 8:00:00    |  |
| Miler, Sue                                       | 104 Estes             | ate 1986 Ford Taurus 15301 2.5Liter L4 | 11/17/98 813:40 AJ 11/17/98 8:00:00     | ins Preyers  |
|  | 108 Entres            | ate 1999 Chevrolet Truck Pickup K10/K1 | 11 11/17/98 8 24 20 Al 11/17/98 8:00:00 |  |
| Michaels, Thomas                                 |                       |  |   | -Ber   |

| Step | Action  |
|------|---|
| 2    | Click one of the following folders to select from the type of work order:   |
|      | <ul> <li>Estimates</li> <li>Repair Orders</li> <li>Complete</li> <li>Invoices</li> <li>Canceled</li> <li>All</li> </ul> |
|      | and the available work orders of that type display.   |
| 3    | Click to select the work order to which the recommended service<br>is to be added, edited, copied, or deleted.          |
| 4    | Click the <b>Edit</b> button and the work order displays with the <b>Summary</b> folder active.                         |

| Bein Bies Edt   | seath List Activities Depoits Io |   |   |
|---|----------------------------------|---|---|
| Summary Wokshe<br>Custome<br>Name Grey C<br>Daytere # | et   Defail   Totals             | Work Order<br>Statut<br>E climate<br>Created<br>II.177/98 10:02 28 AM<br>Promised<br>II.177/98 5:00:00 PM | Save<br>X Cancel<br>Od Preyers<br>Der<br>() Pychare<br>() Pychare |
| Type Item   | Description<br>Vaccum Service    | Qty Rate Price Total 1<br>1 \$24.99 \$24.99   | Fac Note  |

### Recommended Services, Continued

#### How To (continued)

| Step | Action   |
|------|--|
| 5    | Click the <b>Rec Serv</b> button, and the <b>Vehicle Recommended</b> |
|      | Service form displays indicating any services that have already      |
|      | been recommended for that vehicle.                                   |

| ype la  | liens | Description                     | Due Dale  | Noke       | Calegos | Mg    | Next Date Deadine Date | Next Milage Deudine Date Milage   |
|---------|-------|---------------------------------|-----------|------------|---------|-------|------------------------|---|
| abor 3  |       | 30,000 MILE SERVICE             | 8/8/2007  | INCLUDES   |         |       | 8/8/2007               |   |
| aboi 3  |       | B0.000 MILE SERVICE             | 1/3/2008  | INCLUDES.  |         |       | 1/3/2008               |   |
| abor A  |       | ALITOMATIC TRANSMISSION SERVICE | 4/75/2008 | INCLUDES   |         | 1.000 | 4/15/2008              | The second se |
| abox 9  | IOK.  | 90,000 MILE SERVICE             | 5/9/2008  | INCLUDES:  |         | +15   | 5/9/2000               |   |
| Darge D |       | Core Ovage                      | 5/9/2008  | 12 39 38 3 |         |       | 5/3/2008               |   |
| abor A  | 4CS2  | A/C SERVICE - CHECK FOR LEAKS   | 5/30/2008 | INCLUDES   |         | 100   | 5/30/2008              |   |
| abor A  | ACS2  | A/C SERVICE - CHECK FOR LEAKS   | 7/25/2008 | INCLUDES:  |         |       | 7/26/2008              |   |
| abor A  | W     | ADJUST ENGINE VALVE LASH        | 9/26/2008 | INCLUDES:  |         |       | 9/26/2008              |   |

**Note:** The recommended service list is color-coded. A quick glance can let you know when services are due.

Red items are past due (based on time or mileage). Yellow items are currently due or due within the next 45 calendar days. Green items are due 45 or more days into the future.

**How To** To add a recommended service to a vehicle, perform the following steps from the **Vehicle Recommended Services** form:

| Step | Action   |
|------|--|
| 1    | Click the New button, and the Recommended Service form |
|      | displays.  |

### Recommended Services, Continued

How To (continued)

| 📟 Recommen               | ded Service               |                      |                          |                       |                           |                             |
|--------------------------|---------------------------|----------------------|--------------------------|-----------------------|---------------------------|-----------------------------|
| Customer                 |                           |                      |                          |                       |                           | <mark>√</mark> <u>S</u> ave |
| Gray, Carl               |                           |                      | v.                       |                       |                           | X Cancel                    |
| Vehicle                  |                           |                      |                          |                       |                           |                             |
| 1998 Honda F             | relude 2156CC 2.2Liter    | L4                   | $\overline{\mathbf{v}}$  |                       |                           |                             |
| Odometer                 |                           |                      |                          |                       |                           |                             |
| First Mileage<br>0       | First Date<br>11/17/98    | Current Mileage<br>0 | Current Date<br>11/17/98 | Average Miles Pe<br>0 | rDay<br>.0                |                             |
| Deadlines                |                           |                      |                          |                       |                           |                             |
| Mileage Date<br>12/30/99 | Next Deadline<br>12/23/98 | Last Remin           | der                      |                       |                           |                             |
| Item Type<br>Labor       | Item Item Item            | Desc<br>10v          | ription<br>/30           |                       |                           |                             |
| Mfg<br>•                 |                           |                      |                          |                       |                           |                             |
| Increment                |                           |                      | Deadline                 |                       |                           |                             |
| Miles<br>3000            | Months OF                 | Days<br>R 0          | Mileage<br>0             | Day<br>12/23/98 💌     | <b>I</b> ■ <u>R</u> epeat |                             |

| Step | Action  |  |  |  |  |
|------|---|--|--|--|--|
| 2    | Click the down arrow in the <b>Item Type</b> field to display available |  |  |  |  |
|      | item types,   |  |  |  |  |
|      |   |  |  |  |  |
|      | OR  |  |  |  |  |
|      |   |  |  |  |  |
|      | begin typing.   |  |  |  |  |
| 3    | Click to select the desired item type.                                  |  |  |  |  |
| 4    | Click the down arrow to in the <b>Item</b> field to display available   |  |  |  |  |
|      | items,  |  |  |  |  |
|      |   |  |  |  |  |
|      | OR  |  |  |  |  |
|      |   |  |  |  |  |
|      | begin typing.   |  |  |  |  |
| 5    | Click to select the desired item.                                       |  |  |  |  |

| Step | Action  |
|------|---|
| 6    | Type the description of the recommended service in the                  |
|      | <b>Description</b> field if necessary.                                  |
| 7    | Type a number in one of the following fields if you want to             |
|      | recommend service after a certain number of miles, months, or           |
|      | days:   |
|      | • Miles   |
|      | Months  |
|      | • Days  |
| 8    | Type a number in the <b>Deadline Mileage</b> field if you want to       |
|      | recommend service to occur by a set mileage.                            |
| 9    | Click the down arrow in the <b>Deadline Date</b> field to display a     |
|      | calendar.   |
| 10   | Click the desired day if you want to recommend that the service         |
|      | occur before a specified date.  |
| 11   | Click to place a checkmark in the <b>Repeat</b> field if you would like |
|      | for the recommended service to recur automatically in the system        |
|      | (cyclical service);   |
| 12   | Click the <b>Save</b> button to save and close the recommended service. |
| 13   | Continue to add additional recommended services for that vehicle.       |
| 14   | Click the <b>Done</b> button to close the <b>Vehicle Recommended</b>    |
|      | Service form.   |

| 15 | These steps are an alternative way to create a Recommended Service.  |
|----|--|
| 16 | You can also add recommended services from items on a Work<br>Order. Add a labor charge to a Repair Order. <i>Do not use a labor</i><br><i>from the flatrates.</i> |
| 17 | After adding the labor, right click on the item grid. The menu below will appear.  |

| <u>N</u> ew Item            |
|-----------------------------|
| <u>E</u> dit Item           |
| <u>F</u> ind Item           |
| Item <u>P</u> rofit         |
| Delete Item from RO         |
| Flatrate Estimating         |
| NAPA <u>C</u> atalog        |
| <u>R</u> ecommended Service |
| <u>G</u> rid Colors         |

| 1 | Click the option titled Recommended Service.                |
|---|---|
| 2 | The Vehicle Recommended Service window will appear, and you |
|   | can create Recommended Service as previously demonstrated.  |

| le Recommended Se | etvice  |   |  |  |  |  |
|-------------------|---|---|--|--|--|--|
|                   |   |   |  |  |  | X Dove   |
| Item De           | มารุณต.   | Cuer Date   | 1kine  | Edepsy   | Mtg   Next Date Deudres Date Next Milage Deaders Date Milage A                           |  |
|                   |   |   |  |  |  |  |
|                   |   |   |  |  |  |  |
|                   | Customer: Anderson, Ann<br>Vehicle: 2005 Avvanti II. 4. | te Recennendet Service<br>Customer: Anderson, Anna<br>Vehicle: 2005 Avvent II: 4.6 L. 201 CID VIII 50HC 24 Valve<br>Nem: Description: | Customer: Anderson, Anna<br>Vehicle: 2005 Avvani III. 4.6 L. 2011 CID VB SOHC 24 Valve | Customer: Anderson, Anna<br>Vehicle: 2005 Avveni II. 4.6 L. 2011 CID VIII SOVIC 24 Valve | Customer: Anderson, Anna<br>Vehicle: 2005 Avveni II. 4.6 L. 2011 CID VIII SCOHC 24 Valve | Customer: Anderson, Annia<br>Vehicle: 2005 Avvenii II: 4.6 L. 2011 CID VIII SCHIC 28 Valve |

### Recommended Services, Continued

**How To** To edit existing recommended services, perform the following steps from the **Vehicle Recommended Service** form:

| Step | Action  |  |  |
|------|---|--|--|
| 1    | Click to select the recommended service to be edited. |  |  |

|                | icle Recommended Service]<br>List Activities Beports Iools (1) | ndowe Help | <u>_ieix</u> |
|----------------|--|------------|--------------|
|                | 12 🛼 🎲 🛸 🕏   | 1 <u>×</u> | 🎳 <b>?</b> 🥑 |
| Customer       |  |            | XDow         |
| Gray, Carl     |  |            | 🖓 birra      |
| Vehicle        | ekade 2156CC 2 20.8er 0.4                                      |            | 2 La         |
| Titte Honda Pa | NUM 213NUL 22LIM LA  |            | Q Copy       |
| Hem            | Description  | Due Date 1 |              |
| 12364          | Brake Inspection   | 11/23/98   | Delete       |
| OIL CHANGE     | 19W30  | 12/23/98   |              |

| 2 | Click the Edit button, and the Recommended Service form |
|---|---|
|   | displays.   |

| 📟 Recommend              | led Service              |                 |                          |                       |                |                             |
|--------------------------|--------------------------|-----------------|--------------------------|-----------------------|----------------|-----------------------------|
| Customer                 |                          |                 |                          |                       |                | <mark>√</mark> <u>S</u> ave |
| Gray, Carl               |                          |                 | 7                        |                       |                | X Cancel                    |
| Vehicle                  |                          |                 |                          |                       |                |                             |
| 1998 Honda Pi            | relude 2156CC 2.2Li      | ter L4          | 7                        |                       |                |                             |
| Odometer                 |                          |                 |                          |                       |                |                             |
| First Mileage            | First Date<br>11/17/98   | Current Mileage | Current Date<br>11/17/98 | Average Miles Per Day |                |                             |
| 0                        | 11/1//98                 | 0               | 11/1//98                 | 0.0                   |                |                             |
| Deadlines                |                          |                 |                          |                       |                |                             |
| Mileage Date<br>12/30/99 | Next Deadlin<br>12/23/98 | e Last Remin    | ider                     |                       |                |                             |
| 12/30/33                 | 12/23/30                 |                 |                          |                       |                |                             |
|                          |                          |                 |                          |                       |                |                             |
| Item Type                | Item                     |                 | ription                  |                       |                |                             |
| Labor                    | OIL CHANGE               | ■ ]10\          | √30                      |                       | _              |                             |
| Mfg                      |                          |                 |                          |                       |                |                             |
| ·                        |                          |                 |                          |                       |                |                             |
| Increment                |                          |                 | Deadline                 |                       |                |                             |
| Miles                    | Months                   | Days            | Mileage                  | Day                   |                |                             |
| 3000                     |                          | DR 0            |                          | 12/23/98 💌 🔽          | <u>R</u> epeat |                             |

### Recommended Services, Continued

How To (continued)

| Step | Action  |  |  |  |  |  |  |  |  |
|------|---|--|--|--|--|--|--|--|--|
| 3    | Edit the following fields as necessary:                                 |  |  |  |  |  |  |  |  |
|      |   |  |  |  |  |  |  |  |  |
|      | • Item Type   |  |  |  |  |  |  |  |  |
|      | • Item  |  |  |  |  |  |  |  |  |
|      | • Mfg   |  |  |  |  |  |  |  |  |
|      | Increment   |  |  |  |  |  |  |  |  |
|      | • Miles   |  |  |  |  |  |  |  |  |
|      | Months  |  |  |  |  |  |  |  |  |
|      | • Days  |  |  |  |  |  |  |  |  |
|      | Deadline  |  |  |  |  |  |  |  |  |
|      | Mileage   |  |  |  |  |  |  |  |  |
|      | • Day   |  |  |  |  |  |  |  |  |
|      | • Repeat  |  |  |  |  |  |  |  |  |
| 4    | Click the <b>Save</b> button to save and close the recommended service. |  |  |  |  |  |  |  |  |
| 5    | Continue to edit other recommended services for that vehicle.           |  |  |  |  |  |  |  |  |
| 6    | Click the <b>Done</b> button to close the <b>Vehicle Recommended</b>    |  |  |  |  |  |  |  |  |
|      | Service form.   |  |  |  |  |  |  |  |  |

# **How To** If you would like to copy an existing recommended service to a current work order, perform the following steps from the **Vehicle Recommended Service** form:

| Step | Action   |
|------|--|
| 1    | Click to select the recommended service to be copied.            |
| 2    | Click the <b>Copy</b> button.                                    |
| 3    | Click the <b>Done</b> button, and the copied recommended service |
|      | displays on the current work order.                              |

| Туре    | ltem    | Description      | Qty | Rate    | Price   | Total   | Тах | Note |  |
|---------|---------|------------------|-----|---------|---------|---------|-----|------|--|
| Sublet  | 1479    | Vaccum Service   | 1   |         | \$24.99 | \$24.99 | V   |      |  |
| 🚺 Labor | 12364 💌 | Brake Inspection | 1   | NO RATE | \$78.00 | \$78.00 |     |      |  |

**How To** To delete existing recommended services, perform the following steps from the **Vehicle Recommended Service** form:

| Step | Action  |
|------|---|
| 1    | Click to select the recommended service to be deleted.                  |
| 2    | Click the <b>Delete</b> button, and the recommended service is deleted. |
| 3    | Click the <b>Save</b> button to save and close the recommended service. |
| 4    | Click the <b>Done</b> button to close the <b>Vehicle Recommended</b>    |
|      | Service form when you have finished working with recommended            |
|      | services for that vehicle.  |

**How To** To add a **Recommended Service** to a group of vehicles, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Pull up the Vehicle Search window by either clicking the Work |
|      | With Vehicles icon on the top menu bar, or choosing Vehicle   |
|      | from the <b>Search</b> drop-down menu.                        |



| Search | List   | Activities | Reports |
|--------|--------|------------|---------|
| Work   | Orde   | r by Numbe | r F5    |
| Work   | Orde   | rs         | F6      |
| Appo   | intmer | nts        |         |
| Custo  | omers  |            | F7      |
| Vehic  | les    |            |         |
| A/R T  | ransa  | ctions     |         |
| Items  |        |            |         |
| Purch  | ase C  | orders     |         |

| 2 | Enter the search criteria for the vehicles for which you plan to add |
|---|--|
|   | a recommended service. For example, you can find all vehicles        |
|   | affected by a technical service bulletin (TSB) and add a             |
|   | Recommended Service to those vehicles so service will be             |
|   | performed next time the vehicle is in the shop. In the example       |
|   | below, the search will yield a list of every 1996 Ford Taurus.       |
| 3 | Click Find.  |

| Vehicle Query      | By Example   | and the second se | ×         |
|--------------------|--|---|-----------|
| Cuttomer           | Vehicle Addition   | a   | X Done    |
| Year               | Make   |   | Q End     |
| 1996               | Ford   |   | 17 Des    |
| Model              | 1.5 m  | Engine  | 1.        |
| Taurud             |  | 1   | Next Page |
| Vehicle Identifica | sion Number  |   | ? Help    |
| Engine Serial Nu   | The service Date Converter | Daly Mileage     Pricing Profile     Mig. Date       Fleet Number     Color       Last Service     Date       Date     Reminder Date       Odometer     Odometer  |           |

| 4 From the <b>Selected Vehicles</b> list, click the <b>Change All</b> button. |
|---|
|---|

| Tep:    | State Vehicle                         | Customer        | Fleet No. 0 | Color | WN -                  | × Done  |
|---------|---------------------------------------|-----------------|-------------|-------|-----------------------|---|
|         | 1996 Ford Telaur 18901 3 DUAre VE     | FLINTSTONE FRED |             |       |                       |   |
| 1       | 1996 Ford Taurus 183CI 3.0Liter VS    | LOU'S           |             |       |                       | Q End   |
|         | 1996 Ford Taurus 183CI 3 OLiter V6    | SCHULZ, ROLF    |             |       |                       | Ede   |
|         | 1996 Ford Taurus 180CI 3.0Liter V6    | NAPA, WARRANTY  |             |       | and the second second | The second se |
|         | 1996 Ford Taurus 160CI 3 OLiter VE    | WHALEN, MIKE    |             |       | 1FALP53567G2E         | See Merry   |
|         | 1996 Ford Taurus 183CI 3 OLiter VS    | KNOTT, DAN      | V           | white |                       | Concernance of the  |
| FRC 529 | MN 1996 Ford Taurup 183CI 3 OLiter VS | CARADORI, MIKE  |             |       |                       | A Bec Serv  |
|         |                                       |                 |             |       |                       | Serv History  |
|         |                                       |                 |             |       |                       |   |
|         |                                       |                 |             |       |                       | NegEx   |
|         |                                       |                 |             |       |                       | Unquery   |
|         |                                       |                 |             |       |                       |   |
|         |                                       |                 |             |       |                       |   |
|         |                                       |                 |             |       |                       | Change All  |
|         |                                       |                 |             |       | -                     | Change All  |
|         |                                       |                 |             |       | -                     | Charge All  |
|         |                                       |                 |             |       |                       | Charge All  |
|         |                                       |                 |             |       |                       | Change All  |
|         |                                       |                 |             |       |                       | Charge All  |
|         |                                       |                 |             |       |                       | Charge All  |
|         |                                       |                 |             |       |                       | Charge All  |
|         |                                       |                 |             |       |                       | Charge All  |
|         |                                       |                 |             |       |                       | Charge All  |
|         |                                       |                 |             |       |                       | Charge All  |
|         |                                       |                 |             |       |                       | Charge All  |
|         |                                       |                 |             |       |                       | Charge All  |

5 From the **Vehicle Result** window click the **Rec Serv** button.

| Ustomer                              |                 |             |   |               |  | Save<br>Concel      |
|--------------------------------------|-----------------|-------------|---|---------------|--|---------------------|
| Year, Make, M                        | ortal Environ   |             |   | -             |  | Chg Quener          |
| P Lacita                             | AND DESCRIPTION | 1           |   |               |  | A Meige             |
| Yea                                  | Make            | -           | Model   |               |  | E State State State |
| -                                    | -               |             |   |               | 1  | Bec Serv            |
| Engine                               |                 |             | Engine Sena   | INo.          |  | ? Help              |
| 1                                    |                 |             |   |               |  |                     |
|                                      |                 |             |   |               |  | 11                  |
| olor                                 | VIN.            |             | Distance Test 1   | AND AND A     |  |                     |
|                                      |                 |             | License Tag S   | Rate Mig Date | and the second s | _                   |
| *                                    | ſ               |             |   | · Mig Uale    | Fr Active  |                     |
|                                      | ſ               | Recent      | Last Service  | Fleet Driver  | I7 Active<br>Fleet Number  |                     |
|                                      | Most            | Recent      |   |               |  | 4                   |
| Initial Contact                      | Most            |             | Last Service  | Fleet Driver  |  |                     |
| Initial Contact                      | Medil<br>Dd     | ometer      | Last Service  |               | Fleet Number   | 2                   |
| Initial Contact<br>Odometer          | Most I<br>Od    | ometer      | Last Service<br>Odometer<br>Date  | Fleet Driver  | Fleet Number   |                     |
| Date                                 | Medil<br>Dd     | ometer      | Last Service<br>Odometer  | Fleet Driver  | Fleet Number   | 2                   |
| Initial Contact<br>Didometer<br>Date | Medil<br>Dd     | eneter<br>P | Last Service<br>Odometer<br>Date<br>Lost Renardes                       | Fleet Driver  | Fleet Number   | 2                   |
| Initial Contact<br>Didometer<br>Date | Medil<br>Dd     | ometer      | Last Service<br>Oldometer<br>Date<br>Lost Remandes                      | Fleet Driver  | Fleet Number   | 2                   |
| Initial Contact<br>Odometer          | Medil<br>Dd     | eneter<br>P | Last Service<br>Odometer<br>Date<br>Lost Remandes<br>Est. Daily Mileage | Fleet Driver  | Fleet Number   | 2                   |

| 6 | In the <b>Recommended Service Change All</b> window, enter the  |
|---|---|
|   | details of the recommended services you wish you add to the     |
|   | vehicles you have selected. Then click Add Service. The service |
|   | will appear in green at the bottom of the screen.               |
| 7 | Click Save.   |

| Service       Item Type       Item       Mfg       Description         Labor       Image: Clear Field       Image: Clear Field       Image: Clear Field         Note       Image: Clear Field       Image: Clear Field       Image: Clear Field         Image: Clear Field       Image: Clear Field       Image: Clear Field       Image: Clear Field         Image: Clear Field       Image: Clear Field       Image: Clear Field       Image: Clear Field       Image: Clear Field         Image: Clear Field       < | Service<br>Item Type Item Mfg Description<br>Labor Clear Field<br>Note<br>Clear Field<br>Add Service<br>Mg Del Service<br>Mg Del Stagda  |          | ienaea sei    | rvice Change All |                 |          |               |            |    |   |                                      |
|---|--|----------|---------------|------------------|-----------------|----------|---------------|------------|----|---|--------------------------------------|
| Labor   Note   Note   Mote  | Labor   Note   Note   Image: Clear Field   Image: Cl  |          |               | Item             |                 | Mfa      | Description   |            |    |   | -                                    |
| Note Clear Fie Add Serv Add Serv Add Stand Del Stage ecommended Service Changes To be Added To be Deleted   | Note       Image: Clear Field         Image: Clear Field       Image: Clear Field         Image: Clear Field |          |               |                  | •               | mig      | Description   |            |    |   | X Cancel                             |
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| ecommended Service Changes = To be Added = To be Deleted  | ecommended Service Changes = To be Added = To be Deleted          Type       Item       Description       Mfg  |          |               |                  |                 |          |               |            |    |   |                                      |
| ecommended Service Changes = To be Added = To be Deleted  | ecommended Service Changes = To be Added = To be Deleted          Type       Item       Description       Mfg  |          |               |                  |                 |          |               |            |    |   | <u></u>                              |
| ecommended Service Changes = To be Added = To be Deleted  | ecommended Service Changes = To be Added = To be Deleted Type Item Description Mfg   |          |               |                  |                 |          |               |            |    |   | XDel Service                         |
| ecommended Service Changes = To be Added = To be Deleted  | ecommended Service Changes = To be Added = To be Deleted Type Item Description Mfg   |          |               |                  |                 |          |               |            |    |   |                                      |
| ecommended Service Changes 🔲 = To be Added 🔚 = To be Deleted  | ecommended Service Changes To be Added = To be Deleted Type Item Description Mfg   |          |               |                  |                 |          |               |            |    |   | Add Standar                          |
|   | Type Item Description Mfg  |          |               |                  |                 |          |               |            |    |   | -                                    |
|   | Type Item Description Mfg  |          |               |                  |                 |          |               |            |    |   | -                                    |
| Type Kent Description   |  | ecommend | led Service I | Changes          | = To I          | be Added | = T           | o be Delei | ed |   | -                                    |
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|   |  | Туре     | Item          | Description      |                 | be Added | <b>—</b> = Ti | o be Delel |    | - |                                      |
|   |  | Туре     | Item          | Description      |                 | be Added | = T           | o be Delel |    | - | -                                    |
|   |  | Туре     | Item          | Description      |                 | be Added | = T.          | o be Delei |    |   |                                      |

### Recommended Services, Continued

| 8 | An information window will appear reminding you that you are<br>about to change all of the vehicles in your selected group. Click<br><b>OK.</b> |
|---|---|
| 9 | Click Save.   |

| ehideQift Result - Change All                                     | and the second | J Saw                   |
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| slor VIN  | the second s   |                         |
|   | the second s   |                         |
| Nor VIN   | Recommended service changes will be applied to all selected v  |                         |
|   | the second s   |                         |
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| Nor VIN<br>Tritical Contact<br>Odometer<br>Date<br>Date<br>Date   | Recommended service changes will be applied to all selected v  | vehicles when you Save. |
| olor VIN<br>Initial Contact<br>Odometer<br>Date<br>Date<br>Date   | Recommended service changes will be applied to all selected v  | vehicles when you Save. |
| skor VIN.   | Recommended service changes will be applied to all selected v OK OK Last Reminder                                | vehicles when you Save. |
| olor VIN.   | Recommended service changes will be applied to all selected v  | vehicles when you Save. |

### **Recommended Service Letters**

| Recommended<br>Services<br>Reports | <b>Recommended Services</b> reports allow you to print recommended service letters searched by any category or item. You can also specify due date by beginning date and ending date.   |
|------------------------------------|---|
| Before You<br>Begin                | <ul><li>Before you begin printing recommended service letters from LINK and NET, you will need to copy the recserv.dot file onto your <b>Desktop</b>.</li><li><i>Note:</i> This file is on the LINK/NET <b>Installation CD</b> in the <b>Template</b> folder.</li></ul> |
| Ноw То                             | To copy the recserv.dot file into your <b>Template</b> folder, perform the following steps:   |
| Sten                               | Action  |

| Step | Action  |
|------|---|
| 1    | Place your Installation CD into the CD ROM Drive. Click the |
|      | start button, choose run, Select Browse.                    |

| Step | Action  |
|------|---|
| 2    | In the "Look In" window, Choose the drive where your CD is          |
|      | located.  |
| 3    | Click on the down arrow in the "Files of Type:" field. Choose       |
|      | ALL Files.  |
| 4    | Choose the Template folder. Choose Recserv.dot                      |
| 5    | Hold the left mouse button down, and drag the recserv.dot file to   |
|      | the Windows desktop.  |
| 6    | Release the left mouse button to drop the recserv.dot file onto the |
|      | Windows desktop. This will create a Desktop Icon Named              |
|      | Recserv.dot.  |

| Browse             |           |       |     |         |          | ? ×          |
|--------------------|-----------|-------|-----|---------|----------|--------------|
| Look jn: 🔂         | Template  | <br>ŀ | - 🗈 | <u></u> | <u>r</u> |              |
| 🖲 customlett       | er        |       |     |         |          |              |
| 💌 dot4144          |           |       |     |         |          |              |
| 💌 las5160          |           |       |     |         |          |              |
| Recserv            |           |       |     |         |          |              |
| File <u>n</u> ame: | Recserv   |       |     |         |          | <u>O</u> pen |
| Files of type:     | All Files |       |     | •       |          | Cancel       |

### Recommended Service Letters, Continued

**How To** To print recommended service letters from LINK and NET, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Select <b>Recommended Service</b> from the <b>Reports</b> menu on the          |
|      | toolbar in LINK/NET, and the <b>Recommended Service Reports</b> form displays. |

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|   |            |
|   |            |

| Click the down arrow in the <b>Category</b> field, and scroll to highlight |
|--|
| the appropriate category.  |
|  |
| <i>Note:</i> The default for this field is ~Any.                           |

| Step | Action   |
|------|--|
| 3    | Click the arrow key in the Item field, and scroll to highlight the |
|      | appropriate item.  |
|      |  |
|      | <i>Note:</i> The default for this field is ~Any.                   |
| 4    | Type the appropriate begin date in the <b>Begin</b> field.         |
| 5    | Type the appropriate end date in the <b>End</b> field.             |
| 6    | Click the New button, and the Selected Recommended Services        |
|      | screen displays a list of all customers and vehicles with          |
|      | recommended services due.  |

| elected Recom   | arnied Services  |          |                      |                           |                            | RID X                 | Sec. 1   |
|-----------------|--|----------|----------------------|---------------------------|----------------------------|-----------------------|--|
| angery "hey     | Ben: "Any  | For      | 516/8 No 415/00      |                           |                            | Xbre                  |  |
| dere            | Network Planets  | a Durðan | Tes.                 | Omogian                   | Date Deadlore M            | 210                   |  |
| Auff. Mak       | 1981 Overskit Converte 1   | 11/22/98 | 1754                 | 1857                      | 11/24/98                   | to Dener              |  |
| Tiest Service   | 1995 Chevrolet Truck Fig 106   | 3/10/99  | ARCONDITIONING       | Complete check of Ar Co   | 5/28/99                    | and the second second |  |
| Feet Service    | 1894 Develet Tuck Bia 181  | 6/3/99   | 09                   | DHEOK BRAVES              | 6/3/99                     |                       | A DI N   |
| Fleet Service   | 1994 Chevrolet Truck Big 101   | 6/3/99   | 005                  | DEX OWNERST               | 18/3/99                    | 12 Eput               | parameter and a second   |
| ord Mail        | 1901 Chevrolet Corvette  | 13/25/98 | LOF                  | Lubication, sil change, a | + 3/14/99                  |                       | XDow   |
| ang Allen       | 1994 Cadilac Service 300   | 2/11/99  | LOF                  | Exbecation, oil change, a | + 3/14/99                  |                       | Q3=  |
| ensin, daies    | 1909 Buick Regal 1730  | 3/14/99  | LOF                  | Laboration, oil-change, a | a 3/14/99                  |                       | - M-   |
| man's           | 1997 Field Taurus 18303 134  | 1/(27/98 | LOF                  | Lubecation, oil change, a |                            |                       | 10000  |
| entigenet, bras | 1304 Chevrolet Truck Pic 102   | 1/13/90  | LOF                  | Lubication, oil change, a | # 2/12/98                  |                       |  |
| dece, Earl      | 1000 Dodge Diejkolve 152   | 10/12/98 | LOF                  | Lubication, of change, a  |                            |                       |  |
| ediavel, Inc    | 1996 Chevrolet Truck Pic 101   | 3/7/98   | LOF                  | Lubicatori, isl change, e | <ul> <li>HV3/98</li> </ul> |                       | 100  |
|                 |  |          |                      |                           |                            |                       |  |
|                 |  |          |                      |                           |                            |                       | 100  |
|                 |  |          |                      |                           |                            |                       | 126  |
|                 |  |          |                      |                           |                            |                       | 1000   |
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|                 | and the second s |          |                      |                           |                            |                       |  |
|                 | Concession in succession   | D-CO     | ACCURATE AND INCOME. | A CONTRACT OF C           | ALC: NOT THE               |                       |  |

| Step | Action  |
|------|---|
| 7    | Click the <b>Export</b> button, and the <b>Save As</b> dialog box displays. |

| Caragor 'Nay be 'Nay Fac.316.20 fey 15/15/20<br>And Mail 10: Oncode<br>A field Service 10:00 Carada<br>Mac. Allen 19:00 Carada<br>Mac. Mac. Mac. Mac. Mac. Mac. Mac. Mac. | Columned Pro-  | and Services   | A IPI |  |
|---|--|--|-------|--|
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|   | Jenef, Mali<br>J. Flet Service<br>M. Flet Service<br>M. Ret Service<br>M. Ret Service<br>Mark Mali<br>Jenson, Ann<br>Universit<br>Jenstein, Tec<br>Helice, San<br>Dentern, Tec | Titl: Chernell<br>Titl: Chernell |       |  |

| 8  | Select the My Documents folder from the Save in field.                    |
|----|---|
| 9  | Type recserv.doc in the File name field to export the Selected            |
|    | Recommended Services file from LINK.                                      |
|    | <i>Note:</i> Disregard the Save as type field because we are turning this |
|    | file into a Word document.  |
| 10 | Click Save. Note: at this point, if you have filled in your email         |
|    | configuration in the internet setup fields. LINK/NET will ask you         |
|    | "Do you want to send reminders as E-Mail when possible?"                  |
| 11 | If you select yes, then your emails will go to the Email Queue for        |
|    | sending later.(4.XX)  |

| Step | Action   |  |  |  |  |  |
|------|--|--|--|--|--|--|
| 12   | You may now either Minimize or Close LINK/NET                |  |  |  |  |  |
|      | (recommended)  |  |  |  |  |  |
| 13   | 3 Double click the Recserv.dot Icon on your windows desktop. |  |  |  |  |  |
| 14   | Now you may Edit your letter to say what you want.           |  |  |  |  |  |

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| We appreciate y  |  |  |

| 15 | Select Mail Merge from the Tools menu on the toolbar, and the |  |
|----|---|--|
|    | Mail Merge Helper dialog box displays.                        |  |

# Recommended Service Letters, Continued

| 10 | Chek the Get Data button in the 2 Data source held.          |
|----|--|
| 17 | Select Open Data Source, and the Open Data Source dialog box |
|    | displays.  |

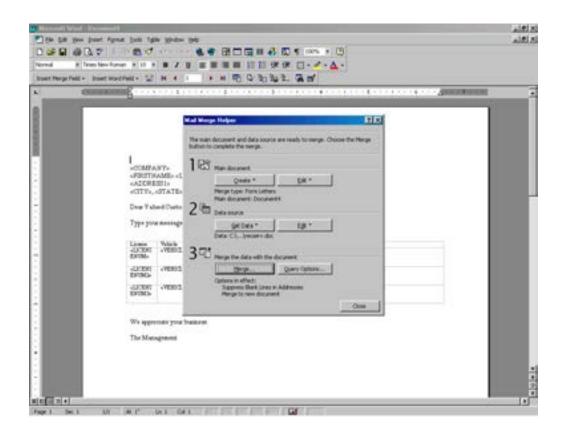
# Recommended Service Letters, Continued

How To (continued)

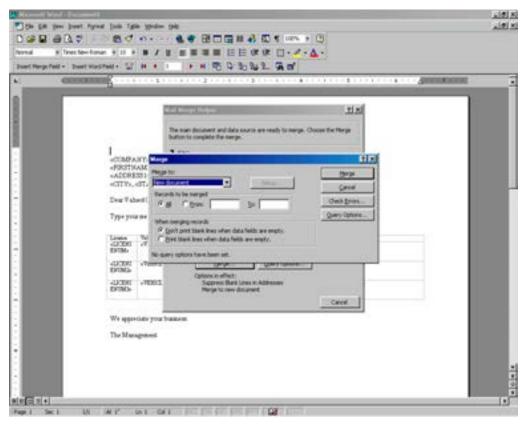
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| 18 | Click to select the My Documents folder from the Look in field. |
|----|---|
| 19 | Click to highlight recserv.doc on the Name line.                |

| Step | Action  |
|------|---|
| 20   | Click the <b>Open</b> button, and the <b>Mail Merge Helper</b> dialog box |
|      | displays.   |



|   | Step | Action           Click the Merge button in the 3 Merge the data with the |
|---|------|--|
| ſ | 21   | Click the Merge button in the 3 Merge the data with the                  |
|   |      | document field, and the Merge dialog box displays.                       |



|    | Be sure your Internet is open before attempting to send Email.         |  |  |  |  |
|----|--|--|--|--|--|
|    | the section <b>Sending Email</b> for ways to work with Email messages. |  |  |  |  |
| 23 | Recommended service letters are also sent to the Email que. See        |  |  |  |  |
|    | ready to print.  |  |  |  |  |
| 22 | Click the <b>Merge</b> button. The recommended service letters are now |  |  |  |  |

### Voiding an Invoice

**Overview** This feature allows you to cancel an invoice. Once the invoice is canceled, all parts are placed back into inventory, technician billed hours are reversed, and the customer account is credited.

**How To** To void an invoice, perform the following steps:

| Step | Action  |  |  |  |  |  |
|------|---|--|--|--|--|--|
| 1    | Click the <b>Dollar Sign</b> (Accounts Receivable) icon on the TRACS main screen menu bar, and the <b>Customer Account History</b> screen displays. |  |  |  |  |  |

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|------------------|----------------|-----------------|--------------|---|-----|-------------|
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|                  |                |                 |              |   |     |             |
|                  |                |                 |              |   |     |             |

# Voiding an Invoice, Continued

| Step | Action  |  |
|------|---|--|
| 2    | Scroll the <b>Customer</b> field to find the appropriate customer name. |  |

| Duskomer           | Current Balance     St 00 | Credit Levil | -6           | XQ            |
|--------------------|---------------------------|--------------|--------------|---------------|
| Customer           | Evering #                 | Day I        | Contact Name | Addens        |
| Cash Customer      |                           |              |              |               |
| 100, Andy Smith    |                           | 555-222-7777 |              | 205 Main Stee |
| 100. Betay Savih   |                           | 555-111-4444 |              | 113 Main Site |
| 100, Bob Smith     |                           | 555-222-1111 |              | 119 Main Stee |
| 100, D-anell Smith |                           | 555 222 6666 |              | 204 Main Stee |
| 100, Donnie Smith  |                           | 995 222 6995 |              | 203 Main Stee |
| 100, Helen South   |                           | 555 111-7777 |              | 116 Main Stee |
| 100, Jack Smith    |                           | 555-111-9999 |              | 110 Main Shee |
|                    |                           |              |              |               |

## Voiding an Invoice, Continued

#### How To (continued)

| Step | Action   |
|------|--|
| 3    | Click to highlight the name of the appropriate customer, and the |
|      | account information displays.                                    |

| TRACS - [Customer Account  | ent History)<br>s Bepots Iook Windows Be  | 6        |        |          |          | 1012<br>1012 |
|--|---|----------|--------|----------|----------|--------------|
| the second s | 13 \$ 3 3                                 |          |        |          | <b>3</b> | ? 🕖          |
| Customer<br>Coll Centry Lines  | Current Bala                              | nce Cied | t Lina | 3        |          | X Dore       |
|  | 2000                                      | Theo     |        |          |          | 🔆 Sev        |
| Posted Trans Type Ret ID<br>N RO 445   | Date Transaction<br>56 11/11/39 3 Invoice | Dedk     | Debi   | Balance. | 2        | > Edi        |
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|  |   |          |        |          |          |              |
|  |   |          |        |          | 4        |              |
|  |   |          |        |          | 2        | 2            |

1 Click to highlight the invoice to be voided.

# Voiding an Invoice, Continued

| Step | Action   |  |
|------|--|--|
| 4    | Click the <b>Void Invoice</b> button, and a credit invoice displays. |  |

| TRACS - Customer Account History<br>Ele Search List Activities Beports | And the second se |              | التانية.<br>الثانية |
|--|---|--------------|---------------------|
| 9 9 18 2 19  | 🕏 🚠 🔿 🙆   |              | 🏭 <b>?</b> 🧾        |
| Dustomer<br>[100. Betry Smith  | Current Balance   | Credit Limit | X Dove              |
|  | 201   |              | 👾 Linv              |
| Posted Txerx Type (Ref. ID Date<br>N RO 44555 11/11/                   |   | Debi Balance | 197 Edit            |
| N RO 44857 11/11/  | 39.9 Credit Invoice   | \$8.97 \$0   | Show Aging          |
|  |   |              | Statement           |
|  |   |              | Becept              |
|  |   |              | [Void Invoic        |
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|  |   |              |                     |
|  |   |              |                     |
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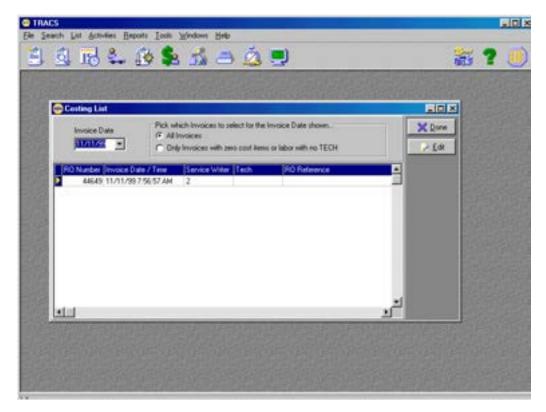
| 2 | Click the <b>Done</b> button. | You have now voided an invoice. |  |
|---|-------------------------------|---------------------------------|--|
|---|-------------------------------|---------------------------------|--|

### Working with the Costing Feature

**Overview** The costing feature allows you to assign a technician and a cost to fields that were left blank on the invoice.

**How To** To work with the costing feature, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click to select Activities from the TRACS main screen menu bar.  |
| 2    | Click to select <b>Costing</b> from the <b>Activities</b> pull-down menu, and the <b>Costing List</b> screen displays. |



| Step |  | Ac   | tion            |              |             |
|------|--|--|-----------------|--------------|-------------|
| 3    | Click the Edit   | button, and the W  | ork Order scree | en displays. |             |
|      | 1 112 🕹 🚯 🕻  | k 51 - 2 -   |                 | <b>1</b> 11  | .id/<br>? 🧾 |
|      | Wark Onder II 446<br>Type Res<br>III<br>Labor AAA<br>0<br>11/<br>0<br>11/<br>0<br>11/<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1<br>1 | 9<br>A WHEEL TOTAL AL<br>- A WHEEL TOTAL AL<br>- MONTHLY ANA TOW |                 | Second RO    |             |

4 Edit the **Cost** field if needed.

| Step | Action   |
|------|--|
| 5    | Scroll right until the <b>Tech</b> (Technician) field appears. |

| ≝ ⊴ 15 ° 4 6 \$ 5 5 ⊃ ≦   | <b># ?</b> 🦉           |
|---|------------------------|
| Work Order II 44649<br>Description Price Cost Tech Actual His Bi  |                        |
| M         4 WHEEL TOTAL AUGNMENT         59.00         00           Import         MONTHLY ANA TOWS & SERVICALI         48.00         15.36 | 15<br>0 X Serol        |
| 11/   | Becalculate            |
| PO Nor<br>2 4   | Next R0<br>Previous R0 |
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|   |                        |
|   |                        |
|   | 1963                   |
|   |                        |
|   | -                      |
|   |                        |

| 6 | Edit the <b>Tech</b> (Technician) field if needed.                 |
|---|--|
| 7 | Click the <b>Save</b> button. You have now worked with the costing |
|   | feature.   |

### **Merging Customer Records**

**Overview** This feature allows you to merge one customer with another (for example, when the same customer is entered into the system twice or when one company buys another company).

**How To** To merge customer records, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click the <b>Customer and Vehicle</b> icon on the TRACS main screen |
|      | menu bar, and the Customer List screen displays.                    |

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|  |                       |  |   |  |
| a good and and the second second   | and the second second | A LAND AL  |   | Succession of  |
| Customer List: 13000 entries   |                       |  |   |  |
| Customer   | Lve II                | Dev II   | Address 1   | 1 Mar  |
| 100. Andy Smith  |                       | 555-222-7777   | 205 Man Street  | X Day  |
| 100, Betzy Smith   |                       | 555-111-4444   | 113 Man Sheet   | Q End  |
| 100, Bob Smith   |                       | 555-222-1111   | 119 Main Street   |  |
| 100, Danel Sevity  |                       | 555-222-6666   | 204 Main Street   | Edi  |
| 100. Donnie Smith  |                       | 555-222-5555   | 203 Main Sheet  |  |
| 100. Helen Smith   |                       | 555 111-7777   | 116 Main Steel  | 2 Hor  |
| 100 Jack Smith   |                       | 555-111-9999   | 118 Main Steet  | <b>B</b> ROWSER  |
|  |                       |  |   |  |
| 100. Jake Smith  |                       | 555-111-8888   | 117 Main Street   | Second Se |
| 100, Jake Smith<br>100, James Smith  | -                     | 555-111-8888<br>555-222-4444   | 117 Main Sheet<br>202 Main Sheet  |  |
| 100, James Smith   |                       |  | and the second se |  |
| 100, James Smith<br>100, Jame Smith  |                       | 995-222-4444<br>995-111-3033   | 202 Man Street  | and Mathics  |
| 100, James Smith<br>100, Jame Smith<br>100, Joe Smith  |                       | 995-222-4444<br>995-111-3333<br>995-222-3333   | 202 Man Street<br>112 Man Street  | and Mathics  |
| 100, James Smith<br>100, Jame Smith  |                       | 995-222-4444<br>995-111-3333<br>995-222-3333<br>995-111-2222                                 | 202 Man Stoet<br>112 Man Stoet<br>201 Man Stoet   | ere Ynheit<br>Acct Histo   |
| 100, Janes Smith<br>100, Jane Smith<br>100, Joe Smith<br>100, John Smith<br>100, Marvin Smith  |                       | 995-222-4444<br>995-111-3333<br>995-222-3333<br>995-111-2222<br>995-222-8888                 | 202 Main Stoet<br>112 Main Stoet<br>201 Main Stoet<br>111 Main Stoet<br>206 Main Stoet  | ere Yehes<br>Acct Histo<br>Locatem   |
| 100, Janes Smith<br>100, Jane Smith<br>100, Jone Smith<br>100, John Smith<br>100, Marvin Smith<br>100, Marvin Smith<br>100, Marvin Smith |                       | 595-222-4444<br>595-111-3033<br>595-222-3333<br>595-111-2222<br>595-222-8888<br>595-111-6666 | 202 Man Street<br>112 Man Street<br>201 Man Street<br>111 Man Street<br>206 Man Street<br>115 Man Street  | Acct Histo<br>Locations  |
| 100, Janes Smith<br>100, Jane Smith<br>100, Joe Smith<br>100, John Smith<br>100, Marvin Smith  |                       | 995-222-4444<br>995-111-3333<br>995-222-3333<br>995-111-2222<br>995-222-8888                 | 202 Main Stoet<br>112 Main Stoet<br>201 Main Stoet<br>111 Main Stoet<br>206 Main Stoet  | Social History   |

# Merging Customer Records, Continued

| Step | Action   |
|------|--|
| 2    | Click the Find button, and the Customer Query By Example |
|      | screen displays.   |

| Customer Query By |                    |  |          |
|-------------------|--------------------|--|----------|
| Customer          | Vehicle Additional |  | X Dan    |
| LastNane          | Fist Name          | Customer Type  | End      |
| Company           | Dept               | Number   | Des      |
| Contact Name      | Contact Number     | Sil To Trie  | Next Pag |
| Conscinate        | Conscinuitoer      |  | 7 84     |
| E Mal Addess      |                    | Contraction of the local division of the loc |          |
|                   |                    |  |          |
| Date of           | Addess             | Biling Address   |          |
| Cleation          | Sheet              | Steet  |          |
| Last Service      | Additional         | Additional   |          |
|                   | -                  |  |          |
| Last Reminder     | City               | Dy.  |          |
|                   | 1                  |  |          |
| Last Thank You    | State Zp Code      | State Zip Code   |          |
| -                 |                    |  |          |
| Notes             |                    |  |          |
| 1                 |                    | -  |          |
| -                 |                    | I  |          |
|                   |                    |  |          |
|                   |                    |  |          |

| 3 | Type the last name of the customer to be merged in the Last Name |
|---|--|
|   | field.   |

## Merging Customer Records, Continued

#### How To (continued)

| Step | Action   |
|------|--|
| 4    | Click the Find button, and the Selected Customers screen |
|      | displays.  |

| 1 12 4 19 4 19 1             | <u>a</u> 📮 |              |                 | 5   |
|------------------------------|------------|--------------|-----------------|-----|
| Selected Customers: 1300 end |            |              |                 |     |
| Customer                     | Evel       | Day II       | Addess 1        |     |
| 100. Andy Smith              |            | 555-222-7777 | 205 Man Steet   |     |
| 100, Beby Smith              |            | 555-111-4444 | 113 Main Street |     |
| 100, Bob Smith               |            | 555-222-1111 | 119 Main Steel  |     |
| 100, Danel Smith             |            | 555-222-6866 | 204 Main Street |     |
| 100, Dorwe Smith             |            | 555-222-5555 | 203 Main Street |     |
| 100, Helen Smith             |            | 555-111-7777 | 116 Main Street |     |
| 100. Jack Smith              |            | 555-111-9999 | 118 Main Steel  |     |
| 100, Jake Smith              |            | 555-111-8988 | 117 Main Street |     |
| 100. Janes Smith             |            | 555-222-4444 | 202 Main Steel  |     |
| 100, Jane Smith              |            | 555-111-3033 | 112 Main Street |     |
| 100, Joe Smith               |            | 555-222-3333 | 201 Main Street | b   |
| 100, John Smith              |            | 555-111-2222 | 111 Main Street |     |
| 100, Marvin Smith            |            | 555-222-0888 | 205 Main Street | 122 |
| 100, Mike Smith              |            | 555 111 6666 | 115 Main Street | 1   |
| 100. Nancy Smith             |            | 555-111-5555 | 114 Main Sheet  |     |
| 100. Steve Smith             |            | 555-222-2222 | 200 Main Sheet  | 4   |
|                              |            |              |                 |     |

5 Click to highlight the appropriate customer name.

StepAction6Click the Edit button, and the Edit Customer screen displays.

| Edit Customer - 100, Andy Smith                              | × ×  |
|--|--|
| Last Name First Name   | Save .   |
| Andy Smith<br>Company  | X Cancel   |
|  | 🚑 Herge  |
| ieneral   Edleg Info   Accounts   Note                       | Next Page  |
| Tate Customer Type Date of                                   | ? Helo   |
| Individual Pedine Creato                                     |  |
| Day Number Evening Number FAX Number [11/11.<br>595-222-7777 | Conception of the local distance of the loca |
| Contact Name Contact Number 11/11                            |  |
| E Mail Address   | mender   |
|  |  |
| Addens Street  | tenk You   |
| 205 Man Street   |  |
| Additional   |  |

# Merging Customer Records, Continued

| Step | Action  |
|------|---|
| 7    | Click the Merge button, and the Customer Merge screen |
|      | displays.   |

| Customer Merge  |  |        |      | aiDi.   |
|---|--|--------|------|---|
| Merger This Customer  | > Into The Customer  | Cancel | *    | ?   |
| Culonee to Marge From Name 100. Andy Smith Daytone Phone 9955-222-7777 Everang Phone Address 205 Main Street Day State Zap Cutomer's Vahicles | Customer to Merge Ts Name Daytem Phone Evening Phone Address Oly State Customer's Vehicles |        | XI * | End     End     End     Edd     End     Edd     End     Edd     End     End     End     End     End     End     End |
| A TO Street<br>ALA - Street<br>ALA - 205 Man Street<br>ALP - Additional<br>ALP - Additional<br>ALP - City State<br>AVE                        | Zo Code  |        |      | Unawy<br>Diarge All<br>? Eleb   |

| 8 | Scroll the Name field in the Customer to Merge To column to |
|---|---|
|   | find the appropriate customer name.                         |

# Merging Customer Records, Continued

| Step | Action   |
|------|--|
| 9    | Click to highlight the name of the appropriate customer, and the |
|      | customer information displays.                                   |

| Customer Merge                                   |   |             |                |            | Lini2         |
|--|---|-------------|----------------|------------|---------------|
| Merge This Customer                              | > Into The Custor   | -           | Mege<br>Cancel | 1          | 2 inite<br>() |
| Cutome to Marge From<br>Name<br>[100. Andy Smith | Customer to Merge To<br>Name<br>1000000000000000000000000000000000000 |             |                | Xi<br>Save | × Done        |
| Daytone Phone<br>1995-222-7777                   | Daytime Phone<br>555 111-7777   |             |                | Cancel     | Edd           |
| Evening Phone                                    | Evening Phone   | -           |                | ext Page   | New Veg       |
| Addess<br>[205 Main Street                       | 136 Main Street   | _           |                | ? Helo     | Acct History  |
| Chy State Zp                                     | - City  | State Zic   |                |            | Locations     |
| Customer's Vehicles                              | Customer's Vehicles   | State State |                |            | NegEst        |
| 10.  |   |             |                |            | > Export      |
| 2  | - P   |             |                |            | Unquery       |
| A TO Steel                                       |   |             |                |            | Quarge All    |
| AU ( 205 Man Street                              |   |             |                |            | ? Heb         |
| ALP - Additional<br>ALP - Additional             |   |             |                |            |               |
| APU Dy State                                     | Zip Code  |             |                |            | 9             |
|  |   |             |                |            |               |

| 10 | Click the Merge button, and the customer list appears.              |
|----|---|
| 11 | Click the <b>Done</b> button. You have now merged customer records. |

### **Merging Vehicle Records**

**Overview** This feature allows you to merge one vehicle with another (for example, when you have entered the same vehicle into the system twice).

**Note:** Do not try to merge unlike vehicles (for example, Audi to Corvette). TRACS will allow you to do this, and it cannot be edited.

**How To** To merge vehicle records, perform the following steps:

| Step | Action   |
|------|--|
| 1    |  |
|      | Click the <b>Customer and Vehicles</b> icon on the TRACS main screen menu bar, and the <b>Customer List</b> screen displays. |

| Ele Seath List Activities Beports In |        |                     |                   |         | <u></u> X   |
|--------------------------------------|--------|---------------------|-------------------|---------|---|
| 5 5 18 🛼 🚯 🗣                         | 1 II 3 | 🙇 🖳                 |                   | 1       | ? 🕖   |
| Customer .                           | Evel   | Day #               | Address 1         | Adden 2 | X Done  |
| 100, Andrew Smith                    |        | 555-777-8888        | 100 Main Street   |         | A Fase  |
| 100, Betzy Smith                     |        | 5551114444          | 113 Man Street    |         | Q End   |
| 100. Bub Smith                       |        | 555-222-1111        | 119 Main Street   |         | and the owner of the |
| 100. Carry Snith                     |        |                     | 9680 TYSEN ROAD   |         | ~ E(H   |
| 100, Danell Smith                    |        | 555-222-6666        | 204 Main Sheet    |         | 0.000   |
| 100, Dave Smith                      |        | 555-222-9999        | 207 Main Street   |         | 2300  |
| 100, David Smith                     |        | 315-635-0041 eh     | 7763 BARBARA LANE |         | New Veb   |
| 100, Donnie Smith                    |        | 555-222-5555        | 203 Main Street   |         | and inter suff  |
| 100, Frank Smith                     |        | 555-333-6555        | 212 Main Sheey    |         | wy Vehicles   |
| 100, Greg Smith                      |        | 555-333-3333        | 210 Main Sheet    |         |   |
| 100, Helen Smith                     |        | 555-111-7777        | 116 Man Sheek     |         | Acid History  |
| 100, Jack Smith                      |        | 555-111-0999        | 118 Main Sheet    |         | CONTRACTOR OF   |
| 100. Jake Snith                      |        | 555-111-0000        | 117 Main Sheet    |         | Locations   |
| 100 James Seith                      |        | 555-222-4444        | 202 Main Sheet    |         | THE OWNER WATER   |
| 100, Jane Smith                      |        | 555-111-3333        | 112 Main Street   |         | NegEst  |
| 100, Jeannie Smith                   |        | 555-333-2222        | 209 Main Street   |         | 1 AFarm   |
| 100, Jethey Smith                    |        | 584-8099 rh         | 530 ROUTE 19      |         | the second second   |
| 100, Joe Snith                       |        | <b>555</b> 222 3333 | 201 Main Street   |         | Depertury in  |
| 100, John Seith                      |        | 555 111 2222        | 111 Man Street    |         |   |
| 100, Justin Smith                    |        | 555 333 4444        | 211 Main Street   |         | (Markell)   |
| 100, Marc Smith                      |        | 555-333-1111        | 208 Main Street   |         | The second  |
| 100, Marvin Smith                    |        | 995-222-8888        | 205 Main Street   |         | ? Help  |
| 100, Mike Smith                      |        | 995111-6666         | 115 Main Street   |         | and the second second   |
| 100, Nancy Smith                     |        | 985 111-5555        | 114 Main Street   |         |   |
| 100. Steve South                     |        | 985-222-2222        | 200 Main Street   |         |   |
| 100, Tan Smith                       |        |                     | 1392 Duplexo Lane |         |   |
| 100, Ton Snith                       |        | 555-333-7777        | 1056 Avenue A     | *1      |   |
|                                      |        |                     |                   | 1       | 1   |

2

Click to highlight the appropriate customer.

# Merging Vehicle Records, Continued

#### How To (continued)

| Step | Action  |
|------|---|
| 3    | Click the Vehicles button, and the Selected Vehicles screen |
|      | displays.   |

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|---|---|
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| Tag         State         Vehicle         Support           1309 Fard Muntang 3020 5 (0.Ler VI)         100, Anders Smith | Fleet No Color<br>Fleet No Color<br>Erd<br>Erd<br>Erd<br>Erd<br>Erd<br>Erd<br>Erd<br>Er |

4 Click to highlight the appropriate vehicle.

# Merging Vehicle Records, Continued

| Step | Action   |   |
|------|--|---|
| 5    | Click the Edit button, and the Edit Vehicle screen displays. |   |
|      | Crick die Edit odden in die Edit verliete sereen displays.   | LEIX X<br>Lerki<br>X<br>Lerki<br>Lerki<br>Lerki |
|      |  |   |

# Merging Vehicle Records, Continued

| Step   |                     | Action  |  |
|--|---------------------|---|--|
| 6  | Click the Merge but | ton, and the Vehicle Merge so   | creen displays.  |
| Vehici<br>Casty<br>Vehici<br>Vehici<br>Vehici<br>Vehici<br>Vehici<br>Vehici<br>Vehici<br>Vehici<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>Vehici<br>Casty<br>V | United Days         | Into This Vehicle  Vehicle to Merge To  Show Only Merge From Customer's Vehicles  Vehicle  Vehicle  Vin  Lossvan Number State  Reat Number Floot Discel  Last Repair Date  Note | LICIX<br>X<br>X<br>Carcel<br>Cog Decel<br>Cog Decel<br>Cog Decel<br>Cog Decel<br>Cog Decel |
| Phong Ph<br>Orfinal P<br>Location  |                     | Est. Dialy Mileage  |  |
|  | -                   |   |  |

| 7 | Scroll the <b>Vehicle</b> field to find the appropriate vehicle. |
|---|--|
| 8 | Click to highlight the appropriate vehicle.                      |

# Merging Vehicle Records, Continued

| Step | Action   |
|------|--|
| 9    | Click the Merge button, and the Selected Vehicles screen |
|      | displays.  |

| Ein Sench List Activities Beports Inde Windows Help   | N KIRK   |
|---|--|
| 5 5 💀 🛼 🐼 象 🚮 🔿 🙇 💭   | 😹 ? 🥑 🗍  |
| Test         State         Outcode           19/75 Ford Mustang 30203 5.0Liter VII         100, Andrees Smith | Pleet Itis Ciliz   Ciliz  Cili |

| 10 | Click the <b>Done</b> button. | You have now merged vehicle records. |  |
|----|-------------------------------|--------------------------------------|--|
|----|-------------------------------|--------------------------------------|--|

### **Change Vehicle Owner**

**Overview** This feature allows you to move a vehicle from one customer to another (for example, when one customer sells a vehicle to another customer).

**How To** To move a vehicle, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click the <b>Customer and Vehicles</b> icon on the TRACS main screen menu bar, and the <b>Customer List</b> screen displays. |

| Control         Eve #         Name #         Address for the state #         Address for the state #           000. Restry Smith         595-1772 d000         100 Main Steart         ■<   | 1 5 18 2. 19 5   | 6 5 A | á 🔳           |  | 35   | <b>2</b>                              |
|---|--|-------|---------------|--|------|---------------------------------------|
| USE Access South         SSS2224 0000         Not Mark Stead           108. Betsy South         5951113 4444         113 Main Stead           108. Carey South         5955222 4111         119 Main Stead           109. Carey South         5955222 4010         204 Main Stead           100. Davell South         5955222 4010         204 Main Stead           100. Davell South         5955222 4000         204 Main Stead           100. Davell South         595522 9000         207 Main Stead           100. Fack South         595533 9005         212 Main Stead           100. Jack South         5955113 9000         118 Main Stead           100. Jack South         5955113 9000         117 Main Stead           100. Jack South         595513 9000         117 Main Stead           100. Jack South         595513 9000         117 Main Stead           100. Jack South         595513 9000         117 Main Stead           100. Jack South         595522 9033 2011         900 Main  | Curtomer .   |       | Day =         |  |      | V Dore                                |
| 100. Bob Smith         995/222 1111         115 Main Steef         9600 TVSEN RGAD           000. Carey Smith         995/222 6666         204 Main Steef         9600 TVSEN RGAD           000. David Smith         995/222 6666         204 Main Steef         9600 TVSEN RGAD           000. David Smith         995/222 6666         204 Main Steef         9600 TVSEN RGAD           000. David Smith         115 (JS5 0041 m)         71/3 IA/IIIA/ALLANE         9600 TVSEN           000. David Smith         995/222 6955         203 Main Steef         9600 TVSEN           000. David Smith         995/222 6955         203 Main Steef         9600 TVSEN           000. Fund Smith         995/233 3333         210 Main Steef         9600 TVSEN           000. Helen Smith         995/313 3333         210 Main Steef         9600 TVSEN           000. Jack Smith         995/313 3333         210 Main Steef         9600 TVSEN           000. Jack Smith         995/313 3333         110 Main Steef         9600 TVSEN           000. Jack Smith         995/313 3333         112 Main Steef         9600 TVSEN           000. Jack Smith         995/313 3333         112 Main Steef         9600 TVSEN           000. Jack Smith         995/313 3333         210 Main Steef         9600 TVSEN  |  |       |               |  |      | _                                     |
| State         Second PriSEN ROLLD         Edit           00. Dawell Smith         905 222 6666         204 Main Street         Image: Street  |  |       |               |  |      | Q End                                 |
| 00. Daved Smith         975-222-6666         204 Main Street         Image: Street           00. Daved Smith         955-222-9009         207 Main Street         Image: Street           00. Daved Smith         955-222-9009         207 Main Street         Image: Street         Image: Street           00. Downie Smith         955-323-9009         207 Main Street         Image: Street  |  |       | 555-222-1111  | 119 Man Street   |      |                                       |
| 00. Dawe Smith         595-222 9099         207 Main Street         Main Street           00. Dawed Smith         115-635-0041 sh         77/3 34/104/A4 LANE         Image: Smith         Image:   |  |       |               |  | - 12 | - E/R                                 |
| Op         Disk         D   |  |       |               |  | - 19 | 0.1                                   |
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2 Click to highlight the appropriate customer.

Continued on next page

# Change Vehicle Owner, Continued

#### How To (continued)

| Step | Action  |
|------|---|
| 3    | Click the Vehicles button, and the Selected Vehicles screen |
|      | displays.   |

| IRACSIC [Selected Vehicles: 1 evoies].<br>Elle Seach List Activites Bepats Icols Windows Help |                             |                 | A K BA   |
|---|-----------------------------|-----------------|--|
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| Tag State Violode<br>1994 Buos, Regal 1990 3 TLaw VS  | Curtoner<br>100, Jack Snith | Fleet No. Color | Dove     Edd     Edd     Edd     Dec Serv     Serv Butuy     Neg Ext     Dange All     P Heb |
|   |                             | لار             |  |

Continued on next page

#### How To (continued)

| Step | Action   |
|------|--|
| 4    | Click the Edit button, and the Edit Vehicle screen displays. |

|  | Model<br>Regal<br># Sevial No.  | 3.0  | 2001<br>1001  |
|--|---|--|---|
|  | Regal   | -  | . 11  |
|  | Regal   |  | -   |
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|  | Fieel Driver  | Fleet Number   |   |
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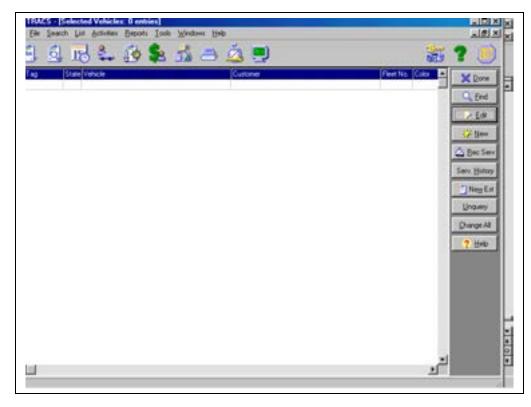
# Change Vehicle Owner, Continued

| Step | Action   |
|------|--|
| 5    | Click the Chg Owner (Change Owner) button, and the Vehicle |
|      | Move screen displays.                                      |

| fehicle Hove                                     |                     |    |
|--|---------------------|----|
| Move This Vehicle                                | To This Customer    | 18 |
| whicle to Move                                   | Customer to Move To | Xo |
| Justomer Namer                                   | Nave                |    |
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| Teel Number Fleet Driver                         | -                   |    |
| ant Repair Date                                  | State Zp            |    |
| an regar para                                    |                     |    |
|  | Customer's Vehicles |    |
| Kote   |                     |    |
|  |                     |    |
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|  |                     |    |
|  |                     |    |
|  |                     |    |
|  |                     |    |
|  |                     |    |

| 6 | Scroll the <b>Name</b> field to select the appropriate customer name. |
|---|---|
| 7 | Click to highlight the name of the appropriate customer.              |

| Step | Action  |
|------|---|
| 8    | Click the <b>Move</b> button, and the <b>Selected Vehicles</b> screen displays. |



| 9 Click the <b>Done</b> button. | You have now moved a vehicle. |
|---------------------------------|-------------------------------|
|---------------------------------|-------------------------------|

### Chapter 8: Integrating TRACS and QuickBooks

### Introduction

Before attempting to import TRACS into QuickBooks you need to be familiar with TRACS and must be proficient in QuickBooks. If you have never used QuickBooks we strongly recommend that you take a QuickBooks training course.

TRACS support recommends importing into a new QuickBooks company. If you are importing into an existing QuickBooks company, configuration changes may be needed in order to complete a successful import. However, TRACS support cannot guarantee a successful import into an existing QuickBooks company.

#### Learning Objectives

After completing this module, you will be able to:

- □ Create a new QuickBooks company
- □ Configure a TRACS export directory
- □ Import TRACS into a new QuickBooks company
- □ Import TRACS into a existing QB company
- □ Understand the QuickBooks import

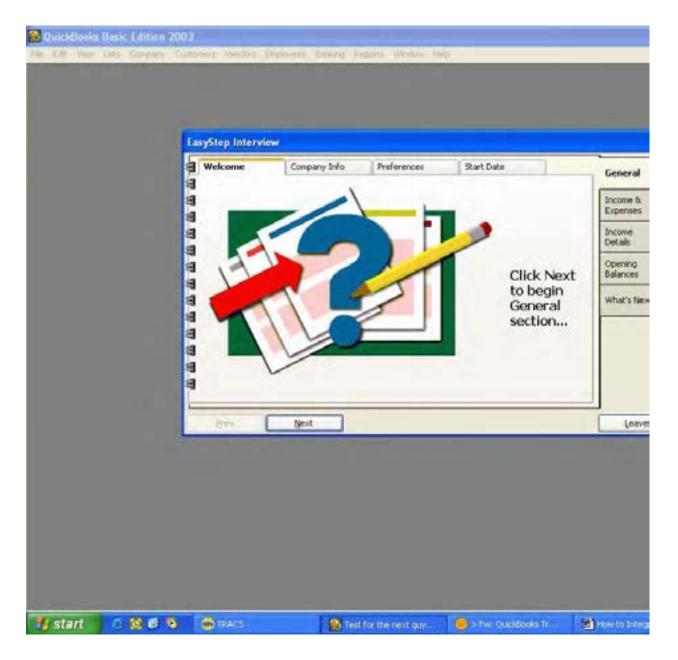
### Creating a New QuickBooks Company

1. Open QuickBooks and left-click on **File** from the toolbar at the top of QuickBooks window.

2. Left click on **New Company**.

QuickBooks displays the following screen:

| Edit View Lists   | Company     | Customers  | Vendo | es En | ployees | Banking | Reports | Window | n Help  |        |   |
|---|-------------|------------|-------|-------|---------|---------|---------|--------|---------|--------|---|
| New Company<br>Open Company<br>Open Previous Company<br>EasyStep Interview<br>Close Company | Y           |            | heck  | 0     | Reg     | Acont   | Rmnd    | Pend   | Support | Beckup | - |
| Back Up<br>Restore<br>Archive & Condense Da<br>Utilities<br>Accountant's Review             | ts          | :          |       |       |         |         |         |        |         |        |   |
| Print Forms<br>Printer Setup<br>E-mail Forms  |             | 01949<br>• |       |       |         |         |         |        |         |        |   |
| Register QuickBooks Ba<br>Update QuickBooks<br>Exit   | sic Edition | AŁ+F4      |       |       |         |         |         |        |         |        |   |
|   |             |            |       |       |         |         |         |        |         |        |   |
|   |             |            |       |       |         |         |         |        |         |        |   |
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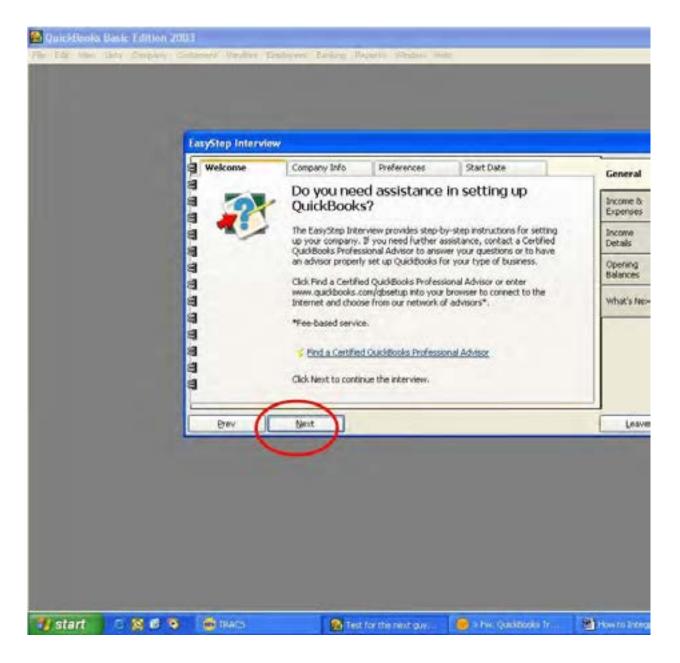


QuickBooks displays the EasyStep Interview window:

#### 3. Click Next.

Tip: At this point, you may press Enter three (3) times or follow steps 3 - 5.

QuickBooks displays the following screen:



4. Click Next.

🚰 Quickleon David Edition (2013 EasyStep Interview Wekome Company Info. Preferences Start Date General 1 Setting up a new QuickBooks company Income & Expenses 1 We've designed this interview to help you set up your NEW QuickBooks company. 1 We'll walk you through choosing and setting up various QuickBooks Features. Income Details a, If you don't want to use this interview and prefer to add minimal information to get started, cick this button: 8 Opening Balances Sip Interview Click Next to continue the What's Next 3 a Next Leave (Pre-🛞 Test for the next guy.... 🚺 start 🛛 🕄 🕄 🗣 🚍 38445 The International Texas

QuickBooks displays the following screen:

#### 5. Click Skip Interview.

| Mease miter your company, name, address, and the first condition if your face year.     Bent       Conversity Rage     Canvel       Legal Name     Help       Address     Help       Country     US       Phone #     Phone #       Phone #     <  | Creating New Company   |   |
|--|--|---|
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| Addrese<br>Coultry US V<br>Phone #<br>Phone # |  | Cavel   |
| Country US V<br>Phone #<br>Pack #<br>E-mail<br>Web Ster<br>Finst month in your fiscal year<br>Print month in your fiscal year<br>Print month in your fiscal year<br>Print month in your fiscal year  | 3700/0202  | Heb   |
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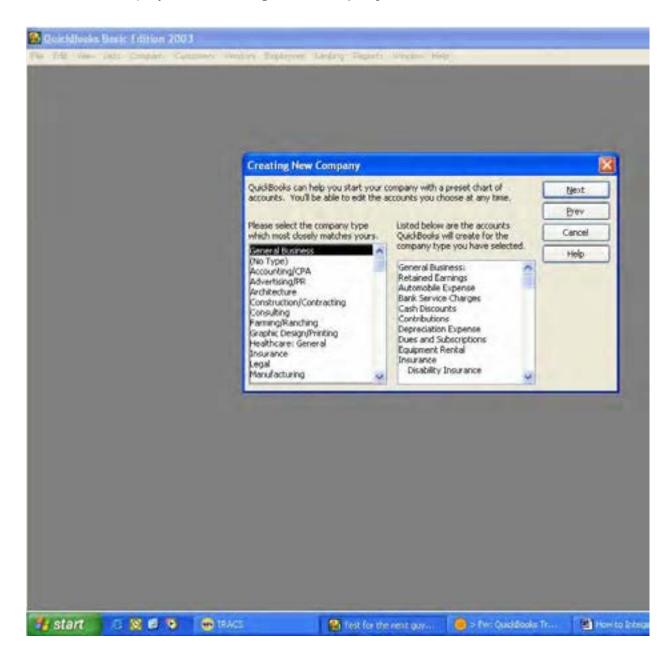
QuickBooks displays the Creating New Company screen:

6. Enter the business information.

Note: If the customer already has an existing company, it is suggested that you create a "test" company in order to see how TRACS sets up the Chart of Accounts).

7. After entering necessary information, left-click Next.

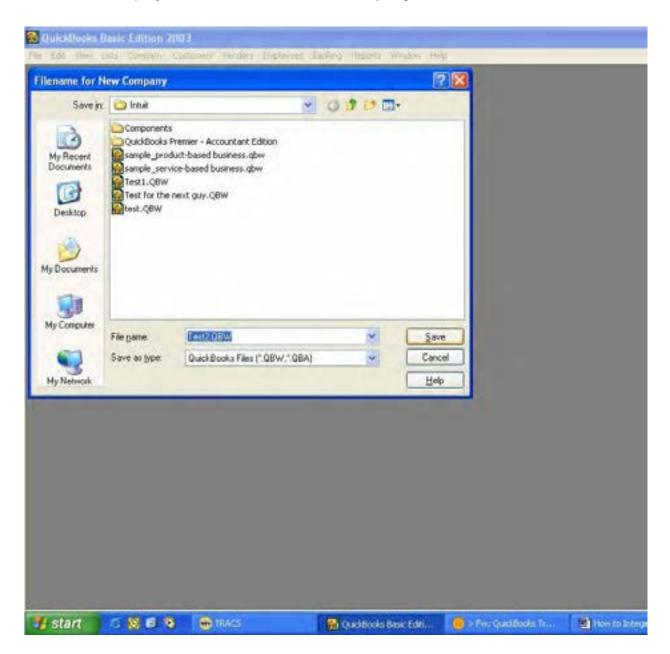
QuickBooks displays the **Creating New Company** window:



QuickBooks is able to create a company with a preset chart of accounts for various types of business. **TRACS uses the General Business company type that defaults to general accounts**.

8. Make sure that **General Business** is selected and click Next (QuickBooks will typically have already selected **General Business**).

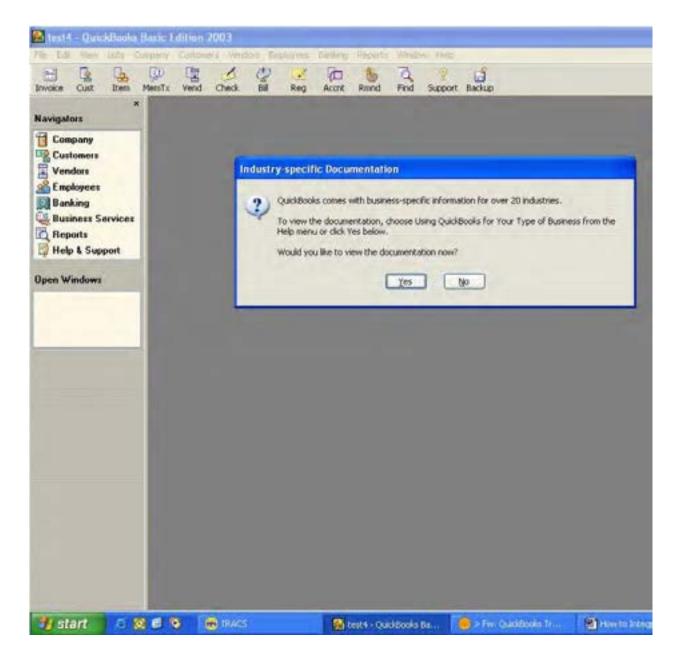
QuickBooks displays the **Filename for New Company** window:



Note: This window displays the location of the actual database and the name of the file. Pay special attention to the directory of the database for future reference.

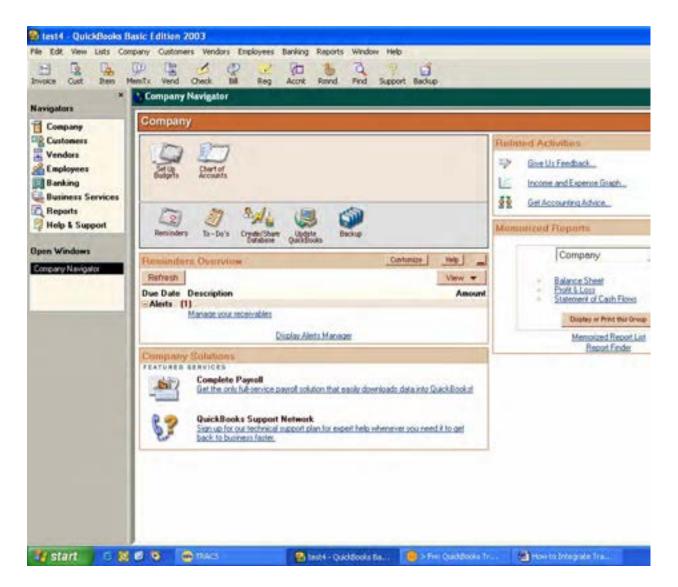
- 9. Left-click Save.
- 10. A message window will briefly display a **Working** status with a progress bar.

QuickBooks displays the Industry-Specific Documentation window:



11. Left-click once on NO.

QuickBooks opens the new company and automatically displays the **Getting Started** with **QuickBooks** and the **Company Navigator** windows:



12. Left-click on X in the right hand corner below the main window heading.

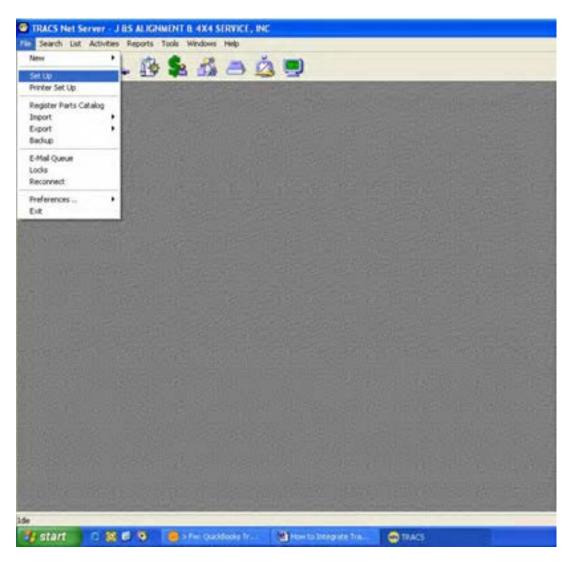
Congratulations!

Your QuickBooks company is now created.

## **Configuring the TRACS Export Directory**

- 1. Open TRACS and left-click on **File** from the toolbar above the icon buttons.
- 2. Left-click on Setup.

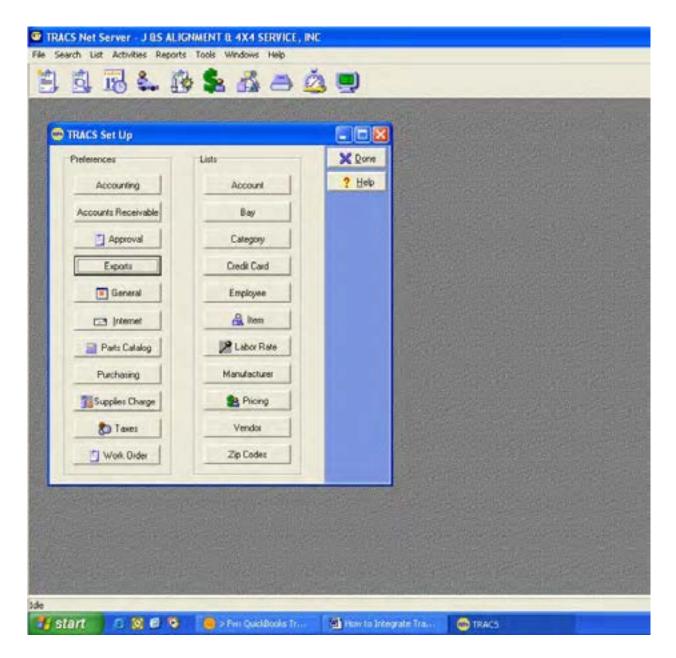
QuickBooks displays the following screen:



Tip: You can create a folder on the root of the C:\ drive entitled "QBExports" prior to editing the export directory and specify this as the desired export folder. This will create a consistent folder for imports to be stored, thereby making imports easier to locate.

### Configuring the TRACS Export Directory, Continued

TRACS displays the **Set Up** window:



3. Left-click on Exports from the Preferences box.

C LENCY THE FARMER OF REAL AVAILABLE AND A DISTRICT. INC. 5 5 6 4 6 4 6 6 9 . . . Performan Links XQue 7 140 According. Toper's Directory Configuration arts Repairedly counting Transmittin Elepter Directory. 14 Wallings Export Directory Approval Epot Acrossing Transmiss XCe Espony Die Mitel Drive Mill = D -C General Dwith! Descion in Ci C2 Manut and the second See Name Part Cealury Catalogia Pathane Sicole Chaige uning Export Dates Dian P Egent Vendra Investor-Namore on Sala 17 Experimentation Premierca 3 Web, Date Hetart Set Set Set - batters S. 

TRACS displays the Export Directory Configuration window:

4. The **Accounting Export** directory is on the left side of the window. It defaults to the "C:\" drive.

5. Change the placement of the file by clicking on the folder under the C:\ drive within the Directory box.

6. Place a check mark in the radio buttons for **Export Vendor Invoice Number on Bills** and **Export Method of Payment.** 

7. Once you have the directory specified to the location of your preference, left-click on **Save.** 

8. Left-click on **Done** on the TRACS Set Up window.

### Importing TRACS into a New QuickBooks Company

Note: If there are any errors importing into QuickBooks, write down the error line and error message. Continue with the export by clicking OK. Repeat if necessary.

□ After a full import completes, call TRACS Support.

□ If the import will NOT continue, stop and call Support.

### Step 1: Back Up TRACS and QuickBooks

**Note:** Once the company has been setup in QuickBooks, make sure to backup TRACS <u>and QuickBooks</u>. **THIS MUST HAPPEN EVERY TIME PRIOR TO THE EXPORT/IMPORT PROCESS**.

### Step 2: Create the Export File

- 1. Minimize QuickBooks and open the main screen of TRACS.
- 2. From the toolbar, left-click on Activities.
- 3. Once the drop-down list appears, left-click on Accounting Export.
- 4. A window will appear and ask you if a backup has been performed. Left-click on Yes.
- 5. A window will appear that reads "Add time to file name." Left click on **Yes.**
- 6. A Save As window will appear.

# Note: If need be, the directory can be changed at this point for this one instance. Otherwise, the directory is pre-assigned in TRACS.

7. Left-click Save.

8. The screen will disappear and **the Accounting Export** window will be in the background. The number of transactions processed will be noted on that box.

9. When finished processing, a window appears and displays the amount of transactions exported.

10. Click **OK.** 

11. A message box appears that reads "Switch To Your Accounting Program."

#### Note: This box details the exact location of the file that should be imported.

12. Left click on OK.

13. A message box appears that reads, "If you had errors, contact TRACS Support." Click **OK.** 

### Importing TRACS into a New QuickBooks Company, Continued

14. This concludes all steps taken in TRACS to create the Export file. The file now exists in the specified location.

**Note:** If the customer cannot find the file, check the Export directory in TRACS. Usually this will be the location of the file unless the directory was changed at the "Save As" screen (see step #6 above).

### Step 3: Import The Data Into QuickBooks

1. Minimize TRACS and open QuickBooks.

2. From the toolbar, left-click on File.

3. A drop-down list appears. Move your mouse over the field. For most versions, another list will display.

4. Left-click on Import.

# Note: Newer versions will have another list that will populate off Import to display different types of import files. We import .IIF files.

5. Once you have click Import or Import File Type, another Import window will appear. This is the same as a "look in" window.

6. Find the corresponding export file and left-click once to highlight the file.

7. Left-click one time on **Open.** 

**Note:** QuickBooks defaults its directory for imports to: C:\programfiles\intuit\quickbooks\*\*\*

8. Once you have clicked on **Open**, the file will begin importing and a progress bar will display. If no errors occur, QuickBooks displays a message box that reads, "Your data has been imported."

**Note:** If you encounter errors, write down the error message and the error line number. Left-click on OK and allow the import to continue. ALL TRANSACTIONS BEFORE THE ERROR ARE ALREADY APPLIED INSIDE OF QUICKBOOKS. Once the import finishes, QuickBooks displays a message box that reads, "Your data has been imported."

9. Stop and call TRACS.

### Importing TRACS into an Existing QuickBooks Company

# Note: Before you try to import TRACS into an existing company you will need to be an experienced QuickBooks user.

The first step is to understand how the chart of account functions in TRACS: 1. Click **File**, then click **Setup**, and finally choose Accounting.

The system displays the following screen:

| Default Account For  | Account Name           | Account Type            |
|----------------------|------------------------|-------------------------|
| Accounts Payable     | Accounts Payable       | Accounts Payable        |
| Accounts Receivable  | Accounts Receivable    | Accounts Receivable     |
| Cash Payment         | Undeposited Receipts   | Bank                    |
| Cash Refund          | Miscellaneous Journals | Bank.                   |
| Check Payment        | Undeposited Receipts   | Bank.                   |
| Credit Card Payment  | Merchant Account       | Bank                    |
| Credit Journal       | Miscellaneous Journals | 8 ank                   |
| Debit Journal        | Miscellaneous Journals | Bank                    |
| Inventory Adjustment | Inventory Adjustments  | Other Current Asset     |
| Labor Sales          | Labor Sales            | Income                  |
| Part Asset           | Inventory              | Other Current Asset     |
| Part Cost            | Cost of Parts Sold     | Cost of Goods Sold      |
| Part Sales           | Part Sales             | Income                  |
| Refund Credit Card   | Merchant Account       | Blank.                  |
| Return Check         | Miscellaneous Journals | Bank.                   |
| Sales Tax            | Sales Tax Payable      | Other Current Liability |
| Shop Supplies        | Part Sales             | Income                  |
| Sublet Asset         | Sublet Purchased       | Other Current Asset     |
| Sublet Cost          | Cost of Sublet Sold    | Cost of Goods Sold      |
| Sublet Sales         | Sublet Sales           | Income                  |

Note: All of the account names and type must match the Chart of Accounts in your existing QuickBooks Company. If you have been creating invoices in your QuickBooks Company, you will need to make some modifications to the Sales Tax Account because QuickBooks will not allow TRACS to import to an existing Sales Tax Payable Account. In order to get the Sales Tax money to import smoothly, we have to create a new account called TRACS Sales Tax Payable.

2. Open QuickBooks and go to Edit-Preferences-Sales Tax and click on the "Company Preferences" tab. For the question "Do you collect sales tax?" select **NO.** 

3. Open the **Chart of Accounts** in QuickBooks and edit the existing Sales Tax Payable account by adding "XXX" to the account name. After completing the import, you can merge the "XXX Sales Tax Payable" account into the Sales Tax Payable account TRACS brought over, unless you would like to keep the account separate.

4. The **Chart of Accounts** should now look like the following screen:

| Default Account For  | Account Name            | Account Type            |
|----------------------|-------------------------|-------------------------|
| Accounts Payable     | Accounts Payable        | Accounts Payable        |
| Accounts Receivable  | Accounts Receivable     | Accounts Receivable     |
| Cash Payment         | Undeposited Receipts    | Bank                    |
| Cash Refund          | Miscellaneous Journals  | Bank                    |
| Check Payment        | Undeposited Receipts    | Bank                    |
| Credit Card Payment  | Merchant Account        | Bank                    |
| Credit Journal       | Miscellaneous Journals  | Bank                    |
| Debit Journal        | Miscellaneous Journals  | Bank                    |
| Inventory Adjustment | Inventory Adjustments   | Other Current Asset     |
| Labor Sales          | Labor Sales             | Income                  |
| Part Asset           | Inventory               | Other Current Asset     |
| Part Cost            | Cost of Parts Sold      | Cost of Goods Sold      |
| Part Sales           | Part Sales              | Income                  |
| Refund Credit Card   | Merchant Account        | Bank                    |
| Return Check         | Miscellaneous Journals  | Bank                    |
| Sales Tax            | Tracs Sales Tax Payable | Other Current Liability |
| Shop Supplies        | Part Sales              | Income                  |
| Sublet Asset         | Sublet Purchased        | Other Current Asset     |
| Sublet Cost          | Cost of Sublet Sold     | Cost of Goods Sold      |
| Sublet Sales         | Sublet Sales            | Income                  |

Now when data is exported, all Tax money will be placed in an account called TRACS Sales Tax Payable. After this modification is made the system is ready to import data.

NOTE: Once the data is imported into QuickBooks, TRACS Support is not responsible for supporting QuickBooks. It is up to the user to be proficient in balancing the company's books within QuickBooks.

### **Understanding the QuickBooks Import**

After your data has been imported successfully, the next step is to apply all customer payments. If using the default chart of accounts in TRACS, all payments are stored in the Undeposited Receipts Account. Follow the directions below to apply customer payments and group money in the Undeposited Funds Account.

If you would like TRACS to deposit payments directly to Undeposited Funds you will need to manually create these accounts in TRACS. Please call TRACS support for assistance.

- 1. Open QuickBooks.
- 2. Click on List and then Choose Chart of Accounts.
- 3. Double-click on the **Undeposited Receipts Account.**

The system will display the following screen:

| Date                  | Number | Paye                |      | Payment | 1               | Deposit               | Balance   |
|-----------------------|--------|---------------------|------|---------|-----------------|-----------------------|-----------|
|                       | Туре   | Account             | Memo |         | 1000            | and the second second |           |
| 01/14/2000            |        | BUCKY, RICK         |      | П       | 10.27           | 10.27                 |           |
|                       | PMT    | Accounts Receivable |      | 11 1    |                 |                       |           |
| 01/14/2000            |        | CHADWICK, BILL      |      |         |                 | 48.17                 | 58.44     |
|                       | PMT    | Accounts Receivable |      | 11      |                 |                       |           |
| 01/14/2000            |        | PLYMOUTH            |      |         |                 | 52.85                 | 111.29    |
|                       | PMT    | Accounts Receivable |      |         |                 |                       |           |
| 01/14/2000            |        | CROLICK, SANDY      |      |         | 86.46           | 197.75                |           |
| 1                     | PMT    | Accounts Receivable |      |         |                 |                       |           |
| Hecord & Edt St Splts |        |                     | Rs   |         |                 | balance               | 9,912.36  |
| He Rest               | ore E  | Q-Report Co Go      | To   |         | 1-Li<br>Sort by |                       | ocument + |

4. Click on the first transaction and then click Edit.

### Understanding the QuickBooks Import, Continued

The system will display the following screen:

| Custom                         | er Payı               | ment                    |                                |                        | DATE<br>4/2000                  | BAL            | ANCE<br>0.00   | **       | <u>N</u> ext<br>Pre <u>v</u> |
|--------------------------------|-----------------------|-------------------------|--------------------------------|------------------------|---------------------------------|----------------|----------------|----------|------------------------------|
| <u>C</u> ustomer.Job<br>Memo   | BUCKY, RIC            | к                       | *                              | Pr                     | nount<br>nt. Method<br>weck No. | 10.27<br>89034 |                | ×        | OK<br><u>C</u> ancel         |
| C Deposit To                   | Contraction of the    | ited Receipts           | <u> </u>                       |                        |                                 |                |                |          |                              |
| Existing Credit<br>Apply Exist |                       | 0.00                    |                                | Total to /<br>Unapplie | Apply<br>ed Amount              |                | 10.27<br>10.27 | -        | Apply                        |
| voices paid (wi<br>Date        | h this paymer<br>Type | nt) and those<br>Number | still outstandin<br>Orig. Amt. | Disc. Date             | Amt. Due                        | Pag            | ment           | Print Co | ed Memo                      |
|                                |                       |                         |                                |                        |                                 |                |                |          |                              |

5. Click on the option **Group** with other undeposited funds and then click **Auto Apply**.

6. Click **OK**. A beep will sound that notifies the user that the transaction is now sent to the **Undeposited Funds Account**.

7. Repeat steps 4-6 until all transactions are in the **Undeposited Funds Account**. When finished, there should not be any transactions left in **the Undeposited Receipts Accounts**.

8. After all transactions are in the **Undeposited Funds Account**, money is now able to be deposited from the **Undeposited Funds Accounts** to the checking account.

Note: From this point forward, it is necessary to understand QuickBooks. TRACS Support cannot help you balance your business if QuickBooks is not understood. This is the one proven way to apply your credits and to group your money in the Undeposited Funds Account. QuickBooks experts may have other ways of applying credits, but this is the recommended best method.

### **Frequently Asked Questions**

What information exports over to QuickBooks?

#### 1. All A/R transactions

- □ Any Repair Order that has a status of "Invoice" (not previously exported)
- □ Any payment received
- □ Any debit or credit journal made to the account

#### 2. The invoice imports the following information:

- □ Invoice dollar total
- □ Parts dollar total
- □ Sublet dollar total
- □ Charges dollar total
- □ Labor dollar total
- □ Sales Tax dollar total
- □ Invoice Number, Customer Account Name & Address

#### Invoice

| CNTTYPE                                  |   |  |
|--|---|--|
| counts Receivable AR                     |   |  |
| op Supplies INC                          |   |  |
| les Tax Payable OCLIAB                   |   |  |
| 0  |   |  |
| 0  |   |  |
| blet Sales INC                           |   |  |
| ASSET                                    |   |  |
| blet Purchased COG8                      |   |  |
| et of Parts Sold COGS                    |   |  |
| et of Sublet Sold COGS                   |   |  |
| DOR2 BADOR3 BADOR4 BADOR5                | PHONE1 PHONE2 FAXNUM CONT1 CTYPE  |  |
|  |   |  |
|  |   | 271-2509   |
|  | KELSEY GOODMAN  |  |
|  |   |  |
| CNT NAME AMOUNT DOCNUM                   |   |  |
|  |   |  |
|  |   |  |
|  |   |  |
|  |   |  |
|  |   |  |
|  |   |  |
|  |   |  |
|  |   |  |
|  |   |  |
|  |   |  |
| at of Sublet Sold GOODMAN, KELSEY        | 83.20 10957   |  |
|  |   |  |
|  |   |  |
| CNTTYPE                                  |   |  |
| counts Receivable AR                     |   |  |
| deposited Receipts BANK                  |   |  |
| DOR2 BADOR3 BADOR4 BADOR5                | PHONE1 PHONE2 FAXNUM CONT1 CTYPE  |  |
| LUTATION COMPANYNAME                     | FIRSTNAME MIDINIT LASTNAME  |  |
| LSEY GOODMAN PO BOX 38104                | COLO SPGS, CO, 80937  | 271-2509   |
| Individual MRS                           | KELSEY GOODMAN  |  |
| CNT NAME AMOUNT DOCNUM                   | PAYMETH   |  |
| ONT NAME AMOUNT DOCNUM                   | PAYMETH   |  |
|  |   |  |
| deposited Receipts GOODMAN, KELSEY       | 100.00 Cash   |  |
|  | 444.44  |  |
| counts Receivable GOODMAN, KELSEY        | -100.00 Cash  |  |
| A XX TTTTTOOX BEREVENES XX BTTTEECOULDOX | Control Receivable AR<br>p Supplies INC<br>es Tax Payable OCLIAB<br>iet Sales INC<br>ASSET<br>let Purchased COGS<br>a of Parts Sold COGS<br>a of Sublet Sold COGS<br>a for Sublet Sold COGS<br>a for Sublet Sold COGS<br>a for Sublet Sold COGS<br>a for Sublet Sold COGS<br>contro Receivable GOCOMAN, KELSEY<br>os Tax Payable GOCOMAN, KELSEY<br>os Susplies GOCOMAN, KELSEY<br>sold Sold SocomAN, KELSEY<br>sold Sold GOCOMAN, KELSEY<br>sold Sold GOCOMAN, KELSEY<br>a for Sublet Sold GOCOMAN, KELSEY<br>contro Receivable AR<br>Sposited Receivable AR<br>Sposited Receivable AR<br>Sposited Receivable AR<br>Sposited Receivable AR<br>Sposited Receivable AR<br>Station ComPANYNAME<br>CATT NAME AMOUNT DOCNUM<br>Individual MRS<br>CNT NAME AMOUNT DOCNUM<br>Sery GOCOMAN PO SOX 38104<br>Individual MRS | CNTTYPE CNTTYP |

### Frequently Asked Questions, Continued

#### 3. Purchase Orders & Inventory Adjustments

□ Purchase order Number

□ Vendor Account Name

□ All inventory adjustments come across as an Adjustment PO

IACONT NAME DESC ACONTTYPE ACCNT Accounts Payable Accounts Payable AP ACCNT Inventory Inventory OCASSET IVEND NAME ADDR1 ADDR2 ADDR3 ADDR4 ADDR5 PHONE1 VEND Napa Augden General/AB Hadley Napa Augden General/AB Hadley ITRNS TRNSTYPE DATE ACCNT NAME AMOUNT DOCNUM ISPL TRNSTYPE DATE ACCNT NAME AMOUNT DOCNUM IENDTRNS TRNS BILL 10/16/3 Accounts Payable Napa Augden General/AB Hadley -109.23 9891 Napa Augden General/AB Hadley 109.23 9891 SPL BILL 10/16/3 Inventory ENDTRNS.

#### How can I tell where my money is going from TRACS into QuickBooks?

| Delault Account For  | Account Name           | Account Type            |
|----------------------|------------------------|-------------------------|
| Accounts Payable     | Accounts Payable       | Accounts Payable        |
| Accounts Receivable  | Accounts Receivable    | Accounts Receivable     |
| Cath Payment         | Undeposited Receipts   | Bank                    |
| Cash Refund          | Mincellaneous Journals | 8 ank                   |
| Check Payment        | Undeposited Receipts   | Bank.                   |
| Credit Card Payment  | Merchant Account       | Bank.                   |
| Credit Journal       | Miscellaneous Journals | Bank.                   |
| Debit Journal        | Miscellaneous Journals | Bank                    |
| Inventory Adjustment | Inventory Adjustments  | Other Current Asset     |
| Labor Sales          | Labor Sales            | Income                  |
| Part Asset           | Inventory              | Other Custent Asset     |
| Part Cost            | Cost of Parts Sold     | Cost of Goods Sold      |
| Part Sales           | Part Sales             | Income                  |
| Refund Credit Card   | Merchant Account       | Bank.                   |
| Return Check         | Miscellaneous Journals | Bank                    |
| Sales Tax            | Sales Tax Payable      | Other Current Liability |
| Shop Supplies        | Part Sale:             | Income                  |
| Sublet Asset         | Sublet Purchased       | Other Current Asset     |
| Sublet Cost          | Cost of Sublet Sold    | Cost of Goods Sold      |
| Sublet Sales         | Sublet Sales           | Income                  |

The column on the left labeled Default Account For is the account name in TRACS. The column in the middle labeled Account Name is the account name is in QuickBooks. The Column on the right labeled Account Type is the account type in QuickBooks.

NOTE: The TRACS import is designed to save time and the trouble from manually typing in data. Once your data is imported successfully you need to understand how to use QuickBooks to balance out your business. TRACS does not support working with QuickBooks. Importing your data into QuickBooks is only half of the process you must understand QuickBooks in order to balance out your business.

### Conclusion

The purpose of this document is to provide guidance on importing into QuickBooks successfully.

TRACS only supports importing your data into a new QuickBooks company. Although it is possible to import into an existing company, TRACS does not support this option.

#### Learning Objectives Recap

After completing this module, you are able to:

- □ Create a new QuickBooks company
- □ Configure a TRACS export directory
- □ Import TRACS into a new QuickBooks company
- □ Import TRACS into a existing QB company
- □ Understand the QuickBooks import

### **Exporting Data from TRACS into QuickBooks**

### Introduction

This module walks you through exporting data from Tracs and importing the data into QuickBooks.

#### Learning Objectives

After completing this module, you will be able to:

- □ Back Up Tracs and QuickBooks
- $\Box$  Create and export file
- □ Import the file into QuickBooks
- □ Understand when to call Support

### **Exporting Data From Tracs to QuickBooks**

**Note:** If there are any errors importing into QuickBooks, write down the error line and error message. Continue with the export by clicking OK. Repeat if necessary.

□ After a full import completes, call Tracs Support.

□ If the import will NOT continue, stop and call Support.

#### Step 1: Back Up Tracs and QuickBooks

**Note:** Once the company has been setup in QuickBooks, make sure to backup Tracs UandU QuickBooks. THIS MUST HAPPEN EVERY TIME PRIOR TO THE EXPORT/IMPORT PROCESS.

#### Step 2: Create The Export File

- 1. Minimize QuickBooks and open the main screen of Tracs.
- 2. From the toolbar, left-click on Activities.
- 3. Once the drop-down list appears, left-click on Accounting Export.
- 4. A window will appear and ask you if a backup has been performed. Left-click on Yes.
- 5. A window will appear that reads "Add time to file name." Left click on Yes.
- 6. A Save As window will appear.

**Note:** If need be, the directory can be changed at this point for this one instance. Otherwise, the directory is pre-assigned in Tracs.

7. Left-click Save.

8. The screen will disappear and the Accounting Export window will be in the background. The number of transactions processed will be noted on that box.

### Exporting Data from TRACS into QuickBooks, Continued

9. When finished processing, a window appears and displays the amount of transactions exported.

10. Click OK.

11. A message box appears that reads "Switch To Your Accounting Program."

**Note:** This box details the exact location of the file that should be imported. EXPORTING DATA FROM TRACS TO QUICKBOOKS Reference Guide

12. Left click on OK.

13. A message box appears that reads, "If you had errors, contact Tracs Support." Click OK.

14. This concludes all steps taken in Tracs to create the Export file. The file now exists in the specified location.

**Note:** If the customer cannot find the file, check the Export directory in Tracs. Usually this will be the location of the file unless the directory was changed at the "Save As" screen (see step #6 above).

#### Step 3: Import The Data Into QuickBooks

- 1. Minimize Tracs and open QuickBooks.
- 2. From the toolbar, left-click on File.

3. A drop-down list appears. Move your mouse over the field. For most versions, another list will display.

4. Left-click on Import.

**Note:** Newer versions will have another list that will populate off Import to display different types of import files. We import .IFF files.

5. Once you have click Import or Import File Type, another Import window will appear. This is the same as a "look in" window.

6. Find the corresponding export file and left-click once to highlight the file.

7. Left-click one time on Open.

**Note:** QuickBooks defaults its directory for imports to: C:\programfiles\intuit\quickbooks\*\*\*

### Exporting Data from TRACS into QuickBooks, Continued

8. Once you have clicked on Open, the file will begin importing and a progress bar will display. If no errors occur, QuickBooks displays a message box that reads, "Your data has been imported."

**Note:** If you encounter errors, write down the error message and the error line number. Left-click on OK and allow the import to continue. ALL TRANSACTIONS BEFORE THE ERROR ARE ALREADY APPLIED INSIDE OF QUICKBOOKS. Once the import finishes, QuickBooks displays a message box that reads, "Your data has been imported."

9. Stop and call Tracs.

**Note:** If a technician is NOT available and manual transactions need to be entered, restore the last QuickBooks backup. This will remove the imported transactions and clear the company back to its original form prior to the import. Employ any changes and backup QuickBooks again. Tracs will walk you through re-importing the file as well as any changes that need to be made to the imported file.

#### Conclusion

This module walked you exporting data from Tracs and importing the data into QuickBooks.

#### Learning Objectives Recap

After completing this module, you are able to:

- □ Back Up Tracs and QuickBooks
- □ Create and export file
- □ Import the file into QuickBooks
- □ Understand when to call Support

### **QuickBooks Troubleshooting Guide**

### Introduction

This module walks you through how to troubleshoot four common scenarios when importing data from Tracs to QuickBooks.

#### Learning Objectives

After completing this module, you will be able to troubleshoot the following four common scenarios:

- □ Transaction not in balance
- □ Unable to change the name type or add a duplicate name
- □ Tax field cannot be left blank
- □ Unable to change an account type

#### **Other Considerations**

There are other errors when importing to QuickBooks, but most of these errors have to be handled on a case-by-case basis. The four basic errors in this guide are the most common errors and take very little time to fix (unless you have to dial in to get the .IIF file).

1• Easiest method: Customer sends the .IIF file as an attachment on an email.

2• Next-best method: Customer copies and pastes the .IIF file to the FTP site: ftp://support:support@napacatalog.com

3• Least favorable method: Dial into the customer's site using PCAnywhere and extract the file to your hard drive.

### QuickBooks Troubleshooting Guide, Continued

### **Scenario 1: Transactions Not in Balance**

This scenario is often experienced in regards to Repair Orders (invoice). When the price of an item (parts, labor, sublet, or charge) carries a third decimal point, i.e. \$99.543, Tracs will round up or down depending on the value of the third decimal. In the example of \$99.543, Tracs displays the price as \$99.55. This sometimes causes a fault in the dollar totals that add up to make the total amount of the invoice.

#### Example Error Message

|   | Accounts    | Receiveb             |  |                           |         |                         |  |
|---|-------------|----------------------|--|---------------------------|---------|-------------------------|--|
| lavigators                                | \$ Go to    | GPet.                | Cold Transaction 🛅 Quick Report  |                           |         |                         |  |
| Company<br>Customers<br>Vendare           | Date:       | Number<br>Type       | Customer Itom Itom<br>Description  | Q1                        | Rate    | Ant Chrg<br>Itiled Date | Ant Paid<br>Due Date                     |
| Employees<br>Banking<br>Pusiness Services | 10/56/2003  | AMDX<br>AMDX         | GOODMAN, KELSEY  |                           |         |                         | 100.0                                    |
| Reports<br>Help & Support                 | 10/06/2003  | 1242                 | GOODEMMA, KELSEY   |                           |         |                         | - 147                                    |
| pen Windows                               | 30/06/2003  | 10948<br>3W<br>10957 | THEL VOID<br>GOODHANA, KELSEY  |                           |         | 214.99                  | 0./                                      |
| Dust of Accounts                          | COLUMN T    | ning                 |  |                           | 8       | 20.00                   | and the local data and the second second |
|   | 10/06/01 WA | ning                 | a not in balance. Make sure the amounts in the detail area on the form for t | the transaction equal the | anort a | 1000                    |  |

### QuickBooks Troubleshooting Guide, Continued

**Example Export File** 

**IPAYMETH** NAME PAYMETH Cash PAYMETH Check PAYMETH Credit Card IACCNT NAME DESC ACCNTTYPE ACCNT Accounts Receivable Accounts Receivable AR ACCNT Shop Supplies Shop Supplies INC ACCNT Sales Tax Payable Sales Tax Payable OCLIAE ACCNT Part Sales Part Sales INC ACCNT Inventory Inventory OCASSET ACCNT Cost of Parts Sold Cost of Parts Sold COGS ICUST NAME BADDR1 BADDR2 BADDR3 BADDR4 BADDR5 FAXNUM PHONE1 PHONE2 CONT1 CTYPE RESALENUM SALUTATION COMPANYNAME FIRSTNAME MIDINIT LASTNAME CUST THOMPSON AUTOSUPLY THOMPSON AUTOSUPLY THOMPSON AUTOSUPLY DATE ACCNTNAME AMOUNT ITRNS TRNSTYPE DOCNUM DATE ACCNTNAME AMOUNT ISPL TRNSTYPE DOCNUM IENDTRNS TRNS INVOICE 10/16/3 Accounts Receivable THOMPSON AUTOSUPLY 105.92 (Invoice Total Line) 10975 SPL INVOICE 10/16/3 Sales Tax Payable THOMPSON AUTOSUPLY -6.37-10975 "←" Indicates the (2) items SPL 10/16/3 Part Sales THOMPSON AUTOSUPLY -99.54 INVOICE 10975 that you add together to SPL INVOICE 10/16/3 Inventory THOMPSON AUTOSUPLY -54.75 10975 get the Invoice total. 10/16/3 Cost of Parts Sold THOMPSON AUTOSUPLY SPL INVOICE 54.75 10975 ENDTRNS

#### Solution

1. Direct the customer to pull up the invoice in Tracs and click on the Totals tab.

2. You will find the dollar totals for each of the items we import that makes up the total amount of the invoice.

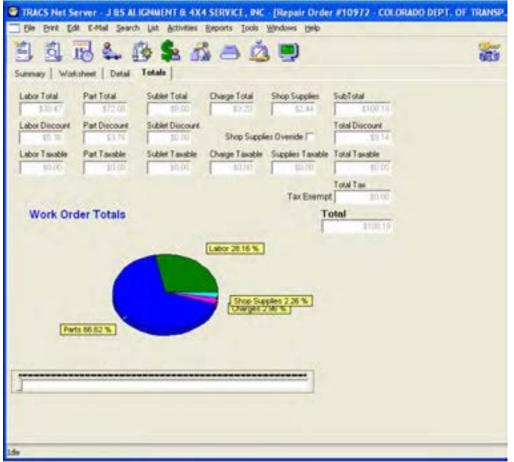
3. Open the file in EDIT PAD.

4. Find the error line with Edit Pad and copy that whole transaction to a new file within Edit Pad.

5. Make the necessary edits (ex: change the "-99.54" to -\$99.55).

6. Save the document as 10-13fix.iif.

7. Send the file back to the customer to import.



### Scenario 2: Unable to Change Name Type or Add Duplicate Name

This scenario happens when attempting to import a customer or AR (Accounts Receivable) invoice that has the same name as a vendor or AP (Accounts Payable) account. QuickBooks only has one name list for both vendors and customers. Sometimes you are unable to find the vendor because the shop may have previously written a check to this customer. Therefore, QuickBooks still views this account name as an AP account.

#### Example Error Messages

|  | Col management.  | N Reg Acore Roved Find :                | the second s | ADDRESS OF TAXABLE PARTY.  | invoke Cast Item 1   |
|--|--|---|--|--|--|
|  |  | Edit Transaction                        | REAL PROPERTY AND  | Co ta  | Lavigators   |
|  |  |   |  |  | Company  |
|  | 230  |   | Nation   | Data   | Customers  |
| blied Data   |  | Warning                                 | Type   | 10/16/2003   | Venders  |
| and the second se  |  | And the second second second second     | PHE  | Los Los Colos  | Employees  |
| plcate name.   | type of a name or add duplicate name   | Error on Line 13: You can't change      | AMEX   | 10/16/2003   | Banking  |
| and the second sec   | A COUNTRY OF A COU |   | PHT  | and a state of the   | Business Services  |
|  | Cancel   |   | 1242   | 10/16/2003   | Beports  |
| Contraction of Contra |  |   | PMI  | -  | Help & Support   |
|  |  | THELL                                   | 10948  | 10/16/2003   | and the second s |
| 214  |  | VOID:<br>GOODMAN, KELSEY                | 2W<br>10957  | 10/16/2003   | pen Windows  |
|  |  | accurate tables                         | IW   | 1001012000   | copurts Receivable   |
| 20   |  | AAA STUCO & PLASTER                     | 7427   | 10/16/2003   | Dat d Accounts   |
| the second se  |  | GENORIAL                                | 1.00002  | 809072578  |  |
|  |  | AAA STUCO & PLASTER                     | 7428   | 10/16/2003   |  |
| and the second second second   |  | 1990-1990-1990-1990-1990-1990-1990-1990 | GENORIA.   | 1.1.2  |  |
|  |  |   |  | 10/16/2003   |  |
|  |  |   | -  | -  |  |
|  |  |   | -  | -  |  |
|  |  |   | _  | -  |  |
|  |  |   | 1  |  |  |
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|  |  |   | _  | -  |  |
|  |  |   | -  | -  |  |
|  |  |   | -  | and the second s |  |
|  |  |   | 1.   | -  |  |
|  |  |   |  |  |  |
| Ending balance   |  | how open biglance                       | 2  | 1 line   |  |
| Ending bein  |  |   |  | Sort by Date   |  |

| vigators                      | \$ Gette   | Shet.           |   | _   | _    |            |        |
|-------------------------------|------------|-----------------|---|-----|------|------------|--------|
| Company                       | Date       | Nater           | Cutoner 3em   | Qhi | Fide | Aut Ovg    | Ant    |
| Vendors<br>Employees          | 10/14/2003 | 7/04            | SCORPAN, Warning  | 1   |      | Biled Date | Die    |
| lanking                       | 13/34/2003 | AMEX .          | Googenese, Dromanities 22: Carl record invalid transaction. |     |      |            |        |
| asiness Services<br>sports    | 13/34/2003 | 1242            | SOCCHWAL  |     |      |            |        |
| nip & Support                 | 10/14/2003 | 10940           | THEL  | _   |      | -          |        |
| Windows                       | 19/54/2005 | 2W<br>10957     | KOEDI<br>GOODPIAA, KELSEY                                   | -   |      | 214.99     | 10/16/ |
| ato Recentible<br>al Accounts | 13/36/2003 | DW.<br>7427     | AMA STUCO & PLASTER   |     |      | 30.00      |        |
|                               | 10/06/2003 | 00%5876<br>7428 | AAA STUCO & PLASTER   |     |      |            | 10060  |
|                               | 10/04/2000 | GENERIL         |   |     |      |            | 10046  |
|                               |            |                 |   | -   |      |            | -      |
|                               | -          |                 |   |     |      |            |        |
|                               | -          | -               |   |     |      |            |        |
|                               | -          |                 |   | -   | -    |            | -      |
|                               |            |                 |   |     |      |            |        |
|                               | -          |                 |   | _   | _    |            | -      |

#### Solution

1. Find the transaction with the error line in Edit Pad.

2. Copy & paste the whole transaction to a new document and repeat for other duplicate name errors. Most invoices have an associated payment – it's suggested that you ask the customer if the invoice has a payment.

**Note:** Some transactions will have up to 20+ lines and may contain many error lines, but they still belong to the same transaction.

3. The last error to note is "Error on line 22: Cant record invalid transaction." This will be the last line of that transaction. Find the name of the account in the Transaction. Review the following example:

| PAYME  |                         |          |                  |                 |   |         |
|--------|-------------------------|----------|------------------|-----------------|---|---------|
| PAYME  | TH Check                |          |                  |                 |   |         |
| PAYME  | TH Credit (             | Card     |                  |                 |   |         |
| IACCN' | TNAME DESC              | ACCNT    | TYPE             |                 |   |         |
|        | Accounts Receiv         |          | Accounts Receiv  | able AR         |   |         |
| ACCNT  | Shop Supplies           | Shop St  |                  |                 |   |         |
| ACCNT  | Sales Tax Payal         | ble      | Sales Tax Payat  | ole OCLI        | AB                                      |         |
| ACCNT  | Labor Sales             |          |                  |                 |   |         |
| ACCNT  | Part Sales              | Part Sal |                  |                 |   |         |
| ACCNT  | Inventory               | Inventor | y OCASS          | BET             |   |         |
| ACCNT  | Cost of Parts So        | ld       | Cost of Parts So | ld COG          | S                                       |         |
| ICUST  | NAME BADDE              |          | BADDR2           | BADDR3          | BADDR4 BADDR5                           |         |
|        | PHONE1                  | PHONE    | 2 FAXNU          | M CON           | T1 CTYPE RESALENUM SAL                  | UTATION |
|        | COMPANYNAM              | EFIRSTN  | AME MIDINI       | T LASTNAME      |   |         |
| CUST   | COLORADO DE             | PT, OF T | RANSPORTATIO     | ON COLO         | RADO DEPT OF TRANSPORTA                 | TION    |
|        | 2025 COMMER             | CIAL BLV | D COLO S         | SPGS, CO, 8090  | 6 5761868                               |         |
|        | JERRY - 332-38          | 74 CELL  | Fleet 98-0250    | 65              | COLORADO DEPT, OF                       |         |
| TRANS  | PORTATION               |          |                  |                 |   |         |
| ITRNS  | TRNSTYPE                | DATE     | ACCNT NAME       | AMOUNT          | DOCNUM                                  |         |
| ISPL   | TRNSTYPE                | DATE     | ACCNT NAME       | AMOUNT          | DOCNUM                                  |         |
| ENDTR  | RNS                     |          |                  |                 |   |         |
| TRNS   | INVOICE<br>108.19 10972 | 10/16/3  | Accounts Receiv  | vable COLC      | RADO DEPT. OF TRANSPORTA                | TION    |
| SPL    | INVOICE<br>10972        | 10/16/3  | Shop Supplies    | COLORADO        | EPT OF TRANSPORTATION                   | -2.44   |
| SPL    | INVOICE                 | 10/16/3  | Labor Sales      | COLORADO D      | EPT OF TRANSPORTATION                   | -30,47  |
|        | 10972                   |          |                  | General and a   | and the state of the state of the state |         |
| SPL    | INVOICE                 | 10/16/3  | Part Sales       | COLORADO        | EPT OF TRANSPORTATION                   | -75.28  |
|        | 10972                   | 1911010  | 1 mil Conce      | SAFALA PROPERTY | in the interest structures              | 10120   |
| SPL    | INVOICE                 | 10/16/3  | Inventory        | COL             | ORADO DEPT. OF TRANSPORTA               | TION    |
| ~ ~    | -48.72 10972            | 1011010  | in tomory        |                 |   |         |
| SPL    | INVOICE                 | 10/16/3  | Cost of Parts So | d cou           | RADO DEPT. OF TRANSPORTA                | TION    |
|        | 48.72 10972             | 10,1000  | acor or r and do |                 | and the set of the set of the           |         |
| ENDTR  | (1-7) E (1-7) E         |          |                  |                 |   |         |
|        |                         |          |                  |                 |   |         |

4. Ask the contact to locate the vendor in QuickBooks and adjust the name slightly. By modifying the name, we change the AP account name in QuickBooks thereby allowing the transaction to create a new AR account name. You can save this as 10-16fix.iif and send to the customer to import. Make sure the customer backs up QuickBooks in case an error is created.

5. If the customer is unable to find the AP account name, then edit the transaction account name in Edit Pad and save changes. Have the contact to make the same changes to the Name in Tracs exactly like your changes to the export file. Review the following example:

#### COLORADO DEPT. OF TRANSPORTATION changes to COLORADO DEPARTMENT OF TRANSPORTATION

**Note:** It is recommended to have the customer change QuickBooks instead of **making changes to Tracs and the import.** 

### Scenario 3: Tax Field Cannot Be Left Blank

**Note:** In Scenarios 3 & 4, these errors only pertain to sales tax, which should only happen the first time the customer imports. However, for clients that use sales tax reports, the Sales Tax Feature may be turned ON in QuickBooks. Any time you experience a sales tax error, this should be the first place you check.

The Tax Field Cannot Be Left Blank error occurs when the customer has the Sales Tax Feature turned ON in QuickBooks. This causes QuickBooks to try and add sales tax to the invoice that already has Sales Tax applied.

#### Solution

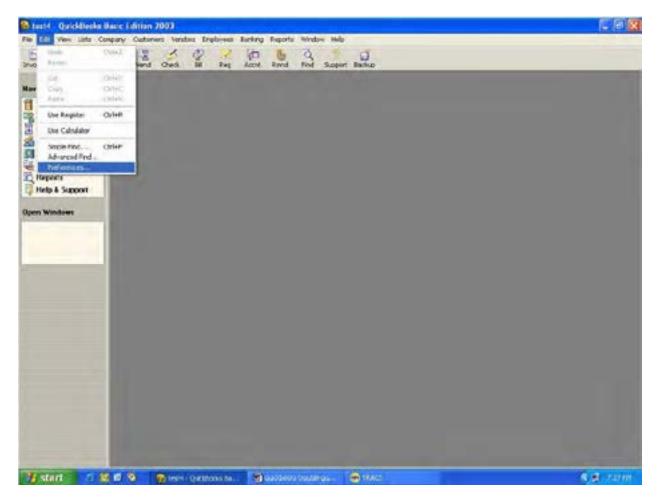
- 1. Restore the back up of QuickBooks first.
- 2. Instruct the customer to turn OFF the Sales Tax Feature in QuickBooks.
- 3. Re-import the same file.

4. This will usually fix the problem unless the customer did not rename the "SALES TAX" account assigned by QuickBooks when the company was created (this will be addressed in Scenario 4 on p.12).

# Note: If the client is unsure of how to turn off the Sales Tax Feature in QuickBooks, walk s/he through the following steps:

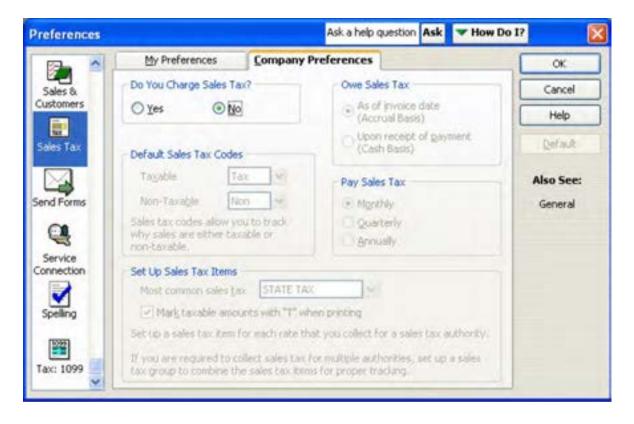
1. Open QuickBooks and left-click one time on Edit from the toolbar.

2. Left-click on Preferences.



3. Scroll the slide bar on the left side of the Preferences window down towards the bottom until you are able to see the icon for Sales Tax.

4. Left-click one time on Sales Tax, and then left-click on the Company Preferences tab.



5. Left-click one time in the radio button for No in the Do you Charge Sales Tax? box.

Note: The customer can turn this option back ON after the import to run Sales Tax reports in QuickBooks, but must make sure it is <u>OFF</u> before importing.

### Scenario 4: Unable to Change an Account Type

This scenario occurs when importing a transaction in which the account name of the transaction type shares the name of another account type. For example, Sales Tax Payable in Tracs is considered Other Current Liability Account. Sometimes a user may rename the account type to some other account type. This is also true of shop supplies; most accountants view shop supplies as an expense account or a cost of doing business. However, because Tracs charges the customer a percentage of labor or total invoice, this is considered an income account.

#### Example Error Messages



Followed by



**Note:** This means any transactions after this point will not import, BUT all transactions before are currently added.

#### Solution

1. Restore the back up.

2. Normally with Sales Tax Payable accounts we will rename the account to Sales Tax Payable Old. This is done in case the customer already has information in this account that they do not want to lose.

3. The same holds true for shop supplies, but shop supplies is a necessity for shops because of items they purchase for cleaning and upkeep of the grounds which are not chargeable through Tracs.

### Conclusion

This module walks you through how to troubleshoot four common scenarios when importing data from Tracs to QuickBooks.

#### Learning Objectives Recap

After completing this module, you will be able to troubleshoot the following four common scenarios:

- □ Transaction not in balance
- $\hfill\square$  Unable to change the name type or add a duplicate name
- □ Tax field cannot be left blank
- □ Unable to change account type

### **Chapter 9: Reports**

### Overview

Types of<br/>ReportsThis chapter covers the following types of reports that can be generated using<br/>TRACS:

- Printed Reports
- Lists
- Financial Profiles
- Work Flow Sheets

### **Generating Reports to Print**

**Report Types** Now that the work order has been created, the vehicle serviced and the technician's information documented, you might need to print some reports. The report categories that are available for your use include the following:

- Accounts Receivable
- Customer
- Item + Inventory
- Purchasing
- Recommended Service
- Sales + Productivity
- Service History
- Work Order

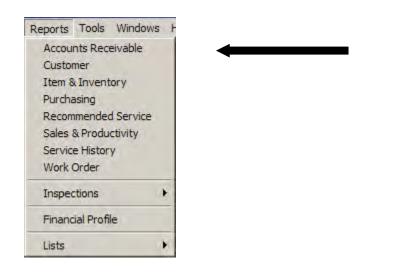
#### <u>REPORT EXAMPLES ARE LISTED PRIOR TO THE INDEX IN THE</u> <u>REPORTS EXAMPLES AREA.</u>

AccountsAccounts Receivable reports include the following:ReceivableTransaction SummaryTransaction Detail

- Customer Summary
- Aged Accounts
- Statements
- Payment Notes

How To To print an Accounts Receivable report, perform the following steps

| Step | Action  |
|------|---|
| 1    | Click <b>Report</b> on the TRACS main screen menu bar, and the report |
|      | categories display.   |



| Step | Action   |
|------|--|
| 2    | Click Accounts Receivable, and the Accounts Receivable |
|      | <b>Reports</b> form displays.                          |

| Select a Report to Print       | Select Transaction Types       | Xe         |
|--------------------------------|--------------------------------|------------|
| C Transaction Summary          | C Al Tomaction                 | in all the |
| C Transaction Detail           | C Received Relation            | 10000      |
| C Customer Summary             | C serveration                  |            |
| C Aged Accounts                | Dates                          |            |
| 🖱 Statements                   | Regn 11/1/20                   |            |
| Select a Statement Type        | Erst 11/17/30 E                |            |
| C lance                        |                                |            |
| C Parl Due                     |                                |            |
| <b>C</b> LetOnt                |                                |            |
| Statement Format Options       |                                |            |
| Rinoperpoer/opep//             |                                | 2          |
| Formel customer address to the | 10 erweisper Quatomer Number 📰 |            |
| 🗖 Show Asha on Dietenetr       |                                |            |

| 3 | Click to select a report from the <b>Select a Report to Print</b> box.    |
|---|---|
| 4 | Click appropriate options from the following boxes if available:          |
|   | <ul> <li>Select Transaction Types</li> <li>Dates</li> </ul>               |
|   | Select a Statement Type   |
|   | Statement Format Options  |
| 5 | Click the <b>Preview</b> button to display the report on your monitor if  |
|   | desired.  |
| 6 | Click the <b>Print</b> button to send the report to your default printer. |
| 7 | Click the <b>Done</b> button when you have completed printing your        |
|   | reports, and the TRACS main screen displays.                              |

| Customer<br>Reports | Customer reports include the following: |
|---------------------|---|
|                     | Customer List Report                    |

- Customer Vehicle List Report
- Customer Work Order History Report
- Customer Work Order History Summary Report
- Customer Partial AR History

How To

To print **Customer** reports, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click <b>Reports</b> on the TRACS main screen menu bar, and the |
|      | report categories display.                                      |

| Reports | Tools     | Windows   | F |
|---------|-----------|-----------|---|
| Accou   | nts Rec   | eivable   |   |
| Custor  | ner       |           |   |
| Item 8  | Invent    | tory      |   |
| Purcha  | asing     |           |   |
| Recom   | mende     | d Service |   |
| Sales   | & Produ   | ctivity   |   |
| Servic  | e Histor  | у         |   |
| Work    | Order     |           |   |
| Inspec  | tions     | 1 1       | 1 |
| Financ  | ial Profi | le        |   |
| Lists   |           |           |   |

2 Click **Customer**, and the **Find Customer** form displays.

| Customer Query By | Example      | and a second |                | And in case of the local division of the loc | 1         |
|-------------------|--------------|--|----------------|--|-----------|
| Customer          | Vehicle Add  | tional   |                |  | X Done    |
| Last Name         | First Name   | 1/1  | Customer       | Type   | Q End     |
|                   |              |  |                | -  | Cear      |
| Company           |              | Day Number   | Evening Number | FAX.Number   |           |
| Contact Name      | Contact N    | unber Bill To  | lis            | Title  | Next Page |
| Consect reame     | Construction | unce ou to   |                |  | ? Heb     |
| E Mail Address    | - 12         |  |                | Sec.   |           |
|                   |              | -  |                |  |           |
| Date of           | Address      |  | ling Address   |  |           |
| Creation          | Steet        |  | hoel           |  |           |
| Last Service      | Additional   |  | ddtional       | _  |           |
| Last Reminder     | 00           |  | 2ey            | _  |           |
| Last Thank You    | State Zp Cod | -  | itate Zip Cox  | 3e   |           |
| -                 | 1            |  | 1              |  |           |
| Votes             |              |  |                |  |           |
|                   |              |  |                | ~ ~  |           |
| -                 |              |  |                |  |           |
|                   |              |  |                |  |           |
|                   |              |  |                |  |           |

| Step | Action  |
|------|---|
| 3    | Click the appropriate field, and type your desired search criteria.   |
| 4    | Click the <b>Find</b> button, and a <b>Find Customer Result</b> form displays<br>any item(s) that match your search criteria. The <b>Customer</b><br><b>Reports</b> form displays over your found items.<br><i>Note</i> : If no items were found, you have no items to print. You<br>can try searching on different criteria. |

#### How To (continued)

| Customer Reports  |  |  |
|---|--|--|
| Select a Report Customer List Report Customer Vehicle List Report Customer Work Order History Report Customer Work Order History Summary Report Customer Partial AR History | Starting Date<br>5/9/2008<br>Ending Date<br>5/9/2008 | <u>©one</u><br>6∂ Preview<br><u></u> Print |

| Step | Action  |
|------|---|
| 5    | Click to select a report from the Select a Report to Print.                     |
| 6    | Click in <b>Starting Date</b> field or <b>Ending Date</b> field to specify date |
|      | parameters.   |
|      | Note: Not all customer report types require date parameters.                    |
|      | The boxes only appear when those types that do are selected.                    |
| 7    | Click the <b>Preview</b> button to display the report on your monitor, if       |
|      | desired.  |
| 8    | Click the <b>Print</b> button to send the report to your default printer.       |
| 9    | Click the <b>Done</b> button when you have completed printing your              |
|      | reports, and the TRACS main screen displays.                                    |

Item +Item + Inventory reports allow you to search for an item or group of itemsInventoryby specific criteria. You can also specify the starting and ending date for yourReportsprinted report.

**Item + Inventory** reports include the following:

- Inventory Movement
- Item Quantity
- Item Sales
- Item Valuation
- Part Value by Vendor & Mfg
- On Hand
- On Hand (sorted by Description)
- Physical Inventory
- Stocked Item
- Stocking Level By Quarter
- Price Sheet
- Item History
- Part Manufacturer History
- Item Barcodes

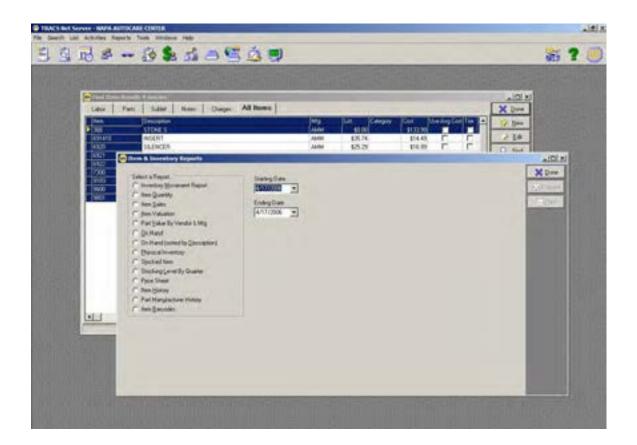
| How To To print an Item + Inventory report, perform the following ste | How To | orm the following steps |
|---|--------|-------------------------|
|---|--------|-------------------------|

| Step    |                 | Action  |
|---------|-----------------|---|
| 1       | Click Rep       | orts on the TRACS main screen menu bar, and the |
|         |                 | gories display.                                 |
|         |                 |   |
| Reports | Tools Window    | NS F  |
| Accou   | nts Receivable  |   |
| Custo   | mer             |   |
| Item 8  | & Inventory     |   |
| Purcha  | asing           |   |
| Recon   | nmended Service |   |
| Sales   | & Productivity  |   |
| Servic  | e History       |   |
| Work    | Order           |   |
| Inspec  | ctions          | •   |
| Financ  | tial Profile    |   |
| Lists   |                 | *   |

| Find Item                             |  | and the second se |        |
|---------------------------------------|--|---|--------|
| Type Item                             |  | Sub-liem  | X Done |
|                                       |  | Use Sub-Rem Feature   | #End   |
| Description                           |  |   | Clear  |
| Manufactures                          | Vendor   | Understan Hig   | ? Help |
| Lategory                              | Rate   | God Life  |        |
| Cost List                             | Location 2                                     |   |        |
| F Lock Cost F Loci<br>Unit of Messawe | k List IP Use Average Cost<br>Per Car Quantity | Sales<br>Use Sales Feature<br>Gaunto  |        |
| Minimum Qty                           | Maximum Qty                                    | 4/17/2006   |        |
| Asset Account Cost Acc                | ount Sales Account                             | Questies  |        |
| Active IT Stocked                     | P Lock Description                             | Use Quantity Feature  |        |
| IF Calc Supplies                      | P Never Tax                                    |   |        |
| Tier                                  |  |   |        |
| Ste                                   |  | #Part #   |        |

| Step | Action   |
|------|--|
| 3    | Click the appropriate field, and type your desired search criteria.  |
| 4    | Click the <b>Find</b> button, and a <b>Find Item Result</b> form displays any<br>item(s) that match your search criteria. The <b>Item + Inventory</b><br><b>Reports</b> form displays over your found items. |
|      | <i>Note</i> : If no items were found, you have no items to print. You can try searching on different criteria.   |

How To (continued)



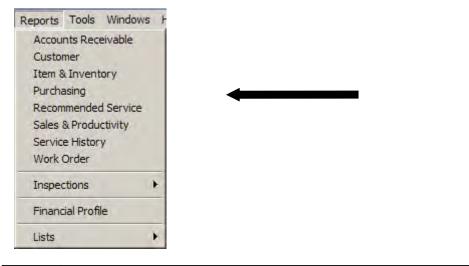
| Step | Action  |  |
|------|---|--|
| 5    | Click to select a report from the <b>Select a Report</b> box.             |  |
| 6    | Click in Starting Date field or Ending Date field to specify date         |  |
|      | parameters.   |  |
|      | Note: Not all Report types require date parameters. The                   |  |
|      | boxes only appear when those types that do are selected.                  |  |
| 7    | Click the <b>Preview</b> button to display the report on your monitor, if |  |
|      | desired.  |  |
| 8    | Click the <b>Print</b> button to send the report to your default printer. |  |
| 9    | Click the <b>Done</b> button when you have completed printing your        |  |
|      | reports, and the Find Item Result form displays.                          |  |
| 10   | Click the <b>Done</b> button, and the TRACS main screen displays.         |  |

| Purchasing | <b>Purchasing</b> reports include the following: |  |
|------------|--|--|
| Reports    |  |  |
|            | Onen PO List                                     |  |

- Open PO List
- New PO List
- Quantity on Order Report
- WIP Locator
- Vendor Received PO List

**How To** To print **Purchasing** reports, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click <b>Reports</b> on the TRACS main screen menu bar, and the |
|      | report categories display.                                      |



| 2 | Click <b>Purchasing</b> , and the <b>Purchasing Reports</b> form displays. |
|---|--|
|---|--|

| urchasing Reports           |        |
|-----------------------------|--------|
| Select a Report to Print    | X Do   |
| C Open PO List              | 6ð Pre |
| C New PO List               | Er Br  |
| O Quantitiy On Order Report |        |
| C <u>W</u> IP Locator       |        |
| C Vendor Received PO List   |        |

| Step | Action  |
|------|---|
| 3    | Click to select a report from the Select a Report to Print.                     |
| 4    | Click in <b>Starting Date</b> field or <b>Ending Date</b> field to specify date |
|      | parameters.   |
|      | Note: Not all Report types require date parameters. The                         |
|      | boxes only appear when those types that do are selected.                        |
| 5    | Click the <b>Preview</b> button to display the report on your monitor, if       |
|      | desired.  |
| 6    | Click the <b>Print</b> button to send the report to your default printer.       |
| 7    | Click the <b>Done</b> button when you have completed printing your              |
|      | reports, and the TRACS main screen displays.                                    |

**Recommended Recommended Service** reports allow you to: Service Reports

- Generate a list of vehicles for which you have recommended services for a particular category, item, or date range
- Generate a report summarizing the recommended service for each vehicle
- Print a copy of the report, email a copy to the customer, or export a copy to a text file

The report combines all services due by customer, and displays:

- Mileage Due / Date Due
- Customer phone numbers
- Report also includes notes for the Recommended Service

**How To** To generate **Recommended Service** reports, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click <b>Reports</b> on the TRACS main screen menu bar, and the |
|      | report categories display.                                      |

| Reports | Tools      | Windows   | S |
|---------|------------|-----------|---|
| Accou   | ints Rec   | eivable   |   |
| Custo   | mer        |           |   |
| Item 8  | & Invent   | tory      |   |
| Purch   | asing      |           |   |
| Recon   | nmende     | d Service |   |
| Sales   | & Produ    | ictivity  |   |
| Servio  | e Histor   | y         |   |
| Work    | Order      |           |   |
| Inspe   | ctions     |           | • |
| Finan   | cial Profi | ile       |   |
| Lists   |            |           | + |

| 2 | Click Recommended Service, and the Select Recommended |
|---|---|
|   | Services form displays.                               |

| 3 | Enter your search criteria for recommended services. For   |
|---|--|
|   | Category and Item, either choose from the drop down list, or   |
|   | check the box labeled <b>Any</b> . Choose a date range, with the starting  |
|   | date at <b>Begin</b> and the ending date at <b>End</b> . You also have the choice of combining the list of services by <b>Customer and Vehicle</b> |
|   | choice of combining the list of services by <b>Customer and Vehicle</b>  |
|   | or by <b>Category and Item</b> . Choose one of these as well.  |
| 4 | Click the <b>Find</b> button, and a list of vehicles appears.  |

| Calegory 12 Any              |          | 6epi<br>(4/3/20 | Exd<br>09 💽 (97/2008 💌         | e<br>C  | ort Options<br>By Customer /<br>By Category a<br>Part Note |   |                               |                                | × Dove<br>> Edi<br>Q. End<br>6:3 Preview |
|------------------------------|----------|-----------------|--------------------------------|---|--|---|-------------------------------|--------------------------------|--|
| Selected Recommended Service | Day #    | DurDate         | Veticie                        | Floret No.  | Iteri  | Description   | Date Dandere                  | Misson Deaders Misson Date C A | - Pint                                   |
| Anderson, Arma               | 555-1234 | 5/5/2008        | 1999 Dudge Truck Ran 2500 3/4  | a subscription of the second se | 90K  | 90 DOD MILE SERVICE   | CARL CONTRACTOR OF THE OWNER. | 0                              |  |
| Anderson, Anna               | 555-3234 | 7/25/2008       | 1999 Dudge Truck Ran 2500 3/4  |   | ACS7   | the second se | F 7/26/2008                   | 0                              | > Expo                                   |
| Anderson, Arma               | 955-3234 | 5/30/2008       | 1999 Dodge Truck Ram 2500 3/4  |   | AC\$2  | A/C SERVICE - CHEO  | F 5/30/2008                   | Ø                              | ET E MA                                  |
| Anderson, Area               | 555-3234 | 4/15/2008       | 1999 Dodge Truck Ram 2500 3/4  |   | ATS  | AUTOMATIC TRANSM  | IS 4/15/2008                  | 0                              | 1 × 10*                                  |
| Anderson, Anna               | 555-3234 | 5/9/2000        | 1999 Dudge Truck Flam 2500 3/4 | 6   | CORE   | Core Charge   | 5/5/2008                      | 0                              |  |
| Bold, Ben                    | 595-3253 | 5/5/2008        | 1993 GMC Truck Jenny-S15 2WD   | - i   | 30K  | 30,000 MILE SERVICE   | 5/9/2008                      |                                |  |
| Bold Ben                     | 555-3253 | 5/5/2008        | 1994 BMW 5304 3 D L 2997 CC V  | 1.0   | 30K  | 30,000 MILE SERVICE   | 5/9/2008                      |                                |  |
|                              |          |                 |                                |   |  |   |                               |                                |  |

| 4 | Select any of the vehicles off of the list and click Edit to examine |
|---|--|
|   | the recommended service information.                                 |

| Recommended                   | Service   | -                         | -                               |   |                   |
|-------------------------------|---|---------------------------|---------------------------------|---|-------------------|
| Customer                      |   |                           |                                 |   | J Save            |
| LUTTRELL, JON                 |   |                           | · 7                             |   |                   |
| /ehicle                       |   |                           |                                 |   | X Cancel          |
| 1996 Creveblet Lu             | osina 1890) 3 Turei Vi  | (                         | 10                              |   | The second second |
| Odometer                      |   |                           |                                 |   |                   |
| Fist Mileage<br>204000        | Fast Date<br>6/3/2003   | Current Mileage<br>240000 | Current Date<br>7/26/2005       | Average Miles/Day<br>45.9   |                   |
| Deadlines                     |   |                           |                                 |   |                   |
| Mileage Date<br>4/13/2006     | Next Deadine<br>4/13/2006   |                           |                                 |   |                   |
| Service                       | 677.  |                           | Description                     |   |                   |
| Item Type                     | € &wA   | Hig                       | A DECEMBER AND                  | 4115 MARATE   |                   |
| and the second                | - laws  | 1                         | FOUR WHEEL                      | ALIANMENT   |                   |
| Note                          |   |                           |                                 |   |                   |
|                               |   |                           |                                 |   |                   |
|                               |   |                           |                                 |   |                   |
| 2012200000                    |   |                           | the second second               | 200   |                   |
| Deadline to next p<br>Mileage | Day   | Hepeated (cyclic)         | services and increm<br>s Months |   |                   |
| 252000 OR                     | the second se | P Repeat                  | 12000                           | and the second se |                   |
| 535000 EH                     | 3/0/2000 *  | LA PLABAR                 | 12000                           | 0R 360  |                   |

| 5 | You may edit any of the fields that are not grayed out. Click Save        |
|---|---|
|   | to save any changes and return to the vehicle list.                       |
| 6 | From the Select Recommended Services window, click Preview                |
|   | to display the report for the selected vehicle on your screen.            |
| 7 | Click <b>Print</b> to send the report to your default printer.            |
| 8 | Click <b>Export</b> to export the report to a text file. After choosing a |
|   | file location, click Save.  |
| 9 | Click <b>Email</b> to send an email of the report to the customer whose   |
|   | vehicle is selected.  |
|   | Note: The customer must have an email address listed.                     |

| Sales +<br>Productivity | <b>Sales + Productivity</b> reports include the following:        |
|-------------------------|---|
| Reports                 | <ul><li>Sales Analysis</li><li>Sales Analysis with Tire</li></ul> |
|                         | Sales Register  |
|                         | Sales Register (summary-only)                                     |

- Sales By Ad Source
- Sales by Category
- Sales by Tax Class
- Server Writer Productivity
- Technician Productivity
- Override
- Invoice Averages Report
- Sales By Customer

**How To** To print **Sales + Productivity** reports, perform the following steps:

| Step | Action   |
|------|--|
| 1    | Click <b>Reports</b> on the <b>TRACS</b> main screen menu bar, and the |
|      | report categories display.   |

| Reports | Tools     | Windows   | + |
|---------|-----------|-----------|---|
| Accou   | nts Rec   | eivable   |   |
| Custor  | mer       |           |   |
| Item 8  | Invent    | tory      |   |
| Purcha  | asing     |           |   |
| Recom   | mende     | d Service |   |
| Sales   | & Produ   | ctivity   |   |
| Servic  | e Histor  | у         |   |
| Work    | Order     |           |   |
| Inspec  | tions     |           | • |
| Financ  | ial Profi | le        |   |
| Lists   |           |           | + |

| 2 | Click Sales + Productivity, and the Sales and Productivity |
|---|--|
|   | Report form displays.                                      |

| Select a Report to Print              | Dates            | XD        |
|---------------------------------------|------------------|-----------|
| Sales Analysis                        | IT 10 10000      | 68 Pre    |
| C Sales Analysis with Tire            | Begin 5/9/2008 💌 |           |
| Sales Register                        | End 5/9/2008     | <u></u> E |
| C Sales Register (summary-only)       |                  |           |
| C Sales By Ad Source                  |                  |           |
| C Sales By Category                   |                  |           |
| 🔿 Sales By Tax Class                  |                  |           |
| C Server Writer Productivity          |                  |           |
| C Technician Productivity (Invoiced)  |                  |           |
| C Technician Productivity (Completed) |                  |           |
| C Override                            |                  |           |
| C Invoice Averages Report             |                  |           |
| C Sales By Customer                   |                  |           |
|                                       |                  |           |

| Step | Action   |
|------|--|
| 3    | Click to select your desired report in the <b>Select a Report to Print</b>     |
|      | box.   |
| 4    | Click the <b>Begin</b> and <b>End</b> fields to select the dates for which the |
|      | report should print.   |
|      | All sales reports require date parameters.                                     |
|      |  |
|      | If you are creating a Sales by Customer report, you must also                  |
|      | enter a number for Minimum Sales Amount (as seen in the                        |
|      | screenshot below). This report automatically ranks your best                   |
|      | customers with the highest sales.  |
| 5    | Click the <b>Preview</b> button to display the report on your monitor, if      |
|      | desired.   |
| 6    | Click the <b>Print</b> button to send the report to your default printer.      |
| 7    | Click the <b>Done</b> button when you have completed printing your             |
|      | reports, and the TRACS main screen displays.                                   |

#### How To (continued)

| Select a Report to Print              | Dates                   | X D    |
|---------------------------------------|-------------------------|--------|
| 🗢 Sales Analysis                      |                         | 6d Pre |
| C Sales Analysis with Tire            | Begin 5/9/2008 💌        |        |
| C Sales Register                      | End 5/9/2008            |        |
| Sales Register (summary-only)         | End 5/3/2008            |        |
| C Sales By Ad Source                  |                         |        |
| C Sales By Category                   | Sales By Customer       |        |
| 🔿 Sales By Tax Class                  | Minimum Sales Amount    |        |
| C Server Writer Productivity          | 0                       |        |
| C Technician Productivity (Invoiced)  | Whole dollar amount, no |        |
| C Technician Productivity (Completed) | wildcard (example: 500) |        |
| C Override                            |                         |        |
| C Invoice Averages Report             |                         |        |
| Sales By Customer                     |                         |        |
|                                       |                         |        |

**Service History** The following are types of **Service History** reports: **Reports** 

- Consolidated Report for All Invoices
- Detailed Report of Selected Work Orders
- Detailed Report of All Work Orders
- Summary Report

Service history reports include fleet number, driver, tag, and VIN, in order to distinguish between vehicles of the same make/model/year from a single customer.

*Note*: You must have a vehicle highlighted in an active work order or on the **Selected Vehicle** form before you can access a **Service History** report.

**How To** To print a **Service History** report, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click <b>Reports</b> on the TRACS main screen menu bar, and the |
|      | Reports pull-down menu displays.                                |

| Reports | Tools     | Windows   |
|---------|-----------|-----------|
| Account | nts Rec   | eivable   |
| Custor  | mer       |           |
| Item 8  | Invent    | tory      |
| Purcha  | asing     |           |
| Recom   | mende     | d Service |
| Sales   | & Produ   | ctivity   |
| Servio  | e Histor  | у 🗸       |
| Work    | Order     |           |
| Inspec  | tions     |           |
| Financ  | ial Profi | le        |
| Lists   |           |           |

| 2 | Click to select <b>Service History</b> from the <b>Reports</b> pull-down menu, |
|---|--|
|   | and the Vehicle History Search window displays.                                |

| Step | Action  |
|------|---|
| 3    | Search for specific criteria as needed.                                 |
| 4    | Click the <b>Find</b> button, and a list of available reports displays. |

| Vehicle History Search   |              | ×                              |
|--|--------------|--------------------------------|
| Search Repair Orders U<br>C All listed fields<br>C Selected fields | sing         | <u>X</u> Done<br><u>X</u> Find |
| Search for   | Invoice Date | Clear                          |
| R.O. Reference   | R.O. Note    | 1                              |
| Item   | Item Type    | 1                              |
| Category   | Manufacturer | 1                              |
| Description  | Item Note    |                                |
|  |              |                                |

| Step | Action  |
|------|---|
| 5    | Click to select a report from the available report options.             |
| 6    | Click to place a check mark in the Print on plain paper (no pre-        |
|      | printed letterhead) field if desired.                                   |
| 7    | Click the <b>Preview</b> button to view the report before printing if   |
|      | desired.  |
| 8    | Click the <b>Print</b> button, and the report is sent to your printer.  |
| 9    | Click the <b>Done</b> button when you are finished printing the report. |



Work Order Work Order reports include the following: Reports

- Warranty / Comeback Report
- Completed Work Order Report
- Canceled Work Order Report
- Open Repair Orders by Service Writer
- Open Estimates by Service Writer
- All Your Work Orders by Service Writer
- Work in Progress Report

#### **How To** To print **Work Order** reports, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click <b>Reports</b> on the TRACS main screen menu bar, and the |
|      | report categories display.                                      |

| Reports | Tools     | Windows | F |
|---------|-----------|---------|---|
| Accou   | nts Reo   | eivable |   |
| Custo   | mer       |         |   |
| Item 8  | Invent    | ory     |   |
| Purcha  | asing     |         |   |
| Recon   | mende     | Service |   |
| Sales   | & Produ   | ctivity |   |
| Servic  | e Histor  | у       |   |
| Work    | Order     |         |   |
| Inspec  | ctions    |         | • |
| Financ  | ial Profi | le      |   |
| Lists   |           |         |   |

#### 2 Click **Work Order**, and the **Work Order Reports** form displays.

### How To (continued)

| Select a Report     Starting Date       Warranty / Comeback Report     5/9/2008       Completed Work Order Report     Ending Date | 68 Pre <u>v</u> ie |
|---|--------------------|
| Warranty / Comeback Report     S/9/2008     Source Ending Date  | 68 Previe          |
| L'hong Date   |                    |
|   | - Print            |
| Canceled Work Order Report 5/9/2008 👻   |                    |
| Dpen Repair Orders by Service Writer  |                    |
| © Open Estimates by Service Writer  |                    |
| All Open Work Orders by Service Writer  |                    |
| Work In Progress Report   |                    |

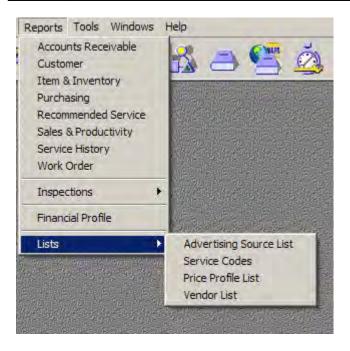
| Step | Action  |
|------|---|
| 3    | Click to select a report from the <b>Select a Report to Print</b> .             |
| 4    | Click in <b>Starting Date</b> field or <b>Ending Date</b> field to specify date |
|      | parameters.   |
|      | Note: Not all work order reports require date parameters.                       |
| 5    | Click the <b>Preview</b> button to display the report on your monitor, if       |
|      | desired.  |
| 6    | Click the <b>Print</b> button to send the report to your default printer.       |
| 7    | Click the <b>Done</b> button when you have completed printing your              |
|      | reports, and the TRACS main screen displays.                                    |

### Lists

| Lists | Lists are available for the following:  |
|-------|---|
|       | <ul> <li>Advertising Source List</li> <li>Service Codes</li> <li>Price Profile List</li> <li>Vendor List</li> </ul> |

**How To** To generate and print a **List**, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Choose Lists from the Reports menu on the TRACS menu bar. |



2 Choose one of the types of lists from the sub-menu.

## Lists, Continued

#### How To (continued)

| Step | Action   |
|------|--|
| 3    | A preview window of the specified report will appear (a <b>Price</b> |
|      | Profile List report is shown below). Use Next Page to view all       |
|      | the pages of the report.   |
| 4    | Click <b>Print</b> to send the report to your default printer.       |

| EntPart   | (Pletyme)  | Seet Page | Last Page | FitHought | Fi Widh   | 1007   | Dote |                |        |
|-----------|------------|-----------|-----------|-----------|-----------|--------|------|----------------|--------|
| 4/17/2006 | 4 52:40 PM |           |           | Price Pro | file List |        |      | P              | age 1  |
| AARP      |            |           | Acti      | Υ         |           |        |      |                |        |
| Item      | Mg         | Vendor    | Tec       | h Catego  | ary Type  | Basis  | 5    | Fixed<br>Price | Matrix |
| *Any      | "Any       | "Any      | *Anj      | 'Any      | Part      | List   | -10  | \$0.00         |        |
| Default P | ricing     |           | Acte      | φ.Υ       |           |        |      |                |        |
| Item      | Mg         | Vendor    | Tec       | h Catego  | ny Type   | Basis  | 5    | Fixed<br>Price | Matrix |
| *Any      | "Any       | *Any      | "Anj      | "Any      | *Any      | Matrix |      |                | FARGO  |
| 21*       | "Any       | "Any      | *Any      | "Any      | Part      | Cost   | 70   | \$0.00         |        |
| 75100     | *Any       | "Any      | "Am       | "Any      | *Any      | Fixed  | 0    | \$0.99         |        |
| *Any      | ECH        | "Any      | "Any      | *Any      | "Arry     | Profit | 45   | \$0.00         |        |
| *Any      | CRB        | "Any      | *Am       | "Any      | *Any      | Profit | 55   | \$0.00         |        |
| *Any      | NBH        | "Any      | "Any      | *Any      | Part      | List   | -2   | \$0.00         |        |
| LOF       | *Any       | "Any      | *Anj      | "Any      | *Any      | List   | 0    | \$0.00         |        |

### **Financial Profiles**

| Financial<br>Profiles | Financial Profiles allow you to:  |
|-----------------------|---|
|                       | <ul> <li>See a summary of sales, costs, and profits for a specific time period</li> <li>See a summary of operating expenses for a specific time period</li> </ul> |

- Calculate net profits for a specific time period
- Change variables and recalculate based on new numbers (you can model "what-if" scenarios and save them)

#### **How To** To generate and save a **Financial Profile**, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Choose Financial Profile from the Reports menu on the TRACS |
|      | menu bar.   |

| Reports Tools  | Windows   | ł |
|----------------|-----------|---|
| Accounts Red   | teivable  |   |
| Customer       |           |   |
| Item & Inven   | itory     |   |
| Purchasing     |           |   |
| Recommende     | d Service |   |
| Sales & Produ  | uctivity  |   |
| Service Histo  | ry        |   |
| Work Order     |           |   |
| Inspections    | Ģ         | * |
| Financial Prot | file      |   |
| Lists          | i.        | + |

| Step | Action   |
|------|--|
| 2    | Click New Profile to create a new financial profile. |

| Description     | Create Date         | Last Saved          | Begin Date | EndDate    |    | X Done      |
|-----------------|---------------------|---------------------|------------|------------|----|-------------|
| Profile 1       | 12/05/2005 9.44 PM  | 12/05/2005 3:44 PM  | 03/01/2005 | 12/05/2005 |    |             |
| Another Profile | 04/12/2006 10:05 PM | 04/12/2006 10:06 PM | 04/03/2006 | 04/12/2006 |    | New Profile |
|                 |                     |                     |            |            |    | > [di       |
|                 |                     |                     |            |            |    | X Delete    |
|                 |                     |                     |            |            |    |             |
|                 |                     |                     |            |            |    |             |
|                 |                     |                     |            |            |    |             |
|                 |                     |                     |            |            |    |             |
|                 |                     |                     |            |            |    |             |
|                 |                     |                     |            |            |    |             |
|                 |                     |                     |            |            |    |             |
|                 |                     |                     |            |            |    |             |
|                 |                     |                     |            |            |    |             |
|                 |                     |                     |            |            |    |             |
|                 |                     |                     |            |            | +1 |             |

| Step | Action   |  |
|------|--|--|
| 2    | Enter a name for the profile into the <b>Profile Name</b> field.     |  |
| 3    | Click on the <b>Begin Date</b> drop down menu and choose a beginning |  |
|      | date from the calendar.  |  |
| 4    | Click on the <b>End Date</b> drop down menu and choose an end date   |  |
|      | from the calendar. The space between these two dates is the time     |  |
|      | period for which your financial profile will be generated.           |  |

| Tinuncial Profile  | -   |                     |                                    | (Construction of Construction |      |                               |
|--|---|---------------------|------------------------------------|---|------|-------------------------------|
| Picile Name<br> Example Financial Picile<br>Sales   OperatingExpenses  10448 | Last Seved  | GM/12/2006 10:19 PM | BeginDate<br>EndDate<br>S.To.Sales | Sun Non Tue Wed Thu Fri Sat   |      | Save AL<br>Save AL<br>X Saved |
|  | Net Labor Sales  <br>Net Part Sales  <br>Sublet Sales  <br>Total Sales            | 10.00               |                                    | 7 8 9 10 11 10 13<br>14 15 16 17 18 19 20<br>21 22 23 24 25 26 27<br>28 25 30<br>Today: 4/12/2006   |      |                               |
| Labor Cost Rech wage   | a selbout benefiti) [<br>Parts Cost ]<br>Sublet Costs ]<br>It Cost of Sales ]     | \$0.00              |                                    |   |      |                               |
|  | Labor Gener Poste<br>Parls Gener Poste<br>Sublet Gener Profit<br>dal Gener Profit |                     |                                    |   |      |                               |
|  |   |                     |                                    |   | 4.00 | D Bed 1                       |

| Step | Action   |  |  |  |
|------|--|--|--|--|
| 5    | Click the Load Sales & Cost button to generate the numbers for   |  |  |  |
|      | the selected time period.  |  |  |  |
| 6    | Click on the tabs to see operating expenses and totals, or click |  |  |  |
|      | Next at the bottom of the screen to advance to the operating     |  |  |  |
|      | expenses window.   |  |  |  |

| - Financial Profile  |                                       |  |                 |           |
|--|---------------------------------------|--|-----------------|-----------|
| Provide the second seco | Cineted: 04/12/2006 10:197<br>( Saved | M Begin Date 11/12/2004 =<br>End Date 11/12/2005 =   | Load Sales Mont | J Save As |
| - And an and a second second second  | 1 Amount                              | 7: Fo Sales  |                 | × Dencel  |
| Net Lab  | or Sales \$4.52                       | and the second |                 |           |
| Net Po   | et Sales \$9.25                       | 80 6717  |                 |           |
| 540  | iet Sales 30                          | 00 0   |                 |           |
| Tota   | Sales 411.27                          | 44 100   |                 |           |
| Labor Cost (lest) wages withink t  | tervelita) \$1,411                    | 00 103   |                 |           |
| Pi   | ets Cost \$4,24                       | 50 30.77   |                 |           |
| Sub  | er Doins S                            | 00 1   |                 |           |
| Total Cost of  | Sales St. St.                         | <u>10.00</u>   |                 |           |
| Labor Gro  | os Posti                              | 48.62  |                 |           |
| Parts Gro  | ns Profe                              | 5475   |                 |           |
| Sublet Geo   | es Proix                              | 0  |                 |           |
| Total Gross  | Profit                                | -58-17   |                 |           |
|  |                                       |  |                 |           |
|  |                                       |  | 4.50            | To Need   |

| Step | Action   |
|------|--|
| 7    | You can type in any of the text areas that are not grayed out to         |
|      | change the numbers. Click Load Sales & Cost again to                     |
|      | recalculate totals. Here, you can take advantage of "what if"            |
|      | scenarios. For example, you could increase the amount of money           |
|      | spent on advertising and see how that effects your overall               |
|      | expenses.  |
| 8    | Click on <b>Save</b> to save the financial profile. The dates and all of |
|      | the changes that you made will be saved. The profile will be saved       |
|      | under the name listed in the <b>Profile Name</b> field.                  |
| 9    | Click on <b>Save As</b> to save the profile under a different name. If   |
|      | you are editing a profile that you have already saved, this will         |
|      | allow you to save the changes without overwriting the old profile.       |
|      | This is a great way to keep track of your "what if" scenarios            |
|      | without altering your original profile.                                  |

| Publie Name<br>Example Financial Proble |                            | Dealed D4/              | 12/2006 10 13 PM Bright Date 11/12/2006 • Load Sales (Cont   | J Same |
|---|----------------------------|-------------------------|--|--------|
| Silles) Comating Expenses (1)           | Savel<br>Aecount<br>444.00 | Lad Saved<br>& To Sales | End Date 11/12/2005 Load Sales BCor<br>Parcit Service Writer 6<br>Parcit Taxes 6<br>Parcit Unkums 7<br>Parcit Parcit Unkums 7<br>Parcit Unkums 7<br>Parcit Unkums 7<br>Parcit Unkums 7<br>Parcit Parcit P | Coro   |
| Papet Owner T<br>Papet Service          |                            | -                       | Total Operating Expenses 1444 (c) 322  |        |

# Financial Profiles, Continued

| Step | Action   |
|------|--|
| 10   | The profile that you saved will now show up on the financial   |
|      | profile list. To edit a profile late, double click on a profile, or select the profile and click <b>Edit</b> . |

| Financial Profile List                       | A CONTRACTOR OF A CONTRACTOR O | 10                  |            |            |      | _ 0 2          |
|--|--|---------------------|------------|------------|------|----------------|
| Desception                                   | Create Date  | Last Saved          | Begn Date  | EndDate    |      | X Done         |
| Profile 1                                    | 12/05/2005 9.44 PM   | 12/05/2005 9 44 PM  | 09/01/2005 | 12/05/2005 |      | When Profile   |
| Another Proble                               | 04/12/2006 10:05 PM  | 04/12/2006 10:06 PM | 04/03/2006 | 04/12/2006 |      | William Little |
| Example Financial Profile<br>Example Profile | 04/12/2006 10:19 PM  | 04/12/2006 10:30 PM | 11/12/2004 | 11/12/2005 |      | ≥ Edit         |
| Example Profile                              | 04/12/2006 10:19 PM  | 04/12/2006 10:20 PM | 11/12/2004 | 11/12/2005 | 1    | X Delote       |
|  |  |                     |            |            |      | V. V.Conne     |
|  |  |                     |            |            |      |                |
|  |  |                     |            |            |      |                |
|  |  |                     |            |            |      |                |
|  |  |                     |            |            |      |                |
|  |  |                     |            |            |      |                |
|  |  |                     |            |            |      |                |
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|  |  |                     |            |            |      |                |
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|  |  |                     |            |            |      |                |
|  |  |                     |            |            |      |                |
|  |  |                     |            |            |      |                |
|  |  |                     |            |            | - 11 |                |
|  |  |                     |            |            | 1.1  |                |
|  |  |                     |            |            | -    |                |

#### **Work Flow** Technician **Work Flow Sheets** are part of NAPA's Preventative Maintenance Program. They allow the technicians to keep a detailed record of exactly what has been checked out on a specific vehicle. Blank sheets can be printed and filled in during maintenance, and they can also be altered and saved inside TRACS.

There are five different kinds of Work Flow Sheets:

- Vehicle Visual Inspection
- Technician Work Flow Sheet Level 1
- Technician Work Flow Sheet Level 2
- Technician Work Flow Sheet Level 3
- Technician Work Flow Sheet Level 4

#### How To To print a blank Work Flow Sheet, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Choose <b>Inspection</b> from the <b>Reports</b> menu on the TRACS menu |
|      | bar, and then choose the desired work flow sheet.                       |

| Reports Tools Windows   | Help   |
|---|--|
| Accounts Receivable<br>Customer<br>Item & Inventory<br>Purchasing<br>Recommended Service<br>Sales & Productivity<br>Service History<br>Work Order |  |
| Inspections   | Blank Vehicle Visual Inspection Sheet  |
| Financial Profile   | Blank Technician Work Flow Sheet Level 1<br>Blank Technician Work Flow Sheet Level 2 |
| Lists   | Blank Technician Work Flow Sheet Level 3   |
|   | Blank Technician Work Flow Sheet Level 4   |

| Step | Action  |
|------|---|
| 2    | The blank work flow sheet appears in PDF format, displayed by   |
|      | Adobe Acrobat. Click the printer icon to print.   |
|      | Note: You must have Adobe Acrobat Reader installed on your computer for the sheet to display correctly. |



# Work Flow Sheets, Continued

**How To** To attach a **Work Flow Sheet** to a specific vehicle, perform the following steps:

| Step | Action  |
|------|---|
| 1    | Click the <b>Work with Vehicles</b> icon in the top menu bar, or choose |
|      | Vehicles from the Search drop-down menu.                                |
| 2    | Enter any search criteria for the vehicle you wish to work with. In     |
|      | the example below, all 1996 vehicles will be displayed. If you          |
|      | wish to display the entire list of vehicles, do not enter any criteria. |
|      | Click Find.   |

| Vehicle Query By E   |                       |                           |   |           |
|--|-----------------------|---------------------------|---|-----------|
| Customer   | Vehicle Additiona     | 4 ]                       |   | X Done    |
| Year Hake  |                       |                           |   | Q End     |
| 1996   |                       |                           |   | Coar      |
| Model  |                       | Engine                    |   |           |
|  |                       | 1                         |   | Next Page |
| Vehicle Identification N   | umber                 |                           |   | ? Help    |
|  |                       |                           |   |           |
| Engine Setial Number   | P                     | aly Mileage Pricing Photo |   |           |
| -  |                       |                           | 2   |           |
| License Number   | State Fleet Driver    | Fleet Number              | Color   | _         |
|  | 1 1                   |                           | 101   |           |
| Recent   | First Service         | Last Service              | and the second se |           |
| Date   | Date                  | Date                      | Reminder Date   | _         |
| and the second second  | and the second second | -                         |   |           |
| Didometer  | Odometer              | Odometer                  |   | _         |
| 1  |                       |                           |   |           |
| Notes  |                       |                           | and the second se | _         |
| in the second se |                       | Search Locatio            | n 🔛 Vehicle Active  |           |
|  |                       | A Dermanana               |   |           |
|  |                       |                           |   |           |

# Work Flow Sheets, Continued

| Step | Action   |
|------|--|
| 3    | From the vehicle list window, highlight the desired vehicle by |
|      | clicking on it. Click Inspect.                                 |

| State Vehicle                                    | Cutore                  | Field No.   | Coint        | N/N  | • | Xore  |
|--|-------------------------|-------------|--------------|------|---|---|
| 1996 Chevrolet Truck Blazer 2520 4 3k ter V5     | STRESEMENT              | i na stradi | and a second | 1.00 | _ |   |
|  | JOHNSON, LYNN           |             |              |      |   | Q Brd   |
| 1996 Toyota Avalon 2995CC 3 0Liter V6 1M2FE      |                         |             |              |      | _ | > Edd   |
| 1996 Toyota Availon 2995CC 3 IDLike V6 1M2FE     |                         |             |              |      |   |   |
| 1996 Ford Truck Areastar 18301 3 OUter V6        | SNNWELL DON             |             |              |      |   | - Heart   |
|  | SINWELL, DON            |             |              |      | _ | ALC: NOT OTHER  |
|  | LONNQUIST, RICH         |             |              |      | _ | Bec Ser   |
| 1996 Ford Taurus 103CJ 3.0Liter V6               | LOU'S                   |             |              | 1    | _ | Serie Bokay   |
| 1996 Ford Truck Pickup F150-1/2 Ton 30001 4 (4   | 100%                    |             |              |      |   | Parc Books  |
| 1996 GMC Truck Pickup K15/V15/K1500-1/2 To       | JENSON, DENNIS          |             |              |      |   | NegKit  |
| 1996 Chenrolet Truck Pickup K20/K2500 3/4 Tor    | WIESS, TOM              |             |              |      |   | And Personners and  |
| 1996 Ford Teams 18303 2.0Liter V6                | SCHULZ, ROLF            |             |              |      |   | Unquery   |
| 1996 Dodge Truck Caravan 149Cl 2 4Liter L4       | OPAL                    |             |              |      |   | Diarge M  |
| 1396 Ownrolet Canaler 1460 2.4Liter L4           | ACEVEDO, HECTOR         |             |              |      |   | and the second se |
| 1996 Ford Taurus 183CI 3.0Liter V6               | NAPA, WARRANTY          |             |              |      |   | TE Inspect  |
| 1996 Dodge Status 2429CC 2.4Liter L4             | JOHNSON, CINDY          |             |              |      |   | ? Helo  |
| 1996 GMC Truck Pickup K15/V15/K1500-1/2 To       | STAATS, DAVE            |             |              |      |   | 1 11-0  |
| 1996 Ford Truck Van E150 1/2 Ton 3510 5 Buie     | RANKIN, BRYAN           |             |              |      |   | The second se   |
| 1996 Buck Century/Century Estate Wagon 1(I9C)    | MCDERMOTT, LARRY        |             |              |      |   |   |
| 1996 Pontiac Grand Ats 146CI 2.4Liter L4         | LAMRER, ROGER           |             |              |      |   |   |
| 1396 Plymouth Truck Voyager Van 1810 3 Duter     | (BHAN, DENG             |             |              |      |   |   |
| 1996 Chevrolet Truck Pickup 510 134CI 2 2Liter L | WIDE OPEN THROTTLE, KEN |             |              |      |   |   |
| 1996 Ford Truck Van E 250-1 Ton 460Cl 7 SLAw V   | TOWNER, JM              |             |              |      |   |   |
| 1996 Ford Excert/Excert EVP 119CI 1.9Life L4     | SCHUNEMAN, CARRIE       |             |              |      |   |   |
| 1996 Ovevrolet Truck Blazer 2520 4 3Uter VS      | MCCOV, JIM              |             |              |      |   | 1000  |

| Step | Action  |
|------|---|
| 4    | From the <b>Inspection List</b> window, you can view all of the existing  |
|      | work flow sheets associated with this vehicle. To edit an existing        |
|      | sheet, highlight the desired sheet and click <b>Edit</b> . To begin a new |
|      | work flow sheet, click the button for the desired type - for              |
|      | example, New Visual or New Level 1.                                       |

| avail impection or a second second           | Cinide Date  | Admin WD # | * × 0.00  |
|--|--|------------|---|
| T Technolas West Fire Short Love             | 1 5/2/2006 1 01 29 PM  | 1922       |   |
| 4 Justinican Mork Firm Short Laup            | 1 1077/2005 1 Ri 22 PM   | (659)      | Sterry Mar  |
| 0 Ve Press column title to sort. Double-club | and the second | 1659       | New Lev   |
| 2 A community of arts of the Advant games    |  | 200        | Service Law   |
|  |  |            | and the second se |
|  |  |            | Service Law   |
|  |  |            | Winw Lev  |
|  |  |            | > Edd   |
|  |  |            | and the second se |
|  |  |            | X Datie   |
|  |  |            |   |
|  |  |            |   |
|  |  |            |   |
|  |  |            |   |
|  |  |            |   |
|  |  |            |   |
|  |  |            |   |
|  |  |            |   |
|  |  |            |   |
|  |  |            | -   |
|  |  |            | × 1   |

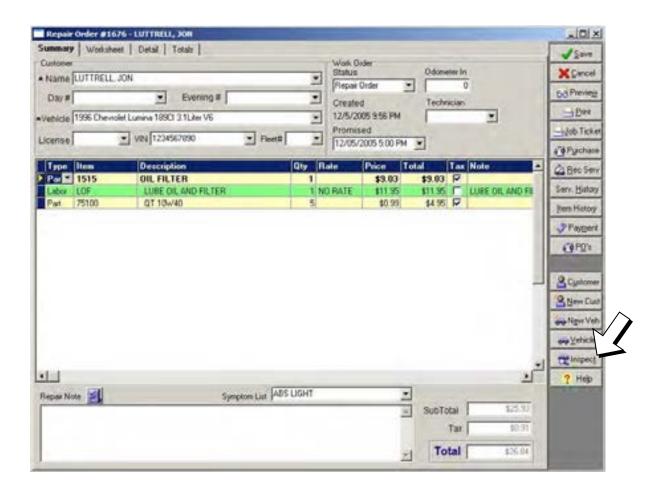
| Step | Action  |
|------|---|
| 5    | When the <b>Work Flow Sheet</b> appears, you can edit it by clicking in the text boxes and typing. You can then save it for future use by clicking <b>Save</b> or print it by clicking <b>Print</b> . |
|      | Note: Some fields such as Customer Name, E-Mail, and phone<br>cannot be edited inside the work flow sheet. You must edit<br>these in the vehicle or customer windows; then if you pull up a           |
|      | new work flow sheet, the new information will be there.   |

| <b></b>  | TECHNICIAN WORK FLOW<br>The Positive Approach" To Total Ve    |  | - Vise<br>X Carcel |
|--|---|--|--------------------|
| Currenter Name FOSTER, JAM                     | ntive Maintenance Prog<br>SMARY Emil                          | Tam Level  | Did Prevent        |
|  | te: 5/2/2006 1:54:38 PM Advise                                |  |                    |
| Make Ford<br>Year 1992 Mileage 0<br>Mile Date: | Model Tauras<br>Visit Tauras<br>VIS<br>Fuel CE C14 C12 C34 C7 | Engine: 183CI 3.0Liter V6<br>Color: Other  |                    |
| License<br>Security Code                       | Current License Tag @ Tex CNo Wheel Lock Location             |  |                    |
| Eadlo Code<br>Cresslents                       | Other.  | Transmission Types & Accessing Collardad<br>Accessionaliss<br>Trailer Model CCE. CAthematics |                    |
| Step Standard matter                           | t, should include loampy roads, acceleration and broke        | Thick Here DAC DAN   |                    |

### Work Flow Sheets, Continued

**How To** To access a **Work Flow Sheet** from a work order, perform the following steps:

| Step | Action   |
|------|--|
| 1    | From the work order window, click <b>Inspect</b> . |



# Work Flow Sheets, Continued

| Step | Action   |
|------|--|
| 2    | You can edit or create new work flow sheets from this window.<br>Any work flow sheets already associated with the vehicle will |
|      | already be there.  |

| evel Impector                 | Create Date: Advect WD #   | A X00   |
|-------------------------------|--|---|
|                               | Shust Level 1 5/2/2006 1 01 29 PM 1632   |   |
| 1 Technicism Work Firm        | Sheet Lovel 1 (5/7/2005 1-8) 23 PM (659  | Name Vi   |
| 0 Ve Press column title to so | 1. Double-club, entry to edit, 06 1:01:16 PM 1659  | New Le  |
|                               | There are a second and the second secon | Se Nime La  |
|                               |  | Dime La   |
|                               |  | 4 New La  |
|                               |  | Contract of the second s |
|                               |  | - £d  |
|                               |  | × Det   |
|                               |  |   |
|                               |  |   |
|                               |  |   |
|                               |  |   |
|                               |  |   |
|                               |  |   |
|                               |  |   |
|                               |  |   |
|                               |  | _   |
|                               |  |   |
|                               |  |   |

### **Chapter 10: Additional Functions**

### **Spell check**

This chapter is designed to help explain functions that are found throughout the program. What differentiates these functions from the others is that they are used in so many different locations that it is difficult to assign to a specific area of the LINK/NET programs.

#### Contents

- 1. Setting up spell check on NET systems. (NET ONLY)
- 2. Using the spell check function.
- 3. City, State, and Zip Code defaults

| How To | The following change must be done on the NET systems for spell check to |
|--------|---|
|        | function correctly.   |

| Step | Action  |
|------|---|
| 1.   | Starting from the main screen, click the "create a new estimate"  |
|      | button and start a new estimate, or you can open an existing Work |
|      | Order.  |
| 2.   | The Work Order screen will appear. Notice the Repair Notes        |
|      | section toward the bottom.  |

| Step | Action  |
|------|---|
| 3.   | Next to the header "Repair Note", you will see a new button.          |
|      |   |
|      |   |
|      |   |
| 4.   | This button will start the spell check on the text in the repair note |
|      | field. The following is a walkthrough of how it works.                |

| 쨜 TRACS Link - [New Estimate]   | _ 🗆 ×                 |
|---|-----------------------|
| ∰E Eile Print Edit E-Mail Search List Activities Reports Tools Windows Help | <u>_ 8 ×</u>          |
|   | ? 🕕                   |
| Summary Worksheet Detail Totals   |                       |
| Customer Work Order Status  | X Cancel              |
| Name Cash Customer  | 68 Preview            |
| Day# Evening# Created   |                       |
| Vehicle No Vehicle 7/18/2000 7:50 AM  | <u> </u>              |
| License VIN Fleet# Promised   | <u>J</u> ob Ticket    |
|   | 😼 P <u>u</u> rchase   |
| Type Item Description Qty Rate Price Total Tax Note                         | 🛓 <u>R</u> ec Serv    |
|   | Serv. <u>H</u> istory |
|   | Item History          |
|   | Payment               |
|   | · · -                 |
|   | A Customer            |
|   |                       |
| <b></b>   | New Cust              |
|   | 🌦 <u>N</u> ew Veh     |
| Repair Note 📶   | <u>⇔</u> Vehicle      |
| Crustomer perfers to use 20W50 uhl. SubTotal \$0.00                         | ? <u>H</u> elp        |
| Tax \$0.00  |                       |
| <b>Total</b> \$0.00   |                       |
|   |                       |

| Step Action |  |
|-------------|--|
| 5.          | Here we have an entry containing various misspellings. |

|  | 6. | Click the "ABC" button to begin the spell check.  |
|--|----|---|
| good because it does not offer the correct spelling of the | 7. | The following is the screen that appears when a word appears to<br>be misspelled or is unknown to the computer. This example is<br>good because it does not offer the correct spelling of the<br>necessary word in the drop selection of replacements. Situations<br>such as these would require typing the correct word in the<br>"Replace With"<br>field. To actually place it in the repair notes, you would press the |

| Repair Note 😹                       |          | _        |        |
|-------------------------------------|----------|----------|--------|
| Crustomer perfers to use 20W50 uhl. | <b>A</b> | SubTotal | \$0.00 |
| The enjun is from a 69 Charger.     |          | Тах 🛛    | \$0.00 |
|                                     | 7        | Total [  | \$0.00 |

| Spell Checker        |  | ×   |
|----------------------|--|---|
| Not found:           | Crustomer  |   |
| Replace <u>₩</u> ith | Crustier   | € <u></u> Beplace   |
| Su <u>gge</u> stions | Crustier<br>Crester<br>Crusted<br>Corseter<br>Cresters<br>Crusader<br>Corseters<br>Creosoter<br>Crusaders<br>Crustacea | <pre>     <u>A</u>dd     <u>O</u>+ Skip Once     Skip Always     <u>Suggest</u>     <u>X</u> Close </pre> |

| Step | Action  |
|------|---|
| 8.   | The next word in the sentence is also misspelled. Its correct |
|      | replacement; however, is listed in the drop menu.             |

| Spell Checker        |   | ×   |
|----------------------|---|---|
| Not found:           | perfers   |   |
| Replace <u>W</u> ith | prefers   | Beplace   |
| Su <u>gge</u> stions | prefers<br>perverse<br>proofers<br>peerer<br>perfervid<br>performer<br>preparers<br>perform<br>perfory<br>pervert | ▲dd         ▲ Skip Once         ▲ Skip Always         Skip Always         Suggest         ▲ Close |

| 9. | Here the correct spelling is listed first. If it was not, all that would |
|----|--|
|    | be required would be to click on the correct word and then click         |
|    | the Replace button. The correction would be applied to the repair        |
|    | notes and the spell check would proceed.                                 |

| Step | Action  |  |
|------|---|--|
| 10.  | The next word to be labeled as misspelled is actually something     |  |
|      | that might be used in actual repair notes. The spell check will see |  |
|      | this as a mistake and attempt to correct it. Spell check allows for |  |
|      | the addition of words into its memory. This allows you to add       |  |
|      | words that you would use frequently. Here we have used 20W50.       |  |
|      | This is a legitimate term in the automotive industry and to avoid   |  |
|      | having it in future spell checks we would need to click the Add     |  |
|      | button.   |  |

| Spell Checker        |       | ×   |
|----------------------|-------|---|
| Not found:           | 20W50 |   |
| Replace <u>W</u> ith | 20w50 | Beplace                                       |
| Sugg <u>e</u> stions |       | Add   |
|                      |       | <sup>©</sup> ∎ <sup>+</sup> Skip <u>O</u> nce |
|                      |       | ⊆* Skip <u>A</u> lways                        |
|                      |       | <mark>?</mark> <u>S</u> uggest                |
|                      |       | 🗶 Close                                       |
|                      |       |   |

11. This will bring up a conformation screen to verify that you do want to add this to the spell check dictionary. Clicking the Yes button will add it to your Spell Check dictionary.

| Confirm | ×                          |
|---------|----------------------------|
| ?       | Add "20W50" to dictionary? |
|         | Yes <u>N</u> o             |

12. You have now completed a spell check.

# Zip Code Defaults

**How To** The following instructions will demonstrate how the defaults and drop menus function with City, State, and Zip Code defaults.

| Step | Action  |
|------|---|
| 1.   | The location where this function is most likely to be used is in the customers and vehicles area. To gain access to this area, click the customers and vehicles button. |
| 2.   | This will open the customer list screen.  |

| 😁 Customer List: 3 entries |       |            |             | _ 🗆 ×                   |
|----------------------------|-------|------------|-------------|-------------------------|
| Customer                   | Eve # | Day #      | Address 1   | 🔀 <u>D</u> one          |
| Lany Fredrick              |       | 555 - 1111 | 123 Ave.    |                         |
| Molly Bell                 |       | 555-1980   | 400 Cir.    | 🔍 <u>F</u> ind          |
| Joe Mitt                   |       | 555-2895   | 489 N. ACER |                         |
|                            |       |            |             | 📝 <u>E</u> dit          |
|                            |       |            |             | <u>8 N</u> ew           |
|                            |       |            |             | 為 New Ve <u>h</u>       |
|                            |       |            |             | <mark>ക</mark> ⊻ehicles |
|                            |       |            |             | <br>Acct History        |
| <u> ا</u>                  |       |            |             | Locations               |

| The best way to show how this function works is to click the new<br>button, and add a new customer. The new customer screen will |
|--|
| appear.  |

| 👼 New Customer  | ×                 |
|---|-------------------|
| Last Name First Name Company  | Save<br>Cancel    |
| General Billing Info Accounts Note  | <u>N</u> ext Page |
| Title       Customer Type       Date of         Individual       ▼       ▲ctive       Creation         Day Number       Evening Number       FAX Number       [7/18/0]         Contact Name       Contact Number       Last Se         E-Mail Address | 10<br>Irvice      |

| Step | Action  |
|------|---|
| 4.   | You can still go through the various customer information fields    |
|      | and add what is needed. When you get to the bottom you will see     |
|      | that the Zip Code and State fields have arrows to indicate a drop   |
|      | down menu. Depending on how you place your cursor in the zip        |
|      | code field will determine how its default menu will behave. Using   |
|      | the tab button will not cause the default menu to appear. Using the |
|      | mouse to move into the zip code field will cause the default menu   |
|      | to appear. Despite how the zip code field is accessed, the new zip  |
|      | code will be entered in the same field as it has always been.       |

How To (continued)

| 📟 Edit Customer - fredrick, larry  |                                    | ×                           |
|--|------------------------------------|-----------------------------|
| Last Name First Name First Name  | -                                  | <mark>√</mark> <u>S</u> ave |
| Company  |                                    | X <u>C</u> ancel            |
|  |                                    | 🌲 <u>M</u> erge             |
| General Billing Info Accounts Note   |                                    | <u>N</u> ext Page           |
| Title Customer Type<br>Individual ▼ ✓ Active   | Date of                            | ? <u>H</u> elp              |
| Day Number         Evening Number         FAX Number           555-1111         555-5432 | Creation<br>8/7/00<br>Last Service |                             |
| Contact Name Contact Number  |                                    |                             |
| E-Mail Address   | Last Reminder                      |                             |
| Address Street 123 Ave.  | Last Thank You                     |                             |
| Additional   |                                    |                             |
| Zip Code City State     O22234   Chester   |                                    |                             |

| Step | Action   |
|------|--|
| 5.   | Once a number is added to the Zip Code field, the default menu<br>will appear and try to locate a match or a number similar to the zip<br>code you are typing. |

| Zip Code | City    |       | State |
|----------|---------|-------|-------|
| Zip      | City    | State |       |
| 02134    | Boston  | MA    |       |
| 02234    | Chester | MA    |       |
| 45678    | Yakima  | WA    |       |

#### How To (continued)

| Step   | Action   |
|--|--|
| 6.   | The zip code being entered may be new and if so the program will<br>alert you of a new zip code and ask if it should add it. Click the yes |
|  | alert you of a new zip code and ask if it should add it. Click the yes   |
|  | button to continue.  |
| Informatio   | n X  |
| The Zip Code was not found. Do you wish to add it now? |  |
|  | Yes No   |

7. A new screen will appear to setup the city and state that will go with the new zip code. When all the information is correct press **Save**.

| 📟 Zip Code Setup | _ 🗆 ×            |
|------------------|------------------|
| Zip Code:        | ✓ Save           |
| 31234            | X <u>C</u> ancel |
| City:            |                  |
|                  |                  |
| State:           |                  |
|                  |                  |
|                  |                  |

| 8. | The new information will now be available in the default menu.   |
|----|--|
|    | When a new customer comes in with the same zip code, the menu    |
|    | will bring it up. You can now press enter to accept the city and |
|    | state associated with it.  |
|    |  |

#### How To (continued)

| Zip Code | City    |       | State |
|----------|---------|-------|-------|
| Zip      | City    | State |       |
| 02134    | Boston  | MA    |       |
| 02234    | Chester | MA    |       |
| 31234    | Nahunta | GA    |       |
| 45678    | Yakima  | WA    |       |

| Step | Action   |
|------|--|
| 9.   | The situation may arise when you will need to delete or change a |
|      | zip code. This can be done in the Setup menu. Click on the Setup |
|      | button from the main screen. The setup menu will appear.         |



| 10. | Click the <b>Zip Codes</b> button, and the Zip Code List will appear. |
|-----|---|
|-----|---|

| Zip Cod | e List  |       |                   |
|---------|---------|-------|-------------------|
| Zip     | City    | State | 🔺 🔀 Done          |
| 02134   | Boston  | MA    |                   |
| 02234   | Chester | MA    | <mark>₩</mark> ew |
| 31234   | Nahunta | GA    | 📝 <u>E</u> dit    |
|         |         |       |                   |
|         |         |       | 🗙 <u>D</u> elete  |
|         |         |       | ▼ <u> </u>        |
| ten     |         |       | Action            |

| Step | Action   |
|------|--|
| 11.  | This screen allows you to change an existing zip code using the  |
|      | Edit button, or you can delete the zip code in the selected line by pressing the <b>Delete</b> button. |

### How to Make Pricing Diskettes

Pricing diskettes are created on the NAPA Store's TAMS system. To create a Pricing diskette Type CO9 from your main TAMS screen. If their account name and number shows up, skip to step number 8 below. If not follow these procedures:

- 1. Go into System Management (SM).
- 2. Choose Maintain TAMS system (SM03).
- 3. Choose Maintain Phone numbers (Option 4).
- 4. Choose option #3 NAPA Access.
- 5. Choose A-ADD to add a new customer or F6 to advance to the next account.
- 6. The TAMS password here under option number 3 must match the number in the TRACS product. The system type should always be "D" for TRACS customer. When you have the customer set up hit F8 to continue then escape to the TAMS main menu screen.
- 7. Type CO9 on the TAMS main menu.
- 8. Choose option #1 Create TRACS Pricing Diskette-- hit enter.
- 9. Choose the dealer that you want and hit enter.
- 10. Choose ALL stocked Line and ALL Line Codes hit F8.
- 11. Insert Diskette hit F8. The TAMS message will appear "this diskette has no label press F8 to use this diskette". It will begin to build a price file. When done, remove diskette, hit escape and resume invoicing.

\*\*NOTE: if you are running long reports during the pricing diskette creation, you may corrupt the diskette and be forced to begin again.

### What Prices come over?

The pricing profile for this customer would be applied to all the parts that are pulled up either in the item file, or through the NAPA CATALOG on TRACS. Only the parts that are found on the Jobber's hard drive will be displayed. Parts that are *Special Class* or Parts that have *never been sold* before by the Jobber <u>will not</u> come over on a pricing diskette. They will not be updated in an item file, nor will they show a cost when they are looked up in the catalog on the TRACS product. You will see only list prices.

# Why can I see the cost through Terminal Access but not on the catalog on my NAPA TRACS product?

If you choose the Terminal Access screen and choose to use the NAPA Catalog from TAMS, you might see the cost of the item. You will see the cost this way because TAMS is pulling up information from the TAMS pricing CD ROM. The parts are not on the Jobbers hard Drive.

Why can't we make a pricing diskette that would show me the cost all of the parts available through the NAPA system?

This would require the Dealer customer to run between 10-15 pricing diskettes each month. Currently, some TAMS systems take over 3 hours to create one diskette for one customer. It would be impossible for some Jobbers to create 10-15 diskettes for each of their TRACS customers. **Why can't my prices come on one CD ROM?** Each account has it's own very special account profile. Here at TRACS, we do not have any way of knowing what price your local NAPA store is selling you products.

### **Reports in LINK/NET**

**How To** The following instructions will demonstrate how to print the various reports available in the LINK and NET programs. An example of each report is included in the pages following these instructions.

The following reports are found in the Reports are of LINK/NET.

| REPORTS                 | SUB-REPORTS  | REQUIREMENTS   |
|-------------------------|--|--|
| Accounts<br>Receivables | Transaction<br>Summary   | Beginning & End Dates  |
| Accounts<br>Receivables | Transaction Detail   | Transaction Type: All Transactions, Receipts & Refunds Only, or Journals Only. Beginning & End Dates   |
| Accounts<br>Receivables | Customer Summary   | Beginning & End Dates  |
| Accounts<br>Receivables | Aged Accounts  | End Date   |
| Accounts<br>Receivables | Statements   | 3 Types: Interim, Past Due, and Last Close.<br>Beginning & End Dates.<br>Formatting: Print on plain paper, address fits a<br>#10 window envelope, show aging on statement,<br>sort by customer # or zip code |
| Item & Inventory        | Charges, Labor,<br>Notes, Parts, and<br>Sublets  | Description, Manufacturer, Vendor, Category,<br>and Rate. There are also many other criteria<br>available by preference.   |
| Purchasing              | Open Purchase<br>Order List, New<br>Purchase Order List,<br>Quantity on Order,<br>and Work in<br>Progress Report | Each of the sub-reports in the Purchasing area is self generating.   |
| Recommended Service     | Recommended<br>Services  | Category, Items, Beginning & End Dates   |

CHART CONTINUED ON NEXT PAGE

| REPORTS              | SUB-REPORTS  | REQUIREMENTS  |
|----------------------|--|---|
| Sales & Productivity | Sales Analysis,<br>Sales Register,<br>Sales Register<br>(summary only),<br>Sales by Ad Source,<br>Sales by Category,<br>Sales by Tax Class,<br>Server Writer<br>Productivity,<br>Technician<br>Productivity,<br>Override | Beginning & End Dates   |
| Service History      | Requires a vehicle to be selected.   | Invoice Date, Repair Order Note, Item Type,<br>Manufacturer, Item Note, Description, Category,<br>Item, and Repair Order Reference.<br>Also has a search for to enter text for all field<br>searches. |

The following reports are found in the Activities area of LINK/NET.

| REPORTS            | SUB-REPORTS                  | REQUIREMENTS                      |
|--------------------|------------------------------|-----------------------------------|
| Create Stock Order | Stock Order                  | Vendor, Manufacturer, or Category |
| Cash Drawer        | Daily Cash Drawer<br>Balance | Date                              |

CHART CONTINUED ON NEXT PAGE

The following report is found on Work Orders in LINK/NET.

| REPORTS              | SUB-REPORTS          | REQUIREMENTS          |
|----------------------|----------------------|-----------------------|
| Service History from | Service History on a | Must select a vehicle |
| Work Orders          | Selected Vehicle     |                       |

# Index to Reports in LINK/NET

| Accounts Receivable Transaction Summary       | 1     |
|---|-------|
| Accounts Receivable Transaction Detail        | 2     |
| Customer Summary Report                       | 3     |
| Aged Accounts Receivable Reports              | 4-5   |
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| Service Writer Productivity Report             | 39    |
|--|-------|
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| Μ        | 57           | Z        | NA           |

# **Chapter 11: Wireless Service Assistant**

The TRACS application supports several wireless devices.

### **Overview**

| Wireless   | Browser based  |
|------------|--|
| Service    | • No software to load on device, software runs on TRACS Server   |
| Assistant: | Help manage your Inventory   |
| Features   | <ul> <li>Help manage your Inventory</li> <li>Easily perform a physical inventory</li> <li>Scan a parts barcode with the built in scanner.</li> <li>The TRACS inventory for the part is displayed</li> <li>Enter the number of parts physically seen on the shelf.</li> <li>TRACS automatically creates an adjustment PO to correct quantity on hand.</li> <li>Supports multiple Wireless Assistants all scanning physical inventory at once.</li> <li>Notes can be made about each count</li> <li>Associate parts already in TRACS with barcodes for easy retrieval</li> <li>Confirm and accept physical inventory counts with new Inventory Reconcile in TRACS</li> <li>Review by Physical Inventory Session</li> <li>Review counting audit trails to see where and when each part count was made, review notes made by Wireless</li> </ul> |
|            | <ul> <li>Assistant user while counting inventory</li> <li>Change counts if errors are found.</li> <li>Accept the Inventory Session to create an adjustment PO that automatically corrects TRACS quantities on hand.</li> <li>Notes can be made about each count</li> </ul>   |
|            | <ul> <li>Start estimates from the parking lot</li> <li>Locate an existing Customer and Vehicle by <ul> <li>By Customer Name or Customer Phone</li> <li>By Vehicle VIN, Tag, or Fleet ID</li> <li>Scanning Vehicle VIN</li> </ul> </li> <li>Create new Customer and Vehicles in the parking lot</li> <li>Select Work Order repair symptoms by drop-down list or enter manually.</li> </ul>  |

### **Getting Started**

**How To** To log in to the Wireless Assistant, perform the following steps:

| Step | Action   |
|------|--|
| 1.   | Click the yellow Login button.                             |
| NAPA | TRACS Wireless Assistant                                   |
| 1    | Login  |
| (    | Version 1.0.0.36<br>Copyright 2007 Genuine Parts Co.       |
| 2.   | Choose your name from the list of employees.               |
|      | ACS Wireless Assistant Major Menu<br>Cancel<br>TRACS Login |

Select employee Manager TIM IVES GLEN ROSEN TERRY WILSON LARRY AHRENS STACEY WOOD KEN KOENIG BRADLEY RASMUSSEN

### Getting Started, Continued

| Step | Action   |
|------|--|
| 3    | Type your password into the text box.              |
| 4    | Click the yellow <b>Login</b> button to the right. |



| 5 | If you have logged in successfully, then the<br>Inventory/Estimate/Logout menu should appear. |
|---|---|
| 6 | To log out, click the yellow <b>Logout</b> button.  |



### Inventory

**How To** To add barcodes for existing inventory items that are non-NAPA parts, perform the following steps.

| Step | Action   |
|------|--|
| 1.   | Choose <b>Inventory</b> from the first screen after you have logged into |
|      | the system.  |



| Nain Mena |
|-----------|
|           |
| •         |
| -         |
|           |
|           |
|           |

# Inventory, Continued

#### How To (continued)

| Step | Action  |
|------|---|
| 3.   | Enter information about the item to which you want to add a |
|      | barcode.  |
| 4.   | Click Find.   |

| TAICS Rohm Loston                     | Note Maria         |
|---------------------------------------|--------------------|
| Find Parts QBE                        | () Back<br>() Find |
| Mfg                                   |                    |
|                                       |                    |
| Item                                  |                    |
| Description                           |                    |
| Category                              |                    |
| Location                              |                    |
| Tire Size                             |                    |
| □ Part is tire<br>Set Item Sort Order |                    |

#### 5. Choose the item from the resulting list.

| Add Barcode to Item | O Back |
|---------------------|--------|
| Mfg Item            |        |
| - CTH31159          | Meer   |
| TS 4886549          | Mon    |
| - BRKPADSTRUCK      | Merr   |
| NBH 8978            | Merr   |
| NCP 2613186         | Men    |
| FIL 6117            | More   |
| NS 71938            | Men    |
| PECFD175            | More   |
| NS 71937            | Mont   |
| - ANTIFREEZE        | Morr   |
| OILOLE              | Men    |
| NGA JV1634          | Men    |
| OIL                 | Mou    |
| - 14436             | More   |
| - FREON             | Meet   |

## How To (continued)

| Step | Action  |
|------|---|
| 6.   | Either type the barcode into the text box, or scan the item's barcode |
|      | using the barcode scanner.  |
| 7.   | Click Save.   |

| TRACS Wireless Assistant | Main Menu |
|--------------------------|-----------|
| -                        | Cancel    |
| Scan or Type Barcode     |           |
| Link - CTH31159          |           |
|                          |           |
|                          |           |
| Save                     |           |

**How To** To start a new inventory session, perform the following steps:

| Step | Action              |
|------|---------------------|
| 1.   | Choose New Session. |



| 2. | Type a name for the session into the text box. You can name it anything you like. |
|----|---|
| 3. | Click Save.   |



## How To (continued)

| Step | Action   |
|------|--|
| 4.   | From the <b>Inventory</b> screen, choose a session from the list under |
|      | Open Session.  |

|     | TUCS  | elen kolstael | Main Menu |
|-----|-------|---------------|-----------|
|     | •     | Add Barcodes  | -         |
|     | •     | New Session   | -         |
|     | - (   | Open Session  | _         |
| SE  | SSION | 1             |           |
| SE  | SSION | 2             |           |
| SES | SSION | 3             |           |

| 5. | To view existing inventory, choose My Inventory Items. |
|----|--|
| 6. | To count items, choose Locate and Count Items.         |

| Inventory Menu |
|----------------|
|                |
|                |
|                |
| int Items      |
|                |

#### How To (continued)

| Step | Action   |
|------|--|
| 7.   | For each item that you wish to add to inventory, either scan the |
|      | barcode using the barcode scanner, or type the barcode or        |
|      | Mfg.Item into the textbox.                                       |
| 8.   | Click Find.  |

| TACS Press Assessed | D Back |
|---------------------|--------|
|                     | - Deck |
| Scan or Type Barco  | de or  |
| Mfg.Item            |        |
|                     |        |
|                     |        |
| (2) Find            |        |

| 9.  | If the part is already in the system, the <b>Inventory Item</b> screen will |
|-----|---|
|     | appear. Enter the <b>Count</b> (how many of that item you have in your      |
|     | inventory). You can also enter other information under                      |
|     | Observations.   |
| 10. | Click Save.   |



#### How To (continued)

| Step | Action  |
|------|---|
| 11.  | After saving an inventory item, you can continue the session by |
|      | scanning (or typing in) the barcode for another item.           |
| 12.  | If the barcode is not already in the system, you can add it by  |
|      | clicking the Create New Item link that will appear.             |



| 13. | In the <b>Create New Item</b> screen, enter the appropriate information about the item into the text boxes. |
|-----|---|
| 14. | Click Save.   |

| TACS Rivers Assistant | Main Mirra |
|-----------------------|------------|
| -                     | C# Save    |
| Create New Item       | Cance      |
| Mfg                   |            |
| FIL                   |            |
| Item                  |            |
| 4040                  |            |
| Description           |            |
| Premium Air Filter    |            |
| □ Part is tire        |            |

| Step | Action  |
|------|---|
| 15.  | Now the inventory screen will appear, just as with any existing       |
|      | item. Enter the <b>Count</b> and any other information.               |
| 16.  | Click <b>Save.</b> This new item will now appear in the inventory for |
|      | further scans. You can continue with the inventory session by         |
|      | scanning another item.  |

| TRACS Wireless Assistant     | Main Menu |
|------------------------------|-----------|
| •                            | J Se      |
|                              | Ca        |
| Inventory Item               |           |
| FIL 4040                     |           |
| Count                        |           |
| 5                            |           |
| Observations                 |           |
| Unit of Measure              |           |
|                              |           |
| Location                     |           |
| Location<br>Part Description |           |
|                              |           |

# **Inventory Reconciliation**

**How To** To reconcile an inventory session within TRACS, take the following steps.

| Step | Action   |
|------|--|
| 1.   | After finishing your inventory session, start TRACS on your  |
|      | computer. Choose Activities from the top menu, and from that |
|      | drop-down list, choose Physical Inventory Reconcile.         |

| Activities | Reports     | Marketing   | Tools |
|------------|-------------|-------------|-------|
| Create     | New Estim   | ate         | F3    |
| Create     | New Appo    | intment     |       |
| Create     | New Custo   | omer        | F4    |
| TAMS       |             |             | +     |
| Create     | Purchase (  | Order       |       |
| Create     | Stock Orde  | er          |       |
| Receive    | Purchase    | Order       |       |
| Parts Fa   | ast         |             |       |
| Receive    | Payment     | -           |       |
| Schedul    | le          |             |       |
| Local Pa   | artsPro Ca  | talog       |       |
| Interne    | t PartsPRC  | Catalog     |       |
| Flatrate   | Estimatin   | g           |       |
| BackUp     |             |             |       |
| Account    | ting Expor  | t           |       |
| Apply F    | inance Cha  | arges       |       |
| Cash Dr    | awer        |             |       |
| Costing    |             |             |       |
| Financia   | al Health C | heck        |       |
| Financia   | al Profile  |             |       |
| Monthly    | Statemen    | its         |       |
| TRACS      | E-Mail      |             |       |
| Unapply    | / Finance ( | Charges     |       |
| Physica    | Inventor    | y Reconcile |       |
| Read Ba    | arcode      |             |       |
| Logoff/    | Logon       |             | F2    |

| Step | Action   |
|------|--|
| 2.   | From the Physical Inventory Session List screen, you can view                                |
|      | sessions that are <b>open</b> , <b>closed</b> , or <b>applied</b> by clicking on the tabs at |
|      | the top.   |
| 3.   | To choose a session, either click <b>Edit</b> with that session selected, or                 |
|      | double-click on that session.  |

|                     | Statur | Created               | Closed   | Applied |   | X Done   |
|---------------------|--------|-----------------------|----------|---------|---|----------|
| Section<br>SESSION1 | OPEN   | 6/19/2007 7:13:36 AM  | Courses. | Paperso | - | Wen      |
| SESSION2            | OPEN   | 6/19/2007 7:14:14 AM  |          |         |   | × Delete |
| SESSION3            | OPEN   | 8/27/2007 12 02:59 AM |          |         |   | V Monor  |
| TUESDAYSESSION      | OPEN   | 9/29/2007 3:31:01 PM  |          |         |   | ≥ Ed≹    |
| MY SESSION          | OPEN   | 9/28/2007 3:31:18 PM  |          |         |   | C Behes  |
|                     |        |                       |          |         |   |          |
|                     |        |                       |          |         |   |          |

# Inventory Reconciliation, Continued

| Step | Action  |
|------|---|
| 4.   | The individual Session Summary shows all parts counted during         |
|      | that session.   |
| 5.   | To enter a new count for any of the items, highlight that item, enter |
|      | the new count in the New Count textbox at the bottom of the           |
|      | screen, and click Change.   |

| Phycial Inventory Se      | rusion - SESSORIA |                  |                       |                               |              |              |        | _ IQ  2    |
|---------------------------|-------------------|------------------|-----------------------|-------------------------------|--------------|--------------|--------|------------|
| ession Summary Andel      | (FINE)            |                  |                       |                               |              |              |        | X Done     |
| Physical Inventory Sessio | 20                | Session Status   |                       |                               |              | 007 12:02:59 | АМ     | V Save     |
| SESSIONO                  |                   | OPEN T           |                       | Closed Date:<br>Approve Date: |              |              | Accept |            |
| trysical Inventory Iter   | m Counts          | 2011000          | lumn title to sort    |                               | Ser an       |              |        | > Edi      |
| Nem Mi<br>OILFILTER FIL   |                   |                  | unt Sum On Hard<br>20 | WIP Inv Ads                   | animenti Con | \$0.00       | \$0.0  | Do Preview |
| FILTER FIL                |                   |                  | 2                     | 0 0                           | 2            | \$0.00       | \$0.0  | Eine       |
|                           |                   |                  |                       |                               |              |              |        | -          |
|                           |                   |                  |                       |                               |              |              |        | C Behesh   |
|                           |                   |                  |                       |                               |              |              | - 11   |            |
|                           |                   |                  |                       |                               |              |              | - 11   |            |
|                           |                   |                  |                       |                               |              |              |        |            |
|                           |                   |                  |                       |                               |              |              |        |            |
|                           |                   |                  |                       |                               |              |              | -1     |            |
|                           |                   |                  |                       |                               |              |              | 1      |            |
| egend - Count diffe       | ma from TRACS QOH | - Count equals 1 | TRACS OOH             | Tot                           | al Session C | otlepact 0   | 0.11   |            |
| Adjust an Item Count      |                   |                  | -                     |                               |              |              |        |            |
| Nem<br>FillTER            | Description       | LIRETER: FR.     | Observe               | dCourt 00                     | H            | Inv Adjust   | terk.  |            |
| Lurine                    | L'acomparent      | courses he       |                       |                               |              | 1            |        |            |
| Vi -                      | Note              |                  |                       |                               |              | Change       |        |            |
| New Count                 | PROEM 1           |                  |                       |                               |              |              |        |            |

| Step | Action   |
|------|--|
| 6.   | To change any other information about the individual parts, either |
|      | double-click or highlight the part and click Edit.                 |
| 7.   | On the Item Detail screen, you can change names and                |
|      | descriptions, as well as adjust counts and costs. When you have    |
|      | finished making changes, click Save.                               |

| Physical Inventory I   | tem Detail                |                         |                         |  | _0      |
|------------------------|---------------------------|-------------------------|-------------------------|--|---------|
| m Change   Ilem Aude 1 | rol                       |                         |                         |  | J Save  |
| Keta                   | Description               |                         |                         |  | X Cance |
| FILTER                 | PREMIUM OIL F             | LTER                    |                         |  |         |
| Mla                    | Unit of Measure           | Location                | Min Qily                | Max Qty  | Edit No |
| FIL.                   |                           | 1                       |                         |  |         |
| Inventory Adjustment   | Calculations              |                         |                         |  |         |
| The Inventory Adjust   | ment is calculated by det | emining the difference  | between the Item Qua    | ntity Observed on the self and   |         |
| the Quantity On Han    | d calculated for the item | n TRACS and adding b    | ack in the WIP you do   | ant see on the self.   |         |
| Observ                 | red Count Total - Oly     | on Hand +               | = Invent                | koy Adustment  |         |
|                        |                           |                         | -                       |  |         |
|                        | 2 - 1                     | D +                     | -                       | 2  |         |
|                        | and the second second     | tory Value The Total C  | ont Impact is calculate | d by multiplying the Item cost by It   |         |
| Inventory Adjustment   |                           |                         |                         |  |         |
|                        | Item Cost                 | Inventory Adjustment    |                         |  |         |
|                        | \$0.00                    | 4 2                     | - 1 - 1                 | 0.00   |         |
| Change Observed Iter   | -                         |                         |                         |  |         |
|                        |                           | and a name of the       |                         | and the second |         |
| If the Observed Hem    | Count is wrong, change    | t here. To save the cha | inges the Save buildon  | must be pressed.   |         |
| New Count Total        | Note for Court            | f Total change          |                         |  |         |
|                        |                           |                         |                         |  |         |
|                        |                           |                         |                         | 1.00   |         |

| Step | Action  |
|------|---|
| 8.   | The Audit Trail tab for each session displays a list of each time a           |
|      | count was entered for an item during that session, even from different users. |

| Phycial Inven    | tory Session  | n - SESSION3       | and the second se |     |       |                                 |   |
|------------------|---------------|--------------------|---|-----|-------|---------------------------------|---|
| Session Summary  | Audit Trail   |                    |   |     |       |                                 | XDone   |
| All Session Iter | ms for this C | Counter            |   |     |       |                                 | ✓ Save  |
| ALL              |               | -                  |   |     |       |                                 | Accept  |
| -                | -             | Click colum        |   |     | -     | -                               | and the second se |
| lten             | Mig           | Description        | Location  | UOM | Count | Scan Date                       | <u>→ E</u> dit  |
| OILFILTER        | EL<br>FL      | PREMIUM OIL FILTER |   |     |       | 2 9/28/2007 3<br>10 9/28/2007 3 | 68 Preview  |
| OILFILTER        | FIL           | PREMIUM OIL FILTER |   | -   |       | 10 9/28/2007 3                  | Birst   |
|                  |               |                    |   |     |       |                                 | CBehesh   |
|                  |               |                    |   |     |       |                                 |   |
|                  |               |                    |   |     |       |                                 |   |
|                  |               |                    |   |     |       |                                 |   |

| Step                                   | Action   |
|--|--|
| 9.                                     | From the Session Summary screen, you can choose whether to   |
|  | keep a session open, to close it, or to apply it.  |
|  | You may want to keep a session <b>Open</b> if you haven't yet finished<br>checking it or making changes. You may want to mark it <b>Closed</b><br>if you have finished making changes but someone else is waiting<br>to look over it, or you think you might come back to it later. You<br>want to choose <b>Applied</b> if you are finished with the session and<br>will be making no further changes.  |
| Physiel In                             | erwiary Session - S255000  |
| Secon Sum                              | ev [Austine]   |
| Physical Inve<br>DESSION1              | ntop Session Status Create Date №27/2007 12:02:59 AM   |
| Physical Inv                           | entory Bern Counts Config Address Date Addre |
| PLIER                                  | IPE         PREMIUM OF PRITER         20         01         02         201         201         00   |
|  | Obten  |
|  |  |
|  |  |
|  |  |
| 100                                    |  |
|  | - Caser differs from TRACS-00H - Caser equals TRACS 00H Total Session Cost Impact 0  |
| Adot on it                             | And a second   |
|  | En Court Court Court Court OOH In Advancer   |
| Adot as it<br>free<br>filters          | The Court Provide Court Court Court Provide  |
| Adot as it<br>free<br>filters          | The Court Provide Court Court Court Provide  |
| Adapt on It<br>https://www.com         | If you chose Applied, you will see this pop-up window:   |
| Adapt on It<br>https://www.com         | mi Court<br>Description<br>PELEVICE OL 40 DEF<br>Note<br>Note  |
| Adust an II<br>Nam<br>New Cou          | If you chose Applied, you will see this pop-up window:   |
| Adust an II<br>Nam<br>New Cou          | If you chose Applied, you will see this pop-up window:   |
| Adapt on B<br>Rem<br>FILTER<br>New Cou | If you chose Applied, you will see this pop-up window:   |
| Adapt on It<br>https://www.com         | Containing the provide the     |
| Adapt on B<br>Rem<br>FILTER<br>New Cou | If you chose Applied, you will see this pop-up window:         Image: Comparison of the second seco  |
| Adust an II<br>New Cou                 | Containing the provide the     |

received into inventory.

**How To** To locate an existing estimate, perform the following steps.

| Step | Action   |
|------|--|
| 1.   | Choose <b>Estimate</b> from the first screen after you have logged into            |
|      | the Wireless Assistant system.   |
|      |  |
| 2.   | Choose <b>Estimate</b> from the first screen after you have logged into the system |

TRACS Wireless Assistant Main Menu

Locate Vehicle by

- <u>Customer Name</u>
- Customer Phone
- Vehicle VIN
- Vehicle Tag
- Vehicle Fleet Id
- Work Order Number

View or Edit

My Work Orders today All Open Work Orders Work Order by number

Create New Customer

#### How To (continued)

| Step | Action  |
|------|---|
| 3.   | Choose the method you want to use to search for the vehicle to which the work order is attached.                                      |
|      | You can locate the vehicle by: Customer Name, Customer Phone,<br>Vehicle VIN, Vehicle Tag, Vehicle Fleet ID, or Work Order<br>Number. |
|      | For example, to search by Customer, choose Customer Name.   |



| 4. | Type in the name and click <b>Find</b>                       |
|----|--|
|    | OR   |
|    | Choose the first letter of the name and then choose from the |
|    | resulting list.  |

#### SMITH, CINDY

| Addr1 |                         |
|-------|-------------------------|
| Addr2 |                         |
| City  |                         |
| State |                         |
| Zip   |                         |
| DayPh | 248-8124                |
| Comp  |                         |
| NgtPh |                         |
| Emal  | httrelljon@yahoo.com    |
| Ctc   |                         |
| CtcPh |                         |
| Notes |                         |
| 1     | Vehicles IditCust Back] |

#### How To (continued)

| Step | Action   |
|------|--|
| 5.   | Choose Vehicles from under the customer's listing. |

| 1203 Terden Lastar     | A Statistics |
|------------------------|--------------|
|                        | CO Back      |
| Vehicle And Tag        |              |
| 2000 Mercury Mountaine | er 244CI     |
| 4.0Liter V6 - DSK602   |              |
| New Vehicle            |              |

| 6. | Choose the ap | propriate | vehicle from | n the resulting list. |
|----|---------------|-----------|--------------|-----------------------|
|----|---------------|-----------|--------------|-----------------------|

#### 2000 Mercury Mountaineer 244CI 4.0Liter V6 - DSK602

Cust SMITH, CINDY Color VIN License DSK602 Eng Serial Curr Miles 33524 Curr Date 2/11/2003 12:00:00 AM Last Miles 0 Last Date 2/12/2003 12:00:00 AM Notes Fleet (Create WO (Edit WO (Edit Yeh) Custemer (Back )

## 7. Choose Edit WO.

| TELES Virdus Ashtart                  | Main Man |
|---------------------------------------|----------|
| Open Vehicle Work<br>WO - Name, Vehic |          |
| 1680 - SMITH, 2000 N                  | dercury  |

#### How To (continued)

| Step | Action  |  |
|------|---|--|
| 8.   | Choose the vehicle from under the customer's listing. |  |

#### 1680 - SMITH, 2000 Mercury

| Note             | System Byte[]               |
|------------------|-----------------------------|
| Cust waiting     | N                           |
| Tech             |                             |
| Bay              |                             |
| Promised<br>date | 30-JUN-2007<br>17:00:00.000 |
| Odometer in      | 300000                      |
|                  | it.Estimate Back ]          |

9. Choose Edit Estimate.



| 10. | Make any appropriate changes to the estimate. |
|-----|---|
| 11. | Click Save.                                   |

**How To** To create a new estimate, perform the following steps.

| Step | Action   |
|------|--|
| 1.   | Either locate an existing customer or vehicle, or create a new |
|      | customer. To create a new customer, choose New Customer.       |

| TRACS Wireless Assistant              | Main Menu |
|---------------------------------------|-----------|
| Locate Vehicle by                     |           |
| Customer Name                         |           |
| Customer Phone                        |           |
| Vehicle VIN                           |           |
| <ul> <li>Vehicle Tag</li> </ul>       |           |
| <ul> <li>Vehicle Fleet Id</li> </ul>  |           |
| <ul> <li>Work Order Number</li> </ul> |           |
| View or Edit                          |           |
| My Work Orders today                  |           |
| All Open Work Orders                  |           |
| Work Order by number                  |           |
|                                       |           |
| Create                                |           |
| New Customer                          |           |

| 2. | Enter the appropriate information about the customer and choose |
|----|---|
|    | Save.   |

| TINES Worker Assistant | March March |
|------------------------|-------------|
| -                      | Save        |
|                        | Cancel      |
| .ast Name              |             |
| First Name             |             |
| Day Phone              |             |
| Company Name           |             |
| · Individual           |             |
| C Business             |             |
| C Fleet                |             |
| Contact info and notes |             |
| Address info           |             |

### How To (continued)

| Step | Action                                       |
|------|--|
| 3.   | From the customer's listing, click Vehicles. |

| JOHN, J | IONATHAN |   |
|---------|----------|---|
| Addr1   |          | _ |
| Addr2   |          |   |
| City    |          |   |
| State   |          |   |
| Zip     |          |   |
| DayPh   | 555-5555 |   |
| Comp    |          |   |
| NgtPh   |          |   |
| Email   |          |   |
| Ctc     |          |   |
| CtcPh   |          |   |
| Notes   |          |   |

[Vehicles Edit,Cust Back]

L

| 4.  | Choose New V        | ehicle.  |  |
|-----|---------------------|--|--|
| _   |                     |  |  |
| 701 | NP We I A TO A TO A | and the second sec |  |



5. Choose all of the appropriate information about the vehicle.



## How To (continued)

| Step | Action   |
|------|--|
| 6.   | From the new vehicle listing, click Create WO. |

## 2006 BMW 525xi 3.0 L 2998 CC L6 DOHC 24 Valve

Cust JOHN, JONATHAN Color VIN License Eng Serial Curr Miles 2000 Curr Date 8/27/2007 1:15:51 AM Last Miles Last Date Notes Fleet ICreate WO (Edit WO) Edit Yeh (Curtomer (Back )

| 7. | Enter appropriate information into the estimate. |
|----|--|
| 8. | Click Save.                                      |

| TIASS Reden Assistant                      | 450 Million |
|--|-------------|
| Current Odometer                           | Cancel      |
| Type notes                                 | _           |
| Customer Is Waiting<br>Select Promise Date |             |
| Select Technician<br>Select Bay            |             |

Select Symptoms

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| voiding an  |       |
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