USER MANUAL VERSION 2.0

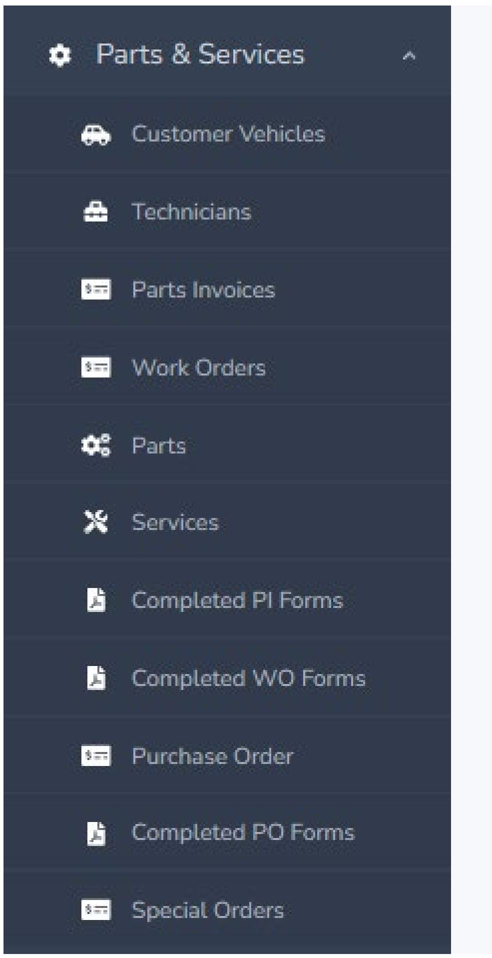
PARTS & SERVICE

Welcome to DMS Complete's Parts & Service user guide. We will cover adding a part to your Parts inventory, Parts Invoicing, Purchase Orders, Special Orders and adding customers. On the Service side, we will cover adding Service Rates & Packages, customers, customer vehicles, Service Technicians, creating Work Orders, Service Tech Job Orders and Service / Work Order Invoicing.

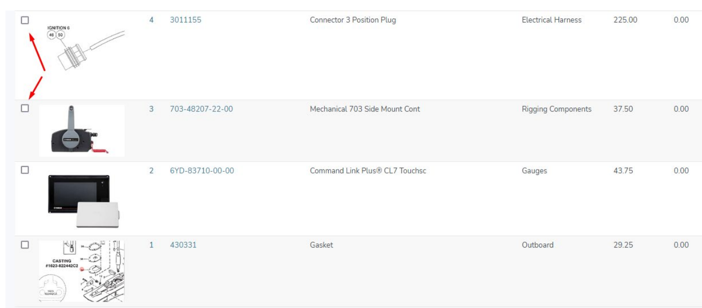
PARTS

Entering Part Inventory

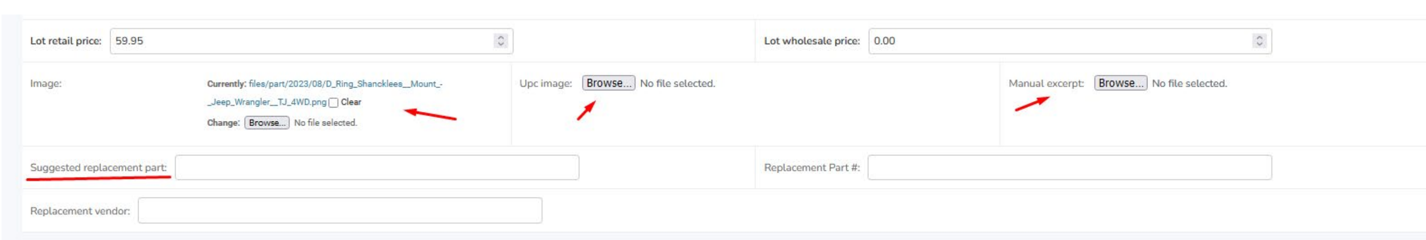
You will begin by going to your left side menu and clicking on the Parts & Services menu option which will bring up a drop down list…click on PARTS.



When you click on Parts, that will bring up your part inventory list or a blank "Select Part to change" page. If you have inventory already added to your database the page may look something like this (image below). You can check a checkbox to bring up an inventory item you wish to review, change or update. If you are adding part inventory for the first time, then you will want to click on "ADD PART" located in the top right corner of the Select Part to change page.



Once you are in the Change Part form, you can enter the details of the part. You can enter a UPC code for reference and upload an image scan of the code as well. You can upload pictures of the part itself and for further reference, you can upload a pic of the manual excerpt that shows where the part is located from the replacement / service manual. If you sort your parts or track them by Category, you can use the Category field for those values. You have both a short description (for customer invoices) and a long description option for the part. If the manufacturer has suggested or if you know of a Replacement Part in the event a part has been discontinued, there is a section just above the Financials section to enter the details of the replacement part.



You have 3 Pricing rates, Retail, Discounted and Wholesale. All are controlled under the Financial section towards the bottom of the Change form. If you sell parts by the Lot (multiples of or case lots) you can set Lot prices as well. Your Retail, Discounted and Wholesale prices are set by the percentage of markup you take. Enter those percentages and then enter your Unit Cost and the system will calculate your different prices. If the price does not look right, then simply adjust the markup percentage. If the different tax rates for your province or state apply to parts, simply check the Apply Tax check boxes for the appropriate tax and the tax will be charged on invoicing.

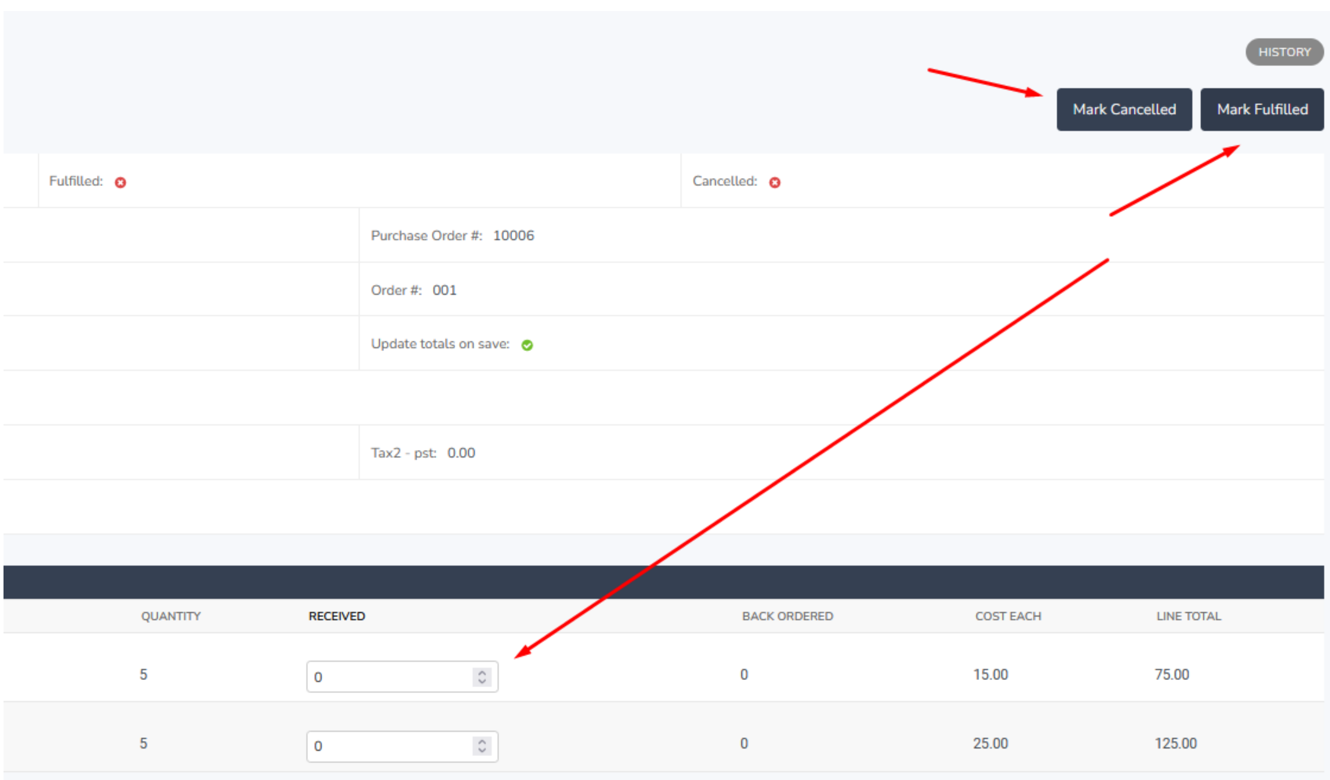
Under Manual Links, you can set links directly to the manufactures service manual for Service Techs & Counter personnel for reference purposes.

Purchase Orders

The system will issue Purchase Orders to replenish part inventory if the data is entered to do so, so when you get to Quantities on hand it will show you what is on Order and what is on Back Order, Delivery Dates and such.

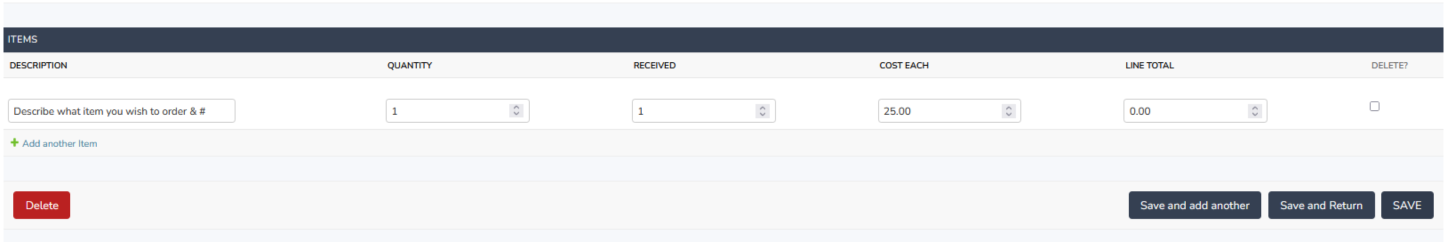
DMS Complete will generate a Purchase Order once all the part quantity levels are met and if Vendor PO Details have been entered into the system. Once a Change Purchase Order form has been generated by the system you will have the option to issue it as is, or you can make manual changes to the order. Once ready to submit, you can print a hard copy of submit the PO by email.

When the replacement inventory has been received you complete the Fulfilled step of the PO by bringing up the issued PO, receiving the parts into inventory and marking the PO as Fulfilled. Reordered parts are added into inventory and the PO will be closed. If you need to cancel the order there is a cancellation button to cancel the PO.



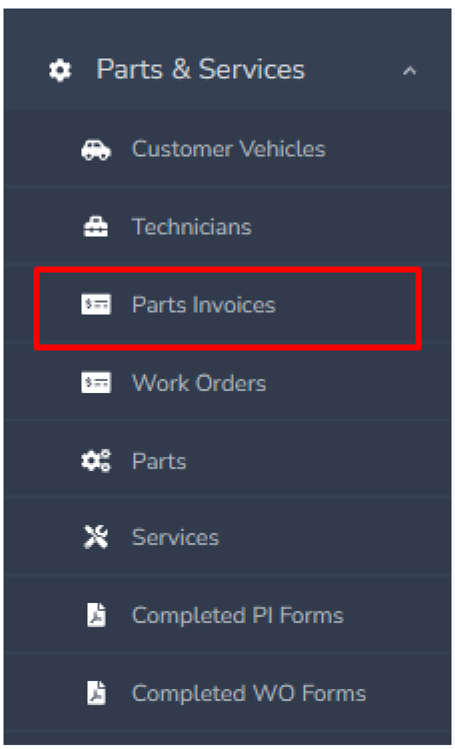
Special Orders

Special Orders are handled similar to Purchase Orders. The only difference is they do not generate a Purchase Order. You create these manually in most cases as Special Orders are done on-line or by phone. Once the item has been received mark the item as received under the Special Order and it will be closed.

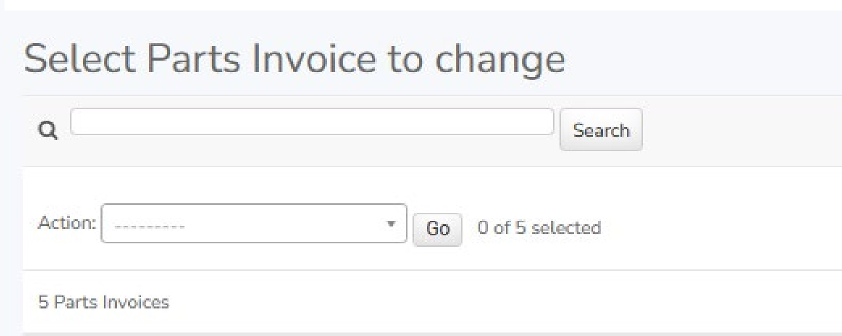


Parts Invoicing

Under the Parts section, you have the ability to issue Customer Invoices just for Parts if you have a separate Parts Dept. The Invoice does not require it to be part of a Service Work Order. So to issue a Parts invoice, click on the Parts Invoices link under the Parts & Services section on the left side menu. That will take you to the Select Parts Invoice to change page.



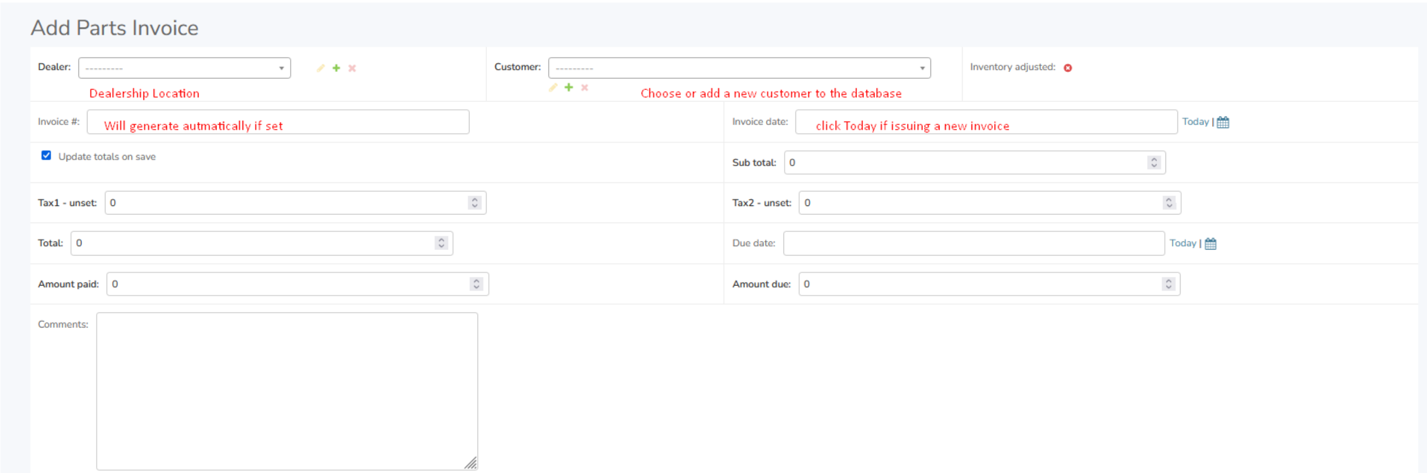
If you need to adjust / correct an existing invoice, choose the invoice ID you need to work on and make the necessary corrections to that invoice file. Always remember to Save your work and print a new invoice copy.



If you wish to create a new invoice, Click on the ADD PARTS INVOICE button in the top right corner of the Select Parts Invoice to change page which will take you to the Add Parts Invoice form:

- Choose your dealership location
- Choose an existing customer, or add a new customer to your customer database (by clicking the green plus sign)
- Enter an invoice date and click Save

This will create an invoice record which will allow you to add the part(s) your customer wish to purchase. You can also create an invoice file at any time and leave it open to add parts to the file during the visit / day / week / month, whichever works best for you and your customer.



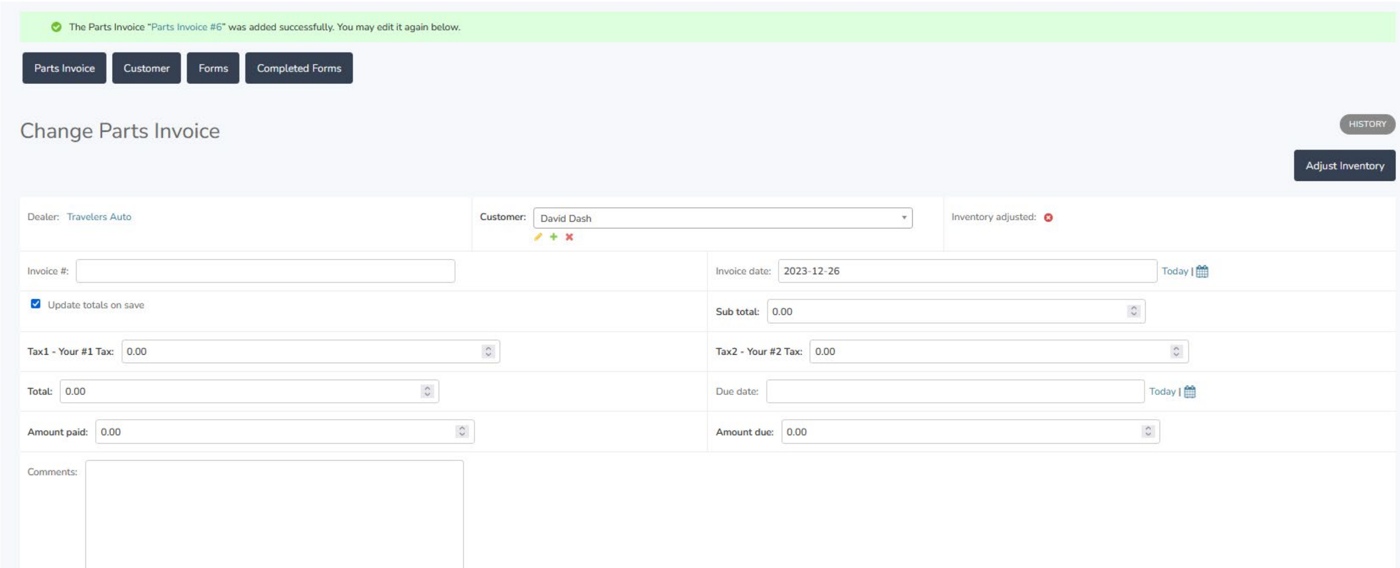
As soon as you create the invoice record this page will appear. Make sure you are displaying the correct customer record, click Today for the Invoice date and proceed to the Part Items section. Click on Add another Part item to create a Part Item line. Add the part from the inventory part list or type a part description, i.e., battery case and a list will appear:

- pick the part item
- choose whether the price to use is Retail, Wholesale, Case Lot or Case Lot Wholesale or this will be a manual entry
- if manual you will have to enter a price if not the system will enter a price based on the inventory description
- next enter the quantity being purchased
- if you made a mistake, you can simply click the x within a circle icon to delete the line
- If more than one part is being purchased repeat the above steps until all items are listed on the invoice record
- once complete, click Save to save the entry and calculate the line(s) total and taxes
- double check to make sure all the items are recorded
- click the Adjust Inventory to update your inventory quantities
- enter your due date and amount paid and click Save
- next click on forms to bring up your dealerships Parts invoice form
- once the proper form is chosen, click the “Get Filled Form” button
- this will generate a pdf version. Hit print (based on your pdf print protocols) to generate a hard copy of the invoice

Always remember to click “Save” to stay on the current form. Save and Return will take you to the previous page you were on.

For customer refunds, issue a refund like a Purchase Order entering the returned goods back into stock. You can create 1 customer for all refunds, or make each customer a vendor to enter the details of the credit. Another option is to issue a Credit Not manually and then proceed to change / cancel the original invoice, making notes under Comments with regard to the change. Your bookkeeper / accountant may have other suggestions because of tax issues.

For customer

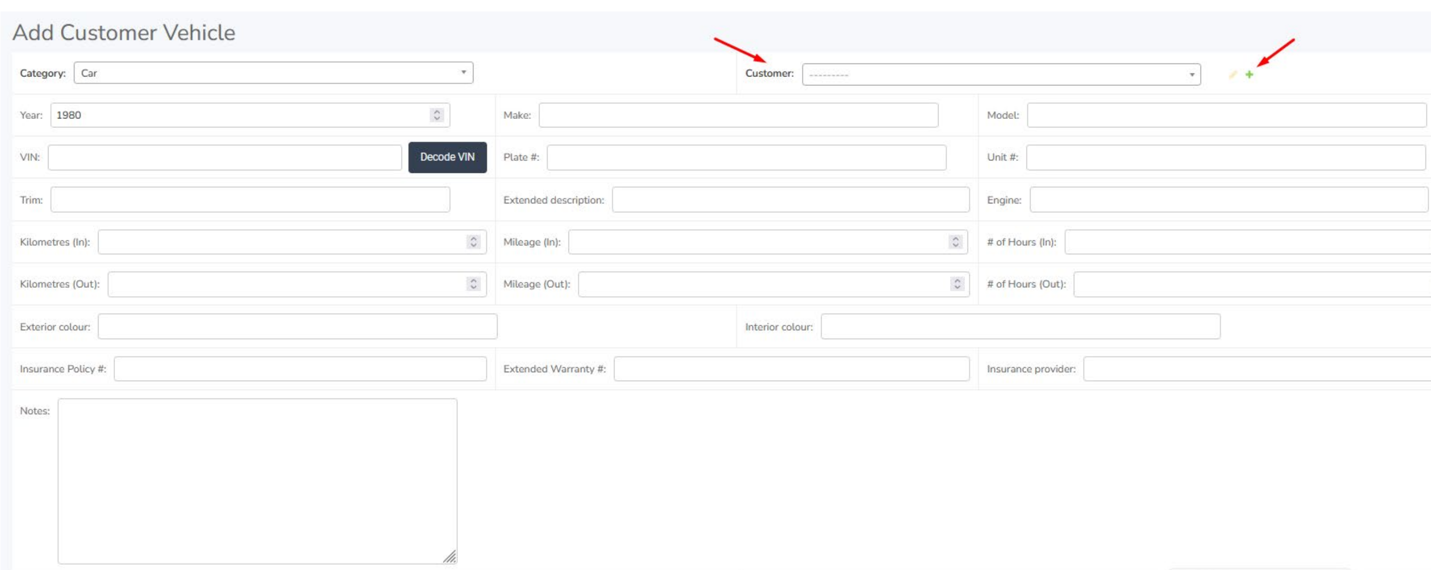


SERVICES

The Services section covers the Service side with Labour charges, Services packages, Work Orders Technician diagnosis, recommendations and invoicing. Nothing on the Service side can begin without a customer or a customer vehicle. So we'll cover these two areas first before we get into the Services section.

Customers / Customer Vehicles

Customers can be entered into your system a number of different ways. You can create a customer profile by going to the Business Relations section of the main menu and choosing Customers. Click the Add Customer button (top right corner) of the Select Customer to change page. You can also create a customer record by going directly to the Customer Vehicles section of the Parts & Services section under Customer and clicking the green "+" plus sign. The yellow pencil will allow you to edit an existing customer record if necessary.



Once the customer record is entered or chosen, you need to create a vehicle record for that customer. You do have a VinDecoder to help with filling in the details off the vehicle if you have the VIN #. If not, simply enter the vehicle details along with any other information you may need for servicing the vehicle. The customer may have more than one vehicle and the system will allow you to create vehicle profiles for all those vehicles. If your customer is a business and owns a fleet of vehicles, you can enter plate and Unit ID #'s to help you identify each vehicle. If you need to retain copies of certificates or warranty documents, you can upload those at the bottom of the vehicle record under FILES. Click on Add another file to give you a browsing button to choose the files location, click Save to add the file to the record.

Services

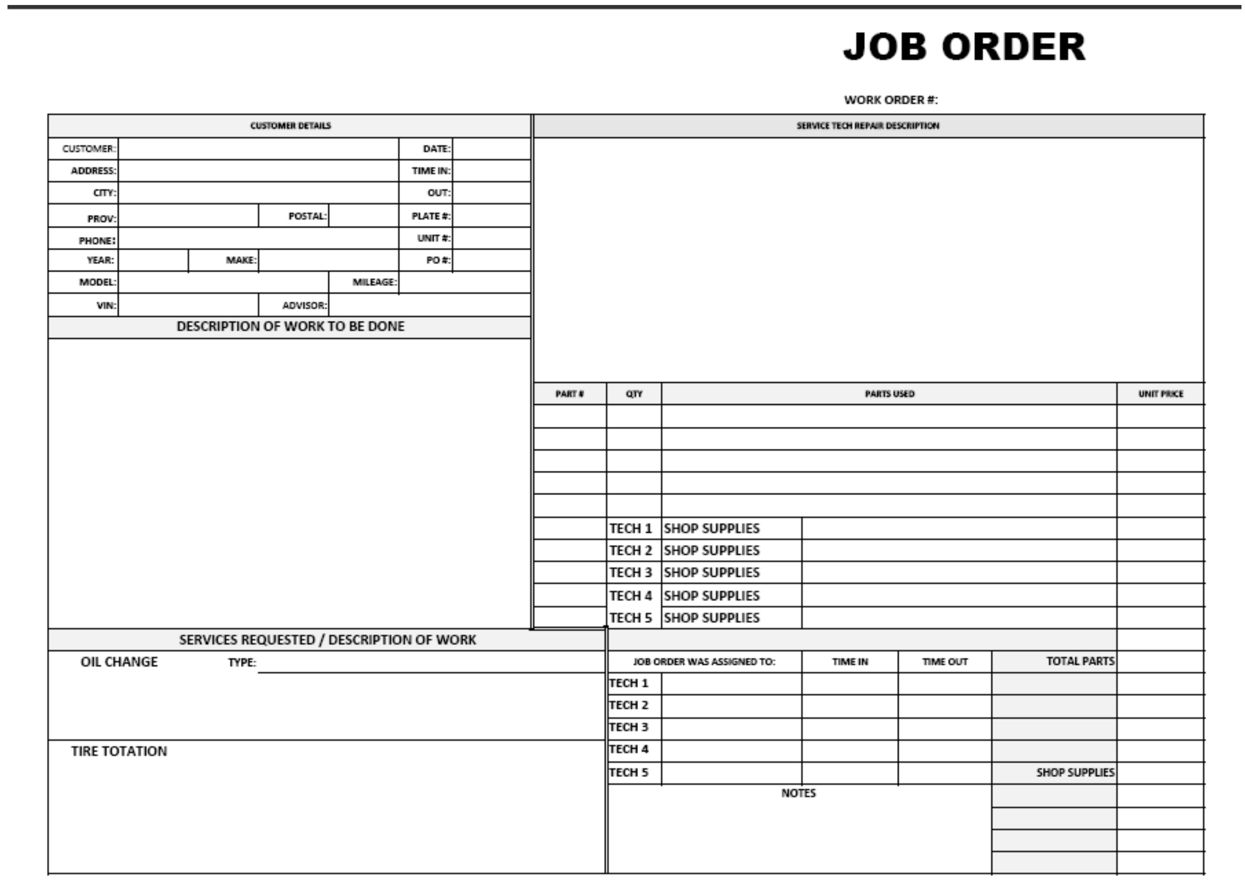
Under Services you will create any Service packages you may offer, i.e., Domestic Oil Changes, Synthetic Oil Changes, Spring Tune Up, Airconditioning Maintenance, etc. You can set a name for the package, a Service #, categorize and provide a brief description for invoicing purposes. There is also an extended text box if you want to make notes for the service advisors or technicians. You will also set package rates, your shop's hourly rate and local tax rates for invoicing purposes.

Work Orders

Work Orders are used to start the repair job the customer is requesting. To begin, click on Work Orders on the left side menu under Parts & Services. That brings you to the Work Order to change page. Select ADD WORK ORDER (top right corner) to create a new Work Order or click on the ID# of an existing work order if one is already open for a customer. Make sure you have selected the correct dealer location and follow these steps:

- set your date
- choose your customer and the customer's vehicle. If they have more than one on file the choice will be a drop down list
- set your Time in (Date and Time)
- enter the Advisor name
- under Service Overview enter the customers description of the problem / request on the work to be done
- if the work required is a simple oil change or tire rotation, there are separate comment boxes for both
- there is also an additional notes and Advisor feedback boxes to record comments for the future / invoice
- once complete, proceed to Forms (black tab at top of the Change Work Order page) and print a copy of the Work Order to review and get the customers signature to proceed with the repairs

Once the Work Order has been authorized by the customer, you can print a Job Order for the Service Technician, provide a hard copy of the WO or, you can assign the job to a technician through the Techs & Feedback section (black tab top of page).



JOB ORDER

WORK ORDER #:

CUSTOMER DETAILS			
CUSTOMER:		DATE:	
ADDRESS:		TIME IN:	
CITY:		OUT:	
PROV:	POSTAL:	PLATE #:	
PHONE:		UNIT #:	
YEAR:	MAKE:	PO #:	
MODEL:		MILEAGE:	
VIN:	ADVISOR:		

DESCRIPTION OF WORK TO BE DONE

SERVICE TECH REPAIR DESCRIPTION

PART #	QTY	PARTS USED	UNIT PRICE
	TECH 1	SHOP SUPPLIES	
	TECH 2	SHOP SUPPLIES	
	TECH 3	SHOP SUPPLIES	
	TECH 4	SHOP SUPPLIES	
	TECH 5	SHOP SUPPLIES	

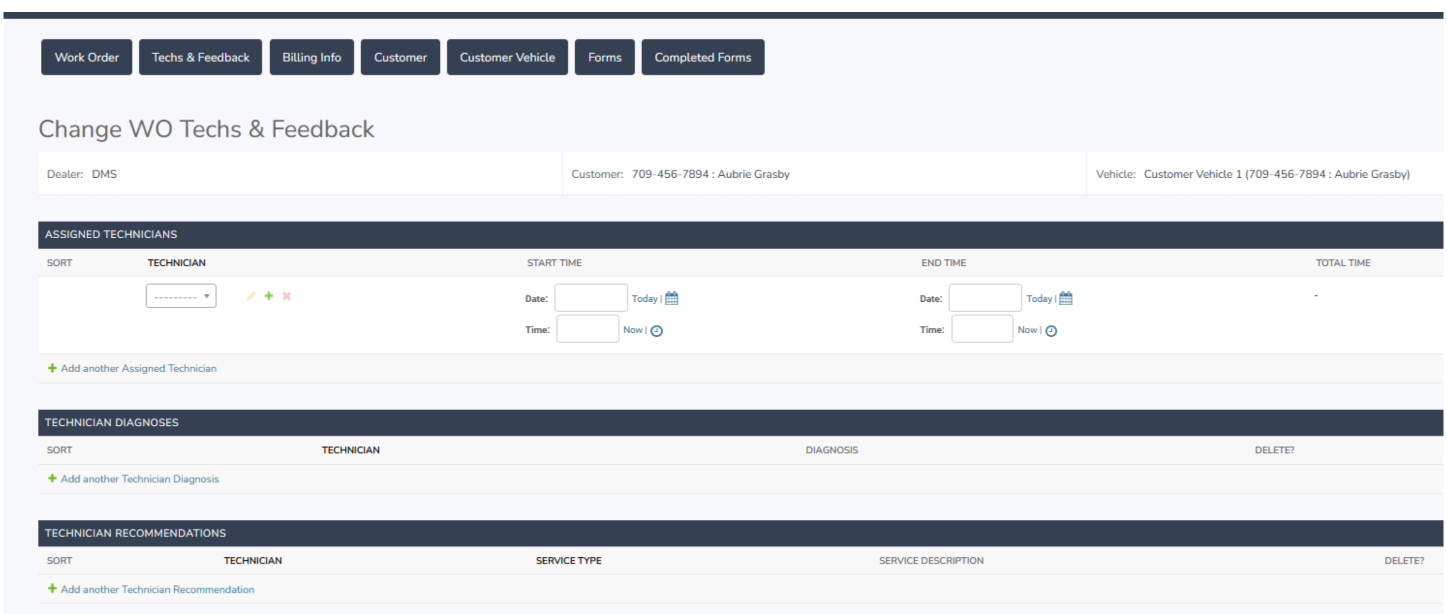
SERVICES REQUESTED / DESCRIPTION OF WORK

OIL CHANGE TYPE:

TIRE TOTATION

JOB ORDER WAS ASSIGNED TO:		TIME IN	TIME OUT	TOTAL PARTS
TECH 1				
TECH 2				
TECH 3				
TECH 4				
TECH 5				SHOP SUPPLIES

NOTES



With hard copies the tech can record parts used for each WO worked on and record the time it took to do a specific repair. If they have login privileges, they could have access the Work Orders Tech & Feedback section to type their diagnosis and even enter the parts used for the repair job if a service invoice record was created for the job.

Service Work Invoice

Once all the repairs have been done, you will want to issue an invoice for payment. From the Change Work Order page click on the Billing Info tab at the top of the page. Here you will enter all the service work done and parts used to complete the repair:

- set your invoice date
- invoice # will automatically set incrementally from the previous invoice #
- make sure the customer and vehicle are correct
- click Save to create a Service Billing Record
- next choose the parts used for the repair. Make sure to use the proper “Price to Use” setting for the invoice. Enter the quantity of the part used and click Save. This will automatically set the part Price and Line Total for the invoice
- next go to the Service Items section to enter the Service related work. If it’s a Service Package choose that or a hourly rate. Again, if it’s a package the price will appear once you click Save. If it’s an hourly rate, enter the amount of hours to complete the repair and click Save. The hourly rate and line total will fill in
- if everything looks fine under the billing details, click the Adjust Inventory button to update Part inventory totals
- next enter the due date (usually the same day the invoice was issued unless billing arrangements were made previously) and the Amount paid to show pmt has been received
- you are now ready to print the customer invoice. Go to Forms and choose the proper Invoice form for your dealership. The system will generate a pdf copy for the customer and you may want to print a second copy for your bookkeeper. The system will also save a copy on file for future reference

Service Technicians

The system will allow you to give your Service Technicians access to Work Orders to provide a diagnosis via their login access and enter parts used to complete the repair job and provide/record recommendations for vehicle maintenance. These can be left on file and even printed on forms for customer reference.

To add a technician to the system, you need to create a user profile for the tech. Go to:

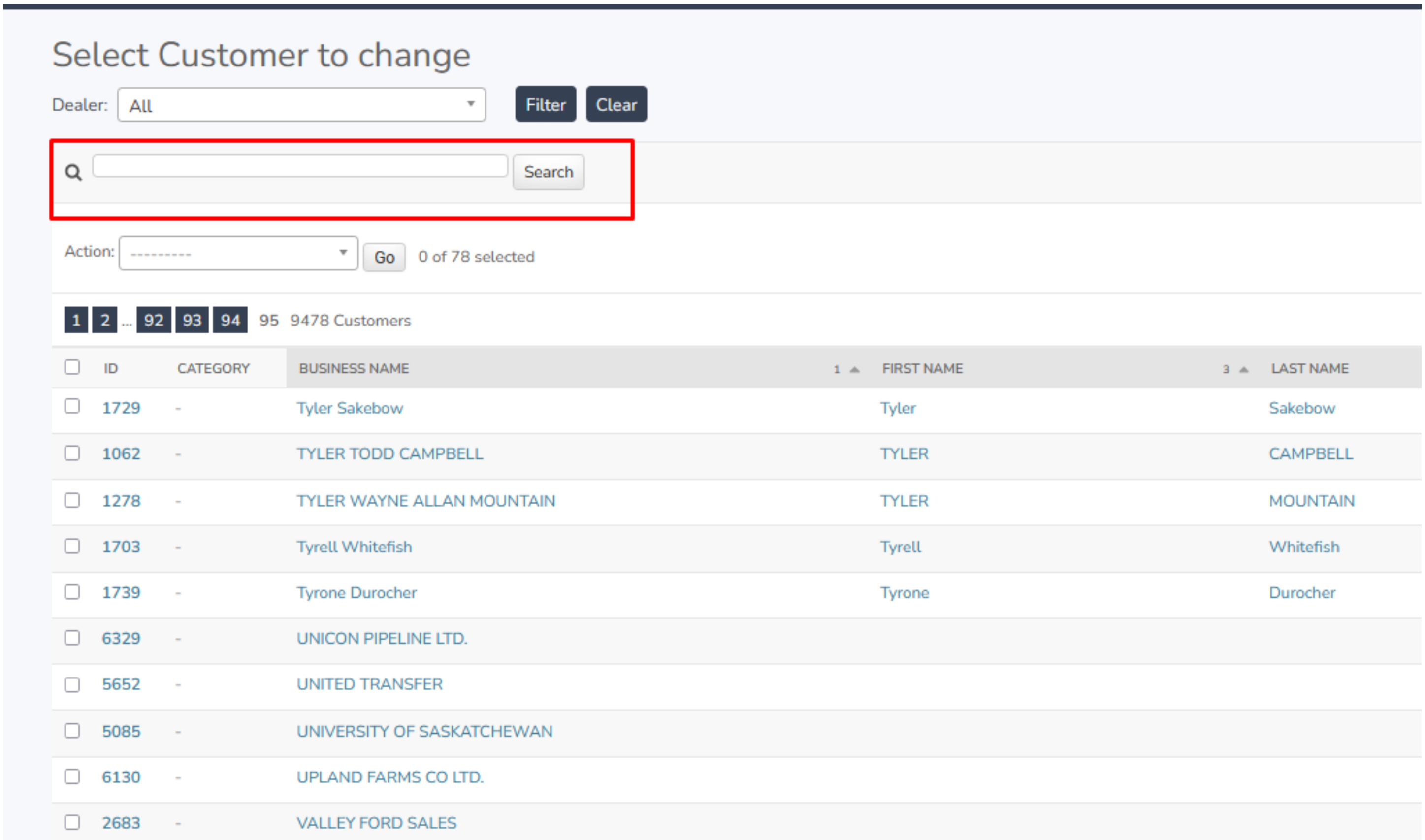
- Administration and click the Users sub-menu
- click the Add User (top right corner) button /to open the User profile page
- create a username and temporary password, then choose your Company and Dealer titles and click “Save and Return”
- this will bring up the Change user page
- complete the Personal info section and the Permission section
- under Permissions, check the Active and Staff status check boxes and choose the DlTech user group. This will give the tech access to Work Orders to provide a diagnosis, add parts used for the repairs, and make recommendations to the Work Order.

Technicians do have access to add customers and customer vehicles. If you wish to change the permission access, contact your DMS Complete representative to make changes to the user group or create one that better suites your needs.

Parts & Service Access Tips

Departments may find it time consuming and frustrating to always open a section they require by going through the leftside menu each time they need to look up a part, create a Work Order or issue an invoice for a customer, so we suggest a simple short cut. When they arrive in the morning and open their computer, depending on the which department it is, they can follow these rules:

1) Parts or Service can always start from the customer database or "Select Customer to change" page. This will allow them quick access to the customer record by doing a simple search



Select Customer to change

Dealer: All Filter Clear

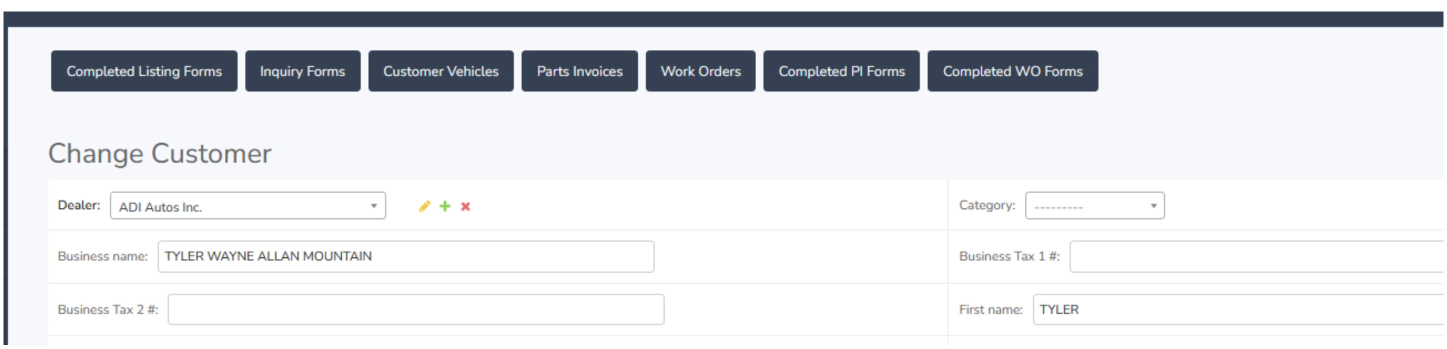
Search

Action: --------- Go 0 of 78 selected

1 2 ... 92 93 94 95 9478 Customers

ID	CATEGORY	BUSINESS NAME	FIRST NAME	LAST NAME
1729	-	Tyler Sakebow	Tyler	Sakebow
1062	-	TYLER TODD CAMPBELL	TYLER	CAMPBELL
1278	-	TYLER WAYNE ALLAN MOUNTAIN	TYLER	MOUNTAIN
1703	-	Tyrell Whitefish	Tyrell	Whitefish
1739	-	Tyrone Durocher	Tyrone	Durocher
6329	-	UNICON PIPELINE LTD.		
5652	-	UNITED TRANSFER		
5085	-	UNIVERSITY OF SASKATCHEWAN		
6130	-	UPLAND FARMS CO LTD.		
2683	-	VALLEY FORD SALES		

From here they can check upcoming reminders, or have quick access to customer vehicles, past Part Invoices, service Work Order and completed forms (invoices and WO's)



Completed Listing Forms | Inquiry Forms | Customer Vehicles | Parts Invoices | Work Orders | Completed PI Forms | Completed WO Forms

Change Customer

Dealer: ADI Autos Inc.

Category: ---------

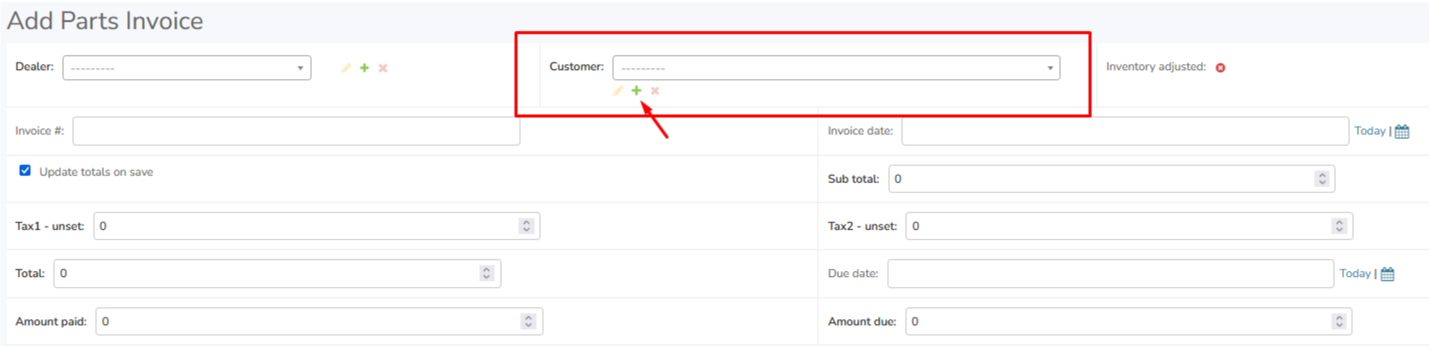
Business name: TYLER WAYNE ALLAN MOUNTAIN

Business Tax 1 #:

Business Tax 2 #:

First name: TYLER

2) The Parts Department could also keep their "Select Parts Invoice to change" page as their starting point. From here you always have access to the "ADD PARTS INVICE" button and once you start a Parts Invoice Record, you can locate a current customer or add a new one to the database very quickly



3) For the Service Department, they can start from the “Select Work Order to change” page. From here they can quickly start a new work order or open a previous record if they need to look up something on a completed work order. Again, there is quick access to an existing customer and customer vehicle or they can add a new customer and vehicle if required