Abbreviated Training

Your basic 3 setup sections have been checked

These are your next steps:

1. Review and edit your labor rates. Consider adding different rates such as \* Medium Truck \* Body Shop Labor \* Pre-inspection \* New customer rate for limited time service discounts \* In-house rates for repairs, inspections, etc
2. Add your 10 best customers. Start by reviewing the video [https://www.youtube.com/watch?v=JeVi1RVyfpA](https://www.youtube.com/watch?v=JeVi1RVyfpA%20%20)  \* Add your company for the potential car sales Remember to set your tax as NON TAXABLE ( 3 step process ) View <https://www.youtube.com/watch?v=GQ_10VLvpBI>
3. Set your in-house vehicles to NON Taxable. Review the previous videos if needed
4. Create your “ canned jobs “ and add the top 30 to your quick list Before beginning, PRINT the existing jobs that Mitchell created as a starter set. At top of screen, look for REPORTS, choose MANAGEMENT, then choose Canned Job List
5. You will need to add CATEGORY and ACCOUNT information .Review this video first <https://www.youtube.com/watch?v=NhJP-08ffpU>
6. Check that your “ quick list items “ are showing. Open any order, right- click on the Zero line and verify your canned jobs are showing
7. Creating Estimates / RO’s – Review the 3 workflow videos
* Demo - Flow Review 1 of 3 <http://youtu.be/Q7Tpjl1nAxY>
* Demo - Flow Review 2 of 3 <http://youtu.be/xVMxjnPmtXw>
* Demo - Flow Review 3 of 3 <http://youtu.be/Aba167KLZEA>
* Diagnostic Times – Add Symptoms to your Estimate or RO. These times are based on your default labor rate. Add new or edit existing under Configurations / Standard Descriptions / Symptoms Descriptions <http://youtu.be/PX-OK5jzV00>
* Symptoms Screen <https://youtu.be/dhChm4jTkTI>
1. New orders show in your Work in Progress Screen Overview <https://youtu.be/V0AaqwJjKRU>
2. Review your work flow videos to change from Estimate to RO, from PO to invoice, from Invoice to paid and closed. NOTHING on your work in progress screen should be there as an invoice unless waiting for customer to come and pay. If you bill customers, process the invoice to move into your accounts payable. Open the invoice, select PAY/Post at bottom left, choose CHARGE ( in house CHARGE ) as payment type. Complete this payment. You will be asked if customer is permitted to charge ( will see this warning until you select this ability under the customer screen top right box ) Paying to charge removes the invoice from your work in progress and places it in Accounts Receivable where you can print statements/ collect money, etc
3. Review Recommendations and Revisions.
4. Check the mileage of every incoming vehicle, and check the scheduled services. Create your recommendations and revisions.
* Add your most used inventory items, whether you stock them or not. You can do this as you enter a part on a RO or do this as Part Entry Review these videos first PARTS - Order Item Entry <https://youtu.be/pvBjwa5orM8>
* Parts Ordering <http://youtu.be/jjY1P2Dugws>
* Setup your parts vendors for online ordering Vendor Setup (Catalog Link)<https://youtu.be/tSsNzx_5tNM>

Run End of Day at close of business each day End-Of-Day Reports <http://youtu.be/me_k7b5mQKs>