

DealerBuilt®

Training Guide

PARTS

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Parts Department Training Guide

Introduction

The Parts Department On-Site Pre-Training Agenda will be used to help your team fully understand your DealerBuilt Parts Module. DealerBuilt Pre-Training is designed to provide your dealership staff with basic and advanced training on your parts department functions. Our goal is to provide your team with enough background training so that on 'Day One / Two', you will be fully prepared to reliably meet your client needs.

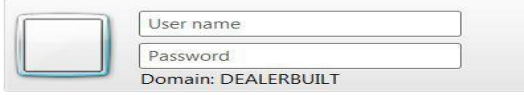

ON-SITE TRAINING AGENDA

During the training period, DealerBuilt domain experts will verify the following completed tasks for each perspective department.

*Please identify your understanding of the listed topics by checking "Yes" to indicate you understand the concept and "No" to indicate you do not.





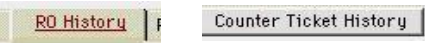

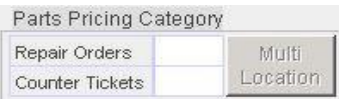

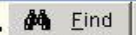

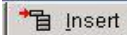


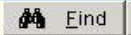
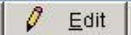
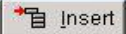

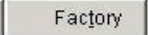

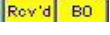
How to Enter LightYear

YES NO

		 A screenshot of a 'Remote Server Log-in' dialog box. It features a computer monitor icon on the left. To the right, there are two text input fields labeled 'User name' and 'Password'. Below these fields, the text 'Domain: DEALERBUILT' is displayed.	Remote Server Log-in (Icon on Desktop)
		 A screenshot of a 'LightYear System Log-in' dialog box. The title bar reads 'Welcome, Please Log-in'. On the left side, the numbers '99' and '241' are visible. The main area contains three text input fields labeled 'User Name', 'Password', and 'Location'. To the right of these fields are two buttons: 'Cancel' with a red 'X' icon and 'OK' with a green checkmark icon.	LightYear System Log-in




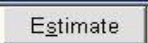
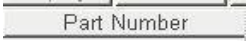
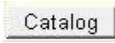











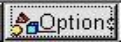
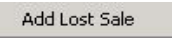






Parts Department Training Guide

YES NO

		 Navigation of the Customer Master Window	
		Finding a customer/vehicle	
		Editing a customer/vehicle record	
		Review of parts on order for a customer	
		Review the counter ticket history	
		Select category for wholesale customers	
		Mark a wholesale customer tax exempt	<input checked="" type="checkbox"/> Tax Exempt <input type="checkbox"/> Tax Exempt on Repair Orders
		Assign pricing codes for CTs and Ros	
		 Navigation of the part Inquiry window	
		Find a part#	
		Edit a part#	
		Insert a part#	
		Toggle cost	
		 Navigation of the Ordering window	
		Find an existing order/return	
		Edit an existing order/return	
		Insert a new order/return	
		Add SOPs (future orders) to order	
		Able to adjust factory orders (if needed)	<input checked="" type="checkbox"/> Adjust Factory Order
		Send order to the factory	
		Receive an order/return	
		Adjust received qty	



Parts Department Training Guide

YES NO

 Navigation of the Counter window	
	Find customer or stock unit  Cust. Pay  Internal
	Create an estimate 
	Enter part number 
	Import from a catalog 
	Adjust pricing code 
	Add SOPs correctly to the Future Order Window 
	Mark as pre-paid (if needed) <input type="checkbox"/> Mark PrePaid
	Add linked (SOP) parts to an open CT Highlight all the parts to post, then Click OK.
	Add comment to part line 
	Add freight (if needed) Freight  0.00
	Add miscellaneous charges/discounts Misc Charges  0.00 
	Convert an estimate 
	Add ship to address (if needed) 
	View all open CTs and estimates 
	Create a credit invoice  
	Add a lost sale  
	Add PO# for charge customer (if needed) PO No. 
	Toggle cost 
	Add any invoice notes (if needed) Invoice Notes 
	Distribute payment   




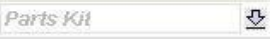




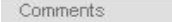


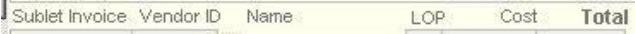




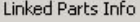

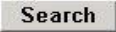
Parts Department Training Guide

YES NO

		 Navigation of the Lookup window
		Add parts to Lookup window Part #(s):
		Import parts from catalog <u>C</u> atalog
		Add quotes New <u>Q</u> uote
		Add parts kits New Parts <u>K</u> it
		Manage quotes and parts kits <u>M</u> anage
		Search for a customer Customer ID: <input type="text"/> ...
		Toggle cost <u>C</u> ost
		Able to remove parts from list <u>R</u> emove
		Able to clear the list Clear <u>L</u> ist
		Able to clear screen Clear <u>A</u> ll
		Adjust pricing code <u>P</u> C <input type="button" value="↓"/>
		Add parts to a new or existing CT Counter Ticket: <input type="text"/> <input type="button" value="New CT"/> <input type="button" value="Add to CT #"/>
		Transfer parts to an RO Repair Order: <input type="text"/> 1 <input type="button" value="↓"/> <input type="button" value="Add to RO #"/>
		 Navigation of the Future window
		Able to remove unwanted parts <input type="button" value="Delete from List Permanently"/>



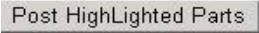
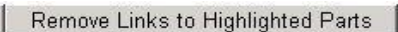
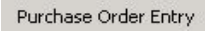
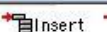




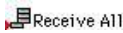
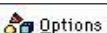
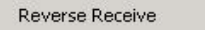

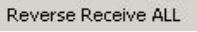
Parts Department Training Guide

YES NO


 Navigation of the RO Jobs window	
	Able to find RO 
	Search for ROs using the RO Summary List 
	Add a parts kit 
	Add parts to RO 
	Adjust pricing code for parts 
	Adjust quantities 
	Add freight for a part 
	Add comments to a part 
	Add SOPs correctly to the Future Order Window 
	Mark as pre-paid (if needed) <input type="checkbox"/> Mark PrePaid
	Able to move parts from one job to another 
	Add Sublets 
	Add linked (SOP) parts Highlight all the parts to post, then Click OK.
	Locate a PO from the Ro Jobs screen 
 Navigation of the RO Totals window	
	Add miscellaneous charges 
   Navigation of the CTRL-3 window	
	Identify parts not received Not Yet Received :
	Identify parts received Received, but Not Posted:
	How to narrow the search 

Parts Department Training Guide



YES NO

		Parts	Linked Parts Info	Ctrl+3	Navigation of the CTRL-3 window Cont'd
					Schedule an appointment  Schedule Appointment
					How to refresh the screen after a search 
					Post pre-paid parts to a counter ticket (-01) 
					Remove parts from CTRL-3 screen correctly 
		Purchase Orders	Create and Receive Purchase Orders		
					Begin/find a purchase order 
					Insert a new purchase order 
					Able to look up a vendor <input type="text" value="Vendor:"/> 
					Find an existing purchase order 
					Edit an existing purchase order 
					Able to receive each line of a purchase order 
					Able to receive a purchase order as a whole 
					Able to reverse a received PO line by line  
					Able to reverse an entire received PO  

Parts Department Training Guide

YES	NO	
<input type="checkbox"/>	<input type="checkbox"/>	Access the Support Tab 
<input type="checkbox"/>	<input type="checkbox"/>	Call the 800# - 800-499-1914

Logging Off the LIGHTYEAR System

YES	NO	
<input type="checkbox"/>	<input type="checkbox"/>	Logging off correctly  from the LightYear or 

<input type="checkbox"/>	<input type="checkbox"/>	Log off the server 
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By signing I acknowledge that I have been trained and understand the above material.

Trainee signautre: _____

Print name _____

Date: _____

Trainer signature: _____

Print name _____

Date: _____

Dealer Manager signature: _____

Print name _____

Date: _____