



TRAINING GUIDE

SERVICE ADVISOR

Recipient agrees to use its best efforts to prevent and protect the Confidential Information, or any part thereof, from disclosure to any person other than Recipient's employees having a need for disclosure in connection with Recipient's authorized use of the Confidential Information.

Service Advisors Training Guide

Introduction

The Service On-Site Pre-Training Agenda will be used to help your team fully understand your DealerBuilt Service Module. DealerBuilt Pre-Training is designed to provide your dealership staff with basic and advanced training on your service 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.

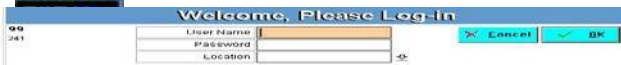
ON-SITE TRAINING AGENDA

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.

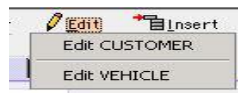
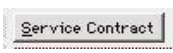
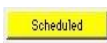
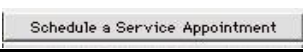
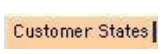
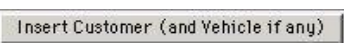
How to Enter LightYear

YES NO

			Remote Server Log-in (Icon on Desktop)
			LightYear System Log-in

Service Advisors 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 of service contracts tied to a customer/vehicle	
		Review of outstanding service appointments tied to customer/vehicle	
		Link to create a service appointment	
		Review the repair order history	
		Creation of customer comments	
		Able to clock in and out for the day	
		 Creation of customer repair orders and internal repair orders	
		Adding quick ops	
		Adding customer complaint	
		Changing pay types	
		Copy VIN to clipboard	
		Print work order	
		Add customer and vehicle if any	
		Cut and Paste VINs	   
		 Assign technicians to a job	
		Able to find RO	
		Assign a tech to a job	 
		Check the status of a job	 

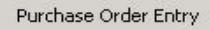
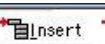
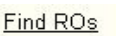
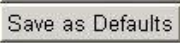
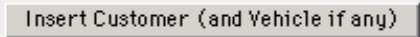
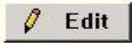
Service Advisors Training Guide

YES NO

Totals		Navigation of the Jobs Screen															
		Changing pay types Customer Pay															
		Adding lines to an existing RO Quick Op Code															
		Adding cause Cause and correction Correction															
		Flagging technicians <table><tr><th>Tech ID & Name</th><th>Est</th><th>FLH</th><th>ACT</th><th>OLH</th><th>Date</th><th>LOP</th></tr><tr><td>1</td><td>0.00</td><td>0.00</td><td>0.00</td><td>0.00</td><td></td><td>1</td></tr></table>		Tech ID & Name	Est	FLH	ACT	OLH	Date	LOP	1	0.00	0.00	0.00	0.00		1
Tech ID & Name	Est	FLH	ACT	OLH	Date	LOP											
1	0.00	0.00	0.00	0.00		1											
		Add warranty info <table><tr><th>LOP Code</th><th>Warranty LOP Description</th><th>Fail Code 1</th><th>Fail Code 2</th><th>Hours</th><th>L,S,N,C</th><th>CC</th><th>Comment</th></tr></table>		LOP Code	Warranty LOP Description	Fail Code 1	Fail Code 2	Hours	L,S,N,C	CC	Comment						
LOP Code	Warranty LOP Description	Fail Code 1	Fail Code 2	Hours	L,S,N,C	CC	Comment										
		Adjusting labor rate or amount PC 1 Standard Cust Pay Labor Rate 0.00 Total 0.00															
		Adding sublets <table><tr><th>Sublet Invoice</th><th>Vendor ID</th><th>Name</th><th>LOP</th><th>Cost</th><th>Total</th></tr><tr><td></td><td></td><td></td><td></td><td>0.00</td><td>0.00</td></tr></table>		Sublet Invoice	Vendor ID	Name	LOP	Cost	Total					0.00	0.00		
Sublet Invoice	Vendor ID	Name	LOP	Cost	Total												
				0.00	0.00												
		Review of special order parts using Ctrl-3 or On Order Parts This RO															
		Cut and paste parts from one line to another Cut Paste															
		Estimate window (Ctrl- 2 window) Repair Order Change Authorizations															
		Delete a job from an RO Delete Job															
Totals		Navigation of the Totals Screen															
		Enter mileage out Out															
		Change RO status Completed - Waiting for Pickup															
		Enter miscellaneous charges and discounts <table><tr><th>Miscellaneous</th><th></th><th></th><th></th><th></th></tr><tr><td></td><td>0.00</td><td>0.00</td><td>0.00</td><td>1.35</td></tr></table>		Miscellaneous						0.00	0.00	0.00	1.35				
Miscellaneous																	
	0.00	0.00	0.00	1.35													
		Add customer co-pay Co-Pay 0.00 0.00 0.00															
		Distribute payments Distribution 0.00 0.00 0.00 0.00															
		Post RO to accounting Post (Close)															
		Print final paperwork Print															
		Run the distribution report Distribution Window															
		Reviewing RO history RO Hist															

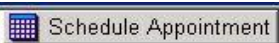
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YES NO

Purchase Orders		Create and receive POs
		Begin/find a purchase order 
		Insert a new purchase order 
		Able to look up a 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 
		Viewing POs attached to ROs 
		Navigation of the RO Summary List
		How to build a list 
		Save your list as a default 
		How to load defaults after searching a different list 
		How to refresh the list 
		Review of the scheduling system
		Creation of service appointments 
		Insert a new customer/vehicle to create an appointment 
		Turn a scheduled appointment into an active repair order 
		Edit an existing appointment 

Service Advisors Training Guide

YES NO

Parts		Linked Parts Info	Ctrl+3	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 Search		
		Schedule an appointment 		
		How to refresh the screen after a search Reset		
Options		Create Estimate	Create an estimate	
		How to insert a new estimate on an existing job 		
		Select a template 		
		How to access 'All Data' 		
Access the Support Tab				
		Access the support website 		
		Call the 800# - 800-499-1914		

Logging Off the LIGHTYEAR System

YES NO

		Logging off correctly		from the LightYear or	
		Log off the server			

Service Advisors Training Guide

By signing I acknowledge that I have been trained and understand the above material.

Trainee signature:_____

Print name_____

Date:_____

Trainer signature:_____

Print name_____

Date:_____

Dealer Manager signature:_____

Print name_____

Date:_____