

# ENTERPRISE RETAIL CLOUD FIXED OPERATIONS USER GUIDE

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## Enterprise Retail Cloud (ERC) – Fixed Operations General Operations

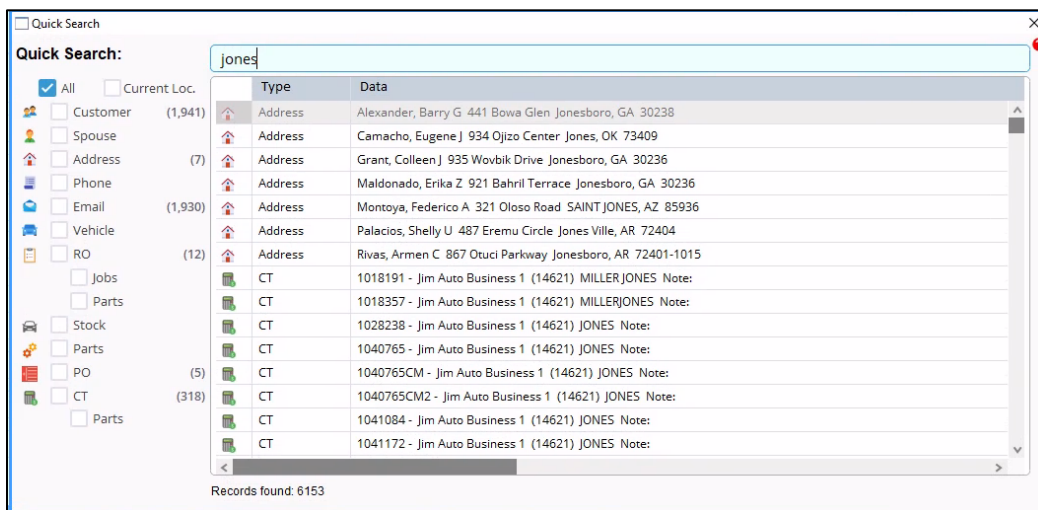
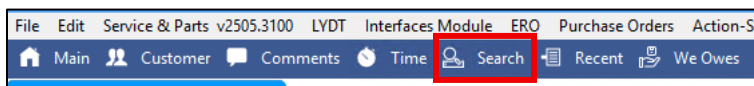
### Help

- ERC supports mouse hover technology. Hovering over buttons or fields will display helpful pop-up messages explaining their function.
- A red question mark icon will appear in the upper right corner when Help documentation is available. Clicking on the icon opens a pop-up summarizing the Help specific to that window. Below is what the icon will look like.



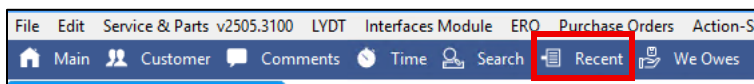
### Quick Search

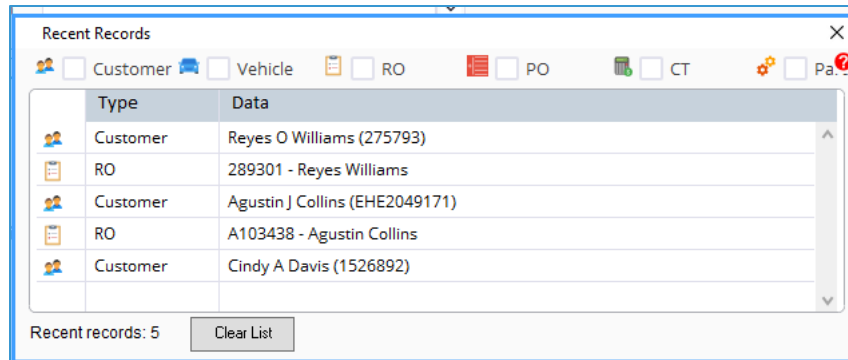
- The multi-field search window allows users to search across multiple data points simultaneously. This search will quickly find things such as customers, addresses, notes on a counter ticket, op codes, anything from the 3 C's and more.
- To access the **Quick Search** window, select **Search** from the tool bar.



### Recent Button

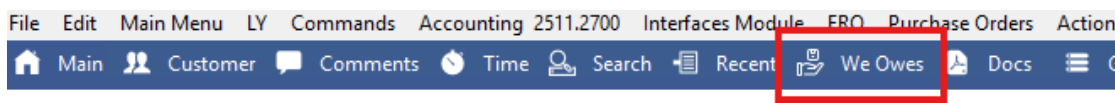
- The **Recents** pop-up will display all the recent items a user has touched throughout the day; this will be cleared after a user selects the **Clear List** button or logs out of Lightyear. To return to a recent item just double click to open the record.





## We-Owe

- To open the **We Owe** window select the button from the top toolbar



- A line item will appear in the **We-Owe** window when the 'due bill' check box in the **Itemizations** window is selected. The **Itemization** window can be found by selecting **Sls/F&I** from the main toolbar and then either navigating to the **Buy** window or the **Lease** window, click **Edit** then click on the three dots next to either Hard Add or Soft Add.
  - Only deals in the status of Sold or higher will populate the We Owe window

Add Type	Description	Cost	Retail	Residualized	Other	DueBill	Cost to	Department	Pmt Effect	Disclose	Upfront
Svc Cont	FSC Easy Care Service Contra ECVSC	895.00	1299.00	0.00	0.00	<input type="checkbox"/>	N/A	Finance	+26.42	<input type="checkbox"/>	
Svc Cont	FSC Easy Care Tire and Wheel ECTW	175.00	225.00	0.00	0.00	<input type="checkbox"/>	N/A	Finance	+4.57	<input type="checkbox"/>	
GAP/DCA	FGD Easy Care Gap ECGAP	499.00	895.00	0.00	0.00	<input type="checkbox"/>	N/A	Finance	0.00	<input type="checkbox"/>	

- Highlight a row and click in the **Notes** field to add a note to a We-Owe. Answer "yes" to the Notes pop-up to type in a new note, then click **OK**.
- Click the **Print** button at the bottom of the screen to produce a We-Owe Detail Report.
- A parts user will be able to click on the **Parts** column. This action will put an "X" in that column representing the parts department has done what is needed to complete the parts department's responsibility for the We-Owe.
- A service user will be able to click on the **Service** column. This action will put an "X" in that column representing the service department has done what is needed to complete the service department's responsibility for the We-Owe.
- A user with Parts Manager or Service Manager access will have the ability to mark the we owe as completed. Simply click the appropriate We-Owe line and select the **Completed** column to mark a We-Owe as complete.
- Color coding is available in the We Owe window. Yellow indicates that the we owe has been open for greater than 30 days and Red indicates a we owe that has been open for greater than 60 days.

- Sold, Approved and Processed columns represent the status of the car deal from F&I. A value will appear if the deal has reached that status.

**We Owe's**

When your department's responsibility in fulfilling the WeOwe is complete, click in the cell to mark it off. You do not have access to other department's responsibilities. Only managers can mark as completed. Click on Notes to enter a Note.

NOTE: There is no need to save. As soon as you click on the cell, the data is saved.

Loc	Date	Name	Deal #	Make	Model	Sold	Approved	Processed	VIN	Description	Parts	Service	Appt	Complete	Notes	
1	09/17/2024	Acevedo, Jo	263396	Toyota	Camry	1	1	1	4T1BD1F1	Paint b		X				Copy VIN
1	09/18/2024	Ellis, Kristi	263437	Ford	Edge	1	1	1	2FMPK3G	Theft F		X				Copy VIN
5	09/19/2024	Pineda, Ma	263503	Chevrolet	Silverado 1500	1	1	1	3GCPWC1	Theft F						Copy VIN
1	09/19/2024	Reyes, Mar	263505	Ford	Edge	1	1	1	2FMPK3K	CHIP B		X				Copy VIN
1	09/21/2024	Porter, Agu	263659	Ford	BRONCO	1	1	1	1FMEE5D	Tow Pt		X				Copy VIN
1	12/06/2024	Lopez, Step	265895	Ford	F-150	1	1	1	1FTEW1C	2' Leve	X					Copy VIN
1	12/06/2024	Lopez, Step	265895	Ford	F-150	1	1	1	1FTEW1C	Leathe	X					Copy VIN
1	12/16/2024	Pacheco, M	266250	Ford	F-350	1	1	1	1FT8W3B	GOOSI						Copy VIN
1	07/04/2024	DUCK, DON	266512	Ford	ESCAPE	1	1	1	1FMCU0A	Missec	X	X				Copy VIN
1	12/05/2024	DUCK, DON	266512	Ford	ESCAPE	1	1	1	1FMCU0A	Missec	X	X		Parts ordered		Copy VIN
1	09/11/2025	Scribner, Si	266547	Ford	MUSTANG	1	1	1	1FA6P8CF	NSD 5						Copy VIN
1	11/11/2025	Pokorney, Ji	267140	Ford	Explorer	1	1	1	1FMSK7K	Alarm						Copy VIN

Lines found: 26

Print

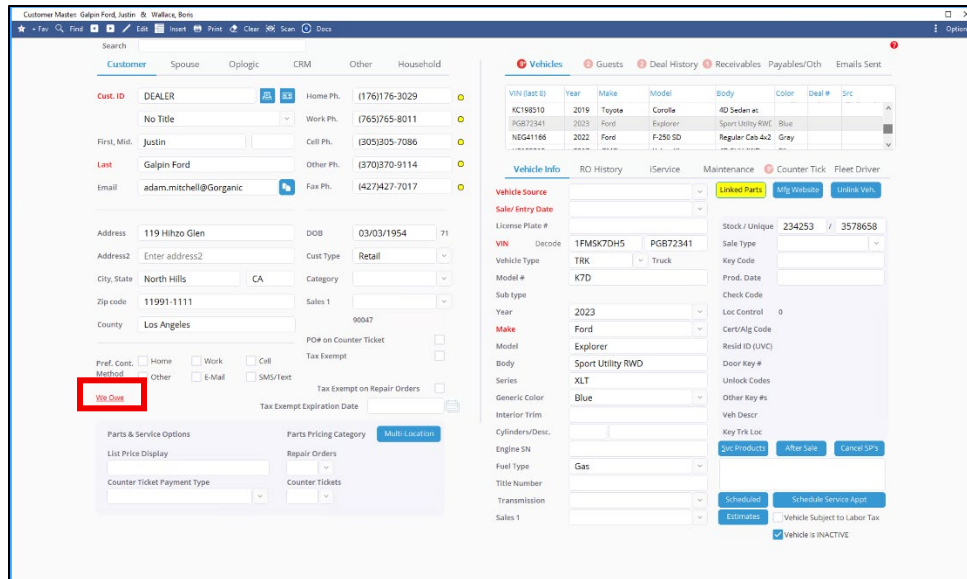
- Click the **Copy VIN** button to speed up the repair order write up process or the lookup of part numbers in a parts catalogue. The user will receive an acknowledgement message of **VIN Copied**, just click **OK** to continue.
- The column widths can be made larger or smaller.

## Customer Master Window

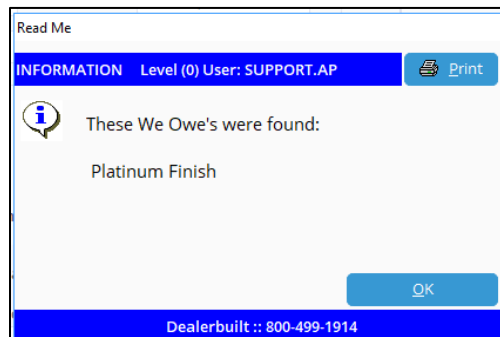
- Counters have been added to the Vehicles, Guests, Deal History, Receivable, and Payables/Other tabs to notify the user when information is available in any of the tabs within the Customer Master window.

The screenshot shows the Customer Master window for a customer named Cindy Davis. The 'Vehicles' tab is selected and highlighted with a red box. The vehicle list shows two vehicles: a 2022 Chevrolet Equinox and a 2018 Toyota Tacoma. The vehicle details for the 2022 Chevrolet Equinox are visible, including VIN, license plate, and purchase date.

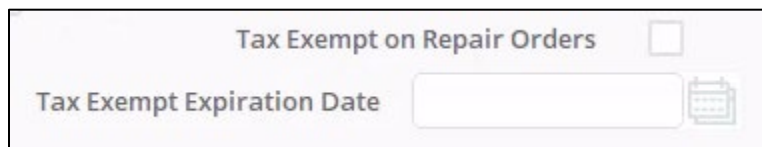
- A We Owe alert will appear in the Customer Master window when there is an outstanding we owe tied to the VIN/Stock # being viewed.



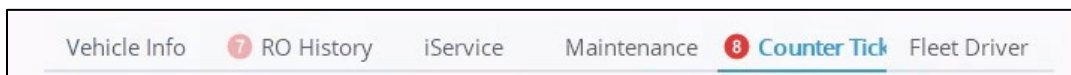
- When the **We Owe** hyperlink is selected a **Read Me** pop-up will appear with a message that pulls the description of the we owe from the Itemization window in F&I.



- A **Tax-Exempt Expiration Date** field has been added.



- Counter Ticket history is displayed in the **Counter Ticket** tab.

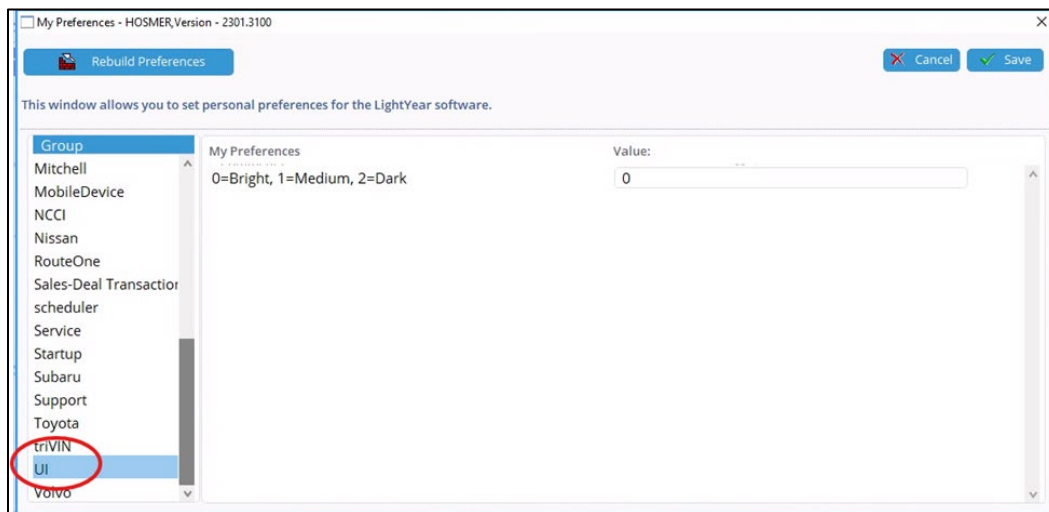


- Users can batch print Counter Tickets in the Customer Master window by selecting the **Counter Ticket** tab, select the **Print List** button and then **Print All** or **Print Highlighted** counter tickets.

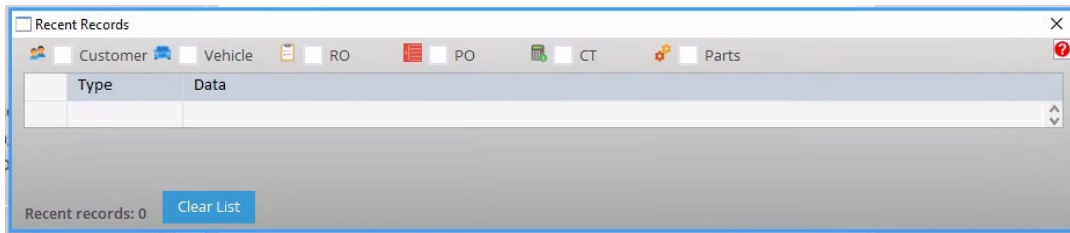
Vehicle Info		RO History	iService	Maintenance	1 Counter Tick	Fleet Driver
		<input checked="" type="radio"/> All	<input type="radio"/> Current	Print List	Print Invoice	
Svc Loc	Invoice #	Date	Amount			
1	1062625	03/24/25	111.59			

## Color Modes

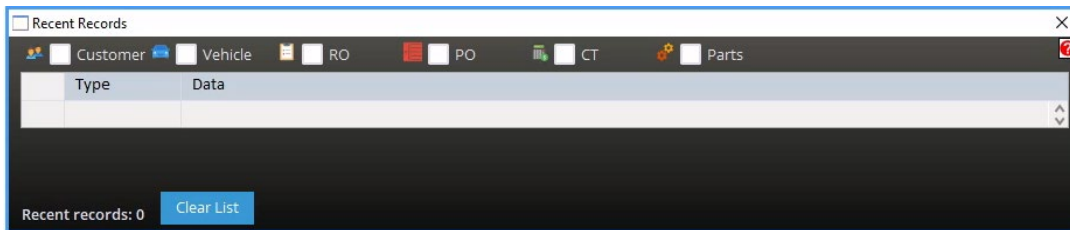
- To change the color of the background from white to either grey or black navigate to **My Preferences** from the **General** option on the action bar.
- The **My Preferences** window will open, then select **UI** in the Group column.
- 0 = Bright is the default, with 1 = Medium, and 2 = Dark.



1 = Medium

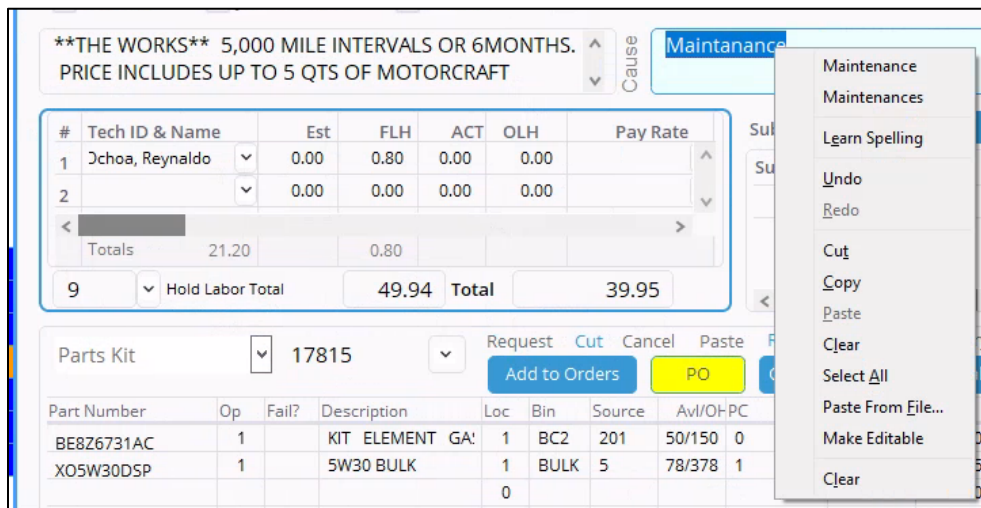


2 = Dark



## Spell Check

- A user will need to highlight the misspelled word then right click on it to get a list of purposed spellings or the user can add the word to the dealership's spelling dictionary in case the word is common dealership lingo. Example: diag
  - To correct the misspelled word and select the correct spelling simply right click to receive a pop-up with selections.

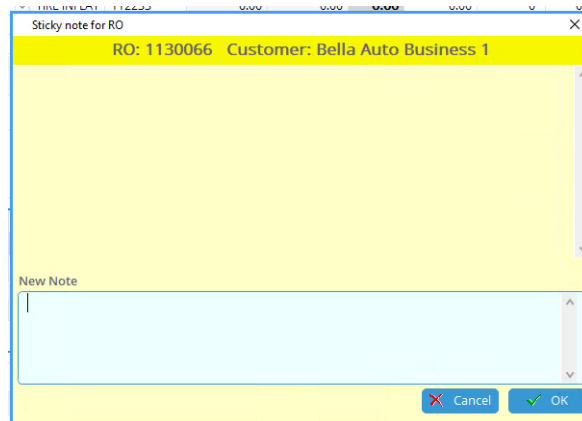
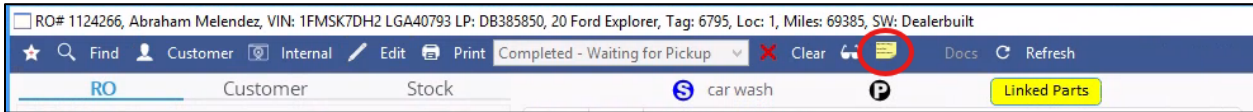


## Refresh

- The **Refresh** button is available in the RO Summary, Schedule, Estimate, Estimate Log, Write-up and Jobs window
  - This will update the record a user is currently viewing

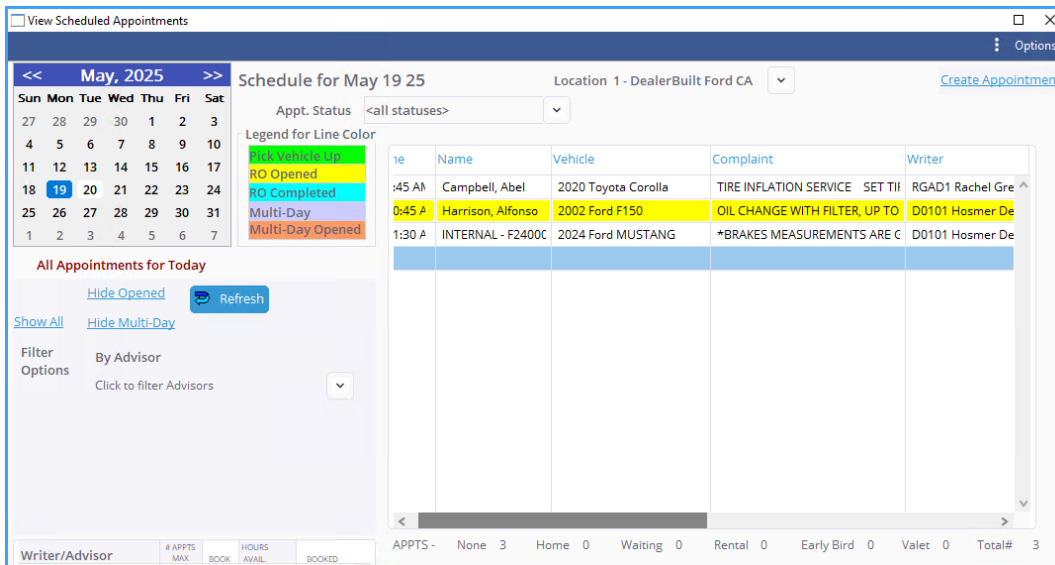
## Sticky Notes

- The notes are RO specific and cannot be edited once the RO is closed
- The notes are accessible through the Write-Up, Jobs, Totals, Dispatch and Technician Job Viewer windows in Service.
- Click on the yellow sticky note icon, for the sticky note pop-up. Enter a note and click **OK** to save the note.



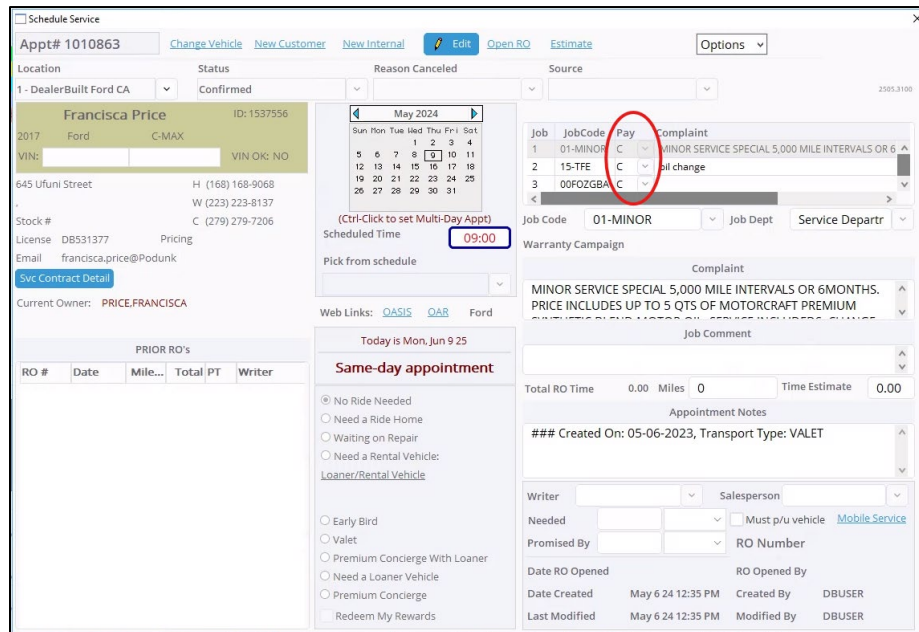
## Service

### Schedule Window

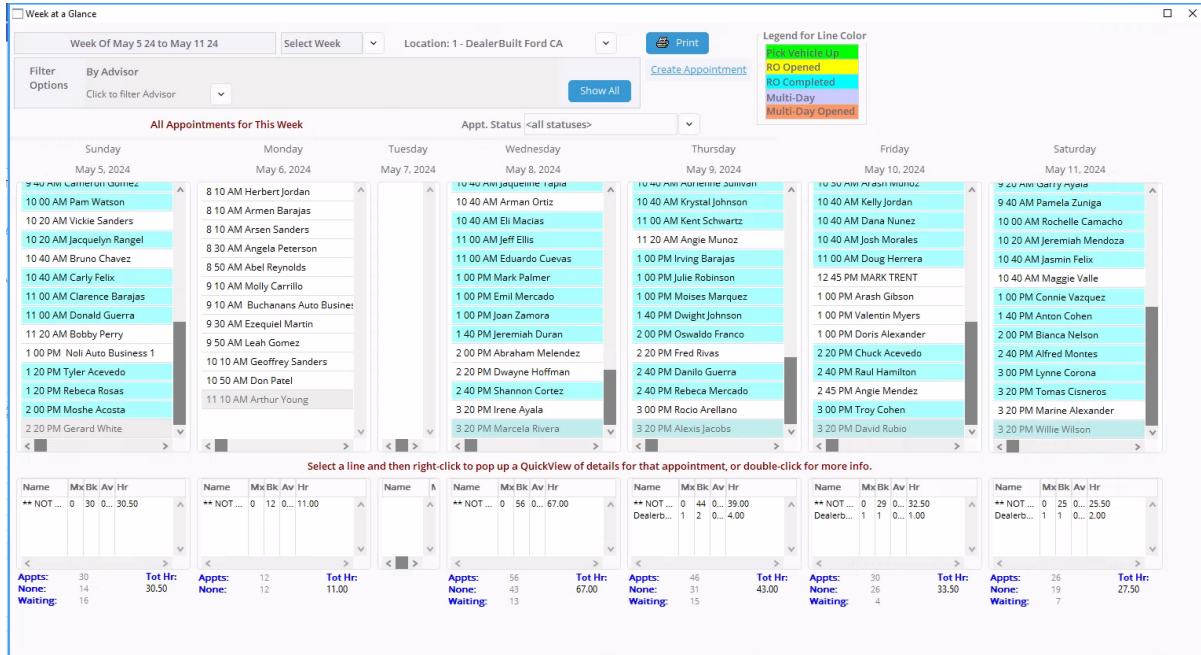




- A Pay Type can be specified per job line in the **Schedule Service** window.

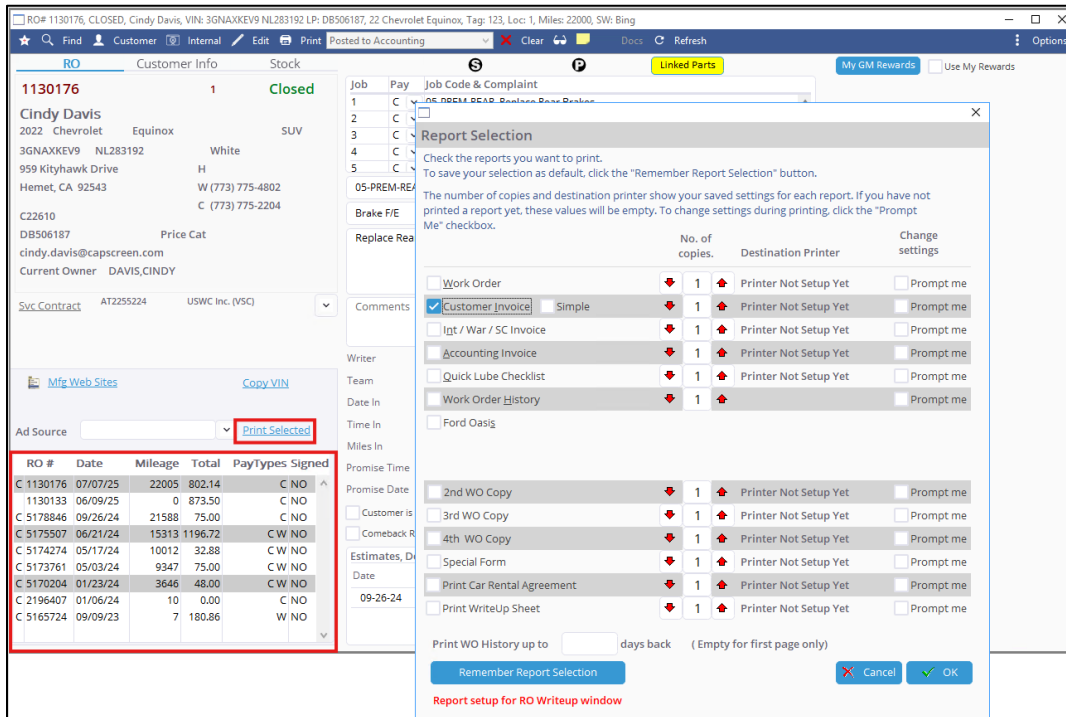


- Week at a Glance view
  - A user can see all appointments and make an appointment
  - A user can see appointments in detail with the right click functionality

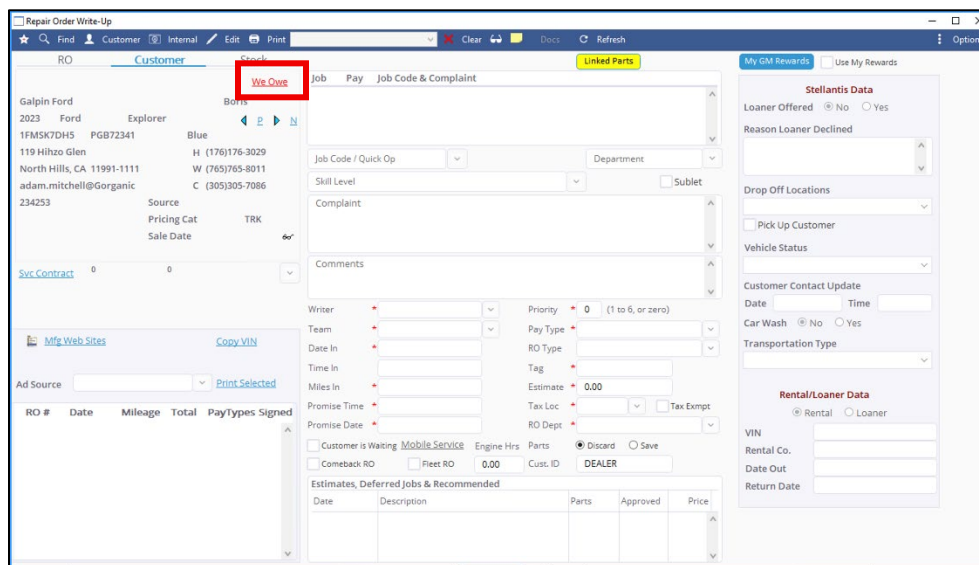


## Write-up Window

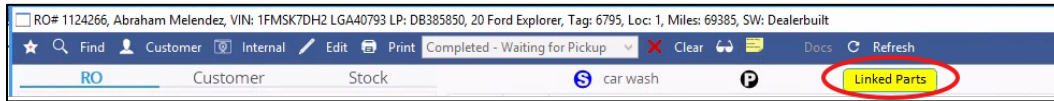
- Batch printing customer invoices by selecting the **Print Selected** hyperlink. Hold down the **Ctrl** button on the keyboard and click on the repair orders to print from the RO History list in the bottom left corner of the Write Up window.



- Pay Types** column added to allow pay types to be selected by job line.
- A **We Owe** hyperlink will appear in red when there is a linked we owe record to the VIN/Stock#

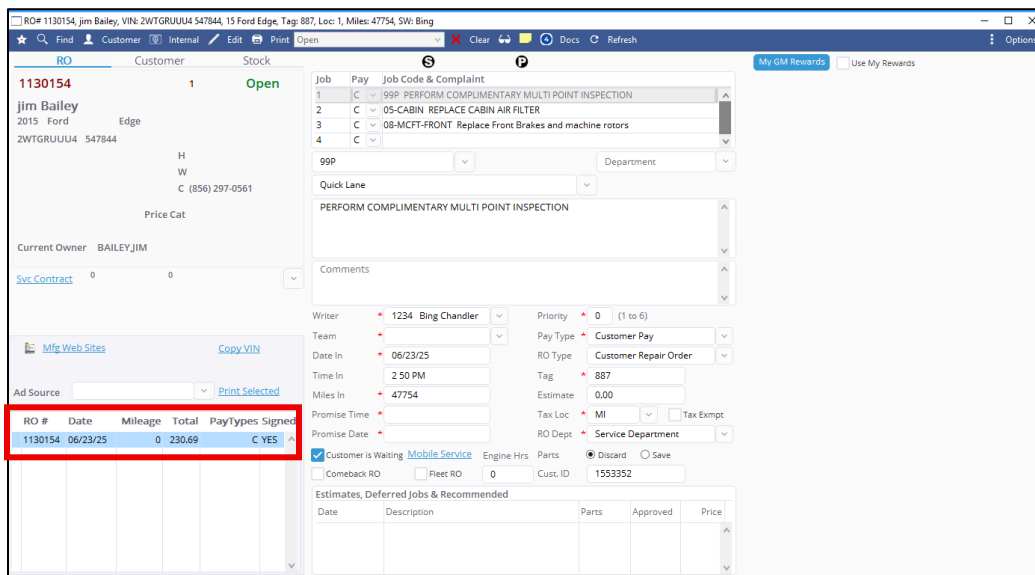


- The **Linked Parts** button is available for managing special order parts. Click the **Linked Parts** button to display a window showing all the linked or special-order parts.



Parts Ordered for MELENDEZ, ABRAHAM										
PO Number	Part Number	Description	Ord Qty	Rcv'd	BO	On Hold	On Hand	Special	Comments	
12214	W7142975440	Nut Hex	2	1	0.00	1	1.00	NO	RO 1124266 Goi	▲
12214	W5205165441	Nut Adjusting Scre	1	0	0.00	1	-2.00	NO	RO 1124266 Goi	
1220PU2	5U5Z14G371BHI	Unit Central Proce	1	0	0.00	1	-1.00	YES	RO 1124266 Goi	
12214	W7178225439	Bolt	4	1	0.00	2	2.00	NO	RO 1124266 Goi	
12214	W7195115439	Bolt	4	1	0.00	3	3.00	NO	RO 1124266 Goi	
12222	W7209885439	Bolt And Washer As	4	0	0.00	1	-1.00	NO	RO 1124266 Goi	

- Docs** button allows access to **Document Management** to view any historical printed documents associated with the repair order.
- Signed** column has been added to the RO History list to signify whether the RO was electronically signed through **iService** solution.



- Engine Hours** field is available to track diesel vehicle engine usage
  - Engine hours is also available in the Totals window and the Tech Job Viewer window.
- A user can have access to copy a concern from the **RO History** window to paste in the story
  - Right click on a concern to select **Copy Complaint**. A window will open to allow the user to copy the concern and paste it in the complaint box when creating a new repair order.

List of RO Jobs for Abigail Baker - 2004 Mazda RX8, JM1FE17N3 40138978

Hide Jobs w/o QuickOp Show All/Refresh Show Only Quick Op Print Close

RO	Job	RO Date	Writer	Dept	Miles	Tech	Code	pt	Concern
309842	1	06/03/	Jane Langdon	SVC	13000		WIPERS	C	replace windshield wiper blades.
	2					Justin Hemmir	OPENRECALI	W	galpin ford service department will check for any open field service action campaigns or
	3					Justin Hemmir	TPCHECK	W	a tire pressure check/inflation service on your vehicle.
	4						Q99PX	C	courtesy multi-point inspection (mpi)
309836	1	05/20/	Jane Langdon	SVC	12000	Justin Hemmir	WRKS1	C	the works motorcraft service package (5qt), most cars and light trucks, install 5 quarts of
	2					Justin Hemmir	WIPERS	C	replace windshield wiper blades.
	3						DIESEL	C	diesel customer states
	4					Justin Hemmir	OPENRECALI	W	galpin ford service department will check for any open field service action campaigns or

Complaint, Cause & Correction for RO # 309836 Job # 3

Complaint.....  
DIESEL - Customer States  
Cause.....  
Correction...

LOP Code	LOP Description	Hours
	MAINTENANCE, , REPLACED WINDSHIELD WIPER BLADES	0.00
	..., Tire Pressure check completed	0.00

RO# 1130133, Cindy Davis, VIN: 3GNAXKEV9 NL283192 LP: DB506187, 22 Chevrolet Equinox, Tag: 788, Loc: 1, Miles: 38778, SW:

Find Customer Internal Edit Print Open Clear Refresh My GM Rewards Use My Rewards

RO Customer Stock  
1130133 1 Open

Cindy Davis  
2022 Chevrolet Equinox SUV  
3GNAXKEV9 NL283192 White  
959 Kityhawk Drive H  
Hemet, CA 92543 W (773) 775-4802  
C (773) 775-2204  
C22610  
DB506187 Price Cat  
cindy.davis@capscreen.com  
Current Owner DAVIS,CINDY

Svc Contract AT225524 USWC Inc. (VSC)

Mfg Web Sites Copy VIN

Ad Source Print Selected

RO #	Date	Mileage	Total	PayTypes	Signed
C 5178846	09/26/24	21588	75.00	C NO	
C 5175507	06/21/24	15313	1196.72	CW NO	
C 5174274	05/17/24	10012	32.88	CW NO	
C 5173761	05/03/24	9347	75.00	CW NO	
C 5170204	01/23/24	3646	48.00	CW NO	
C 2196407	01/06/24	10	0.00	C NO	
C 5165724	09/09/23	7	180.86	W NO	

Job Pay Job Code & Complaint

1	C	05-AF REPLACE AIR FILTER
2	C	00-TIS TIRE INFLATION SERVICE SET TIRES TO FACTORY SPECS
3	C	99P PERFORM COMPLIMENTARY MULTI POINT INSPECTION
4	C	

99P Service Department

Skill Level

PERFORM COMPLIMENTARY MULTI POINT INSPECTION

(773) 775-4802

Writer \* 61 Calderon Arman Priority \* 0 (1 to 6)

Team \* Pay Type \* Customer Pay

Date In \* Jun 9 25 RO Type \* Customer Repair Order

Time In \* 1 36 PM Tag \* 788

Miles In \* 38778 Estimate: 0.00

Promise Time \* 7 30 PM Tax Loc \* MI Tax Exmpt

Promise Date \* RO Dept \* Service Department

Customer is Waiting  Mobile Service Engine Hrs Parts  Discard  Save

Comeback RO  Fleet RO 0 Cust. ID: 1526892

Estimates, Deferred Jobs & Recommended

Date	Description	Parts	Approved	Price
09-26-24	PERFORM GM MULTIPLE POINT VEHICLE INSI	✓	✗	724.27

## Estimates

- “One Edit Mode” can be used to edit multiple jobs at once when the estimate number is the same. In the past each job line had to be taken care of, then clicking OK to advance to the next estimate job line.
- Users can add an estimate or new job with a single click

Estimates - Loc: 1 - R/O Num: 1125120 - Job Num: 1 - Black Book: 3TMAZ5CNH475 - Customer: Jennie Valle

needs before noon ordered

Date/Time	RO Num	Est Num	Job #	Complaint	**Estimates Summary	Include Transferred	P Type	Ap'd	Stat
06/24/2025 7:51 AM	1125120	81257	1	test 1			C	0	1
06/24/2025 7:51 AM	1125120	81257	2	test 2			C	0	1

Customer: Jennie Valle (Hemet, CA 92545), H: (378) 378-9526, W: (643) 643-9053, C: (245) 245-8580  
 Vehicle: 2017 Toyota Tacoma TRD Sport Double Cab V6 (3.5L V6 DI Atkinson Cycle) - 3TMAZ5CN7HM030510

Date/Time: 06/24/2025 7:51 A Est Num: 81257 RO Num: 1125120  
 Complaint: test 1

Price Code: 1 Labor Rate: Quick Op Code:

Tech	Code	Description	**Labor	PC	Hours	Rate	Total	Tax	Approved
X	1			1	1.00	0.00	0.00	0.00	<input type="checkbox"/>
X					0.00	0.00	0.00	0.00	<input type="checkbox"/>

Catalog

Tech	Part Number	Description	**Parts	Loc	Bin	PC	Cost	Price	Qty	Total	Tax	Available	Avl Dats	Approved
------	-------------	-------------	---------	-----	-----	----	------	-------	-----	-------	-----	-----------	----------	----------

Estimates - Loc: 1 - R/O Num: 1125120 - Job Num: 1 - Black Book: 3TMAZ5CNH475 - Customer: Jennie Valle

needs before noon ordered

Date/Time	RO Num	Est Num	Job #	Complaint	**Estimates Summary	Include Transferred	P Type	Ap'd	Stat
06/24/2025 7:51 AM	1125120	81257	1	test 1			C	0	1
06/24/2025 7:51 AM	1125120	81257	2	test 2			C	0	1

Customer: Jennie Valle (Hemet, CA 92545), H: (378) 378-9526, W: (643) 643-9053, C: (245) 245-8580  
 Vehicle: 2017 Toyota Tacoma TRD Sport Double Cab V6 (3.5L V6 DI Atkinson Cycle) - 3TMAZ5CN7HM030510

Date/Time: 06/24/2025 7:51 A Est Num: 81257 RO Num: 1125120  
 Complaint: test 2

Price Code: 1 Labor Rate: Quick Op Code:

Tech	Code	Description	**Labor	PC	Hours	Rate	Total	Tax	Approved
X	1			1	2.00	0.00	0.00	0.00	<input type="checkbox"/>

- The service and parts states feature has been added to the estimating window.

Estimates - Loc: 1 - R/O Num: 1125120 - Job Num: 1 - Black Book: 3TMAZ5CNH475 - Customer: Jennie Valle

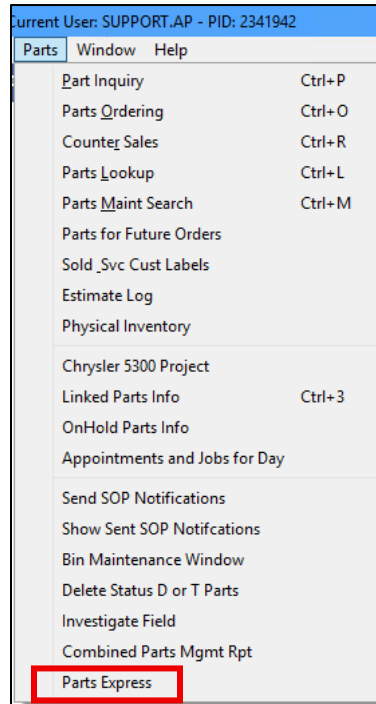
needs before noon ordered

Find Add Est Add Job Edit Approve Delete Print Authorization Apply AllData Menu Send Refresh

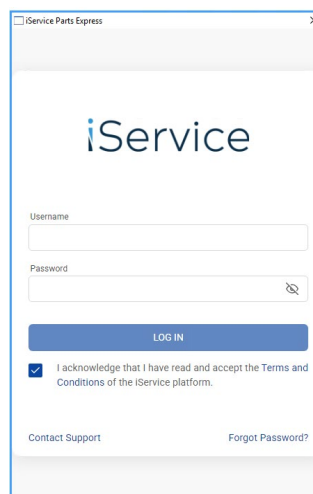
Date/Time	RO Num	Est Num	Job #	Complaint	**Estimates Summary	Include Transferred	P Type	Ap'd	Stat
-----------	--------	---------	-------	-----------	---------------------	---------------------	--------	------	------

## Parts Express with iService

- For those customers using the iService, service lane tool, the Parts Express feature can be used to quickly process new parts quotes. To open the new task list, go to **Parts** > Parts drop-down > Select **Parts Express**



- The user will be prompted to log into iService once daily. The Parts Express window will remain open until the user logs out.



- The Estimate window and the Jobs window will work with the Parts Express window. Tasks in the Parts Express window are generated when a RO gets created, an estimate is in Send to Parts status or when an approval of recommended services occurs.

- A task allows for the copy of either the VIN or the RO number to aid the parts writer in their lookup of part numbers.
- When the card is selected, it will expand and provide more details about each job on the RO.
- Color coding will show the task status in yellow for 5 minutes and red for 10 minutes.

### Recommendation Needs Parts

Joan Ross
15525 Mins

Finish

2011 Subaru Outback  
RO: 370056 [🔗](#)  
VIN: 4S4BRBAL3B1342294 [🔗](#)

---

- JOB #2: Replace water pump
  - Comments: Parts A, B, C...
- JOB #3: Install tire information label as per recall guidelines

- When a user selects a task from the Parts Express window, it will automatically assign the logged in parts writer if it is an iService RO or a Lightyear estimate.
  - If another parts writer has already selected, the same task a pop-up warning will appear and will leave the other person assigned to the task.
- The Lightyear Jobs window will appear to bill out pre-approved parts, or the Estimate window will appear for an estimate task.
- When the task is completed the estimate status will be updated, the quote will sync with iService, the advisor/technician will be notified, and the task will be removed from the list of tasks in the Parts Express window.

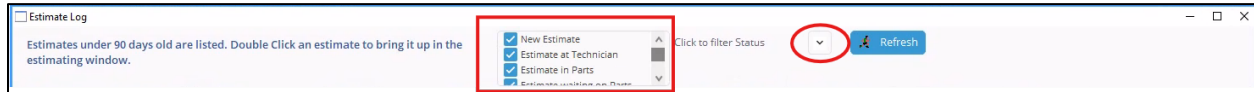
The screenshot shows the Toyota Lightyear software interface. The main window displays a list of tasks with columns for Date/Time, RO Num, Est Num, Job #, Complaint, and Status. A task for 'INSTALL TIRE INFORMATION LABELS PER RECALL GUIDELINES' is highlighted. The right-hand pane shows the 'iService' interface with a 'Parts Express' section. This section lists 'Pre Approval Needs Parts' and 'Recommendation Needs Parts' for the 2011 Subaru Outback (RO: 370056, VIN: 4S4BRBAL3B1342294). The 'Recommendation Needs Parts' section is expanded, showing the task details and a 'Finish' button. The interface also shows customer information, vehicle details, and a list of parts and charges.

## Estimate Log

- Service and Parts status columns added to the window

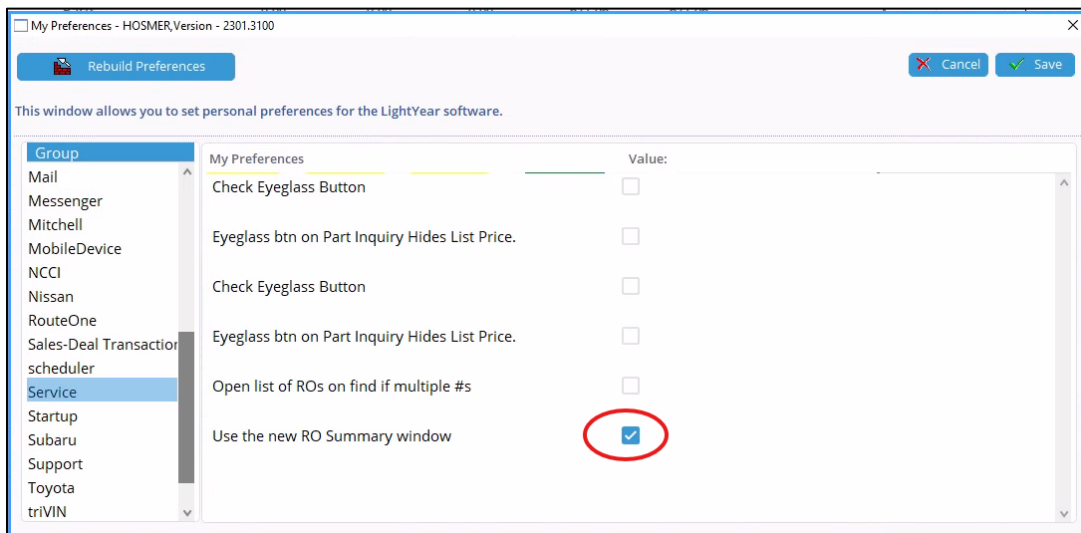
Customer	Estimate	Job#	Date/Time	Vehicle	Service Writer	RO#	Technician	Pay Type	Complaint	Estimate Status	S	P
Bella Auto Busin	81211	1	24 Mar 25 11:2	2021 Ford F150			1130066	S		New Estimate		
Borchardt, Bri				D0101 Dealerbuilt, Hosm				C	*BRAKES MEASUREMENTS ARE IN THE RED!			
Borchardt, Bri	81213	1	28 Mar 25 20:3	1997 Audi A6			1130069	C	REPLACE FRONT BRAKE PADS---DOES NOT INCLUD	Fully Approved		
Borchardt, Bri				2021 FORD BRONCO SP			1130046	C				
Borchardt, Bri	81246	1	5 Jun 25 19:24:	1234 Bing, Chandler			112233 Tribiani, Jo	C	REPLACE FRONT BRAKE PADS---DOES NOT INCLUD	Fully Approved		
Borchardt, Bri	81246	2	5 Jun 25 19:24:	1234 Bing, Chandler			TBTECH3 Ball, Torr	C	REPLACE FRONT BRAKE PADS---DOES NOT INCLUD	Fully Approved		
Borchardt, Bri				2024 Hyundai Palisade			1130068	C	REPLACE CABIN AIR FILTER	Customer Declr		
Campbell, Abel	81212	1	28 Mar 25 19:5	1234 Bing, Chandler			1130115	C	REPLACE FRONT BRAKE PADS---DOES NOT INCLUD	Fully Approved		
Fuller, Jason	81231	1	19 May 25 10:0	2020 Toyota Corolla			1130075	C				
Fuller, Jason	81231	2	19 May 25 10:0	RGAD1 Green, Rachel				C	*BATTERY FUNCTION IS MARGINAL	Fully Approved		
Gerard, Valerie	81216	3	3 Apr 25 01:39:	D0101 Dealerbuilt, Hosm				C	OIL AND OIL FILTER CHANGE	New Estimate		
Gerard, Valerie	81216	4	3 Apr 25 01:47:	D0101 Dealerbuilt, Hosm				C	Customer States cut and reprogram 1 key, you are	Customer Declr		
Gerard, Valerie	81216	5	3 Apr 25 02:04:	D0101 Dealerbuilt, Hosm				C	BATTERY TESTS LOW	Fully Approved		
Gerard, Valerie	81219	1	7 Apr 25 10:33:	D0101 Dealerbuilt, Hosm				C	this is the complaint in Iserv	Fully Approved		
Gerard, Valerie	81215	1	2 Apr 25 20:44:	D0101 Dealerbuilt, Hosm			1130074	C	PERFORM 1ST OIL SERVICE. CHANGE OIL, OIL FILT	New Estimate		
Gerard, Valerie	81215	4	3 Apr 25 14:27:	D0101 Dealerbuilt, Hosm				C	**TEST1**REPLACE REAR BRAKE PADS---DOES NC	Fully Approved		
Gerard, Valerie	81215	5	3 Apr 25 10:29:	D0101 Dealerbuilt, Hosm				C	*TIRES MEASURE GREEN	New Estimate		
Gerard, Valerie	81215	6	3 Apr 25 14:50:	D0101 Dealerbuilt, Hosm			099 Tech, Quick La	C	*BATTERY TEST GREEN	New Estimate		
Gerard, Valerie	81215	8	3 Apr 25 14:52:	D0101 Dealerbuilt, Hosm			099 Tech, Quick La	C	COOLING SYSTEM FLUID EXCHANGE WITH TREATM	New Estimate		
Hughes, Lucia	81215	9	3 Apr 25 14:52:	D0101 Dealerbuilt, Hosm			1130019	C	**TEST1**REPLACE REAR BRAKE PADS---DOES NC	New Estimate		
Jackson, Aaron	81240	1	29 May 25 16:3	RGADV2 Geller, Ross			1130100	C	COOLING SYSTEM FLUID EXCHANGE WITH TREATM	New Estimate		
Jackson, Aaron				2002 Toyota Rav4				C	REPLACE FRONT BRAKE PADS---DOES NOT INCLUD	Fully Approved		

- Status filter lets users select which estimates to view

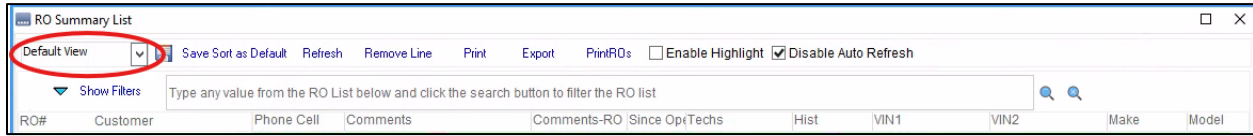


## RO Summary List

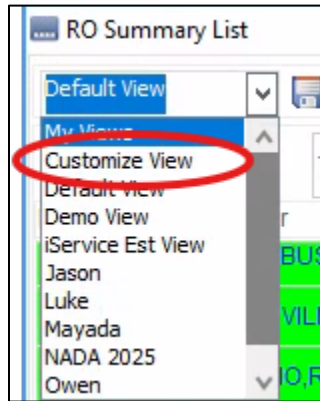
- To utilize the customizable RO Summary List, first access **My Preferences** from the left navigation found under the **General** category. Highlight **Service** and select the checkbox for “Use the new RO Summary window.”



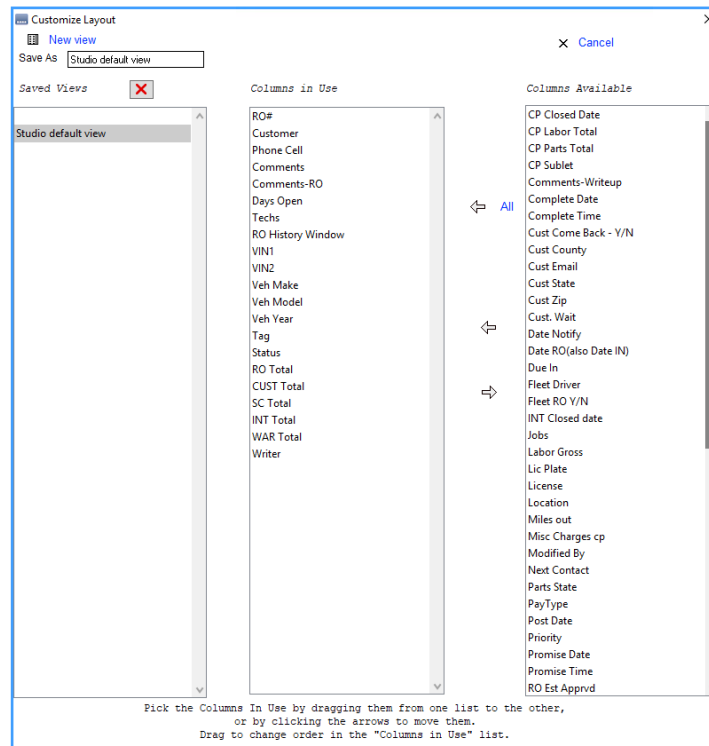
- To create your own view, click the drop-down arrow labeled **Default View**.



- Click **Customize View**



- Click **New View**, assign a name to the view by and select a value from the **Columns Available** box and select the arrow to add the field(s) to the **Columns in Use** box.



- Hyperlink in the **Customer** column of the RO Summary window to take a user directly into the **Customer Master** window
- Hyperlink in the **RO#** column to take a user directly into the **Jobs** window for the RO selected
- **Quick Search** of the RO Summary List by entering any value from the RO Summary window at the top of the window
- **Show/Hide filters** for the RO Summary List to filter by Repair Order Status, Service Advisor, Technicians or several other filter criteria
- Available **Comments** denoted with the number of comments in a red circle that are available for review

The screenshot shows the 'RO Summary List' window with various filters and a table of repair orders. The filters include Repair Order Statuses (All, All Open, Service Writers, Technicians), Service Writers (1234 Bing, Chandler; D0101 Dealerbuilt, Hosmer; RGADV2 Geller, Ross; RGAD1 Green, Rachel), and search criteria for RO Number, Customer, VIN2, and Tag No. The table lists RO#s, Customer names, phone numbers, comments, and vehicle details.

RO#	Customer	Phone Cell	Comments	Comments-RO	Since Opr	Techs	Hist	VIN1	VIN2	Make	Model	Year
1130088	BLAKE AUTO BUSINESS	(287) 287-5876			9 days 23			1FTFW1EF6	EKE73179	Ford	F150	2014
1124852	BONILLA,EMIL	(492) 492-6192			148 days	9999		1FMFU17L2	4LB56321	Ford	Expedition	2004
1125405	BODNE,ERIC	(309) 620-1581			462 days			JTEBU5JR8	E5173584	Audi	MMJpa	1992
1125750	BORCHARDT,BRI	(608) 628-9596	3	test ,	112 days			101398695	43	Hyundai	Palisade	2024
1130068	BORCHARDT,BRI	(608) 628-9596	3	test ,	41 days 1			246515151	12	Hyundai	Palisade	2024
1130069	BORCHARDT,BRI	(608) 628-9596	3	test ,	41 days 1			651491561	561111111	Audi	A6	1997
1125405	CALDERON,PAULO	(847) 847-0000			462 days			19XFA1F87	AE030552	Audi	MMJpa	1992
1130087	CAMERON AUTO BUSINE	(667) 667-2072	1	23843A14T .60	9 days 23			3FA6P0HD0	LR153596	Ford	FUSION	2020
1125114	CISNEROS,RIGOBERTO	(420) 420-6856			141 days	14384 23460		JTDKAMFU6	N3177598	Toyota	Prius	2022
1124301	CRAWFORD,DAVE	(510) 510-1551	4	21N00B 1.2.21	156 days	20850 998435 9		1FTTEW1EG3	JFA32391	Ford	F-150	2018
1130059	D,WILLIS	(614) 800-4611			57 days 2			153667E3G	GGSUUY	Ford	Escape	2003
1127054	DEAL AUTO BUSINESS	(435) 435-8671	1	3001A 0.6 3001	149 days	23005 9999		1FTTEW1C83	PFA53181	Ford	F-150	2023
1125763	DELUCA,THOMAS											

Count: 103      Highlighted Count: 0  
Total: 86,446.33      Highlighted Total: 0.00

- The RO Summary window will auto refresh when a new RO has been created

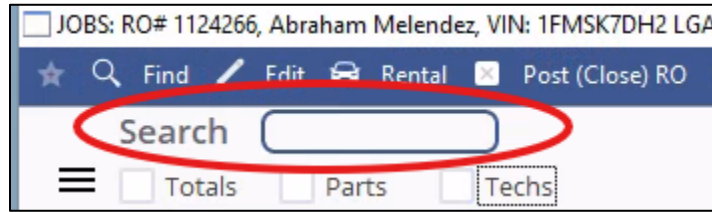
- Right click on any line within the RO Summary window to **Set Status** of the RO

The screenshot shows a list of jobs in the RO Summary window. A right-click context menu is open over the job with ID 1130086. The menu includes options like 'Start Chat', 'Email Customer', 'Text Customer', 'View RO', 'Set Status', 'Communication History', 'Estimate', 'Quick Comment', 'Sticky Notes', 'Jobs', 'Copy vin - Full', and 'Copy Vin - Last 8'. The 'Set Status' option is highlighted, and a sub-menu is visible showing 54 status options ranging from '1 No Status' to '54 Completed - Waiting for Pmt'.

## Jobs Window

The screenshot displays the Jobs Window in DealerBuilt. The top section shows a search bar and filters for 'Totals', 'Parts', and 'Techs'. Below this is a table of jobs with columns for Job ID, Job, Pay, Dept., Status, Complaint, Tech ID, and Lab. The main area is divided into several panels: 'TIRE PRESSURE SERVICE NOT PERFORMED FOR THE FOLLOWING REASON', 'Sublet' information, 'Warranty' details, 'Dates' (RO, Notify date, Closed Date), 'Delivered' status, and a 'Totals' summary table. The 'Totals' table includes columns for Internal, Serv Contract, Warranty, Customer Pay, and RO Total. At the bottom, there is a 'Parts Kit' section and a 'Parts Writer' section with a table for parts.

- Enter a repair order number in the **Search** box in the upper left corner of the **Jobs** window to easily navigate to another repair order.



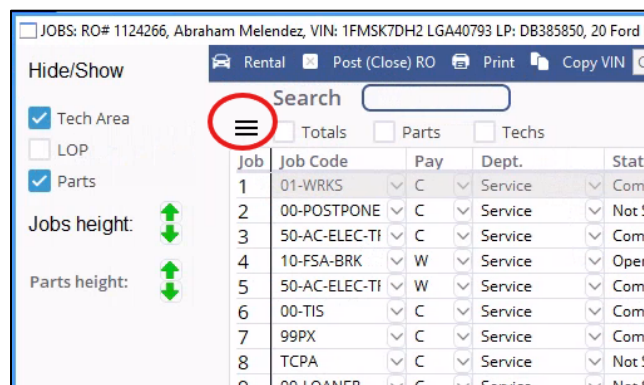
- Customer service and parts states are supported



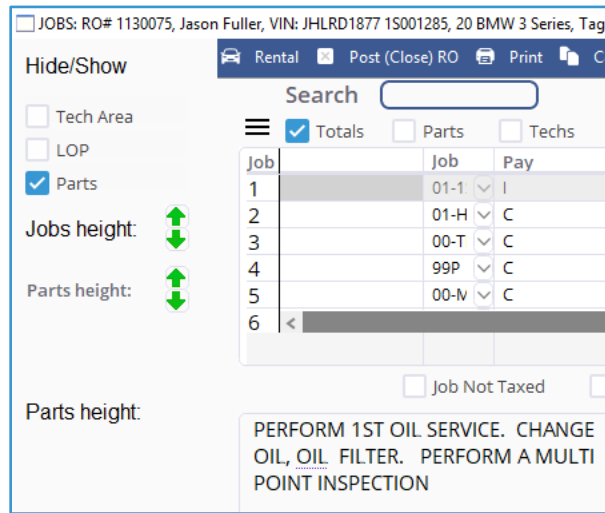
- **Docs** button gives access to the **Document Management** solution to view associated archived documents



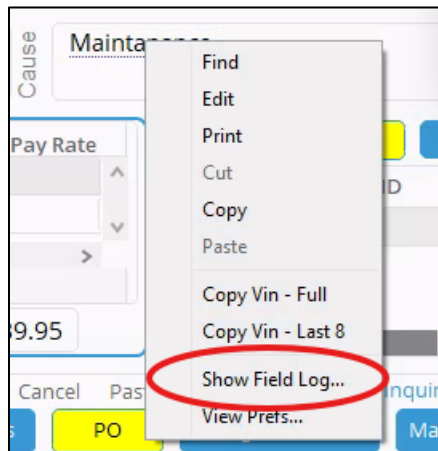
- Right click functionality to **Copy VIN** or view **Field Change Log**
- The **Jobs** window is now more modular for users who don't need to see specific information or would like to see everything in a single window.
  - Totals window and Jobs window in one edit mode
  - Quick way to see all parts and techs added to RO
  - Select the "hamburger" icon in the upper left corner of the Jobs window to hide/show Tech Area, LOP or Parts. The height of the Jobs and Parts areas can also be adjusted.



- Check the **Totals**, **Parts** or **Techs** checkboxes to add the information to the window.
  - Totals, combines the Jobs and Totals window for streamlined closing
  - Parts, displays all parts on all jobs in one view
  - Techs, speeds up technician flagging



- Right click and select **Show Field Log** to view the change log to identify who made the change and when that change was made.



Display Record of Changes (Modifications and Deletions)

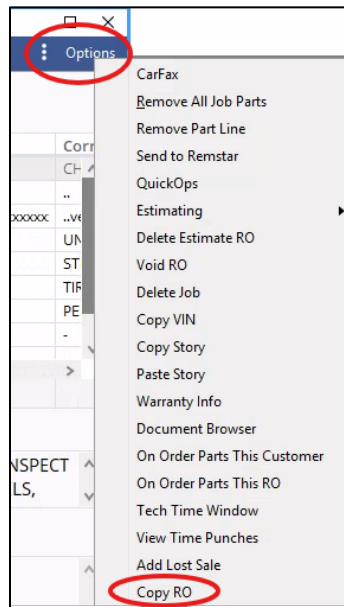
Current Record: RO 1124266 Loc 1 Load Highlighted Time Range Print

Table Name: slrojobs

Column Name: cause

Date Modified	Column Name	Original Value	New Value	Event	Changed By	Record ID	IP Address	Table
06/09/2025 12:26:55	cause	MAINTENANCE--	Maintanance	UPDATE	HOSMER	18895723	10.10.59.210	slrojobs
04/02/2025 14:13:54	cause	..apim software	..apim software xxxxxxxxxxxx	UPDATE	HOSMER	18895725	172.21.58.25	slrojobs
12/08/2024 15:36:33	cause	..	..apim software	UPDATE	DBUSER	18895725	172.21.55.82	slrojobs
12/07/2024 13:23:44	cause	..	..RECALL	UPDATE	DBUSER	18895727	172.21.55.82	slrojobs
12/07/2024 13:21:46	cause	..	..RECALL	UPDATE	DBUSER	18895726	172.21.55.82	slrojobs
12/04/2024 08:44:08	cause	-	..	UPDATE	DBUSER	18895727	172.21.55.18	slrojobs
12/04/2024 08:42:21	cause	MAINTENANCE	..	UPDATE	DBUSER	18895726	172.21.55.18	slrojobs

- The **Copy RO** feature can be accessed by selecting the **Options** menu located in the upper right corner of the Jobs window. This will allow a user to quickly re-write another RO with existing job information. This feature is commonly used to close out the customer pay portion of a repair order and move the warranty jobs to a new repair order.
  - This will also link up the RO copied to the new RO that has been created.

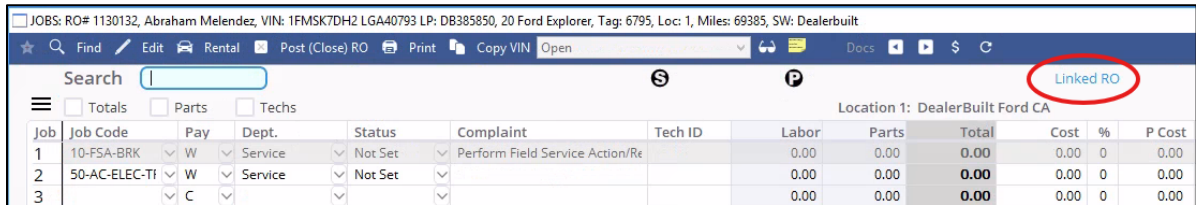


- Select the job lines you want to copy to a new repair order. Then choose the specific Complaint, Cause, and Correction entries you would like included. Next click **OK**.

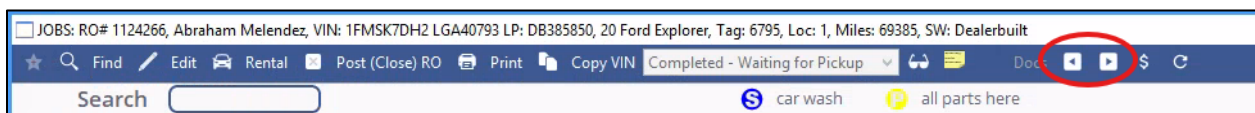
Select the items you would like copied from RO# 1124266 to a new RO

Job	Job Code	Pay	Complaint	Cause	Correction	Recommendation
<input type="checkbox"/>	1 01-WRKS	<input type="checkbox"/> C	<input type="checkbox"/> **THE WORKS** 5,000 MILE INTERV/	Maintanance	<input type="checkbox"/> CHANGE OIL AND OIL FILTER,	
<input type="checkbox"/>	2 00-POSTPONEN	<input type="checkbox"/> C	<input type="checkbox"/> CUSTOMER DECLINED OR POSTPONE	..	<input type="checkbox"/> ..	
<input type="checkbox"/>	3 50-AC-ELEC-TRI	<input type="checkbox"/> C	<input type="checkbox"/> CUSTOMER STATES THE RADIO HAS I	..apim software xxxxxxxxxxxxxxxxxxxxxxx	<input type="checkbox"/> ..verified multipel glitch did nc	
<input checked="" type="checkbox"/>	4 10-FSA-BRK	<input checked="" type="checkbox"/> W	<input checked="" type="checkbox"/> Perform Field Service Action/Recall #	<input checked="" type="checkbox"/> ..RECALL	<input checked="" type="checkbox"/> UNDER ADVANCE NOTICE PA	<input checked="" type="checkbox"/> test 1234
<input checked="" type="checkbox"/>	5 AC-ELEC-TRIM	<input checked="" type="checkbox"/> W	<input checked="" type="checkbox"/> OORS. PLEASE CHECK AND ADVISE	<input checked="" type="checkbox"/> ..RECALL	<input checked="" type="checkbox"/> IOW SWITCH CHROME TIPS ..	<input checked="" type="checkbox"/>
<input type="checkbox"/>	6 00-TIS	<input type="checkbox"/> C	<input type="checkbox"/> TIRE INFLATION SERVICE SET TIRES	..	<input type="checkbox"/> TIRE INFLATION SET TO: 33 P	
<input type="checkbox"/>	7 99PX	<input type="checkbox"/> C	<input type="checkbox"/> PERFORM COMPLIMENTARY MULTI PI	MAINTENANCE	<input type="checkbox"/> PERFORMED COMPLIMENTAF	
<input type="checkbox"/>	8 TCPA	<input type="checkbox"/> C	<input type="checkbox"/> "I consent to being contacted concern	-	<input type="checkbox"/> -	
<input type="checkbox"/>	9 99-LOANER	<input type="checkbox"/> C	<input type="checkbox"/> LOANER VEHICLE THE TIME OUT ON	Vin #	<input type="checkbox"/> ..	

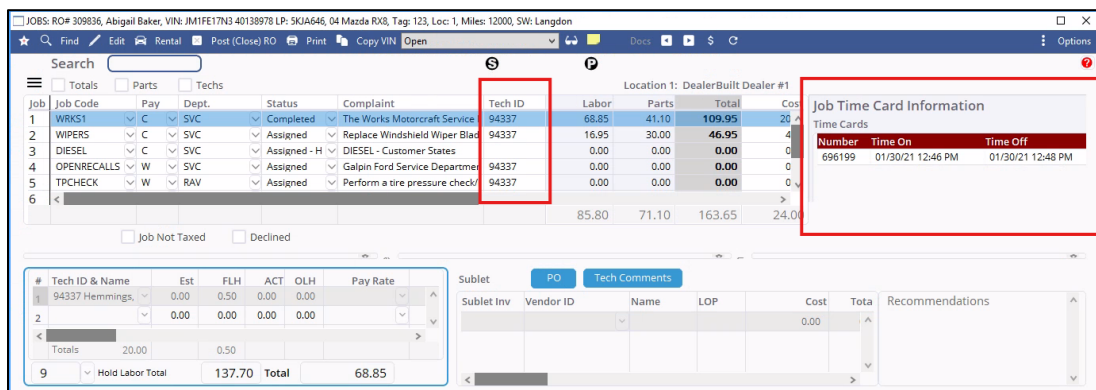
- The Write Up and Jobs window will display a hyperlink labeled **Linked RO**. Clicking this hyperlink will switch the user back and forth between the original repair order and the new repair order. This feature can be helpful when closing out the customer pay portion of the repair order while leaving the warranty jobs in progress.



- Next and Previous** buttons at the top of the Jobs window will allow a user to load the next repair order in sequence or the previous repair order.



- When a user double clicks on one of the Tech ID's in the jobs list the **Job Time Card Information** window will open and display the time punch number and the time on and time off the job. This may be helpful for warranty administrators.



- Jobs list is expanded with easier editing of pay type, department and status.

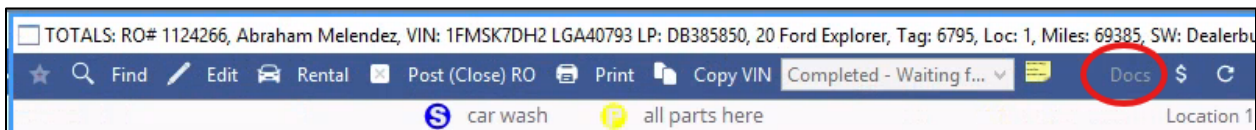
Job	Job Code	Pay	Dept.	Status	Complaint	Tech ID
1	01-WRKS	C	Service	Completed	++THE WORKS++ 5,000 MILE IP	
2	00-POSTPONE	C	Service	Not Set	CUSTOMER DECLINED OR POS	
3	50-AC-ELEC-TI	C	Service	Completed	THE RADIO HAS BEEN ACTING	20858
4	10-FSA-BRK	W	Service	Open	Perform Field Service Action/Re	22345
5	50-AC-ELEC-TI	W	Service	Completed	ALL THE WINDOW SWITCH CH	23005
6	00-TIS	C	Service	Completed	TIRE INFLATION SERVICE SET	22465
7	99PX	C	Service	Completed	PERFORM COMPLIMENTARY M	22465
8	TCPA	C	Service	Not Set	I consent to being contacted c	9999
9	00-LOANER	C	Service	Not Set	LOANER VEHICLE THE TIME OI	

- Job # and Pay Type columns have been added to the Event Logger pop-up in the Jobs window. This can be accessed by clicking on any field in the **Jobs** window and selecting **Show Field Log**.

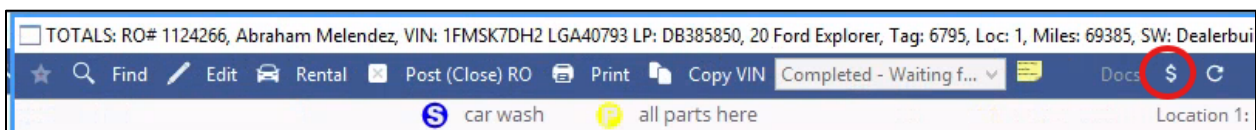
Seq	Column	Old	New	Job # Pay Type	Modifie...	Modified Date	Client A...	Query Id	Record ...	Table	Event
401579011				2	C	API	05 27 25 4:11: PM	172.21.52...	946301879	18926959	sirojobs INS
401579004				1	C	API	05 27 25 4:08: PM	172.21.52...	946301863	16129929	sirotechs INS
401579076				4	C	DB.SUPP...	05 27 25 4:24: PM	10.10.59...	946302019	16129932	sirotechs INS
401579053				3	C	DB.SUPP...	05 27 25 4:24: PM	10.10.59...	946301994	20851394	sirorec... INS
401579072				4	C	DB.SUPP...	05 27 25 4:24: PM	10.10.59...	946302015	20851395	sirorec... INS
401580598				1	C	SUPPORT...	06 03 25 3:21: PM	10.10.59...	946305818	20851423	sirorec... INS
401579005				1	C	yadmin	05 27 25 4:08: PM	172.21.52...	946301864	5919545	siroopc... INS
401579014				2	C	yadmin	05 27 25 4:11: PM	172.21.52...	946301882	5919546	siroopc... INS
401579054				3	C	DB.SUPP...	05 27 25 4:24: PM	10.10.59...	946301996	5885149	siroparts INS
401579074				4	C	DB.SUPP...	05 27 25 4:24: PM	10.10.59...	946302017	5885150	siroparts INS
401579001				0	C	yadmin	05 27 25 4:08: PM	172.21.52...	946301860	11693981	siro INS
401579071				4	C	DB.SUPP...	05 27 25 4:24: PM	10.10.59...	946302014	18926961	sirojobs INS
401579052				3	C	DB.SUPP...	05 27 25 4:24: PM	10.10.59...	946301993	18926960	sirojobs INS
401579002				1	C	API	05 27 25 4:08: PM	172.21.52...	946301861	18926958	sirojobs INS
401579013				2	C	API	05 27 25 4:11: PM	172.21.52...	946301881	16129930	sirotechs INS
401579057				3	C	DB.SUPP...	05 27 25 4:24: PM	10.10.59...	946301999	16129931	sirotechs INS
401579044	balance	0.0	113.68	0	C	DB.SUPP...	05 27 25 4:24: PM	10.10.59...	946301991	11693981	siro UPI
401579066	balance	113.68	281.37	0	C	DB.SUPP...	05 27 25 4:24: PM	10.10.59...	946302012	11693981	siro UPI
401654645	bin	101A		3	C	HOSMER	07 11 25 1:17: PM	10.10.59...	946384098	5885149	siroparts UPI
401654568	bin	101	101A	3	C	HOSMER	07 11 25 1:16: PM	10.10.59...	946384021	5885149	siroparts UPI

## Totals Window

- Docs button gives access to Document Management to view associated printed documents



- \$ button allows access to the **Integrated Payments** solution for credit/debit card processing through the credit card processor, Global Payments.



## RO History

- Users can select and print documents for multiple ROs at once

RO	Job	RO Date	Writer	Dept	Miles	Tech	Code	pt	Concern
1130132	1	06/09/	Hosmer Dealer	Servic	69385		10-FSA-BRK	W	field service action/recall #
	2						50-AC-ELEC-	W	customer states
1124266	1	12/04/	Hosmer Dealer	Servic	69385	Reynaldo Och	01-WRKS	C	**the works** 5,000 mile intervals or 6months. price includes up to 5 qts of motorcraft.
	2						00-POSTPON	C	customer declined or postponed suggested menu services tune up and transmission flui
	3					Tracey Watso	50-AC-ELEC-	C	customer states the radio has been acting up for a while. customer states at times the s
	4					Barbara Bauti	10-FSA-BRK	W	field service action/recall # 23655 rear axle bolt fractures
	5					Debbie Porter	50-AC-ELEC-	W	customer states all the window switch chrome is peeling on all doors. please check and
	6					Revnaldo Och	00-TIS	C	tire inflation service set tires to factory specs

## Intelligent Dispatching

### Route Sheet

- A repair order number will be highlighted in orange in the **RO#/Job#** column for repair orders that are in jeopardy of missing their promise time. The orange color identifies a promise warning.

RO#/Job#	Tag	Date	Customer	Vehicle	Type	Service Writer	Promised Date/Time	Pr	RO Status	Job Status	Waiter	Point Totals	Comment
234607	TR1	May 24 21 8:01 AM	RYAN, ANDERSON	2014 Ford F250SD	W	90073 Skinner, Bri	05-24-21 5:00 PM		Completed - Wa				test note Does it stay?
250032	GAS	Nov 12 21 7:32 AM	MAX, HUGHES	2005 FORD GT	C	90259 Wallace, Tra	11-15-21 5:00 PM		Work in Process				
257076	575f	Feb 3 22 2:15 PM	DAVID, TERRY	2010 Ford Escape	C	92303 Lyman, Joe	5:00 PM		Partial Close				
257196	WHI	Feb 4 22 2:21 PM	Justin Wallace	2021 Ford F150	C	90401 Jones, Paul	02-05-22 5:00 PM		Raymer				
258224	TR 1	Feb 16 22 7:56 AM	DYLAN, ROBERTS	2008 Ford F450sd	C	95263 Martin, Van	02-16-22 6:00 PM		Partial Close				
259019	TR1	Feb 24 22 8:31 AM	CAMERON, JONES	2020 Ford Fusion	C	94470 Powell, Belli	02-24-22 10:30 AM		Partial Close				
260480	TR 1	Mar 11 22 9:49 AM	AVA WILKINS	2006 Ford Mustang	C	94487 Baker, Sonic	03-11-22 3:00 PM		Open				

### Dispatch

- An **Assigned Hold** status is available in the **Dispatch** window. When an entry level tech pulls 2 entry level jobs on a repair order and all other non-entry level jobs are placed in a status of “Assigned-Hold” automatically. When the entry level tech marks those two entry level jobs as completed all non-entry level jobs will automatically have their job statuses changed to “Release Assignment Hold”. Now these three jobs can be pulled by a senior level tech.

Job	Job Code	Complaint	PT	Skill Level	Service Tech	Job Status
1	99-ESP	Vehicle has an ESP contrac	S	Misc	21333 Rojas, S	Completed
2	50-EEC	Customer States check en	C	Misc	21333 Rojas, S	Completed
3	00-TIS	TIRE INFLATION SERVICE	C	Misc	21333 Rojas, S	Assigned - Hold
4	99PX	PERFORM COMPLIMENTA	C	Misc	21333 Rojas, S	Assigned - Hold
5	TCPA	"I consent to being contact	C	Misc	9999 Tech Sub	Assigned - Hold
6			C			

## Setups & App Preferences

### Custom Labor Types

- Labor Type Codes allow customized labor and parts pricing control for each repair order job line. This will allow the user to have fewer job codes for the advisor to search through.
- This feature can only be used by turning on this application preference from **Admin > App Preferences > Service**.

Server	Enables Labor Type selector, providing default values and behavior on RO windows	SL: 1	<input checked="" type="checkbox"/>	EnableLaborTypeCodes
Service				

- Labor Type Codes can be set up by accessing the **Setup** window, then selecting item 20 under **Service Setups** for **Labor Type Codes** window.
- To create a new Labor Type Code, click the **Insert Labor Type** button. Populate the window below with the desired information.

Labor Type
Cancel OK

Code: LOF

Description: Oil Change

Pay Type: C Customer Pay

Department: Quick Quick Lane

Debit Account: [Dropdown]

Prompt user for the distribution when Closing the RO

Source: [Dropdown]

---

Labor Account: [Dropdown]

Labor Price Code: 3 Maintenance

Labor Rate: 49.95

Labor Tax

---

Parts Account: [Dropdown]

Parts Tax: 7.0000

Parts Price Code: B List less 20.00%

---

Misc Account: [Dropdown]

Lube Account: [Dropdown]

Sublet Account: [Dropdown]

---

Created: [Field]

Modified: [Field]

SEQ: 0 Add record, then click Ok.

- With the feature enabled, a user must populate a labor type code on each job line. Below is where this will be populated in the **Write-Up** window.

Job	Pay	Job Code & Complaint
1	C	00-TIS TIRE INFLATION SERVICE SET TIRES TO FACTORY SPECS
2	C	99P PERFORM COMPLIMENTARY MULTI POINT INSPECTION
3	C	01-GAS OIL AND OIL FILTER CHANGE. PRICE INCLUDES .72 HAZARDOUS WAST
4	C	05-WIPERS-FRT REPLACE FRONT WIPER INSERTS

00-TIS [Dropdown] Labor Type [Dropdown] Service Department [Dropdown]

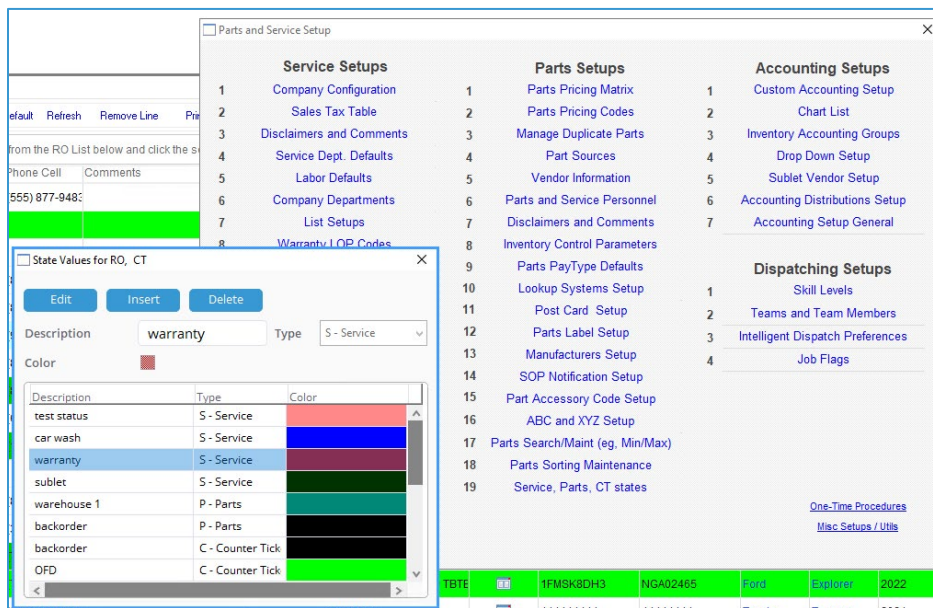
Skill Level [Dropdown]

- This is where the labor type code will be populated in the **Jobs** window.

Job	Job Code	Labor	Pay	Dept.	Status	Complaint	Tech ID	Labor	Parts	Total Cos	%	P Cost	ELR	TE	Cause
1	00-TIS		C	Service	Not Set	TIRE INFLAT		0.00	0.00	0.00	.00	0	0.00	0.00	0.00
2	99P		C	Service	Not Set	PERFORM C		0.00	0.00	0.00	.00	0	0.00	0.00	0.00
3	01-GAS		C	Service	Not Set	OIL AND OIL		0.00	0.00	0.00	.00	0	0.00	0.00	0.00
4	05-WIPERS-FR'		C	Service	Not Set	REPLACE FR		14.95	0.00	14.95	.00	100	0.00	74.75	0.00
5	88-67.5W		S	Quick	Not Set	PERFORMEE		0.00	0.00	0.00	.00	0	0.00	0.00	0.00
6			C					0.00	0.00	0.00	.00	0	0.00	0.00	0.00

## States (Service and Parts)

- Additional statuses can be set for Parts or Service by creating a 'Sub-status' called a **State**.
  - States** can be set up for RO's and Counter Tickets from the Parts and Service Setup window, by selecting option 19 under Parts Setups, **Service, Parts, CT states**



- To create a custom **State** click the **Insert** button.
  - Enter a description for the state
  - Choose a type (S – Service, P – Parts, or C – Counter Ticket)
  - Choose a color to associate with this custom state type
- Once **States** are set up, the **State** can be set in the Jobs window while in Edit mode. The user can right click on the “S” at the top of the Jobs window to update a service **State** or right click on the “P” at the top of the Jobs window to update a parts **State**. Once a State has been set, the icon will change from black to red as depicted in the image below.

- States are also visible in the Estimates, Estimate Log, Dispatch, Totals, and My Jobs windows.

JOBS: RO# 1130075, Jason Fuller, VIN: JHLRD1877 15001285, 20 BMW 3 Series, Tag: 1234, Loc: 1, Miles: 1234, SW: Dealerbuilt

Find Edit Rental Post (Close) RO Print Copy VIN Open

Search  warranty

Totals  Parts  Techs Location 1:

Job	Job	Pay	Dept.	Status	Complaint	Tech ID	Labor
1	VICE	I	Service	Not Set	INSPECTION		13.79
2	01-H	C	Service	Not Set	Headlight le		0.00
3	00-T	C	Service	Not Set	TIRE INFLAT		0.00
4	99P	C	Service	Not Set	PERFORM C		0.00
5	00-N	C	Service	Not Set	your woode		390.00
6							423.74

Job Not Taxed  Declined

PERFORM 1ST OIL SERVICE. CHANGE OIL, OIL FILTER. PERFORM A MULTI POINT INSPECTION Cause MAINTNACE Correction PERFORMED 1ST OIL CHA SERVICE CHANGED ENGINE OIL AN

## Intelligent Dispatching Preferences Setup

- An **Upsell Cushion** field has been added to the Intelligent Dispatching Preferences Setup to allow the system to add priority points to all repair orders written. This will allow repair orders to get dispatched sooner, that might be in jeopardy of missing its promise time due to the possibility of upsells being added to a repair order.

Intelligent Dispatch Preferences Setup

Cancel Save

Job Weighting Values: 1 to 1000

Recheck/ Comeback	Can Complete Today	First Time Customer	Waiter	Waiter Multiplier	Reservation	Team	Endangered	Days Late
100	100	0	100	4	100	0	300	200 per day

Other Qualified jobs	Already Assigned jobs	Upsale	Endangered Threshold
50 per job	50 per job	0	50 % (0-100)

Bought From Dealer	Bought From Dealer Months	Carryover	Carryover Multiplier	Preferred Customer	Ignore ROs older than	RO Priority Multiplier	<input type="checkbox"/> Utilize RO Priority 1 over all other
0	12 x 1-12	200	2 x 1-4	0	10 days	100 x 1-6	

Tech Hours

Default day start time 07:00 Default day end time 19:00 Default lunch start time Default lunch end time

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

Lunch

--	--	--	--	--	--	--

Other ID Preferences

Shop loading refresh interval Notifications Email

Update every 00:05 hours/minutes

If Promised Date empty, calculate from remaining estimated hours on job

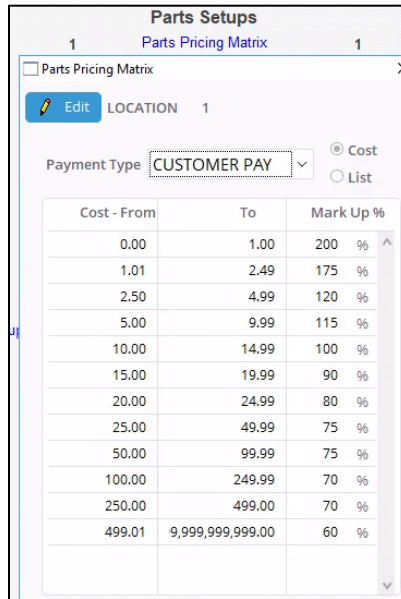
If Promised Time empty, calculate as end of work day.

Upsell Cushion 2.0

## Parts

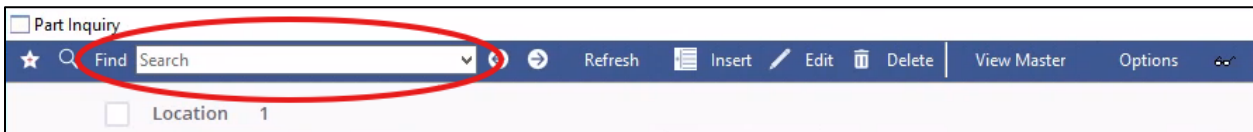
### Price Matrix

- The global parts pricing matrix can now be configured to apply markups based on either cost or list price.
  - **Parts Pricing Matrix** can be found in the main Service & Parts Setups, item 1 in the Parts setup column.



### Inquiry

- Quick search functionality is used by clicking in the **Find** search box and entering a part number, description or multiple words. The **Parts Found By Description** window will display the results of the search. The user will click on the desired part number for the part to be displayed in the **Parts Inquiry** window.



- Parts **Remarks** can be entered by selecting the checkbox in the image below and entering the information.

Part Inquiry

Part Number: YN19 Core#: LLLL  
Description: REFRIGERANT - R-134A  
Vendor Code: FOR Name: FOR Ford Motor Compe

Cost: 1.545  
Sell Price: 3.99  
Retail Price: 3.99  
Book Trade: 4.25  
Flex Price: 3.99  
Always default to Flex Price:

Update Adjust: .00208333  
Min O.H.: 0  
Max O.H.: 0  
Best Stk Lvl: 1546  
ReOrder Pt.: 1333  
Haz Mat: 0.00  
Manufacturer: FOR  
Acct Group:   
Source: 212 MC 20-39+ SLS PER YR

Parts Orders Existing Future  
On Order: 636.00 9098  
On Hold: 105 9098  
Back Order: 25  
Next Stock Order: 0

Core Cost: 0.00  
Clean Core OH: -8985.00  
Dirty Core OH: 0

Stocking Status: S  
Non-Taxable:

Alternate PN: YN19  
Supercede To:   
Supercede from:   
Last Date Sold: Mar 13 25  
Last Buy Date: Oct 9 24  
Last Perpetual:   
Last Physical: Dec 12 22  
Date Added: Jan 2 99  
Aging Date: Mar 13 25  
Ford Base: 19  
Accessory Code:   
6 Mo. Sales / Lost Sales: 10615 / 0

Order Unit: 1  
PerJob: 0  
Dimensions:   
RIM managed: No  
Mfr Guar Qty: 0  
Bin 2:   
Dirty Core Bin:   
Return Code:   
Return PO:   
Dirty Ret. PO:   
Special Tax: 0.00

Remarks:  Do not sell.

36 Month Sales History


Purchase Order	Qty Ord	Date	OrdType	QtyRcd
4606 Loc 1	10608.00	Apr 17 25	S	0
4601 Loc 1	1.00	Dec 6 24	I	0
4599 Loc 1	1.00	Dec 3 24	E	0
4595 Loc 1	50.00	Sep 25 24	I	25

Part Number	Superceded To	Bin Loc	On Hand	List Price
YN19		101	-8985.00	3.99

- These remarks will appear in a Read Me alert when using the Lookup window, or an automatic pop-up will appear when billing the part number in either the Counter Ticket or Jobs window.

Read Me

**NOTE** Level (0) User: HOSMER Print

 PART REMARK:  
Do not sell.

OK

Dealerbuilt :: 800-499-1914

## One Time Use Parts

- One time use parts are components or fasteners that are designed to be used only once during assembly, repair, or installation. These can be set up through the **Inquiry** window.
- To create a one time use part, find a part number in the **Inquiry** window. Click **Edit**, check the check box “OTU – One Time Use Part”, then click the hyperlink.

The screenshot shows the 'Part Inquiry' window with the following details:

- Location: 1
- Part Number: A
- Core#: [Empty]
- Description: EXAMPLE PART A
- Vendor Code: FOR
- Name: FOR Ford Motor Comp
- Stocking Status: N
- OTU - One Time Use Part:  (highlighted with a red circle)
- Buttons: Add, Dealer, Lost Sale

- Fill out the window below with the part number(s) and quantities, then click **OK**.

The 'One Time Use Parts' dialog box contains the following table:

Part Number	Qty	Description
B	1	EXAMPLE PART B
C	1	EXAMPLE PART C
D	1	EXAMPLE PART D
	0	

- Alerts for related parts needed in warranty repairs
- Supports multi-level supersessions e.g., Part A supersedes to Part B, C and D.

This screenshot shows the full 'Part Inquiry' window with the 'One Time Use Parts' dialog box open. The main window displays detailed information for Part A, including pricing, stock levels, and order history. The dialog box shows the list of related parts (B, C, D) as described in the previous image.

**Part A Details:**

- Part Number: A
- Description: EXAMPLE PART A
- Vendor Code: FOR
- Cost: 20.00
- Sell Price: 58.95
- Retail Price: 45.00
- Book Trade: 36.00
- Flex Price: 0.00
- Update Adjust: 0
- Min O.H.: 0
- Max O.H.: 0
- Best Stk Lvl: 0
- ReOrder Pt.: 0
- Haz Mat: 0.00
- Manufacturer: [Empty]
- Acct Group: [Empty]
- Source: 0

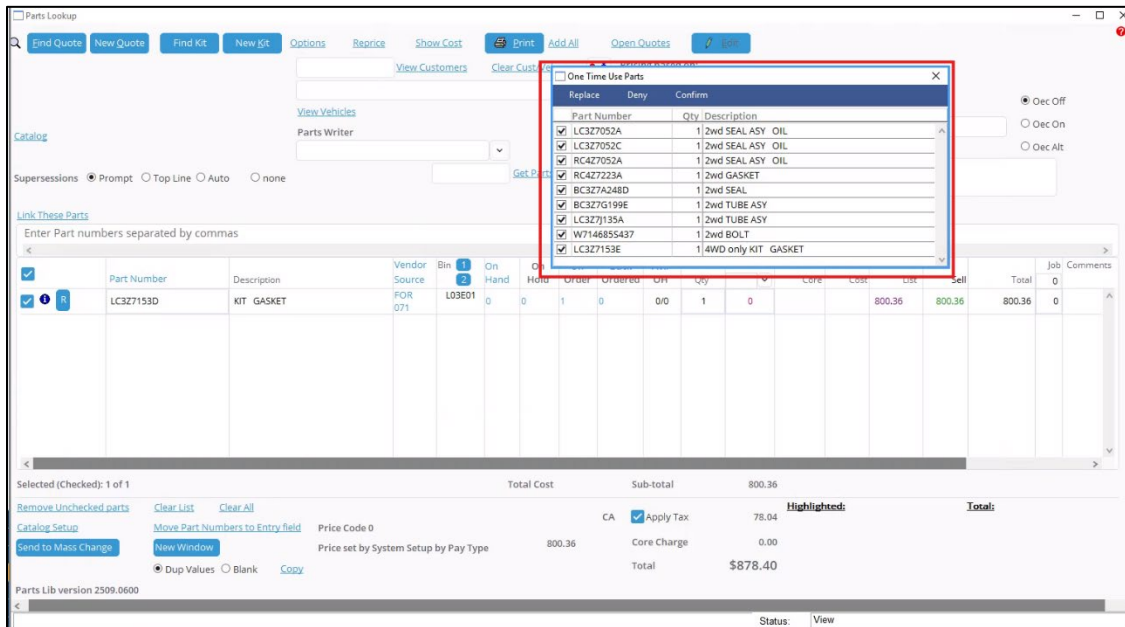
**Parts Orders Summary:**

Order Type	Existing	Future
On Order	0.00	0
On Hold	0	0
Back Order	0	0
Next Stock Order	0	0

**36 Month Sales History:**

Part Number	Superseded To	Bin Loc	On Hand	List Price
A			0.00	45.00

- When a user enters a part number that is tied to “One Time Use Parts” a pop-up will appear asking the user to take action.



- Select the **Replace** button to replace part number “LC3Z7153D” with the list of parts in the example above. The **Replace** option is used when a part number supersedes to multiple part numbers.
- Select the **Confirm** button to add all of the part numbers in the One Time Use list. The **Confirm** option is used when on time use parts are associated with a repair.
- Select the **Deny** button to cancel the list of parts and allows the user to continue.
- If the users unchecks any of the check boxes next to the part numbers in the One Time Use Parts pop-up window those parts will not be added when the user selects either the **Confirm** or **Replace** option.

## Mass Change Window

- More options have been added to the **Mass Change** window
  - Bin 2
  - Clear Bin 2
  - Hold Cost/List/Flex checkboxes
  - Always Default to Flex Price
  - New Stocking Status fields
  - Remarks field

Parts Mass Changes

New Vendor:

New Source:

New Bin 1:   Blank Out Existing Bin 1

New Bin 2:   Blank Out Existing Bin 2

New Dirty Core Bin:   Blank Out Existing Dirty Core Bin

New Cost:   Hold Cost

New List:   Hold List

New Flex Price:   Hold Flex  Always default to Flex Price

New Stocking Status:   Hold Stocking Status

New Remarks:

The Parts in the List below can all be assigned common values specified in the 'New' fields. (If the 'New' fields are blank, those values will not be changed)

Note: If you need to make mass changes to any of the Min/Max Orderingfields, do NOT use this window. Instead, go to Service & Parts/Setup/Parts Setups/17. Parts Search/Maint (eg, Min/Max).

You must enter a parts manager code to continue...

[Delete Highlighted Lines from the List](#) [Update Parts in List Below with Non-Blank Values](#)

Location	Part Number	Vendor	Description	Source	On Han Bin	On Order	Cost	Trade	List
1	4127	FOR	CABIN FILTER	3	4.00 BC5	0.00	11.150	33.95	33.95

## Counter Ticket

- Parts kits can now be billed in the **Counter Ticket** window.
- **Docs** button gives access to Document Management to view associated printed documents
- **\$** button allows access to the **Integrated Payments** solution for credit/debit card processing through the credit card processor.
- **Open Invoice** window includes parts department **Status** column

Open Invoices

Open Counter Tickets   Show CT Invoices  Current Customer Only

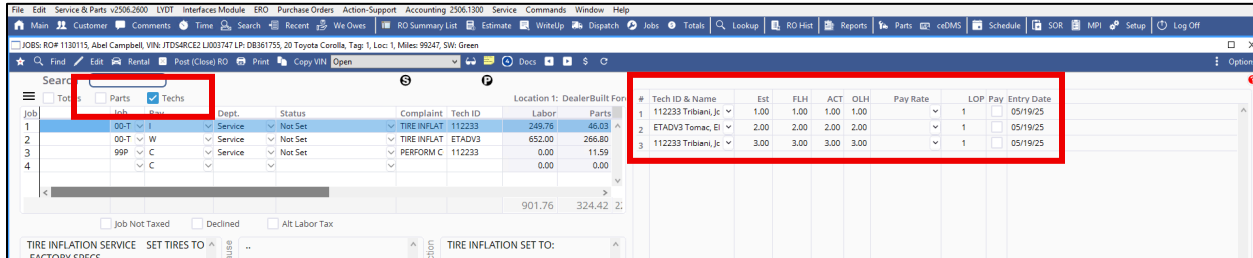
Show CT Estimates  My Tickets Only  Lookup Window Quotes

Counter Person	Invoice	Dept	Customer	Date	Total	Internal	Charge	Total Dist	UnPaid Bal.	Parts Cost	Pay Method	Invoice Notes	MPL Quote/Vin	Status
Morris, Deborah	1062623	4-Parts	Cindy Davis	03/05/25	11	2.75	0.00	0.00	2.75	0.69				⊕
Morris, Deborah	1062621	4-Parts	DealerBuilt Ford 2	02/14/25	21	8.79	0.00	0.00	8.79	0.00	7.99			⊕
Manager, Parts	1062620	4-Parts	Adolfo Jones	02/13/25	2	5254.14	0.00	0.00	5254.14	3559.91				⊕
Jones, Melanie	1062616	4-Parts	Dealerbuilt Auto Busine	10/15/24	1	12.50	0.00	0.00	12.50	10.12				⊕
Jones, Melanie	1062606	4-Parts	MAXIMUM Auto Busines	07/03/24	0	964.79	0.00	0.00	964.79	1663.56	CHARGE			⊕ OFD
Sotzel, Heather	1062602	4-Parts	John Riffe	06/13/24	1	10001.83	0.00	0.00	10001.83	1.92	Cash			⊕ backorder
Jones, Melanie	1062577-01	4-Parts	Jacquelyn Jones	03/06/24	0	0.00	0.00	0.00	0.00	219.25				⊕
Valle, Alfonso	1062571	9-Emp Pts	Garrett Howard	12/23/23	1-	1.56	0.00	0.00	57.00	-55.44	1.30			⊕ waiting for order
Thomas, Giovanni	1062544	9-Emp Pts	Krystal Alexander	12/23/23	0	8.91	0.00	0.00	8.91	7.44				⊕ waiting for order
Thomas, Giovanni	1062543	9-Emp Pts	Bernard Cooper	12/23/23	0	6.60	0.00	0.00	0.00	6.00				⊕ backorder
Thomas, Giovanni	1062542	9-Emp Pts	Valerie Flores	12/23/23	0	1.56	0.00	0.00	0.00	1.56	1.30			⊕ OFD
Thomas, Giovanni	1062540	9-Emp Pts	Esteban Camacho	12/23/23	0	12.42	0.00	0.00	0.00	12.42	10.38			⊕
Thomas, Giovanni	1062521	4-Parts	Collision Auto Business	12/22/23	1-	-25.00	0.00	0.00	-25.00	-25.00		PAYMENT TO REPAIR LB321		⊕
Valle, Alfonso	1062519	9-Emp Pts	Reynaldo Ochoa	12/22/23	1-	12.42	0.00	0.00	0.00	12.42	10.38			⊕ backorder
Valle, Alfonso	1062518	4-Parts	Harvey Coleman	12/22/23	1-	2.70	0.00	0.00	0.00	2.70	2.25			⊕
Valle, Alfonso	1062511	9-Emp Pts	Travis Williams	12/22/23	1-	4.08	0.00	0.00	0.00	4.08	3.40			⊕ return
Valle, Alfonso	1062510	9-Emp Pts	Roy Avila	12/22/23	1-	2.70	0.00	0.00	0.00	2.70	2.25			⊕ return
Rubio, Cristina	1062482	9-Emp Pts	Danielle Hoffman	12/21/23	1-	1.56	0.00	0.00	0.00	1.56	1.30			⊕
Rubio, Cristina	1062481	9-Emp Pts	Kari Cohen	12/21/23	1-	9.32	0.00	0.00	0.00	9.32	7.79			⊕
Rubio, Cristina	1062479	9-Emp Pts	Clifford Herrera	12/21/23	1-	17.48	0.00	0.00	0.00	17.48	15.09			⊕
Rubio, Cristina	1062478	9-Emp Pts	Jonathan Estrada	12/21/23	1-	7.77	0.00	0.00	0.00	7.77	6.49			⊕

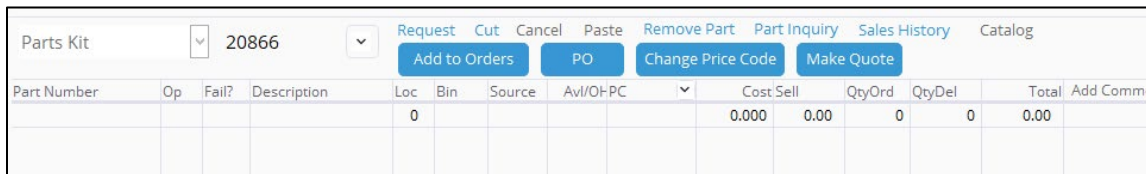
- Counter ticket states allow for additional custom CT statuses per counter ticket
  - **States** can be set up for RO's and Counter Tickets from the Parts and Service Setup window, by selecting option 19 under Parts Setups, **Service, Parts, CT states**

## Jobs Window

- See all parts or techs added to RO by selecting either the **Parts** or **Tech** checkbox in the upper left corner of the **Jobs** window.
  - The area on the right half of the screen will display all parts on the repair order or all technicians depending on which checkbox was selected.

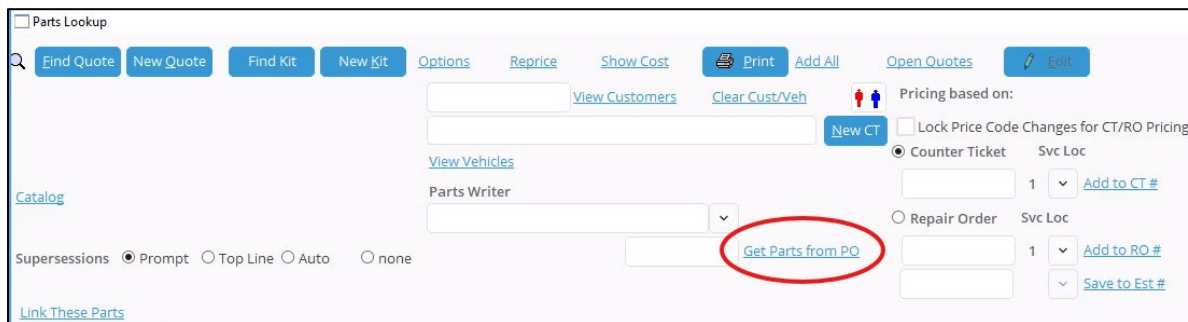


- **Catalog** button has been added to the **Jobs** window to allow a user to flip between Lightyear and a parts catalog.
- Make quotes directly from RO by selecting the **Make Quote** button. This will take a user directly to the Parts Lookup window.

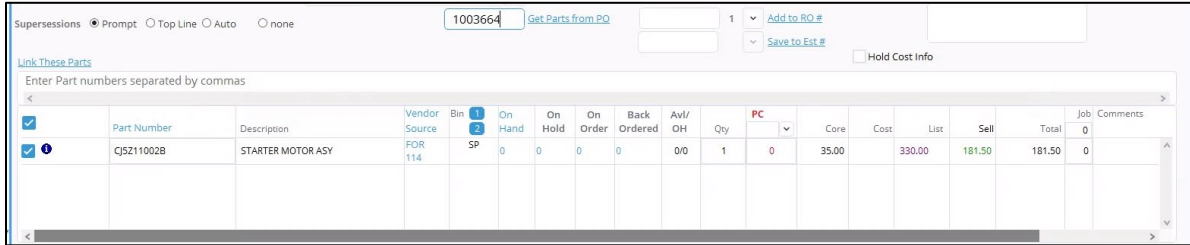


## Parts Lookup

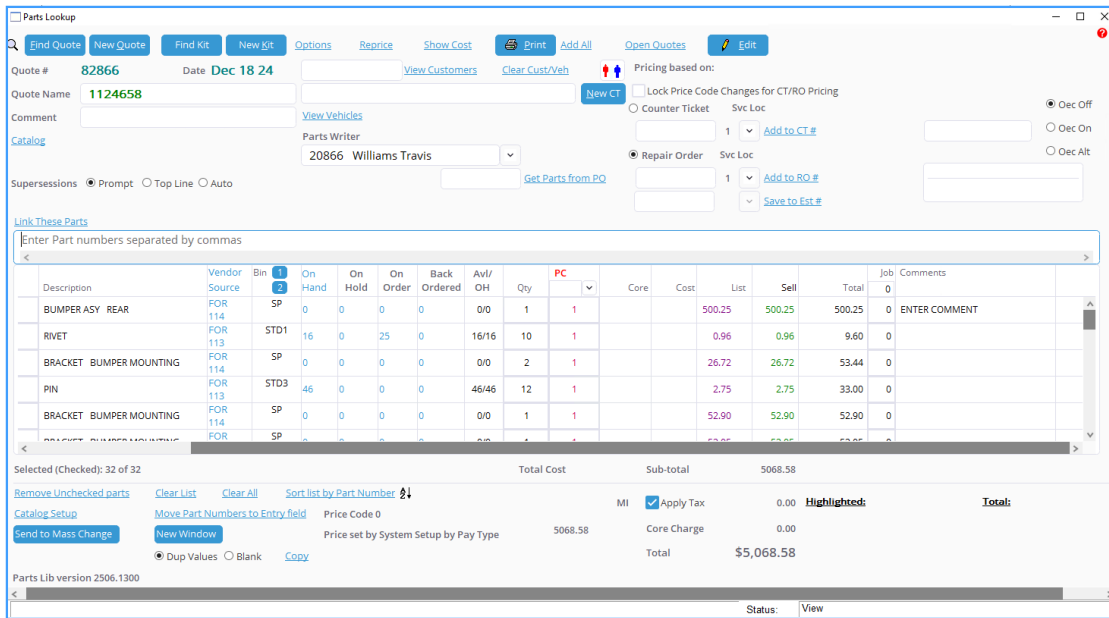
- Pull itemized purchase orders into the **Lookup** window to then roll to RO or CT.



- Enter the purchase order number and click the **Get Parts from PO** hyperlink. All parts on the purchase order will now appear in the parts list in the **Lookup** window.



- Add comments per part line in the Parts Lookup window by clicking in the **Comments** box for the desired part line. When the comment is complete, click **Save**.



- When **Remarks** are added to a part number through the Parts Inquiry window the user will see the letter "R" next to the part number in the parts **Look Up** window. By clicking on the letter "R", a Read Me alert pop-up will appear providing the **Remarks** entered for that part number.



- **Good Better Best** option lets users classify parts by value tier, with a summary by tier. To use the feature, click to the left of the part number and select if each part number is good, better, or best. The bottom right-hand corner of the window will show the totals.

<input type="checkbox"/>	Part Number	Description	Vendor Source	Bin	On Hand	On Hold	On Order	Back Ordered	Avl/ OH	Qty	PC	Core	Cost	List	Sell	Total	Job	Comments
<input checked="" type="checkbox"/>	U8214D202U	CABLE ASY	FOR 100	SOPRO	3	3	0	0	0/3	1	0		17.75	17.75	17.75	0		
<input checked="" type="checkbox"/>	U8214D202V	CABLE ASY	FOR 100	SOPRO	3	3	0	0	0/3	1	0		87.86	87.86	87.86	0		
<input checked="" type="checkbox"/>	U8214D202W	CABLE ASY	FOR 100	SOPRO	3	3	0	0	0/3	1	0		38.34	38.34	38.34	0		

Selected (Checked): 3 of 3		Total Cost	Sub-total	143.95
<a href="#">Remove Unchecked parts</a> <a href="#">Catalog Setup</a> <a href="#">Send to Mass Change</a>	<a href="#">Clear List</a> <a href="#">Move Part Numbers to Entry field</a> <a href="#">New Window</a>	Source 100 Code 0	TX <input checked="" type="checkbox"/> Apply Tax	0.00
Price set by Part Source Setup		143.95	Core Charge	0.00
<input type="radio"/> Dup Values <input type="radio"/> Blank <a href="#">Copy</a>		Total	\$143.95	

<b>Highlighted:</b> ☛ Good: \$17.75 +tax // \$17.75 ☛ Better: \$87.86 +tax // \$87.86 ☛ Best: \$38.34 +tax // \$38.34	<b>Totals:</b> ☛ Good: \$17.75 +tax // \$17.75 ☛ Better: \$87.86 +tax // \$87.86 ☛ Best: \$38.34 +tax // \$38.34
--	---

- Batch linking of parts that are available in stock can be done once a quote is created, click the **Link These Parts** hyperlink.

Parts Lookup

[Find Quote](#) [New Quote](#) [Find Kit](#) [New Kit](#) [Options](#) [Reprice](#) [Show Cost](#) [Print](#) [Add All](#) [Open Quotes](#) [Edit](#)

[View Customers](#) [Clear Cust/Veh](#) [New CT](#) Pricing based on:

Lock Price Code Changes for CT/RO Pricing  
 Counter Ticket Svc Loc  1 [Add to CT #](#)

Repair Order Svc Loc  1 [Add to RO #](#) [Save to Est #](#)

[View Vehicles](#) Parts Writer  [Get Parts from PQ](#)

Supersessions  Prompt  Top Line  Auto  none

[Link These Parts](#)  
 Enter Part numbers separated by commas

- The **Search** window will pop up, prompting the user to search for a customer to link the parts. Select the customer and click **OK**.

Search for Customer or Vehicle ...

[Clear Search](#) [Clear Results](#) [Print](#) [Value](#) [Preferences](#) [Cancel](#) [OK](#)

Exact Match  Begins With  Contains  Ends With

Show Filters  
 Search for Fleet Driver Records by Name Fields

1 Last Name SMITH  
 2 First Name A  
 3 Customer ID  
 4 City, ST, or Zip  
 All Phone  
 6 County  
 7 A/R Number  
 8 RO Number  
 9 Counter Ticket#  
 Deal#  
 Salesperson  
 Location  
 Appointment #

Spouse Last  
 Spouse First  
 First Visit  
 Last Visit  
 Next Contact  
 Birthday  
 Anniversary  
 Ignore Birthday Year  
 Ignore Anniversary Year

VIN Last 8 Year Make Model Body Style Source

[Insert Customer and Vehicle if any](#)  
[Insert Vehicle \(Current Selection\)](#)  
[Load Suspected Duplicates](#)  
[Merge Duplicate Customers](#)  
[Remove Highlighted Lines](#)  
[Load Suspected Orphans](#)  
 System Default  
[Load View Query](#) [Save View Query](#)  
 Only return first 500 rows

Sold Customer  Yes  No  Both  
 Tax Exempt  Yes  No  Both  
 Allow Mail  Yes  No  Both  
 Do Not Email  Yes  No  Both  
 Delete @ M/E  Yes  No  Both  
 Inactive  Yes  No  Both

Customer Name	Customer ID	Type	Address	City/ST/ZIP	County	Home Phone	Work Phone	Spouse	Sales ID	Category	Since	Last
Smith, Aaron	753969	R	56 Hemu Circle	Nuevo CA 92567-8905	Riverside	(607) 607-7674	(438) 438-5348	Gabrielle Smith	740410		01/19/12	01/15
Smith, Abel	134097	R	105 Moasu Way	Temecula CA 92592-5848	Riverside	(284) 284-5058	(456) 456-9116	Anthony Smith	993916		01/19/12	01/15
Smith, Abel	739611	R	183 Nepbuv Street	Riverside CA 92504-1561	Riverside	(623) 623-7696	(470) 470-5392	Felicity Smith	992157		02/27/12	02/27

- On the **Link an Existing Part** window click **OK** to finish the linking process.

Link an Existing Part

Location ID 1

Part Number BE826731AC

On Hand 150.00

On Hold 0

Part #	Description	Qty	OnHand	Avail	Req
388898S	SEAL	0	6	-2	1
5632160L	FENDER ASY	0	0	0	1
BE826731	KIT ELEMEN	1	150	150	1
X05W20C	MOTORGRAF	1	32	32	1
X05W30L	.	0	9	-7	1

Available to be Linked 150.00

No parts available Not enough parts

Reset

When you press TAB, a window will open where you can Find a customer, vehicle, stock veh, Repair Order or Counter Ticket to link the parts.

Linking Information - Click OK to Save the OnHold

Part Number 388898S

On Hold Qty 0

RO / Job

CT Number

Customer Abel Smith

Vehicle

## Transferring Parts to Purchase Order Window

- Create a list of parts to order in the **Lookup** window.
- Click the **Send Parts to PO** link. This action opens the **Purchase Order** window.

Parts Lookup

Find Quote New Quote Find Kit New Kit Options Reprice Show Cost Print Add All Open Quotes Link

View Customers Clear Cust/Veh New CT Pricing based on: Lock Price Code Changes for CT/RO Pricing

Counter Ticket Svc Loc 1 Add to CT #

Repair Order Svc Loc 1 Add to RO # Save to Est #

Get Parts from PO

Send Parts to PO

Hold Cost Info

Part Number	Description	Vendor Source	Bin	On Hand	On Order	Back Ordered	Avl/OH	Qty	PC	Core	Cost	List	Sell	Total	Job	Comments
9003000033	P265 70R17	FOR 100	SP-ORD	0	0	0	0/0	4			781.20	781.20	3124.80			
5M628501A	KIT WATER PUMP REPAIR	FOR 100	1032B	0	0	0	0/0	1			135.26	1135.26	1135.26	0		

Selected (Checked): 2 of 2

Total Cost Sub-total 4260.06

Remove Unchecked parts Clear List Clear All

Catalog Setup Move Part Numbers to Entry field Source 100 Code 0 CA Apply Tax 0.00 Highlighted: Total:

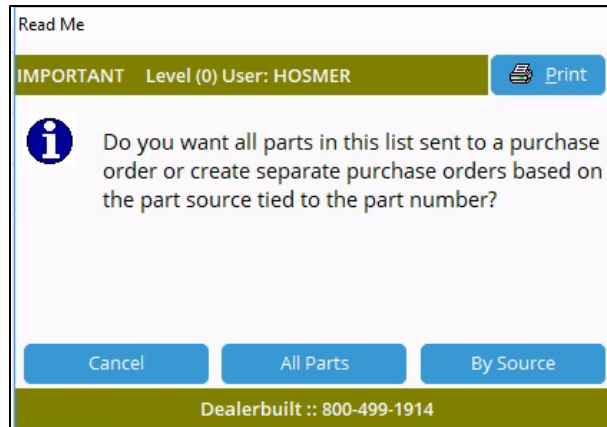
Send to Mass Change New Window Price set by Part Source Setup 4260.06 Core Charge 0.00

● Dup Values ○ Blank Copy Total \$4,260.06

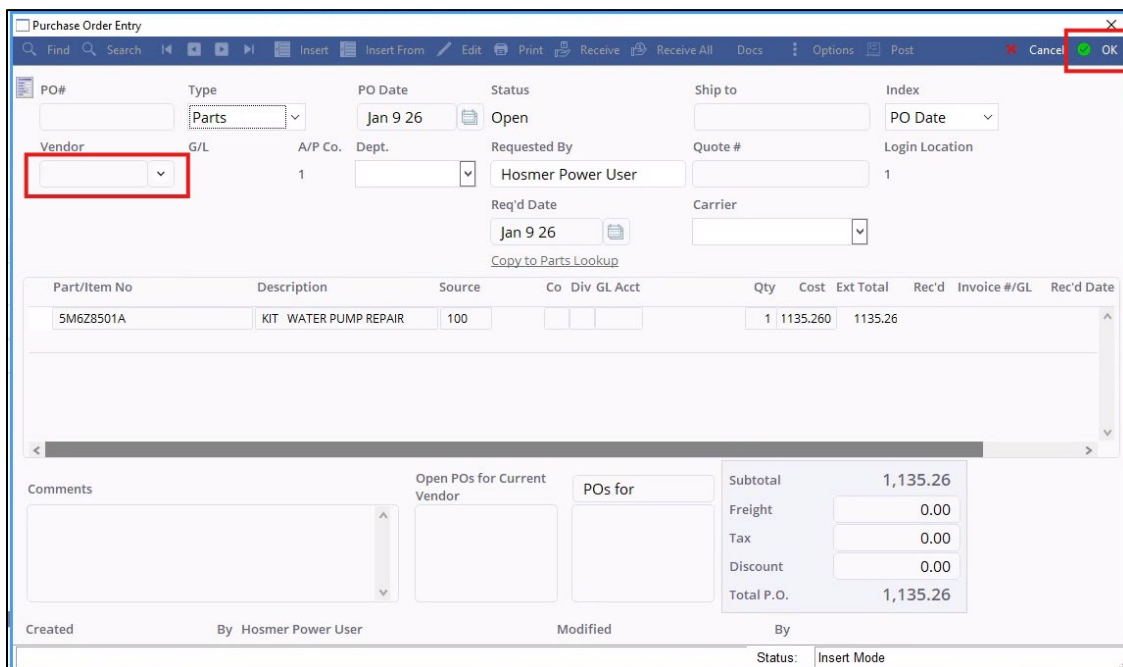
Parts Lib version 2512.3100

Status: View

- The user will be prompted to choose how the parts should be added to purchase orders:
  - Add all parts to a single purchase order, or
  - Create separate purchase orders by part source.



- In this example, select **By Source**, since the tires are being ordered from a tire supplier and the water pump is being purchased from another Ford dealership.
- The **Purchase Order** window will open with only the water pump listed.
  - Select the appropriate vendor and click **OK** to complete the purchase order.



- The **Purchase Order** window will then open again with only the **tire** listed.
  - Select the appropriate vendor and click **OK** to complete the purchase order.

## SOR Window

- Filters for specific Service or Parts personnel associated with a special-order record
- Comments can be added to each part. To enter notes into the **Comments** field, click the **Edit List Comments** button and enter the note.
- Schedule an appointment for a special-order part by selecting the **Schedule Appointment** button. Once in the Schedule Service window the **Linked Parts** button will be highlighted in yellow to indicate a special-order part.

**SOR - Special Order and Linked Parts (Parts Ordered and On Hold, Linked to Customer/VIN, CT, or RO)**

[Set Writer Column Options](#)
[Expand Top List](#)
[Expand Bottom List](#)

RO #  Phone #  Part Number   
 CT #  Customer  Advisor/Writer  List filtered. Click to change

Not Linked to an RO or CT (only to customer or vehicle)

Received, but Not Posted [Post Highlighted Parts](#) [Remove Links to Highlighted Parts](#) [Zero OnHold](#)

ec'd / Ord'd (if diff)	Description	Bin	Ord	Rec'd	Back Ord	OnHold	OnHand	PPaid	PPaid Qty	Writer	Appt	Linked To	Status	Comments
\YFS22FMX	SPARK PLUG		0	0	0.00	1	12.00		0	D0101		RO 1130078 Job 0,		
'N19	REFRIGERANT - R-13	YYY	1	1	0.00	1	3985.00		0	1234		RO 1125664 Job 1 Smith, Pamela		
IU2Z14A088AB	KIT - TERMINAL	51	1	1	0.00	1	8.00		0	D0101		RO 1125061 Job 2 Padilla, Alfons		
V7142975440	NUT HEX	STD3	2	2	0.00	1	1.00		0	D0101		RO 1124266 Job 4 Melendez, Abr		Please call Bob when part arrives
V7178225439	BOLT	STD4	4	4	0.00	2	2.00		0	D0101		RO 1124266 Job 4 Melendez, Abr		
V7195115439	BOLT	STD4	4	4	0.00	3	3.00		0	D0101		RO 1124266 Job 4 Melendez, Abr		

Not Linked to an RO or CT (only to customer or vehicle)

Not Yet Received [Remove Links to Highlighted Parts](#) [Zero OnHold](#)

PO Num	PO Date	Part Number	Description	Bin	Ord	Rec'd	Back Ord	OnHold	OnHand	PPaid	PPaid Qty	Writer	Appt	Linked To	Status	Con
12214	Dec 22 23	W520516S441	NUT ADJUSTING SI	STD1	1	0	0.00	1	-2.00		0	D0101		RO 1124266 Melendez, Abraham		
1220PU2	Dec 21 23	5U5214G371BH	Unit Central Proce		1	0	0.00	1	-1.00		0	D0101		RO 1124266 Melendez, Abraham		
12222	Dec 23 23	W7209885439	Bolt And Washer As	STD4	4	0	0.00	1	-1.00		0	D0101		RO 1124266 Melendez, Abraham		
1111125	Mar 30 24	CL321104M	Hub Asy Wheel		1	0	0.00	1	-1.00		0	D0101		RO 1125307 McIlroy, Keuro		
4602	Jan 24 25	W717875S300	Nut		4	0	0.00	2	0.00		0	D0101		RO 1130007 Alatorre, Isabel		

Stat...