ImEX Tips, tricks and traps, April 24 2010.

Main customer data screen

Customer data table right click menu.

Right any customer's last name. A popup menu appears.

1. To quickly filter customer related data by first name, follow the steps below. This is very handy when dealing with a large database containing many last names that are spelled in the same way (i.e. "Smith' or "Wong")
    a. Select "Filter 'CUSTOMER' by first name
    b. After a new window opens, start typing the first name of the customer.
    c. Once the proper record has been located, press "Enter" on your keyboard to return to previous screen with the selected customer's record highlighted.
2. To specify certain condition or set of conditions (i.e. a job must have a purchase order number, a job must be authorized by a certain person etc.) that must be met while trying to create a repair order for a customer.
    a. Right the customer' last name.
    b. Select "Define repair conditions" from the popup menu.
    c. Click "Add" on the next screen.
    d. Add as many conditions as you like.
    e. Click "Exit". Any employee trying to create a new repair order for this customer will be shown a screen displaying the conditions you defined and will have to complete a confirmation step.

Repair orders/estimates table linked to selected customer and vehicle.

3. In the table showing all estimates / repair orders:
    a. A "*" symbol in the field named "E" indicates that estimate notes are present, Those notes have been either imported from the estimating system, or have been added manually.
    b. A "*" symbol in the field named "W" indicates that worksheet notes are present. Those notes have been either imported from the estimating system, or have been added manually.
4. Double click the "R.O.#" field will cause the express menu to be displayed. From the express menu:
    a. Select "Labor" to quickly see the labor reconciliation screen.
    b. Select "Parts" to quickly see the part and sublet reconciliation screen.
    c. Select "Dates" to quickly see the dates related to the repair order.

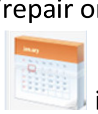
d. Select “$$$” to quickly see the current repair totals.
e. Select “Print “ to access the full repair order print menu.
5. Right clicking any row in the estimate table, will display estimate/repair order popup menu.

Estimate and repair order notes data table.

1. Notes header displays the actual number of notes.
2. Notes are displayed from oldest to newest.
3. To access the newest note, click any note in the table.
   a. Hold down the “Cntrl”+”End” key on your keyboard.
   b. The newest record will be highlighted.
4. To add a quick note to the estimate, right click the estimate in the estimate data table.
   a. Select “Estimate notes”, then “Add quick estimate note”.
   b. A default user name can be stored and will be used for any quick note created here. Simply type the desired name in the “Created by” field and click the “Save” icon represented by a picture of a floppy disk.
   c. Frequently used notes can be stored as presets thus eliminating repetitious data entry. Click “Add presets” to add, edit or delete note presets.
   d. Click “Presets” to display a popup menu showing created presets. Click any menu item to post it to the note.
5. Notes can be automatically emailed from the “Add quick note” screen. Simply click the “Email” button.
6. Click the “Worksheet” button to add the note to the worksheet.

Quick Toolbar

Quick toolbar is a floating menu allowing fast access to the most commonly accessed information.

1. To open the Quick Toolbar, click the “Tools” option on the top drop-down menu, then click “Quick Toolbar”.
2. The Quick toolbar is connected to the highlighted estimate/repair order on the main customer data screen and it will access and display information related to that record.
3. Clicking the  icon will display all labor records linked to selected estimate/repair order.
4. Click the  icon to display all parts and sublet invoice data records linked to selected estimate/repair order.
5. Click the  icon to display dates linked to selected estimate/repair order.
6. Click the  icon to display current repair totals for labor, parts, sublet, ATS, taxes etc.

7. Click the  icon to show repair order print menu.
8. Click the  icon to exit the Quick toolbar.
9. The Quick Toolbar can be placed anywhere on your monitor, simply drag it by its top 

Customer data screen buttons.

1. The Search R.O." button has multiple functions assigned to it. Those functions are set via "Tools"->"Company setup"->"Options 1". Either check or un-check the option "Show expanded search menu options from main menu". After clicking "Search" a new window will allow you to select either "Done", which will display the full repair order details on a new window and "Return", which will locate the repair order data on the customer data screen.
2. The "Navigate" button will display a screen allowing you to perform many repair order related functions (like PPG scale insert, ordering parts, view parts status etc.), without having to search for customer data by last name.
3. The "Cycle" button allows you to quickly specify cycle time related data, and post it to the repair order.
4. The "AccessPoint" button will display Audatex import screen.
5. The "Parts Queue" button will display all repair orders currently waiting for parts order procedures to be completed.

Correcting customer data on leased vehicles.

On the main customer data screen, locate the name to correct, then:

1. Right click on the name.
2. Click "Edit customer data".
3. On the "Add/Edtit customer information" screen click the "Lessor" button.
4. Confirm the message box.
5. Verify the corrected data, edit or change any additional information.
6. Click the "Save" button.

Digital imaging.

Consider using wireless camera for your imaging.

Access digital imaging as you would usually. On the “Add new images” tab:

1. You can check the “Delete original images after copy” option to erase images on an SD card or the camera after transfer.
2. Any images linked with the estimate can be viewed on one screen after the “Thumbnails” pushbutton is clicked.

You can speed up the way digital images are attached to an Audatex estimate or submitted to the insurance company. On the “View existing images” tab”:

1. Specify temporary path for the images. Click the “Open folder” icon located next to “Path to temp. location” field.
2. Browse to the folder, it is recommended that the folder be named “_Images” or “_Temp” (the folder‘s name should start with an underscore “_”, this will place the folder on the top of the directory tree.
3. Click the “Save” icon, represented by an icon of a floppy disk.
4. <u>Steps 2 and 3 have to be done only once on each computer</u>, they do not have to be repeated during each image operation.
5. In the table showing a list of linked images, put a checkmark on each image that you wish to transfer or attached to the estimate.
6. Click the “Submit” button.
7. Wait for “Operation completed. XX images copied.”
8. While in Audatex, or on line, to attach or transfer images, simply browse to the location you selected in step 2.

To email images to any recipient:

1. In the table showing a list of linked images, put a checkmark on each image that you wish to attach to an email.
2. Click the E-mail button located at the bottom of the screen.
3. You default email client will open, with images already attached to the email. The subject of the email will be shown as customer’ last name, vehicle description and a claim number. Fill in the email address of the intended recipient, add any notes and click “send”.

Manipulating images, adding notes and objects to images.

1. On the “Add new images” tab, select an image listed in the table.
2. Right click image, select “View image full screen”.
3. Once image opens in the viewer, press the “Enter” on your keyboard.
    a. To zoom the image in, press “Cntrl” and “+” on the keyboard.
    b. To zoom out, press “Cntrl” and “-“ on the keyboard.
    c. Use “Page Down” key to open the next image.
    d. Use “Page Up” key to open previous image.

4. To insert notes or geometrical shapes like arrows or circles (to highlight an area of damage for example):
    a. On the “Add new images” tab, select an image listed in the table.
    b. Right click image, select “View image full screen”.
    c. Once image opens in the viewer, press the “Enter” on your keyboard.
    d. Press the “F12” function key located on the top of the keyboard.
    e. Drawing menu will open.
    f. Modify the image in any way you wish.
    g. Press “Cntrl” and “S” to save the changes, or;
    h. Press “Esc” to exit the image viewer without saving any changes.

Storing and accessing documents.

The system can store documents of all types. Those documents can then be on a hard drive while being linked to the estimate. To add a document to an estimate:

1. On the main customer data screen, select the customer/vehicle and repair order.
2. Right click the repair order row.
3. Select “Add/view documents” from the menu.
4. On the “Related documents” screen click the “Add new” button.
5. Browse for the document to attach.
6. Click “Ok” or “Open”. The document will be stored. With the estimate.

To view, email or attach images, see steps listed for digital imaging.

Using the ImEX system to backup Audatex estimates.

Steps listed below that the estimates have already been moved to the hard drive from Audatex**.**

1. On the main customer data screen, select the customer/vehicle and repair order.
2. Right click the repair order row.
3. Select “Add/view documents” from the menu.
4. On the “Related documents” screen click the “Audatex buckup” button.
5. Browse to the location where the .XML files are located.
6. Selected the file(s), click “Open” button.
7. The Audatex estimates will backup up and linked with the estimate.

To restore previously backed up estimate.

1. On the main customer data screen, select the customer/vehicle and repair order.
2. Right click the repair order row.
3. Select “Add/view documents” from the menu.
4. On the “Related documents” screen select the “View existing documents” tab.
5. Specify temporary path for the images. Click the “Open folder” icon located next to “Path to temp. location” field.

6. Browse to the folder, it is recommended that the folder be named "_Claims" or "_ClaimTemp" (the folder's name should start with an underscore "_", this will place the folder on the top of the directory tree.
7. Click the "Save" icon, represented by an icon of a floppy disk.
8. <u>Steps 5,6 and 7 have to be done only once on each computer</u>, they do not have to be repeated in the future.
9. Click the "Audatex restore" button. The systems will located linked backups and put in them in the location specified in previous steps.
10. In Audatex, use the "Get work" function to bring the estimate back into the worklist.

Status bar display.

1. The bar located at the bottom of the screen anywhere within the system show the following information:
    a. Names of all of the windows open within the system.
    b. Name of table containing the data.
    c. Status of the screen, either "View" (protected) or "Edit" (ready for entry).
    d. Status of the record, i.e. "Locked" (record locked for data editing).
    e. Status of numeric lock, either "ON" or "OFF".
    f. Status of the "CAPS" lock key, either "ON" or "OFF".
    g. Status of the "SCROLL" key, either "ON" or "OFF".

Accesspoint functionality.

1. Try to keep the number of estimates in Audatex to a minimum. The difference in speed and performance will amaze you.
2. Data displayed by AccessPoint can be sorted and searched by:
    a. Last name of the customer.
    b. License plate number.
    c. Year, make and model of the vehicle.
    d. Claim #.
3. The search function in AccessPoint is very fast, convenient and accurate. Keep in mind that data displayed is current as of last "Refresh".
4. During import of the final version of an ICBC estimate, click the "Add pdf reports" button. That will add all related PDF files to the system. Those documents will be linked with the estimate and can be retrieved at a later time for review.

5. During importing of a new estimate, use the “Match VIN” function. It will locate the correct customer/vehicle record (if one exists in the system already).
6. If so desired, use the “Parts queue” function after converting the estimate into repair order.

Initial data tab.

Pay attention to the following items:

1. APV286 check box.
2. PST exempt status.
3. GST checkbox and amount.
4. “Referred by” should be used, as reports can show where your work is coming from.
5. Estimate remarks print only on the estimate/repair order forms. Be careful when inserting estimate notes, the customer can see them.
6. Worksheet notes print only on the worksheet.
7. Use prefix and suffix fields at every chance.
8. As a minimum use the “Primary area of damage” field.

Rates tab.

1. All labor, sublet and parts tax rates should be set to taxable. For items that are PST exempt, set the PST rate to zero.
2. Audatex estimate ID is also displayed, it is used to import .PDF files and estimate backup/restore.

Insurance /source tab.

1. Select “Source” prior to closing the repair order. Avoid re-selecting the source after an import has been completed into QuickBooks, as QuickBooks may get confused by this process.
2. Input a complete KOL, if one does not automatically import. Reports can be produced that would explain variation in KPI data.
3. Input the Regie number, data in this field will save you time later.
4. Input secondary insurance data (i.e. on Hit and Run claims) to prevent problems with amounts/liability etc.

Desc. tab.

1. Estimate lines can be added, edited or deleted directly in ImEX. To add mass R+I operations for a line:
    a. Right click desired line.
    b. Select “Add R+I for part description”
    c. Click the button “…” on the selection box that opens.
    d. Complete your R+I by making selections from the popup menu.

    e. Assign labor value in decimal points to each line.
    f. Click “Done” when completed.
    g. The system will insert all constructed lines onto the estimate and recalculate the totals.
2. Always delete the “Total loss adjustment” or “Policy limit adjustment” lines.

Dates tab.

1. Actual cycle time is calculated using the “Actual date” and “Time” fields and “Repairs actually completed” date and time fields.
2. The systems will suggest calculated deliver date in the “Calc. completion” field, using data entered in the company setup.
3. “Guarantee text/limitations” field should be populated by a guarantee wording that is insurance company specific. Guarantee wording can be added or edited by clicking the “…” button located right above the field. To add a new guarantee:
    a. Click the “…” button.
    b. Click “View all” tab.
    c. Click “Add new”.
    d. Name the guarantee text with a unique name.
    e. Define the wording of the guarantee.
    f. If the guarantee is the default guarantee you would like to use, click the “Default” button. Note: only one guarantee can be defined as “Default”.
    g. The default guarantee can be different on each computer on the network.
    h. Clicking “Default” button will erase an already stored default guarantee and replace it with the new one.
    i. Guarantee cannot exceed 650 characters including spaces. Click the “Size” button to display current character count.

Proper repair order closing procedures.

1. Make sure that amount displayed on the repair order’s “Cost” tab is equal to the repair total on the final version of the estimate being submitted for approval.
2. All relevant invoices for parts and sublets must be entered in the system.
3. All labor related costs must be properly posted.
4. All related returns are posted.
5. On the “Close repair order – Parts and Sublet” screen verify the amounts in “Sale”, “Purchased” and “difference” fields.
6. Use the “Clean-up” button if required.
7. Use the “Reconcile” button if needed.
8. Add any notes when needed.
9. On the “Close Repair Order – Labor” screen, verify “Allowed”, “Claimed” and “Actual” hours fields.

10. Verify “Refinish total” and “Body total” fields.
11. Make any notes if needed.
12. Review “Job costing” analysis if so desired.
13. On the “Close Repair Order – Modify Profit Centers” screen:
    a. Click the “Edit”, then “Use est.” buttons.
    b. Complete all date related fields.
    c. Move amounts from one profit center to another if so desired.
    d. Select source.
    e. Click the “Invoice” button to complete the invoicing process.
14. Push button functionality:
    a. “Submit” will send an electronic version of the closed repair order to participating payers (i.e. Budget)
    b. “Post to fleet” will post repair cost to a rental unit (applicable only if the vehicle being repaired is a service vehicle and a unit number has been defined).
    c. “CSI” button will add the repair order to the CSI list. This list can be submitted as a spreadsheet to a third party vendor for follow-up.
    d. Deal properly with the PVRT charges.
    e. “Go to”->”Allocate amounts receivable” – see “**Distributing the amounts receivable”** below.
    f. It is normal for the system to show red in the “Suspense” field after the repair order has been closed. This is normal behavior and does not indicate a mistake or error.

Distributing the amounts receivable.

Once the repair order has been invoiced, you can distribute the amounts receivable.

1. Click the “Go to” button.
2. Select “Allocate amounts receivable”.
3. On the “Allocate amounts receivable” screen:
    a. Use the top section of the screen to allocate any amounts payable by the customer. This will create new “customer/job” in QuickBooks with the repair order number and a suffix of “A”.
    b. Click “Save” when changes are complete.
    c. Use the “Third part payer #1” to allocate amount receivable to a third party payer, i.e. a dealer. This will create new “customer/job” in QuickBooks with the repair order number and a suffix of “B”.
    d. Use the “Third part payer #2” to allocate amount receivable to a third party payer, i.e. another insurance company. This will create new “Customer/Job” in QuickBooks with the repair order number and a suffix of “C”.
    e. Click “Save” when changes are complete.

Estimates drop down menu.

Import submitted estimate.

This function is used to import an estimate or repair order from participating party or another shop using the ImEX system. This functionality uses the proprietary file format with ".imx" extension.

Quick Quote.

Quick and convenient way to create a repair quote. Quick quotes cannot be converted into a repair order.

Basic estimate details.

Used to retrieve estimate and or repair order data using an estimate number.

X-fer images from temp bar code.

Used to transfer digital images taken with the Caplio 500SEW camera while using the temporary barcodes.

Work finder.

This function will locate a list of estimates written between specified dates and not converted into a repair order. In order to make this function work properly, make sure to ask the customer for his/hers telephone number.

Repair orders drop down menu.

View schedule.

If used properly, this function can give you an accurate picture of jobs scheduled in.

1. Red arrow on the left column represents "today" when screen opens, or another currently selected date.
2. The letter "B" denotes total number of body hours booked for the day.
3. The letter "P" denotes total number of paint hours booked for the day.
4. "Cap" denotes total percent of the daily capacity for both body and paint hours.
5. Use the "Print" button to print scheduled jobs for today, tomorrow, current week, or a specified date range.
6. Use the "T" icon to go to today's date.

7. Any days can be marked as totally booked (managers block).
8. Any appointment can be marked as “flexible” or “non-flexible”.
9. Schedule should be used with “Parts not received report”.

Parts not received report.

For this report to be accurate, the following steps must be completed:

1. All parts must be ordered using the system.
2. Incoming invoices for account payable should be posted as soon as they arrive.

This report should be used with the schedule to check parts status for incoming jobs.

Edit invoiced order details.

This function is used to edit/update SOME details on an invoiced or exported repair order.

Edit invoiced order details.

This function is used to edit/update SOME details on an invoiced or exported repair order.

Scale report for repair order.

This function is used to retrieve the actual cost of sprayable material from certain scales.

Employees drop down menu.

View employee clocked in.

Used to view the status of employees, usually in connection with the techstation. This function can also be used to perform the clock-in and clock-operations on behalf of the employees, as well as to correct existing recent entries.

Enter time cards.

1. Pay attention to available options and their status (either checked or un-checked). Options can be edited via the “Company setup “screen.
2. Use the session date properly to save keystrokes.
3. Try to verify number of hours claimed versus hours still available, this might save you effort later.
4. Proper labor reconciliation is absolutely necessary to assure proper job costing and payroll.
5. Verify the status of the repair order, prevent posting to orders marked “VOID”.
6. Push button functionality:
    a. Click the “Estimate” button to view all estimate details.

b. Click ”Report” button and select one of the options available for employee related reporting.
c. “Edit table” button is used for direct access to the data and can only be used by tech support.
d. Click “Verify” to review/verify labor reconciliation for repair order.
e. Click “View table” to see time tickets data in table format.
f. Click “Labor summary” to access popup menu. Select desired option to further review labor reconciliation.

Productivity reports.

Enter the start and finish dates by using the calendar or the shortcut button marked “…”.

1. Click the “Unclaimed” button, and then select an employee number form the popup menu.
    a. Report displayed on screen will show all un-claimed hours for employee selected.
2. Click the “Payroll” button, and then select employee number from the popup menu to display productivity report for selected employee.
3. Click the “Reports” button, then select “Report 1”.
    a. Employee productivity report will be displayed in spreadsheet format.
    b. Employee efficiency, averages and clock times will also be displayed.
    c. Enter a value in the “$/hr” field to display an approximate prediction of gross sales.
4. Click the “Reports” button, then select “Report 2”.
    a. Employee productivity report will be displayed in spreadsheet format.
    b. Employee productivity graph will be displayed.
5. Click the “Reports” button, then select “Attendance”.
    a. Employee attendance report will be shown. Employees must clock in and out using the system for this report to display data.
6. Click the “Reports” button, then select “Update reference”.
    a. This function will update the customer and vehicle data within the time tickets table. This should be used after a database repair had to be performed.

“Vendors and Ins. Companies” drop down menu.

Add or edit vendor data.

1. Use the “Phonebook” icon to add vendor data to the phonebook.
2. To print vendor envelopes for mailing cheques etc:
    a. Click “Envelopes” button.
    b. Put a checkmark in a checkbox on every vendor you wish to print envelopes for.
    c. Load the envelopes in the printer.
    d. Click “Print” to start printing envelopes.

Vendor print menu.

1. Click the “Print” button.
2. A print menu will appear.
3. Select desired option form the print menu, including:
    a. Vendor invoice report.
    b. Vendor phone list.
    c. Vendor address list.
    d. Vendor mailing labels.
    e. Vendors file folders labels.
    f. Return address labels for you shop.

Enter bills or credits.

1. If the field named “E-Inv” *(a checkbox) is checked, the data displayed is an electronic invoice.
2. Field named “P/P”, a checkbox, denotes pre-paid invoice, only in use by selected shops, not available in general distribution unless crucial to day-to-day operations of the shop.

Functionality of on screen push buttons.

1. Click “Status” to show ordered/arrived parts status.
2. Click “Options” to shop pop up menu.
    a. Check “Today’s date as invoice date” to save keystrokes while entering data .
3. Click “Report” .
    a. Select “Invoice line report for ‘Vendor name’ and ‘Invoice #’” to see all items posted for the document currently being posted.
4. Click “Verify”
    a. Select “Repair order data” to confirm repair order data.
    b. Select “View back ordered parts” to check B/O list.

Invoice line data screen.

1. GST/HST will be automatically calculated if “Calculate GST” checkbox is checked
2. Check the “Deduct this invoice from labor” when posting data for invoice being charged as labor on the estimate. This will enable proper labor and parts reconciliation.
3. The “Delivered parts location” should be used as the parts location will be printed on the worksheet given to technician. Patys locations can be setup by clicking the button marked “…” locate to the right of the above field.
4. Click the “Supplement” button to create a supplement request. Those requests can be reviewed by an estimator right before doing final supplement/upload of the estimate. This will catch any price changes, quantity or discount issues.
5. Pay attention to the “Discount” field, follow-up any discrepancies in discounts reported by the system. Keep in mind – it is your money!
6. Cost will be calculated at the bottom of the screen (only if vendor discount and prompt have been setup)

7. Search-> Edit ->Select line->Cntrl-Enter to finish posting partially posted parts invoices

View bills or credits.

1. Once screen is displayed, start typing an invoice number. The system will find a closest match to what you have typed. This is similar to the filtering function used on other screen, but the current filter value cannot be displayed.
2. Click the "Clear" button to clear filter and start over.
3. Select invoice number.
4. Right click the desired invoice line.
   a. Invoice lines can be edited, or,
   b. Invoice lines can be deleted.
   c. Exported invoices cannot be manipulated.

Enter shop supplies bills.

This feature must be setup by the tech support. Bills entered will be exported into QuickBooks.

Add return slip.

1. Use suggested option to "use existing invoice data for return" whenever possible.
2. You may use this feature to tack repair times, however the "create a new repair order" method is recommended.

Update return status.

1. Use this function to manually mark outstanding returns as "received" .
2. Use caution – it's your money!

Import electronic invoice.

1. This feature must be setup by the tech support.
2. Only available from participating dealers.
3. Eliminates manual data entry.

Scan arriving parts.

1. This feature must be setup by the tech support.
2. Only available from participating dealers.
3. Eliminates manual data entry.
4. Use handheld scanner to post arriving parts.

Post scanned parts.

1. This feature must be setup by the tech support.
2. Only available from participating dealers.

3. Eliminates manual data entry.
4. Post invoice data into accounting system.

Inventory manager.

1. This feature must be setup by the tech support.
2. Use for inventory control of clips, fasteners etc.
3. An invoice can be produced and billed directly against a repair order.
4. A supplement request can be created.

Stockroom-bill out parts.

1. Used in conjunction with Inventory manager.
2. Used on the techstation or in the stockroom to control items.

Stockroom-return parts.

1. Used in conjunction with Inventory manager.
2. Used on the techstation or in the stockroom to control items.

Distribute shop supplies.

1. Used in conjunction with Inventory manager.
2. Used to control usage of sandpaper, grinding disks etc.

Used parts inventory.

Used for storing data about used parts i.e. locks, striping kits etc.

“Service cars” drop down menu.

Specify the option to use either advanced or regular loaner/rental menu.

1. Tools->company setup->Options 1 tab
2. Check or uncheck the “Use advanced fleet management” menu.

Add/edit service cars.

1. Specify “Next service” date and “Next service km” to be warned about vehicle maintenance.
2. Specify gas tank level and current km.
3. Use “Update” to update current odometer reading.
4. Click “Odometer” to retrieve current odometer reading.
5. Change the status of the vehicle.

Add new rental car contract.

1. Use magnetic scanner to speed up data entry.

2. Click “Same as renter” to eliminate data entry duplication.
3. Specify M.O.B. (used for marketing).
4. Specify D.O.B.
5. Should have Km out, time out, gas level, check expiry date.
6. Optionally, use the “Rental rates” tab to actually charge for the car.
7. Rental agreement can be modified to account for misc. charges like toll bridge, parking tickets etc.

Rental reservation request.

“Reports” drop down menu.

Report selector.

1. Print, fax or email anything.
2. Specify “Start” and “Finish” dates.

Sales & Job costing

1. To `print a vehicle age report:
    a. Click “Vehicle age report”-> pie chart or report.
2. Gross sales report by postal code – where your clients are coming from.
3. Gross sales report by KOL.
4. Gross sales report by referral name.
5. Gross sales report by make (report or pie-chart).
6. Job costing summary report to see gross profit percentages.

Marketing

7. To print “Happy birthday” letters to customers, select “Marketing” then “Send birthday letters” menu.
    a. Click the “Select” button on the newly opened screen.
    b. Select the month you wish to print letters for.
    c. Insert proper paper type into the printer.
    d. Click “Letter” to start printing.
    e. Contact the tech support to modify the letter if needed.
    f. Click envelopes to print the right type of envelopes.
8. To print “Thank you “ letters for all jobs closed between specified dates:
    a. Insert proper paper type into the printer.
    b. Select “Print” radio button.

   c. Click “Marketing” menu, select the “Print Thank you letters” option.
   d. Contact the tech support to modify the letter if needed.

Reports menu continued.

9. Estimates written versus estimates converted (batting average per estimator).
   a. Names can be merged and/or changed to de-fragment data (tools tab)
10. Supplement ratio per source report.
11. KPI analysis.
12. Parts usage comparison.
13. Daily performance report.
14. Print forms menu
    a. Print time cards (2 designs)
    b. Estimate worksheet.
    c. Schedule worksheet.
    d. Blank authorization form.
    e. Blank quality control sheet.
    f. Fax cover sheet.
15. Budgeting.

“Tools” drop down menu.

White board.

1. WB can be sorted by RO, customer’s name, date in and target date, CSR, body tech, paint tech and prep tech.
2. Click “Update sublets” every chance you get to show accurate data.
3. Click “Update C/T” to recalculate real time cycle times.
4. Click “Update hours” for current data.
5. Use the ORS function to reduce load of phone calls.
6. Use the “Communicate” function.