



YES Shop Management

Appointment Scheduling

Add Service Order

The first step in adding a service order is selecting the type of service order wanted. Select counter ticket to create a nameless ticket for over the counter sales. Select appointment to schedule a service for a customer.

- 1 - Counter Ticket**
- 2 - Appointment**
- 3 - Estimate**
- 4 - Invoice**
- 5 - Transfer Ticket**

Next Step

Cancel

Choose Appointment

Click "Next Step"

Add New Appointment

Use this screen to select the customer and vehicle to use for the new appointment. To search for a customer, type any piece of the customer's information in the 'search for' box (i.e. a license number, last name, phone number, etc.)

Search For: Search By:

'Smart' Name	Address	License	Year, Make, Model
DONNER, BILL	1234 NORTH MAIN	WAV 534	2000 Cad Seville
DONNER, BILL	1234 NORTH MAIN	JFK	1996 Chevrolet Corvette

All Locations Just this Location Show Inactive

Type in customers name

Highlight the vehicle

Click "Start Appointment"

When looking for a customer you can find customers by:

Search By:

First Name

Last Name

Last, First Name

Company

Zip

Fob Key

Contact

Phone

AR Code

MI Id

Vehicle Id

Make

Model

License

Vin Number

Fleet Number

Misc 1

Misc 2

When looking for a customer, you can put in partial information.
Such As Partial:

Name

License Plate

VIN

Make

Model

Fleet Number

Confirm Customer Information

Use the Plate to Vin Decoding to...

Customer Maintenance - verify this information EACH TIME you open an invoice
Use this screen to modify customer and vehicle data.

ID 11 / 11 Customer ID

First / Last **BILL** **DONNER**

Company

Address 1234 NORTH MAIN

City State Zip BRADENTON FL 34209

Home Phone 941-755-6655 Phone 2 941- -

Use Point System
Current Points: 1403
Flag Color Black

1 Vehicle 2 Billing 3 Invoicing 4 Follow up 5 Notes 6 DP 7 Images 8 Points

Work 941-235-7751 Fax 941- -
Pager 941- - Cell 941-555-1212
Contact Jill Donner
e-mail

Year 2000 Prod Mon 03/00 Store Id 001
Make CADILLAC
Model Seville SLS
Engine 4.6L V8 TPI DOHC 32V

License WAV 534 ST FL Vin 1G6KS54Y2YU282150
Fleet Number Source
Color Misc

CarFax license plate to Vin decoder

Texting Service Provider
Verizon PCS [108]
 Inactive
 Do Not Use Carfax

Add As New Vehicle
Activant Veh. Lookup
Alt Vehicle Lookup
Inspections ...
Required Fields ...
Transfer ownership ...
Transfer to Used Cars

Show Automatically Save Cancel

get the full information on the vehicle.

Service Needed
Select services to put on the service order by pressing space bar or double-clicking on them.

BILL DONNER 941-755-6655
2000 CADILLAC Seville SLS 4.6L V8 TP1
DOHC 32V

1 - Service Needed 2 - Last Service Orders 3 - Service History 4 - Warranty

Schedule Appointment Show schedule when closing ticket

Description	Due	Due Date	Scheduled	Due Miles	Unit Type
Oil Change Service	Yes	07-12-2011	mm-dd-yyyy	49874	Miles
Brake Service	No Record of Service	N/A	N/A	24000	Miles
A/C Service	No Record of Service	N/A	N/A	N/A	Miles
Rotate Tires	No Record of Service	N/A	N/A	6000	Miles
Fuel Filter Service	No Record of Service	N/A	N/A	36000	Miles
Brake Inspection	No Record of Service	N/A	N/A	N/A	Miles
Transmission Service	No Record of Service	N/A	N/A	24000	Miles

Show non due items Show non serviced items Estimated Units: 46874 Current Units: Highest Miles: 46874

Vehicle Stats
First Service: 01-07-2008
Last Serviced: 07-14-2011 Last Miles: 46874
Times Serviced: 8 over 3.5 years.
Average Invoice: 110.86
Cost per year: 334.07 per month: 27.84
Cost per mile: 0.08 over 11,659 Miles.

Recommended Services

Date	Date Due	Description
01-30-2009	01-30-2009	Upper And Lower Rad Hoses - \$126.20
02-15-2009	03-17-2009	Left Outer CV Joint - \$282.17

Show Automatically Show serviced items Delete Add Edit

Store Id: 001 Save

Choose the service.

Schedule the appointment.

Service Order Scheduling
Use this screen to schedule a date and time for this service order. As you move through various days on the calendar, the list on the right will display service orders scheduled for that day.

BILL DONNER
2000 CADILLAC Seville SLS

1 - Hold as phone quote 2 - Make appointment for service

Time Scheduled	Priority	'Smart' Name	Sur
12:00AM	H-Drop off	Smith, William	~B
11:00AM	A-Wait	Wolf Glass:	Ch

July 2011

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Today: 7/14/2011

Ticket Count: 0 Sell: 0 Estimate: 2 Time: 09:00AM Extra time: .00
Hours: 0.0 Hours: 0.0 Priority: H Drop off Tech Time

Total dollars: 45 Grand Total: 45 Tech: GBJ Service Writer: SM