



YES Shop Management

Customer History

Message	Invoice #	Time Scheduled	Status Code	'Smart' Name	Year, Make, Model
Missed Appointment	Appointment	09:00AM	A-Unconfirmed	JACKSON, TRACY	2001 OLDSMOBILE
Due Appointment	Appointment	10:00AM	C-Confirmed	HAUSER, JANE	2002 CADILLAC
Incoming Appointment	Appointment	11:00AM	C-Confirmed	QUINN, MARY	2000 BUICK LES
	20020		Z-Completed	CURTIS, WILLIAM	1997 LEXUS ES
Exceeded Auth Amount	20026		L-Parts Received	NELSON, RICHARD	1998 CHEVY S10
	20028	08:30AM	Q-Tech Completed	Kester, Debbie	2001 DODGE VIP
	20029		F-Diagnosis	CUTEAN, MR.	2004 CHEVROLE
	20032		F-Diagnosis	McStevens, Rudy	2001 FORD CRO
	20041		Q-Tech Completed	Andrews Constructi	1999 FORD MUS
	20042	10:00AM	K-Parts Ordered	JONES, MR.	1998 CHEVROLE
Exceeded Auth Amount	20043	11:30AM	H-Need Authorization	ALTER, WALTER	2002 HONDA CR-
	20045	01:15PM	Z-Completed	Cicero, Early	1995 Chrysler New
	20046	10:00AM	G-Creating Estimate	BARNES, MR.	1998 HONDA CIV
	20047	10:00AM	L-Parts Needed	ARNOLD, PEGGY	1985 FORD THUN
	20049		P-Vehicle In Shop	Edwards, Perry	1995 CHRYSLER
	20050		P-Vehicle In Shop	DAVIDSON, MR.	1994 Chevrolet Co
	20052		Z-Completed	BARNES, MR.	1997 Jeep Cherok
	20053		Z-Completed	Robinson, Kelsey	1996 Geo Metro
	20054		W-Waiting Delivery	Bailey, George	1993 Ford Truck E
Exceeded Auth Amount	20055		H-Need Authorization	Palmer, Mr.	1998 CHRYSLER
	20056		S-Waiting Pickup	ACME CONSTRUC	2000 Cadillac Sev
	20057	03:00PM	Z-Completed	Tracy, Richard	1996 Oldsmobile
	20058		Q-Tech Completed	CONSTRUCTION U	1994 Chevrolet Tr

Report Tech Time Next Step Filter

F3 - Details History F7 - Totals Search Exit

To view customer history for a customer that has a ticket on the board, you can highlight chosen customer then click "History."

To view history for a customer that does not have an open ticket, click “Customer Records” then click “Inquire-Edit.”

Type in customer information, hit enter or click “Search.” Highlight customer then click “History.”

To view a customers history while you are inside their ticket, click “History.”

Last Service Orders

View previous service orders by double-clicking or highlighting the invoice and pressing enter. View Totals or Details by highlighting the invoice and pressing the associated function key.

BILL DONNER 941.755.6655
2000 CADILLAC SEVILLE SLS 4.6L V8 TPI
DOHC 32V

StoreID	Invoice #	Date Out	Tech	Summary	Miles Out	Total
001	20002	11-24-2008	PC	~OLF	35215.00	39.28
001	20009	03-08-2009	RS	Oil change & tune up	38125.00	154.91
001	20031	05-23-2009	BS	~TU, OLF, (CVB)	44123.00	122.37
001	20033	08-10-2009	PC	Replace Alt	45000.00	142.11
001	20034	04-20-2011	RS	Oil change - Radiator Hose Estimate	46874.00	81.87
002	20031	05-23-2009	BS	~TU, OLF, (CVB)	44123.00	122.37
002	20033	08-10-2009	PC	Replace Alt	45000.00	142.11
002	20034	04-20-2011	RS	Oil change - Radiator Hose Estimate	46874.00	81.87
001	pointment:	mm-dd-yyyy	UNAS	**Discarded appointment**	.00	.00
001	pointment:	mm-dd-yyyy	UNAS	**Discarded appointment**	.00	.00
001	20069	mm-dd-yyyy	GW	~	.00	173.09
002	5	mm-dd-yyyy	SM	~()	.00	.00

Times Serviced: 10 over 3.5 years. / Average Invoice: 106.00 Total 1,059.98
Cost per year: 399.27 per month: 33.27 / Cost per mile: 0.09 over 11,659 Miles.

Show Automatically Print Preview F7 - Totals F3 - Details

Store Id: Save Cancel

To view all previous service orders click “2-Last Service Orders.” Under summary, you can find the job you are looking for.

Previous Service
 This screen presents previous service orders for this customer. If you find line items that you want to copy to another service order, use the space bar to select the lines, then right-click and choose Copy. The lines will then be copied to the 'clipboard' and be ready to be 'pasted' onto another service order. To paste the lines, go to the service order you wish to paste them to, right-click, and choose Paste.

Service Order for: Bill Donner Control #20033 Invoice #20033

Part Number	Description	Total	Vendor	Vend Invoice	Cost	Sour
RA	REPLACE ALTERNATOR	48.5500			15.2500	
*PART	ALTERNATOR (REBUILT)	85.0200			45.0000	
<i>Subtotal for Replace Alt</i>		<i>133.57</i>	<i>Subtotal for</i>		<i>60.25</i>	<i>Su</i>

Auto Open
 All Closed
 All Open
 Miles Since Last Visit
 \$133.57 Billed time: 1.00 Actual Time: .00

You can now open closed tickets to review parts and labor, find the vendor parts were ordered from and the vendor invoice number. You can also print or e-mail the invoice.