| For assistance with the demo call **800-YES-GEN4 (800-937-4364)**	# Service2000 Quick Tour	More information is available at **www.genesisfour.com**

Welcome to the Service2000 Quick Tour.
Service2000 is not only the most feature-rich, efficiency-enhancing, profit-boosting shop management system in the world, but it is also the only one to utilize a fully Windows-compliant interface. This means that its appearance and operation is just like your favorite office suite. If you know how to use conventional Windows-based programs like Microsoft Office, Internet Explorer, and Outlook, you will feel right at home with Service2000.

Installing and updating Service2000

Update Service2000

This program has live update capability, so be sure to install it on a PC that can connect to the Internet. Before installing Service2000, establish an Internet connection, then insert this CD & follow instructions on screen. After the installation completes you will be asked if you would like to check the Internet for updates. Answer yes and follow the instructions on your screen. To check for updates in the future, click on the "Update Service2000" icon on your desktop (shown left). Check for updates periodically to make sure you are always running the latest release. Supported users receive notification via email whenever a new release is available for download.
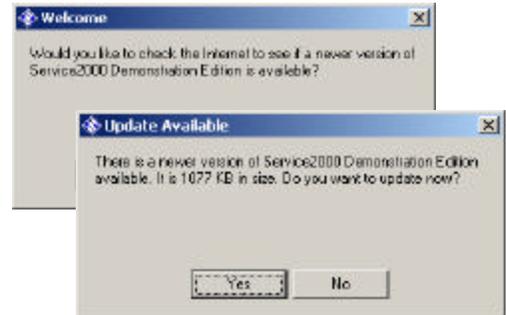
Updating Service2000 over the Internet

About the Quick Tour
This tour will walk you through basic functions in Service2000. Follow these screens exactly as you work with the program and you will understand the how to write, print, and print preview service orders and invoices, add and create new parts, and import from estimates in about 15 minutes. Document Conventions:

Non-italic text is instructional.
Italic text is supplementary information.
Only menu commands are referenced in the instructions. Shortcuts and icons are not referenced.
Hold your mouse over any icon to view the function of that icon (this is called a "Tool Tip").

Service2000 Demo

TO BEGIN: Double-click the Service2000 icon on your desktop. A Module Selection window will appear as shown below.

Module Selection Window and Login Screen

Module Selection Window   **Login Screen**

The Module Selection window (left) allows you to decide which modules you wish to enable for the duration of this session.
Initially, all modules are selected. Deselect any modules you wish to turn off and then click OK.
(Each time the program is restarted, the Module Selection window will reappear. To try different modules, simply restart Service2000.)
The Login Box will appear as shown (above right).
Select the user named "Demo" or "Administrator". Leave password blank. Click Login.
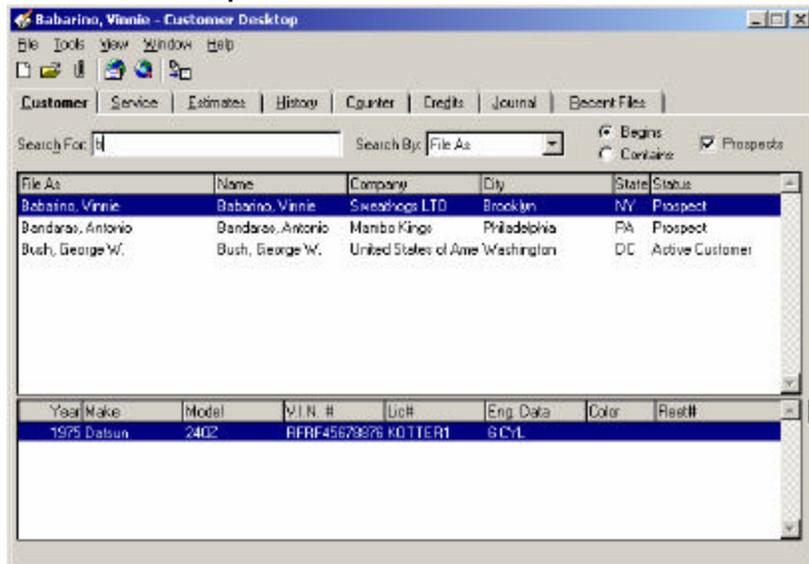The Main Toolbar will appear (as shown below).

Main Toolbar

Click on the Customer Desktop (top left) Icon. The Customer Desktop will open.

Main Toolbar (one of two styles available*)

- *The entire system is operated from the Main Toolbar.*
- *Any area of the system can be opened simultaneously.*
- *The icons on the Main Toolbar are: Customer Desktop, Vendor Desktop, Reports, Inventory Management, Schedule, Service Status, Cash Register, and Configuration.*
- *Some areas of the system are not represented by icons on the Main Toolbar, and can be accessed by clicking "Modules". These areas are: Journal Browser, Phone Book, Time Clock, and View Mitchell Database.*
- *If the Vendor Module is not enabled when you first start the demo, the Vendor Desktop Icon will not appear on the Toolbar.*
- **Note: An alternate, smaller toolbar which uses smaller, unlabeled icons (intended for advanced users) is available at "File", "Use Advanced Main Menu".*

Customer Desktop

Type a few letters to find a customer. Change search parameters if desired.

Click on File, New Customer to create a new customer.

- Customer status is displayed in rightmost column. Possible status conditions are "Prospect", "Active Customer", Inactive Customer, Dead". This status changes from Prospect to Active Customer automatically when the customer's first invoice is marked paid. The "Prospects" checkbox (shown above right) allows you to eliminate prospects from the search display. Vehicle(s) belonging to selected customer appear in the bottom area of the screen. An optional Journal Module (note Journal Tab shown above) allows you to make dated, time-stamped, unlimited-length contact entries, set dates for follow-up, and report on follow-ups due. The Journal is fully functional regardless of customer status.
- Once customer is selected, you can do any of the following:
    - Double-click on customer's name to update customer. This will open the Customer Account Editor (shown below).
    - Double-click on vehicle to update vehicle. This will open the Customer Account Editor (on the Vehicles Tab).
    - Click on a different tab on the customer desktop to start a document for this customer (e.g., Service, Estimate, etc)
    - Click on email icon to instantly send an email to this customer (opens your email client).
    - Click on "globe" icon to instantly open a Yahoo map to this customer's address.
    - Click on the paper clip icon to attach a document to this customer

The Customer Account Editor
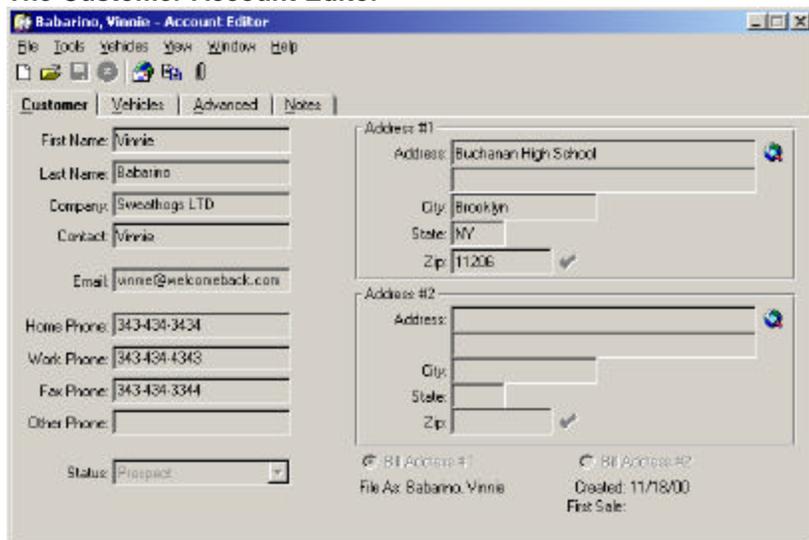
- Once the Customer Account Editor is open, you can do any of the following:
    - Click on File, Update to update this customer.
    - Click on a different tab (such as the Vehicles, Advanced, or Notes tabs) to update different aspects of this customer.
    - Click File, Save to save your changes.

Click on File, Exit (or the X at the top right corner of the window) to close this window.

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Customer Desktop: the Service Tab
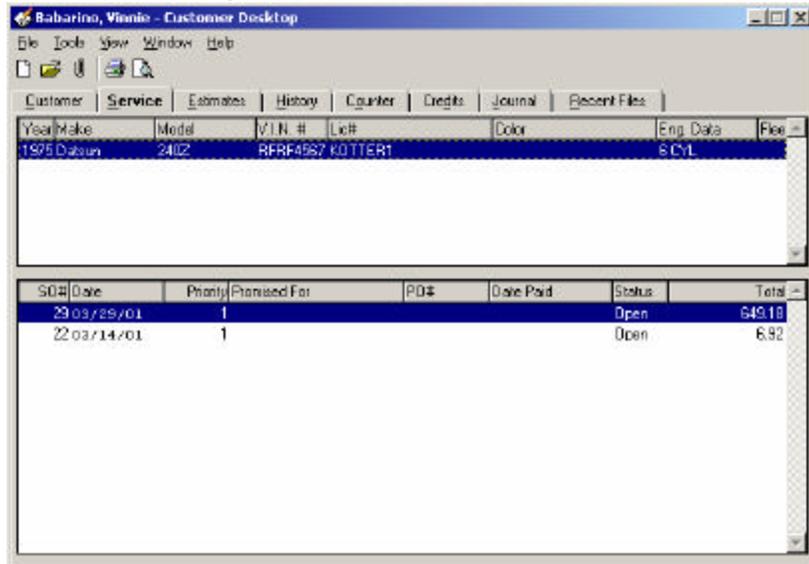
Click on the Service Tab to create a service order or view prior service invoices for this customer.

Click on one of this customer's vehicles to select it. (If the customer only has one vehicle, it will already be selected).

Click on File, New Service Order to start creating a new service order for this customer and vehicle.

> *On the Service Tab:*
> - *All of this customer's vehicles are displayed in the upper area of the screen.*
> - *All prior service invoices for the selected vehicle are di splayed in the lower area of the screen.*
> - *Double-click to update the selected vehicle.*
> - *Double-click to open and view prior service invoices (one of two ways to view service history).*
> - *Print Preview or print the selected service invoice (without having to open it).*
> - *Click on the paper clip icon to attach a file to the selected invoice.*

Service Order Properties (next step in creating a service order)

Fill in requested information as needed.

In the Division field, select the AR Division. (This is the only mandatory field on this screen.)

Click on Create to create a service order.

> - *The first time any particular user uses the system, the division must be selected.*
>   *Thereafter, the system remembers that division and assumes it is the default for that user.*
> - *Other fields presented in this window are optional.*
> - *This Properties window can be re-displayed at any time from within the service order by clicking on File, Properties.*
> - *All customer documents in Service2000 have a Properties window similar to this one.*

A Brand New Service Order

Click File, New to create a new labor line.

Writing your first labor line

Begin typing in the large white box (the "Labor Editor") to write your first labor operation.
Highlight the first labor line (e.g., the primary operation, such as "30,000 Mile Service") and click on the B (Bold) icon.
Fill in pricing as needed in the fields on the right.
Click on File, Save to save this labor line.

- *The first line of your text appears in the upper area of the screen.*
- *Note the tabs along the bottom half of the screen (Labor, Parts, Fees, Items, Sublets, Tech Notes, Time).*
  Each of these tabs allows you to make additional entries that are ASSOCIATED with the selected labor line.
  This means that each labor line is a complete operation, potentially containing all of these items.
- *Optional Labor Categories module allows you to classify this type of work. This is shown at lower right corner of screen in the illustration above but is not activated in the demo upon installation and therefore does not appear on your screen. Optional Modules may be activated in the demo by calling GenesisFour at 800-937-4364.*

Adding parts to a labor line of the service order
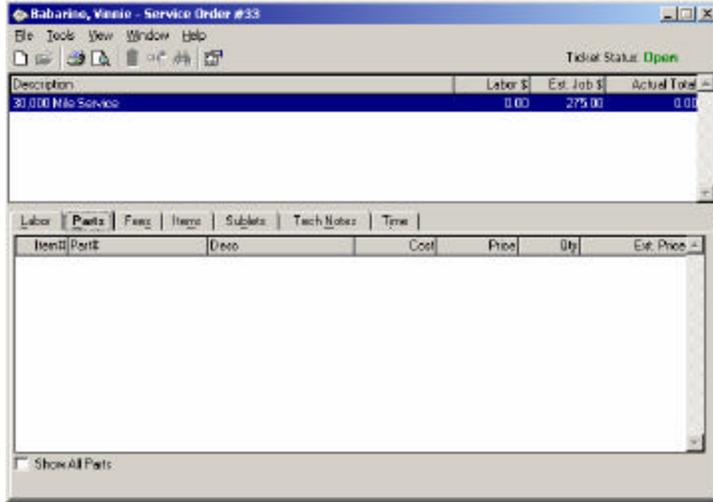
Click on the Parts Tab in order to add parts to this labor line. The Add Parts screen (shown below) appears in a new window.

Searching for and adding parts to a labor line
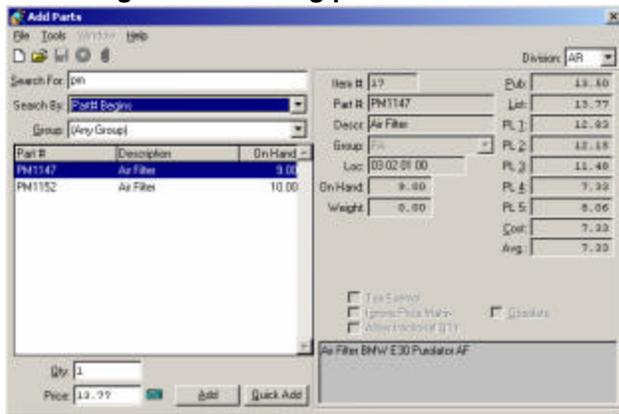
Type "PM" in the Search For field. The system will immediately find parts that begin with "PM".
- *Quick Add will add a part to the service order without closing the Add Parts window.*
- *Change search parameters by clicking on the Search By drop-down menu.*

Click on the desired part and then click on the Add button, or simply double click on the part to add it to the service order.

The part appears on the parts tab of the service order
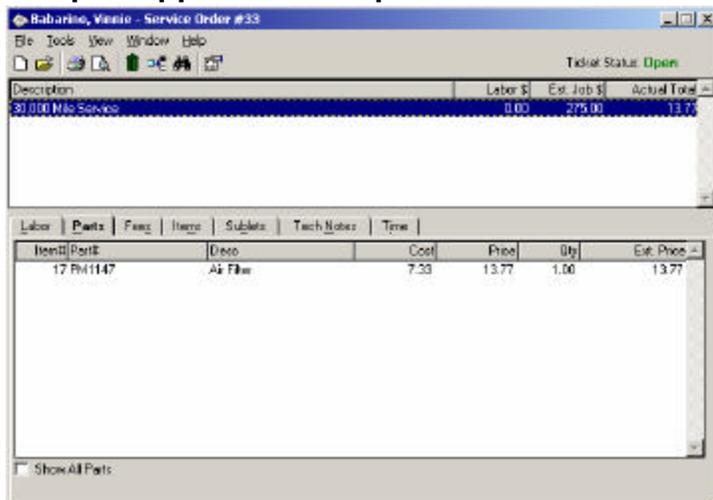
- *Add other parts to this labor operation in the same manner if desired.*

When finished, click on the Labor Tab.

Importing labor lines from an estimate
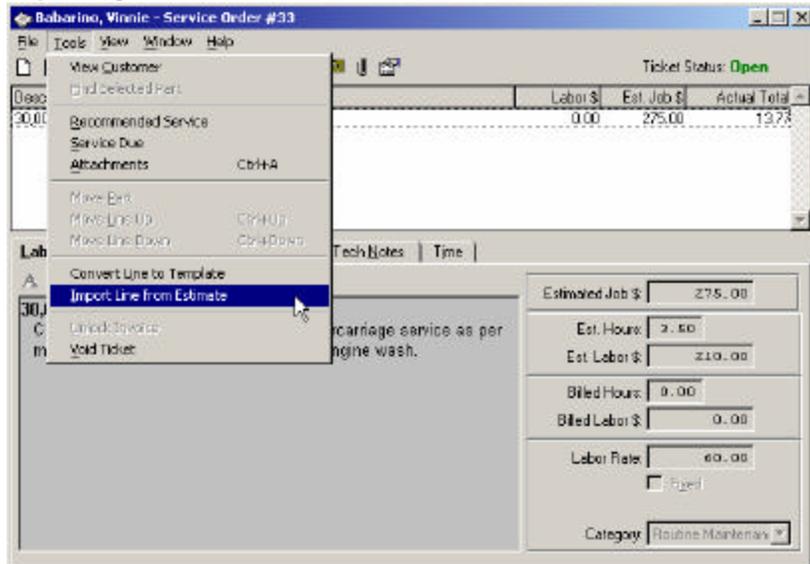
Click on Tools, Import Line from Estimate.

Service Order: importing from an estimate – selecting an estimate to import from
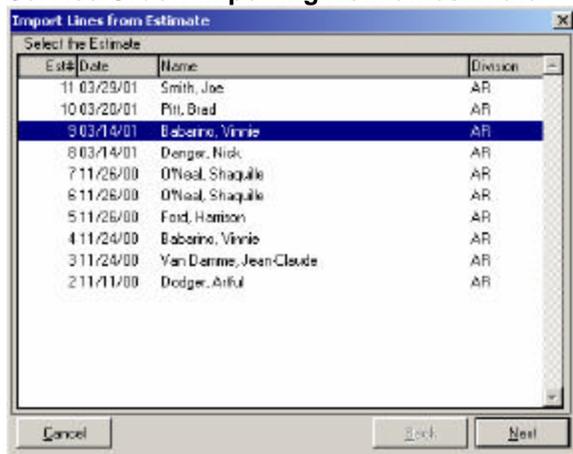
Select the estimate you wish to import from and click Next

Service Order: importing from an estimate – selecting the labor lines to import
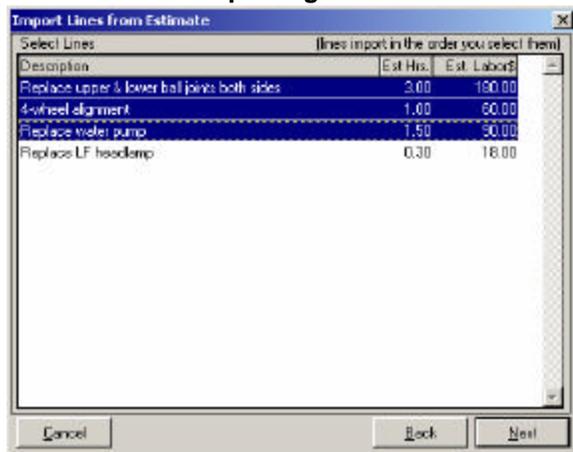
Select the labor line or lines you wish to import. To match our screens, select all 4 of these lines using the instructions below.
- *To select multiple lines, hold down the Control key while you click.*
- *Lines will import in the order you select them.*

Service Order: after an entire estimate has been imported
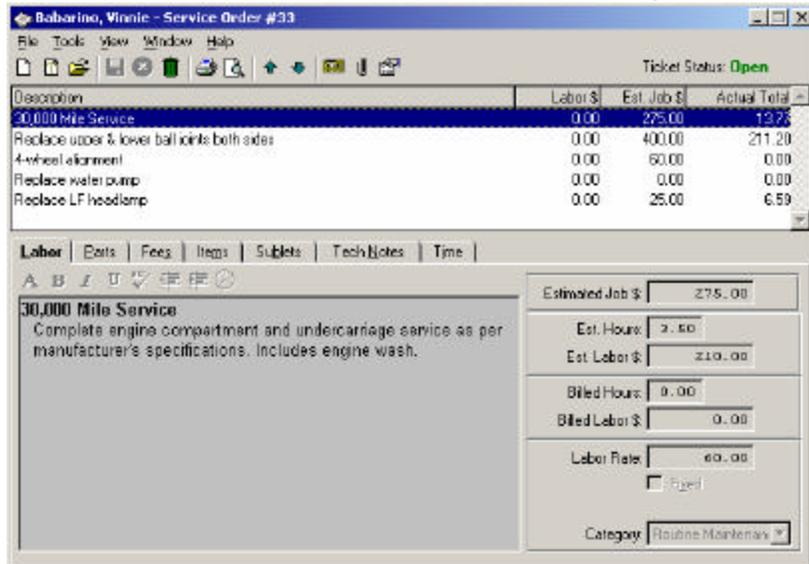
All labor lines from the estimate for this customer have been imported, together with their corresponding parts.

Service Order: viewing parts on the Parts Tab
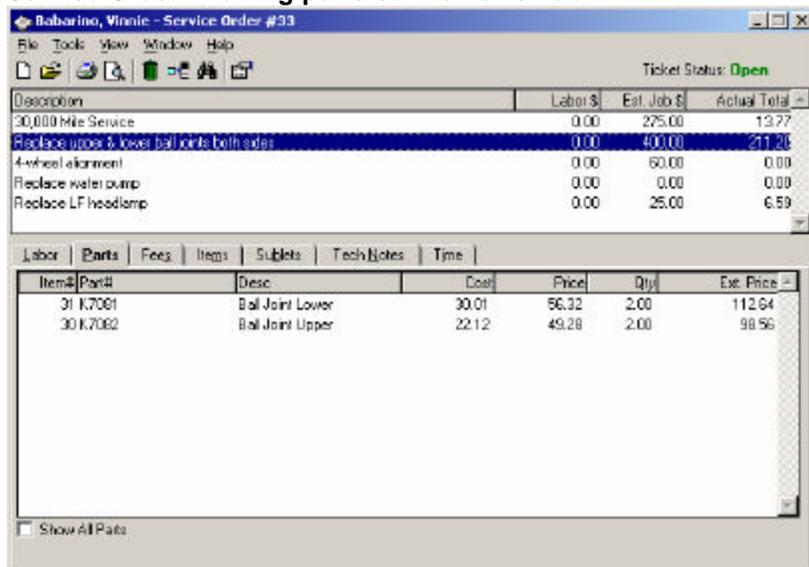
To view the parts on a particular labor line, select the desired labor line, then click on the parts tab.
The parts for that labor line are displayed.

- *To view all the parts on the entire service order, click the "Show All Parts" checkbox in the lower right corner of the screen.*
  - *All the parts on the entire service order will be displayed.*
  - *If you switch back to the Labor Tab, this box will automatically become unchecked.*

Click on the labor tab.

Print Preview or Print the service order
- *At this stage it would be common to either print or print preview this service order.*

To print, click on File, Print.
To print preview this service order, click on File, Print Preview.
- *Screen captures for these instructions omitted due to simplicity of this procedure, but Print Preview is shown below.*

Service Order: Print Preview

Click on File, Print, or the Printer icon to print this service order.

Maximize this window for best viewing.

- *Note that parts are not shown on the service order. They will be shown on the service invoice.*
- *Typical Print Preview functions are available from here.*
- *This screen shows the actual service order as it will be printed if desired (printing is not a required step).*
- *Note that the header text and background colors can be changed. (This is done in the configuration area of the program.)*
- *This service order shows dark blue text with a cyan background.*

Print Preview

File Help

GenesisFour Motors   **Service Order: 33**

Name	Babarino, Vinnie	Company	Sweathogs LTD	Created	04/10/01	Year	1975
Address	Buchanan High School	Address 2		Time	1:50 PM	Make	Datsun
					N/A	Model	240Z
	Brooklyn, NY 11206			Advisor	Demo	Lic#	KOTTER1
Home	343-434-3434	Promised		Division	AR	Fleet#	
Work	343-434-4343	V.I.N. #	RFRF45678876544433	PO#		Color	
Fax	343-434-3344	Eng. Data	6 CYL			Hours In	0
Birthday	6/4/68	Body Style	2 door coupe	Page#	1 of 1		

Job Description		Totals
30,000 Mile Service	Estimated Total	$275.00
Complete engine compartment and undercarriage service as per manufacturer's specifications. Includes engine wash.		
Replace upper & lower ball joints both sides	Estimated Total	$400.00
4-wheel alignment	Estimated Total	$60.00
Replace water pump		
Replace LF headlamp	Estimated Total	$25.00

GenesisFour | 80 Shadow Oak Drive | Sudbury, MA 01776
Tel : 800-YES-GEN-4 | Fax: 978-443-1303 | www.genesisfour.com
I hereby authorize the repair work hereinafter set forth to be done along with the necessary material and agree that you are not responsible for loss or damage to vehicle or articles left in vehicle in case of fire, theft or any other cause beyond your control or for any delays caused by unavailability of parts or delays in parts by the supplier or transporter. I hereby grant you and/or your employees permission to operate the vehicle herein described on streets, highway or elsewhere for the purpose of testing and/or inspection. An express garagemen's lien is hereby acknowledged on above vehicle to secure the amount of repairs thereto. I understand that I have the right to know before authorizing my repairs what the repairs to my car will be and what their costs will be. You need not obtain approval from me prior to performing repairs what the repairs will be or their cost if the total amount for such repairs does not

x 0.885   1 / 1   Ready

Close this window when finished.

Service Order: Applying labor and other charges

Update the labor line to which you want to apply labor charges by clicking on File, Update Labor Line.

Enter labor charges at right. Either enter the value in the Billed Hours field, or click on the "Fixed" checkbox and enter a dollar amount.

Save your changes by clicking File, Save. Repeat for all labor lines as desired.

Click on the other tabs to add other charges which correspond to the name of the Tab (Sublets, Fees, etc.) saving changes as you go.

Service Order: Viewing the total of a service order with the Totals Box

View the totals of a service order by clicking on File, View Totals.

The Totals Box will appear (see next page).

Service Order: the Totals Box

View service order totals in the Totals Box.
- *The "Totals Box" displays when totaling a service invoice.*
- *Your totals will not match those shown above.*
- *A similar "Totals Box" displays when totaling estimates and counter parts invoices (if you have the optional Counter Parts Module).*
- *The Totals Box is generated by a Microsoft office component – it is actually Excel running in the background.*
- *You can actually play with changing numbers if you wish. This will have no affect on the actual service order.*

Service Order: The Totals Box with template loaded

Optional: Click on File, Load Template.
- You will immediately see that you the Totals Box is actually Excel. Therefore, it is possible to customize the Totals Box to display your own profitability analysis formulas this can be as you would an Excel spreadsheet.
  - o You can customize the Totals Box in any manner that Excel would allow. (This procedure is not explained here.)
  - o You can create your own subtotals, totals, recalculations, profitability analyses, and so forth.
  - o Whenever you make such changes, the settings are stored locally on each PC on the network. This means that each PC on your network could have its own "Totals Box", not only for service invoices, but also separately for estimates and counter parts invoices.

Close this window when finished.

Print Preview or Print the service invoice.
- *At this stage it would be common to print or at least print preview this service invoice*
To print, click on File, Produce Invoice.
To print preview this service invoice, click on File, Preview Invoice.
- *Screen captures for these instructions omitted due to simplicity of this procedure, but Print Preview is shown below.*

Previewing the Service Invoice

- *From here you can print the invoice if desired.*

Close this window when finished.
- Next demonstration: creating new part numbers. This is done from the Add Parts window.
- To do this, click on the Parts Tab, then click on File, New Part Line
  Do this now, then go to next page to continue.

Creating a new part from within the Add Parts window

- *To create new part numbers while in a service order, you must first open the Add Parts window, as explained on the previous page, and as shown above. The screen shown below will appear.*

Now, enter the information necessary to create a new part number, as shown below

Click save to save this new part number.

System Configuration

Click on the Configuration icon (rightmost icon) to open System Configuration.

- *The entire system is configured from this window.*
- *The interface is tree-based. It functions just like Windows Explorer.*
- *Feel free to explore this area of the program – it is quite interesting.*

System Configuration: Messages & Disclaimers
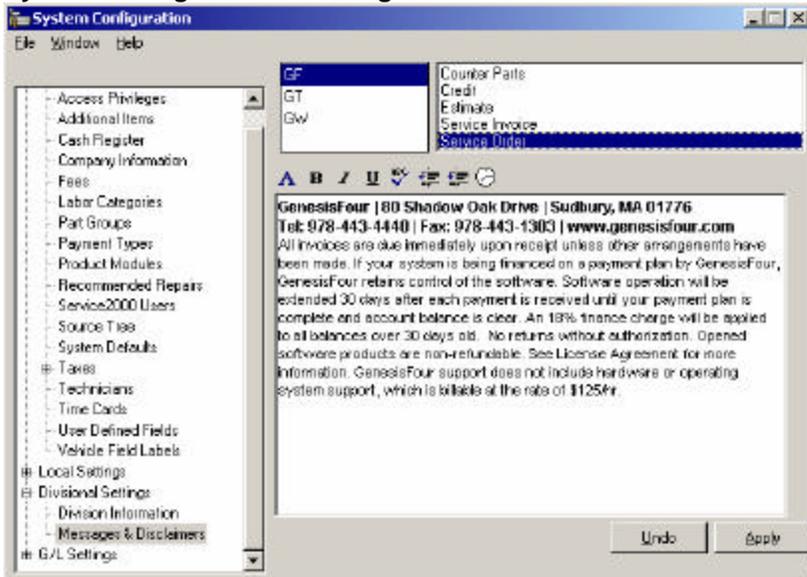
Click on any + to open a configuration topic. Subtopics appear below.

System Configuration: User Defined Fields
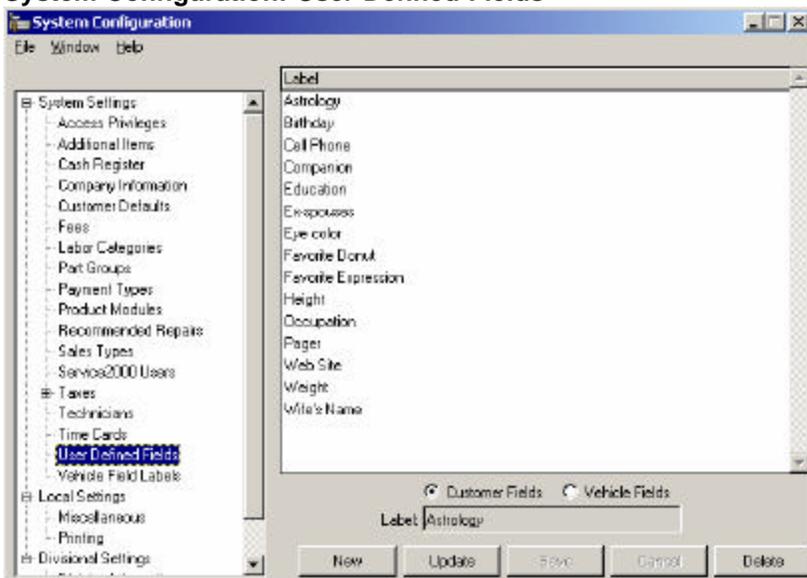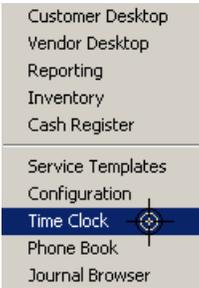

Click on User Defined Fields.
Click on the New button to create new fields for customers or vehicles.

- *These user Defined Fields appear on the Advanced and Vehicle Tabs of the Account Editor, accessible by updating a customer.*
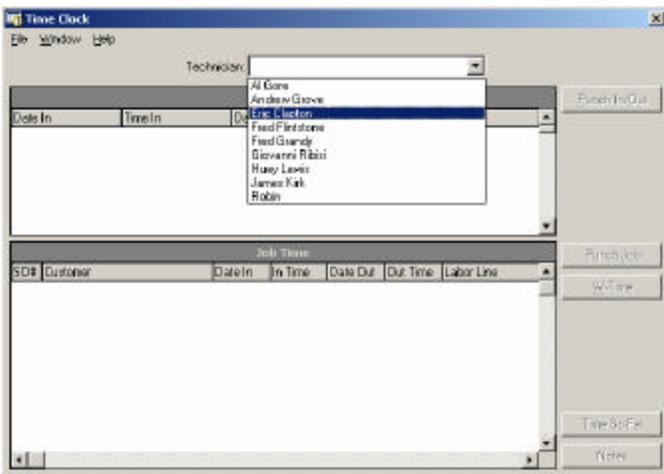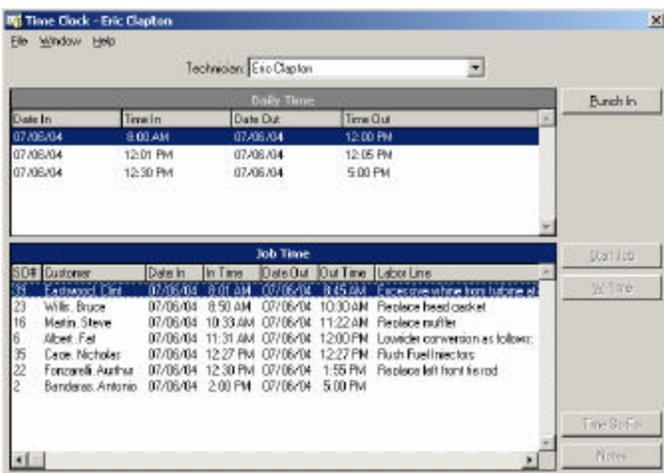
Using the Time Clock

From the Main Toolbar, click on Modules. The menu shown below will appear.

Click on Time Clock. The window shown below will appear.

Select a technician. The time card for the selected technician will appear as shown below.

Punch In, then Start and Stop jobs as desired.

- *Times appear on the Time Tab on the Service Order/Invoice screen.*

Although this Service2000 Quick Tour stops at this point, there is much, much more to see in this program. The Quick Tour is intended to give you an overview of basic functionality, and to showcase Service2000's clean, straightforward, word processor-like design. Hopefully you also experienced its Internet updating capability, which makes frequent updates a reality, and makes installing them effortless. And hopefully you have been able to observe how endlessly configurable and feature-rich Service2000 is – with over 19 modules available and more on the way, there is very, very little this program cannot do. To learn more, please contact your sales consultant or call 800-937-4364 x10. Thanks for taking the Service2000 Quick Tour.