Service2000 Quick Tour

More information is available at www.genesisfour.com

For assistance with the demo call

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 Windowscompliant 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.

4

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 ves 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.

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



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").



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





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.

- 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".

Main Toolbar (one of two styles available*) File Notides Window Helt

Servici	E2000 by GenesisFour
Custoner Desktop	Vendor Desktop
Reporting	inversary Management
Schedda	Service Status
Cash Register	Configuration

SERVICE2000 by GenesisFour

Welcome		×
auld you like to cher nvice2000 Demonst	ok the internet to see if a new ration Edition is available?	er version of
🚸 Update (Available	×
There is a r available. It	ewerversion of Service2000 is 1077 KB in size. Doyou w	Demonstration Edition ant to update now?
	Yes N	۰

Updating Service2000 over the Internet

Customer Desktop

Search For: b		Birrolà 1	Search By: File.	As T	Generation Prospects		
Tile As	Name		Company	Dity	State	e Statue	
Jabaina, Vinnie	Babarino,	Vinnie	Sweathogs LTD	Brooklyn	NY.	Prospect	
Pandara», Antonio	Bandarae	Antonio	Manibo Kinge	Philadelphia	PA	Prospect	
Year Nake	Model	VI.N. #	Lic#	Eng Data	Color	Fleet#	
	10.4.000	DEDEAE	PODTED4 950059	0.054			

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:
 - o Double click on customer's name to update customer. This will open the Customer Account Editor (shown below).
 - o 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)
 - o Click on email icon to instantly send an email to this customer (opens your email client).
 - o 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

First Name: Minnie	Address #1	
Last Name Babaring	Address: Buchanan High School	
Company, Sweathogs LTD	City Brookkin	
Contact Vinnia	State: NV	
Email wnnel@wekoneback.com	Z pr 11206 //	
tome Phone 343434-3434	Address	۵
Vark Phane: 343-434-4343	Gip	
Fax Phone: [343-434-3344	State:	

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.

Customer Desktop: the Service Tab

sar <mark>Make Model VI.</mark> 75 Datsun 2402 RF	N. # Lic# RF4987 KOTTER1	Color	Eng Da	ta Fle
5 Dateun 2402 RF	RF4567 KOTTER1		8 CYL	
1# Date Priority Promise	d For PC	04 Date Paid	Status	Ta
29 03/29/01 1			Open	649.1
22/03/14/01 1			Open	6.9

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)

First Name: Vinnie	Year: 1975
Last Name: Babarino	Make: Datsun
Company: Sweathogs LTD	Model: 240Z
Advisor: Demo	Mileage In: 0
Division: 🗚 📃	Mileage Out: 0
P0#:	Freight: 0.00
Promised:	Priority Code: 1
Hat#:	
Curta	Connel

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

🐟 Babarino, Vinnie - Service Order #33	
Bie Took yew Mindow Help D D ≤= 🖬 O T (→ D) (↓ + + 🛤 (↓ C)	Ticket Status: Open
Description	Labor \$ Est. Job \$ Actual Total *
Loher Bats Fees Items Sublets Techlistes Time A B I I I I I 中世 ()	Estimated Job \$ Est. Houre Est. Houre Est. Labor \$ Billed Houre Billed Houre Billed Labor \$ Labor Rate
	E, fgel

Click File, New to create a new labor line.

Writing your first labor line

S Babarino, Virinie - Service Gruer #33		_ 🗆 X
Be Tole Nov Mindow Belp □ 🛙 🚔 🖬 🕝 👔 🗇 🦄 🕈 ♦ 🛤 🞚 🛣	Ticker Statu	is: Open
Description	Labors Est. Job \$	Actual Total -
30,000 Mile Service	0.00 275.00	0.00
Labor Bats Fees Items Sublets Techlicites Tme ▲ B I III () (● ● ● 30,000 Mile Service Complete engine compartment and undercarriage service as per	Estimated Jab \$ 27 Est. Houry 2.50	5.00
manufacturer's specifications. Includes engine wash.	Est Labor \$ Z1	0.00
	Biled Hours 0.00 Biled Labor \$	0.00

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

🔉 Babarino, Vinnie - Se	rvice Order #33				
Ble Iools Yew Winds D 🖙 🎯 🗛 📋 🤉	v Beb 「仲」四			Ticket St.	atur Open
Description 81 000 Mile Service			Labor \$	Est Job \$	Actual Total -
81,000 Mile Service			0.00	275.00	0.00
Labor Parts Fans	Items Subleta Tech No	ter Tree I			1
Itenti Partit	Deto	Cost	Price	0.0	Ext. Price -
	0.000				
					3
					8
					-
C Show All Parts					

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.

with For 100			- and to	1.0	0.4	10.21
			D-1H	DATE AT		13.35
varch sit 120	H BEOM		Dates	the Film	8.1	12.41
Group (Any	y Group!	<u> </u>	C-C-C-C-C-C-C-C-C-C-C-C-C-C-C-C-C-C-C-	Part and		10.00
ait	Description	On Hand -	thout	00.00.00		40.40
41547	Az Fiber	9.00	Loc	03.02.01.00	n al	11.40
41152	Air Filter	10.00	On Hand	9.00	PL &	7,3
			Weight	0.00	R.5	8.0
			- CHARLES		Cost:	7.2
					ding:	7.2
				Tao Esenio Igram Para Males Altar Internation (11)	E grade	
		-	Distance in	A DUI S TO DI ANA ANA	15	

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

view Costones.		N 0 C2*	Tic	sket Status: Open
End beletted Part			Labors Est. J	ob \$ Actual Total 🗠
Recommended Service Service Due Attachments	Ctritte		0.00 27	5.00 1373
Marce Ben Marce Bas Co Marce Bas Dosa	СР40) Срађено	Tech Notes Time		
Convert Line to Template	,			
Import Line from Estimate	- N		Estimated Job \$	275.00
Lanadi, Savatar Yold Tidast	Ul	rcarriage service as per ngine wash.	Est. Houre: Est. Labor & [2.50 Z10.00
			Billed Hours Billed Labor \$	0.00
			Labor Flater	60.00
	End Deexted Part Becommended Service Service Due Attachments Mare End Mare End Mare End Davn Convert Line from Estimat Uned Triverse Yold Triblet	pad Delexted Part Becommended Service Service Due Attachments CoH+A Mere-Bec Mere-Due Convert Une to Template Import Line from Estimate Unext Execution Your Due Convert Une from Estimate Unext Execution Your Due Convert Une to Template Convert Une from Estimate Convert Estimate Conve	Did Delected Part Becommended Service Service Due Attachments CbHA Mare Brt Mare Brt Mare Dia Convert Une to Template Import Line from Estimate Uned: Inverte Yead Taket	DidDelected Part Labor S Eat J Becommended Service 0:00 27 Service Due 0:00 27 Attachments CbHA 0:00 27 Mare Dirt ChHA ChHA 0:00 Convert Line form Estimate ChHA Estimated Job \$ Convert Line from Estimate Convert Chart Est. Houre Yead Taket Note: Est. Houre Biled Houre Biled Houre Biled Houre Biled Labor \$ Labor Rate Chebor Rate

Click on Tools, Import Line from Estimate.

Service Order: importing from an estimate – selecting an estimate to import from

st‡ Date	Name	Division
11 03/29/01	Smith, Joe	AB
10 03/20/01	Pitt, Bred	AB
9 03/14/01	Babarino, Vinnie	AB
8 03/14/01	Danger, Nick	AR
711/26/00	O'Neal, Shaquile	AR
611/26/08	O'Neal, Shaquile	AR
511/26/00	Ford, Harrison	AR
411/24/00	Babarino, Vinnie	AR
311/24/00	Van Damme, Jean-Claude	AB
211/11/00	Dodger, Arful	AR

Select the estimate you wish to import from and click Next

Service Order: importing from an estimate - selecting the labor lines to import

mport Lines from Estimate			×
Select Lines	(lines import in the or	rder you select fr	imm]
Description	E st Hrs.	Est Labor\$	1
Replace upper & lower ball joints both sides	3.00	190.00	
4-wheel alignment	1.00	60.00	
Replace water pump	1.50	90.00	
Replace LF headlemp	0.30	18.00	
			4
Gancel	<u>H</u> eck	Nee	13

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

51e Iook yew Madow Hap D D 😅 🖬 🔕 🐧 와 👌 🕈 🗣 🎫 🕸 🕼		Ticket Sta	stus: Open
Description	Labor \$	Est. Job \$	Actual Total -
30,000 Mile Service	0.00	275.00	1378
Replace upper & lower ball joints both side:	0.00	400.00	211.20
f-wheel alignment	0.00	60.00	0.00
Replace water pump	0.00	0.00	0.00
Replace LF headlamp	0.00	25.00	6.59
A B J U ② 律序 ② 30,000 Mile Service Complete engine compettment and undercarriage service as per manufacturer's specifications. Includes engine wash.		lab \$ 2 loure: 2.50 bor \$ 3	175.00
	Billed H	10012 0.00	
	BiledLa	\$ 10 d	0.08
	Labor	Rate:	60.05

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

Labor 3 0.00 0.00 0.00 0.00 0.00 Price 56.32 49.28	Ticker St Est. Job \$ 275.00 400.00 60.00 25.00 25.00 0.00 25.00	etu: Open Actual Total 1327 21126 000 0.00 6.59 2 Ext. Price - 11264
Labor 8 0.00 0.00 0.00 0.00 0.00 Price 56.32 49.28	Ticket St Est Job \$ 275.00 400.00 0.00 25.00 Rtp 2.00	Ext. Price
Labor S 0.00 0.00 0.00 0.00 0.00 9.00 Price 56.32 49.28	Est. Job 8 275.00 400.00 0.00 25.00 Rty 2.00	Actual Total - 1277 2002 000 0.00 6.59 Ext. Price - 11264
0.00 0.00 0.00 0.00 0.00 Price 56.32 49.28	275.00 400.00 60.00 25.00 Rty 2.00	1277 20120 0.00 0.00 6.59 Ext. Price - 11264
0.00 0.00 0.00 0.00 Price 56.32 49.28	400.00 60.00 25.00 <u>90/</u> 2.00	211.20 0.00 0.00 6.59 Ext. Price - 112.64
0.00 0.00 0.00 Price 56.32 49.28	50.00 0.00 25.00 <u>Qty</u> 2.00	0.00 0.00 6.59 Ext. Price - 112.64
0.00 0.00 Price 56.32 49.28	0.00 25.00 Rty 2.00	0.00 6.59 Ext. Price
0.00 Price 56.32 49.28	25.00 Rty 2.00	6.59 Ext. Price
Price 56.32 49.28	Rty 2.00	Ext. Price -
Price 56.32 49.28	Q1y 2.00	Ext Price -
56.32 49.28	2.00	112.64
49.28		
40.60	2.00	98.56

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.
 - o If you switch back to the Labor Tab, this box will automatically become unchecked.

Click on the labor tab.

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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.
 - ٠ 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). ٠
 - Note that the header text and background colors can be changed. (This is done in the configuration area of the program.) ٠
 - This service order shows dark blue text with a cyan background. •

🐺 Print Preview		
Eile Help		
≝ा 1:1 € २ अ ४ ४ अ		
GenesisFour Motors S	ervice Or	der: 33
Name Address Babarino, Mnnie Buchanan High School Company Address 2 Sweathogs LTD Created Time 04/10/01 Brooklyn, NY 11206 Promised Advisor Demo Demo Home 343-434-3434 Promised Advisor Demo Work 343-434-3434 Pomised PO# AR Fax 343-434-34344 Eng, Data 6 CYL Po# Birthday 6/4/88 Body Style 2 door coupe Page# 1 of 1	Year 197 Make Dat Model 240 Lic# K0 Fleet# Color Hours In 0	rs Isun IZ TTER1
Job Description		Totals
30,000 Mile Service Complete engine compartment and undercarriage service as per manufacturer's specifications. Includes engine wash.	Estimated Total	\$275.00
Replace upper & lower ball joints both sides	Estimated Total	\$400.00
4-wheel alignment	Estimated Total	\$80.00
Replace water pump	Estimated Total	
Replace LF headlamp	Estimated lotal	\$20.00
GenesisFour 80 Shadow Oak Drive Sudbury, MA 01776 Tel: 800-YES-GEN-41 Fax: 378-443-1303 www.genesisfour.com Thereby substate he repair work retrianter set fort to be done along with the necessary material and agree halyou are not responsible for loss or damage buried or or idea tellinutride in case of ite, her for any other cause beyond you control or for any delage caused by unsatisfaility of parts or delays inparts by the supplier or transport. Thereby participantly our engloyees permission to great the turbide herein described on streets e. highway relisewhere for the pupper or its firg and/or inspection. An sparse garagement's literial thereby adheved aged to along which are in the for the buried thereby adheved aged to along which are indeed to along the second thereby adheved aged to do bein approved from me prior to performing repairs what he repairs will be or held consult be an when the cost of the first or the first or the second to be present on the parts of the parts or the second to be present on the parts and the repairs will be or held cost in the cost of the second to be parts or the second to be parts on the second to be present on the parts of the parts of the second to be parts on the second to be present on the parts when the repairs when the repairs when the repairs to many any second to be admount to such repairs does not		
▼ x 0.885 1/1 ▼ Ready	P	

Close this window when finished.

Service Order: Applying labor and other charges

🗽 Babarino, Vinnie – Service Order #33			X
Be Tale Skov Madaw Help C C 😂 🖬 🕝 🗊 🗇 R. ♦ ♦ 🛤 🞚 🛣		Ticket St	atus: Open
Oescription	Labor \$	Est. Job \$	Actual Total -
30,000 Mile Service	0.00	275.00	13.77
Replace upper & lower ball joints both sides	.0.00	400.00	211.20
4-v/heal alignment	0.00	60.00	0.00
Replace water pump	0.00	0.00	0.00
Replace LF headlamp	0.00	25.00	6.59
30,000 Mile Service Complete engine compartment and undercarriage service as per manufacturer's specifications. Includes engine wash.	Estmained. Est.) Est La Billed La Labor	Hob \$ 3.50 Hours: 2.50 Hours: 0.00 Hours: 0.00 Hours: Figure Figure	275.00 210.00 0.00 60.00

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

New Labor Line	CITHN	🔹 🛤 🞚 🗳		Ticket Sta	atus: Open
New From Template	Ctrl+T		Labor \$	Est. Job \$	Actual Total
vew filor - Drivesbory Part			0.00	275.00	13.77
Update Labor Line	Ctriffe		0.00	400.00	211.2
peiete Labor Line	Del		0.00	60.00	0.00
save.	CIDAS		0.00	0.00	0.00
Lonce:	PRC .	_	0.00	25.00	6.58
Properties	Alt+Enter				
Mew Totals	CtrHQ	ets Tech <u>N</u> otes Time			
Preview Ingoice Produce Tradice			Estimated.	lab \$	175.00
riguote involte		d undercarriage service as per	Est. H	Joure: 2.50	
Second solutions		udes engine wash.	Est La	bor\$ 3	00.01
Print Preview Print	CirleP		Biledt		
					0.00
Close			DiedLa	00121	0.05
			Labor	Fiate:	60.00
				E figer	
				100	

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

🚳 Totals - Sen	vice Order# 17			
E la				
1	Billed Hours	12.00		
	Credited Hours	0.00		
	Actual Hours	0.00		
	Total	Cost	GP \$	GP %
Labor	\$720.00	\$0.00	\$720.00	100.00%
Parts	\$2,499.00	\$1,500.00	\$999.00	39.98%
Sublets	\$0.00	\$0.0D	\$0.00	0.00%
Fees	\$0.00		\$0.00	D.DO%
Freight	\$0.00		\$0.00	D.DO%
Adl tems	\$0.00	\$0.0D	\$0.00	0.00%
Supplies	\$28.80			D.DO%
Sub Total	\$3,247.80	\$1,500.00	\$1,719.00	52.93%
Tax	\$126.39			0.00%
Total	\$3,374.19	\$1,500.00	\$1,719.00	60.95%
6	Jarten shor Datin	3.47		
	Tech Efficiencu	0.00		
Ass	erane Lahor Rate	\$60.00		
R	evenue Per Hour	\$5 266 25		
Gross Profit	Per Actual Hour	\$0.00		
Gross Profi	t Per Credit Hour	\$0.00		

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

1	otals - Servic	e Order#17			
Ele					
Mic	rosoft Office	Spreadsheet		1919-191	
5	N # 4	Σ 2. 3		2	
3.01	A 8	C	D	E	F
1		Billed Hours	[bhrs]	Q	1 C C C C C C C C C C C C C C C C C C C
Z		Credited Hours	[chrs]	5	
3		Actual Hours	[ahrs]		
4					
5		Total	Cost	GP \$	GP %
6	Labor	[ltot]	[lost]	#VALUE!	#VALUE!
7	Parts	[ptot]	[post]	#VALUE!	#/ALUEI
8	Sublets	stot	[scst]	#VALUE!	#VALUE!
9	Fees	[ftot]	0.01001.047	#VALUE!	#VALUE!
10	Freight	[fttot]	10000	#VALUE!	#VALUE!
11	Adl Items	[itot]	[icst]	#VALUE!	#VALUE!
12	Supplies	[sptot]			#VALUE!
13	Sub Total	\$0.00	\$0.00	#VALUE!	0.00%
14	Tex	taxtot	0000000	Construction of a	#VALUE!
15	Total	\$0.00	\$0.00	#VALUE!	0.08%
16		and a second second	1000000000		1
17		Parts/Labor Ratio	#VALUEI		
18		Tech Efficiency	#VALUE!		
19	1	werage Labor Rate	#VALUE!		

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.
 - You can customize the Totals Box in any manner that Excel would allow. (This procedure is not explained here.)
 - You can create your own subtotals, totals, recalculations, profitability analyses, and so forth.
 - 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

Help	N										
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Gene	sisFr	ur Moto	<i>v v</i>					Sei	vice Inv	oice: 33	
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- 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 ٠
 - Do this now, then go to next page to continue.

Creating a new part from within the Add Parts window

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earch By: Pa	ntit Begins	*	Pat #	List:
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• 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.

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	10 900		Loc		PL3	0.00
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Now, enter the information necessary to create a new part number, as shown below

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av (0.00	<u>.</u>	Beli 12.5 Fits E 30 E Best sour	x 875 A/C 3MW ce: Worldbed		

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

- - × 🔚 System Configuration Elle Window Help Counter Parts Credit Access Privileges . Estimate Additional Items GW Service Invoice Cash Register Seture Dr Company Information А В И Ц 🂱 🚍 💬 🖂 Fees Labor Categories GenesisFour | 80 Shadow Oak Drive | Sudbury, MA 01776 Part Groups Tel: 978-443-4440 | Fax: 978-443-1303 | www.genesisfour.com Payment Types All invoices are due immediately upon receipt unless other arrangements have Product Modules een made. If your system is being financed on a payment plan by GenesisFour, **Recommended Repairs** GenesisFour relains control of the software. Software operation will be extended 30 days after each payment is received until your payment plan is Service2000 Users complete and account balance is clear. An 18% thance charge will be applied to all balances over 30 days old. No returns without authorization. Opened Source Tree System Defaults software products are non-refundable. See License Agreement for more Танез information. GenesisFour support does not include herdware or operating Technicians system support, which is billable at the rate of \$125/hr. Time Cards Uper Defined Fields Vehicle Field Labels is Local Settings E Divisional Settings **Division Intomation** Messages & Disclaimers Undo épply # G/L Settings ٠

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.

Time Clock				×
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SD# Dustomer	Daein	tob Tene In Time : Date Dur Dur Time Labor Line	-	Birehich M ² ire
-			-1	Trais Stiffer

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

		Technician Elio Clap	kan 💌	
Sate In 17705/04 17706/04 17706/04	Time in 8:00 AM 12:01 PM 12:30 PM	Davity Th Date Dat 07.406.404 07.406.404 07.406.404	1000 12:00 FM 12:05 FM 5:00 FM	Birch in
D# Dustomer S Exclusion 3 Wills Bru 6 Martin SI Albert Fa	Date in 07/06/0 eve 07/06/0 eve 07/06/0 4 07/06/0	Job Tim In Tane Date 0 4 8:01 AM 07/06 4 8:50 AM 07/06 4 10:33 AM 07/06 4 11:31 AM 07/06	ne La Jou Time Labor Line 10, 1055 AM Excession where from tode 10, 1030 AM Persidee head carket 10, 1122 AM Persidee multier 10, 1122 AM Devidee conversion as Join 10, 1200 FM Lowider conversion as Join	y Datio
	holes 07/06/0 Author 07/06/0 Antonio 07/06/0	14 12:27 PM 07/06 H 12:30 PM 07/06 H 2:00 PM 07/06	404 1227 PM Rush FuelIniectors 404 1:55 PM Replace left from the rod 404 5:00 PM	

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.