

Chapter 4

History

4.1 Why Use History

You should think of History as a service advisor's best friend. History is your "customer consultation screen" procedure.

History should be your first choice when a repeat customer walks through the door or calls you on the phone.

History is a quick way to review the entire repair history of the vehicle, find out if prior Recommendations have been taken care of, see when the next Service Reminder is due, start an Invoice or an Estimate, and update customer, vehicle, and closed invoice information.

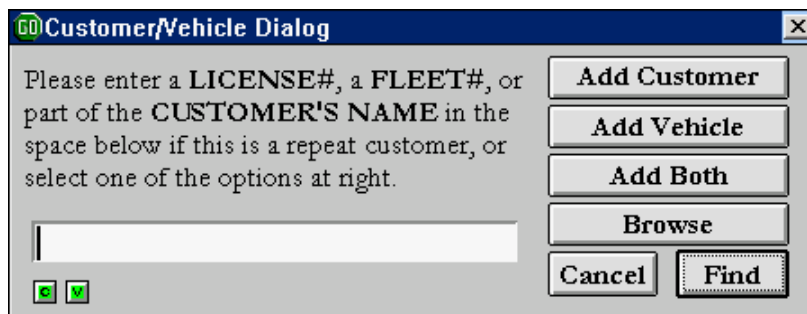
History is one of three ways to view Active Invoices and Estimates, and contains two of the four ways to start new invoices or estimates even if the customer and or the vehicle have never been in the shop before.

4.2 How to Use History

From the Main Screen Menubar single-left-click History:



The customer/vehicle dialog will display next:



If the Customer is already in the database, you may type in the full license plate number, the fleet number, or part of the customer name. Then, either press the <Enter> key, or single-left-click the **Find** button.

If you type in the license number or the fleet number, the History screen will display immediately.

If you type in the customer's name and there is more than one vehicle in the data base associated with that name, then a list of those vehicles will appear. You must highlight the vehicle of choice and single-left-click the **OK** button, then the History screen will display.

If you type in only part of the customer's name, you will first be presented with a list of customers who have that part of the name in common. Choose the customer you want by highlighting the name and single-left-click the **OK** button. Then, if more than one vehicle is associated with this customer, you will be asked to choose which vehicle in the list to lookup. Then, the History screen will display.

Invoice#	Closed Date	Mileage	Synopsis	Total
024834	08/02/2001	121,134	LOF	\$127.90
024088	03/20/2001	118,011	LOF - COOLANT DRAIN/FILL	\$150.66
023795	01/26/2001	116,833	Electrical Diag.	\$958.93
023600	12/15/2000	115,699	VAC - DIAGNOSIS, ELECTRICAL - DIAGNOSIS, ELECTRONIC	\$2060.94
023461	11/16/2000	115,023	LOF - BRAKE INSP 4WHL DSK	\$156.14

4.3 History Screen Elements

Vehicle and Customer Information: In the upper left portion of the screen is the vehicle information and in the upper right portion of the screen is the customer information. If you single-**right**-click in any of the vehicle or customer fields you will be taken directly to either the Vehicle Master Record or Customer Master Record. The master records give you more information about the vehicle and the customer. Also, from the master records you can change information - such as a phone number, or a model year - and it will be changed globally, meaning it will be changed in everything the customer or vehicle is associated with. (You can also make changes on an invoice instead of through the master records, but they will only be changed on that specific invoice.)

Recommendations: If there are recommendations associated with the vehicle, the last line in the vehicle portion will be filled in. To read the entire memo field, single-**right**-click the recommendation line.

Vehicle History: Below the vehicle and customer information, is a scrolling list of every invoice associated with the vehicle. Each line lists the invoice number, the date it was closed, the mileage at the time of the invoice, the synopsis, the total dollars charged, the status of the invoice (paid in full, charged to account, etc.), and the gross profit (shown as a percentage).

If you wish to see one of the closed invoices in detail, put the cursor on the synopsis line and single-right-click. You will see this dialog:

The screenshot shows a dialog box titled "History - View Invoice in Detail". It contains the following information:

- Invoice: 010440
- Date: 07/28/1994
- Mileage: 90544
- Customer: Randall & Barbara Cheesewright
- Vehicle: 231CXR 90 Ford Taurus
- Synopsis: LOF STNDRD - BRAKES R/DRM/FWD - VAC

At the bottom, there are radio buttons for "Print", "Display", "Customer Copy", "Shop Copy", and "Tech Copy". The "Display" and "Shop Copy" options are selected. There is also a "Copy to New Estimate" button in the upper right corner, and "Cancel" and "OK" buttons at the bottom right.

Print or Display: The radio buttons at the bottom of the screen allow you to print or display the invoice. They also give you the choice of what version of the invoice you will print or display: customer copy, shop copy, or tech copy. When you have made your choices, single-left-click the **OK** button.

Copy to New Estimate: This screen has one other important aspect. In the upper right hand corner is a **Copy to New Estimate** button. This can be very useful if your customer is bringing in his vehicle for a service you have done before, for instance an Oil change or a 30K service. When you choose this button a new estimate with the customer and vehicle information will be started. It will also include all of the same parts and labor operations as the closed invoice. You will need to verify parts costs but this is a very quick way to write an estimate.

Reminder Letters: Below the vehicle history is a scrolling list of reminder letters that have been sent to the customer. The letters are listed by due date, with the next service due at the top of the list (unless a service was missed, then a date that has been passed will be first). Once a service has been performed GO removes the reminder letter associated with it. To review or change the reminder letter, single-right-click on the due date, letter name, or reminder field.

Customer and Vendor Phone Books: Directly below the reminder letters you will see two small green buttons labeled "C" and "V". Single-left-click on either of them and you have a quick lookup of all customer and vendor phone numbers.

The **History Screen** contains seven procedure buttons:



Print Worksheet: The History Worksheet prints when you single-left-click the **Print Worksheet** button. It contains detailed customer and vehicle information, a space for handwritten notes, and a "Disclaimer / Customer Approval" section (which can be modified in the Options & Forms Setup screen.)

You can use it, if you prefer, and if local law allows, in lieu of a formal estimate to obtain customer approval for a job; or use it simply as a glorified piece of scratch paper.

A cutoff point may be selected for vehicles with lengthy histories to limit the History Worksheet to one page.

Job Quotes: The Job Quotes Data Table stores "canned" parts and labor quotes, and when accessed from the History screen, it is poised to lookup quotes specific to the vehicle on the history screen. These quotes can then be turned into estimates. Job Quotes will be discussed in detail in a future chapter.

Parts History: Single-left-click this button and a report of all the parts ever sold for the vehicle on the History screen will be generated. The report is organized by invoice, with the most current invoice first in the list and the oldest invoice last. The report also lists when the invoice was closed and the mileage of the vehicle at the time the invoice was closed.

Labor History: Single-left-click this button and a report of all the labor operations performed for the vehicle on the History screen will be generated. The report is organized by invoice, with the most current invoice first in the list and the oldest invoice last. The report also lists the date the invoice was closed and the mileage of the vehicle at the time the invoice was closed.

Start Invoice: Single-left-click this button and an invoice will be started for the customer and vehicle on the History screen.

Start Estimate: Single-left-click this button and an estimate will be started for the customer and vehicle on the History screen.

Scheduler: Single-left-clicking this button takes you to the scheduler where you can select a date and time for work to be done, and start an invoice or an estimate. GO remembers the customer and the vehicle when you enter the scheduler from the History screen, so any invoices or estimates started from the scheduler are automatically started for the customer and vehicle you selected in History. More on how to use the scheduler is presented in Chapter 14.