AUTOS2000 BY JAZZ DESIGNS

Your Complete Automotive Shop Management Software Solution

AUTOS2000 Reference Guide

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C H A P T E R 1 G E N E R A L S E T U P

REMEMBER IF THERE IS ANYTHING THAT WE DIDN'T COVER IN THIS MANUAL OR IF YOU HAVE ANY QUESTIONS ABOUT AUTOS2000 PLEASE CONTACT OUR OFFICE AT (888) 792-8867 WE WOULD BE HAPPY TO ASSIST YOU.

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SETTING UP YOUR COMPANY INFORMATION IN AUTOS2000

You will notice that the company information screen has 9 different tabs

1. Your Company Information
2. Invoice Defaults
3. Estimate Policy
4. Invoice Policy
5. Warranty Policy
6. Counter Policy
7. More Policy's
8. Company Logo
9. Interfaces

To help you better understand what they are, we are going to go through them 1 by 1

Your Company Information:

This tab contains all your basic company information and then has a few custom options:

1. "Use Alternate Label for Bar Number" This is for use under the consideration that your state doesn't have a "BAR" but you would like to have something print out in its place you can enter that here
2. "Have Custom Invoice" This is for when you have had a customer invoice created for your shop by Jazz Designs and you would like the system to print it instead of one of our standard 3 invoices.
3. "Use Cash Drawer" This is used in conjunction with the AUTOS2000 Cash Drawer. By setting this to "Yes" you will be asked to enter in the opening balance of the cash drawer every morning.
4. "Use Security" We understand that some shops want to be able to limit some of their employees to what they can and can't do in the program. By setting this to "Yes" it will activate the security in the system. To find out more about setting up the Security please call Jazz Designs at (888) 792-8867.
5. "Keep a Rotating Backup?" By having this check every time that you open AUTOS2000 it will ask you to create a backup file.

Invoice Defaults:

This section of the company setup is what you could consider the lifeblood of the work order. We are going to take some time and go through each field one by one.

1. Payment Terms (This will print on the bottom of the invoice IE: Due Upon Receipt)
2. Invoice Description (This will print on the bottom of the invoice IE: Thank You for Your Business)
3. Invoice Num Type (You will have the following three options)
    - A. Use Auto Number (By using this option the system will automatically generate the next work order number, keeping them in succession)
    - B. Manually Enter Number (This option is for when you write up your repair orders by hand and would like the system to have the same number every time you create a new work order. It will ask you to enter the next work order number.

C. Don't Use Invoice Numbers (When selecting this option the system will not print out a work order number on the invoice). **NOTE:** You must still have a Starting Work Order Number set in the system.

4. Start Work Order # (This is the number that you would like to start your work orders at)
5. Start Estimate # (This is the number that you would like to start your estimates at)
6. Counter (This is the number that you would like to start your counter sales at)
7. Tax Parts Y/N
8. Tax Labor Y/N
9. Tax Cores Y/N
10. Select Invoice (This is where you can select the invoice style that you would like to use. AUTOS2000 has 3 separate ones included; please see pages 4a, 4b, and 4c for samples. You can also see invoice samples by clicking on the View Sample Invoices button located just to the right of the drop down arrow.
11. Invoice Header Font (This will change the font style of your company name on the invoice print out)
12. Disclaimer Font Size (Here you can change the size of the fonts for all your disclaimers)
13. Disclaimer Font (This will change the font style of your disclaimer font)
14. Printer Header Info (By selecting No on this option none of your company information will print out on the invoice)
15. Default Print Quan (This will set the default number of invoices or estimates to print out)
16. Use Multiple Printers (By setting this option to yes every time you go to print an invoice or estimate the system will ask you what printer you would like to print to)
17. Print Est Revisions (This will tell the system whether or not to print out any estimate revisions)
18. Parts Pricing (Under parts pricing we give you 2 different options)
    A. Use Auto Mark Up (By selecting this whenever you enter a part into a work order, the system will go through and calculate the Retail Price from the mark-up and margin that you have setup)
    B. Use Retail Price (Whenever you add a part to the work order it will always use the retail price that you have setup)
19. Show In Labor
    A. Show Just Total (When printing the invoice the hours will not print)
    B. Show Hours and Total (When printing the invoice the hours and total will print)
20. Show Hazard As
    A. Show Hazard with Part (When printing the invoice the hazard waste charge will be printed on the parts line)
    B. Show Hazard Just as Total (When printing the invoice the hazard waste charges will show up at the bottom of the invoice only)
    C. Don't Show at all (This option will hide the Hazard changes from the customer)
21. Print Pay Method (By selecting NO on this option the payment method will not print out)
22. Use Mileage Out (Use this if your shop uses a Mileage Out)
23. Show EPA Number (Whether or Not you want the EPA number to print)
24. Show FET (Whether or Not you want the FET number to print)
25. Use Shop Charge
26. Show Bar Number (Whether or Not you want the BAR number to print)

CREATING A WORK ORDER

1. From the AUTOS2000 Main Menu, select WORK ORDERS/ESTIMATES
2. Select ADD WORK ORDER. Note: This can also be done from the "Open Work Orders" screen and the "All Open Tickets" screen.
3. From here the system will open the "Find customer for new work order screen"

   The "Customer Search Screen" gives you 7 different options to search from. All the search fields are what we call a fuzzy search IE: If I am searching for the last name "Spiker" I can type in "Sp" or "ik" hit my "TAB" key and still be able to find the person that I am looking for.

   When doing a search and the customer can't be found, the system will ask you if you would like to add them.

   Once the customer that you are searching for has been found you have 2 options:

   A. You can highlight the customer you are looking for and use the "Continue" button.

   B. You can just DBL Click on the customer in the list and be on your way.

   To find out more about adding customers please see page 9.

4. From here the system will open the "Select vehicle screen". NOTE: if you search for a customer via the "License", "VIN Number", or "Vehicle Tag Number" you will never see this screen.

   The "Select Vehicle Screen" is a list of all the vehicles that a particular customer has. This screen also gives you the ability to add a vehicle to a customer if it is not currently listed by clicking on the "Add Vehicle" button.

   Once you have found the vehicle that you are looking for you have one of 2 options:

   A. You can highlight the Vehicle that you are looking for and use the "Continue" button.

   B. You can just DBL Click on the Vehicle in the list and be on your way.

   NOTE: Before you continue on to the Work Order you can also enter the vehicles mileage here or you can just enter it into the Work Order itself.

5. Now you should be looking at the Work Order Screen itself. The following information should help you in entering parts, labor, sublet, discounts, adding estimate revisions.

A. Adding Parts into a Work Order

AUTOS2000 gives you 3 different options on adding parts into a work order.

1. Directly to the Work Order Screen
2. Parts Search
3. Parts Quick List

1. **Entering parts directly into a work order…**

On the bottom left corner of the work order screen you will notice a section Work Order Parts. To add parts to this section you have 2 options.

A. Typing in the part number and having the system enter all the information for you.

B. Entering a Description Directly

A. Typing in the Part Number

In this section you will notice that there is a blank line. What you need to do is click into the blank part number field. At this point you can start typing in the part number. You will notice, as you type, if the part is in the system it will find it for you. If this is a new part number to the system you will receive a message box asking you if you would like to search the Alternate Part numbers in the system. If the part is not in the system you will get the “Add Parts Screen”. You will have 3 options:

1. **Quick Add** (This option adds the part to the system without making you go though the entire parts add procedure.)
2. **Setup** (This option will allow you to add the part into inventory and setup all options for it.)
3. **Cancel** (After using cancel you must hit “ok” to select another part. You will go back to Work Order Screen. You must hit “Esc” 2 times to clear that part or retype the part number.)

After entering the part number into the Work Order the system will tab to the Part Description. Please enter the part description, and then hit “Tab” to go to the quantity field. Please enter the quantity, and then hit “Tab” to go to the price field. Please enter the price.

B. Enter the part description directly

You do not have to have a part number. If no part number is associated you can enter the part description only. “Tab” over to the part description field, type in the description, and then hit “Tab” and enter the quantity, hit “Tab” and enter the price and then hit your “Tab” key again to update the work order total.

2. **Using the parts search**

The "Part Search" gives you 9 different options to search from. All the search fields are what we call a fuzzy search IE: If I am searching for the Description "Serpentine Belt" I can type in "Serp" or "Belt" hit my “TAB” key and still be able to find the part that I am looking for.

Once the Part you are searching for has been found you have 2 options:

A. You can highlight the Part that you are looking for and use the “Continue” button.

B. You just DBL Click on the Part in the list and be on your way.

3. Using the Parts Quick List

The "Parts Quick List" is a current list of all parts that you have in AUTOS2000. From here you have 2 options:

A. You can highlight the Part that you are looking for and use the "Continue" button.

B. You can just double click on the Part in the list.

B. Adding Labor to a Work Order

AUTOS2000 gives you 3 different options on adding labor into a Work Order.

1. Directly to the Work Order Screen
2. Labor Search
3. Labor Quick List

1. Entering labor directly into a work order…

On the bottom left corner of the work order screen you will see a Work Order Labor section. To add labor to this section there are 2 options:

A. Selecting the labor type from the drop down list.

B. Entering a description directly.

A. Selecting the labor type from the drop down list

Point your arrow to the blank "Labor Type" field and click. You can start typing in the labor type ID or use the down arrow and scroll through the list. If you will notice as you type it will bring up matching labor types. If this is a new labor type ID to the system there will be a message box asking if you would like to add. By selecting yes, the system will give you the "Labor Type Add" screen. Now that you have selected a labor type the system will take you to the mechanic field so that you can select who is assigned to do the work. It will then ask for the total for the labor or you can just enter the time and the system will calculate the total for you.

B. Enter the labor description directly

If there is no labor type ID you can go to the labor description field directly and type in the description. Then hit "Tab" to move to the select mechanic field, and then "Tab" to the enter total field and then hit you "Tab" key again to update the work order totals.

C. Adding Sublet to a Work Order

To add sublet to a Work Order click on the "Edit Work Order" button located at the top of the screen on the tool bar. This will open the "Edit Work Order" screen. Click on the third tab over that reads "Sublet Charges". You can now enter the Sublet information.

Under sublet you will notice there are 4 fields across the top and 1 large one below. They are as follows:

1. Company Name (Which does not print on the Work Order)
2. Sublet Cost (This is what you paid to the sublet company)
3. Sublet Price (This is what you are charging the customer)

4. Taxable (This signifies whether it is taxable or not)
5. Description (This is the description that will print out for the customer)

To find out more about the “Edit Work Order Screen” please see page 15.

D. Adding Discounts to a Work Order

To add discounts to a Work Order click on the “Edit Work Order” button located at the top of the screen on the tool bar. This will open the “Edit Work Order” screen.

In the second column the last 3 fields are as follows:

1. Parts Discount
2. Labor Discount
3. Discount Amt (Which allows you to enter a total discount amount for the entire Work Order.)

Note: To type in a discount amount type it in as a decimal figure. IE: for a 10% discount type .1 or for a 15% discount type .15.

E. Adding Estimates Revisions

To add Estimate Revisions to a Work Order click on the “Edit Work Order” button located at the top of the screen on the tool bar. This will open the “Edit Work Order” screen. Click on the second tab over, that reads “Estimate Revisions”. You can now enter the estimate revisions. When you are finished entering the revisions click on the Update button.

To find out options on printing the estimate revisions please review the company setup screen which is page 3.

To find out more about the “Edit Work Order” screen please see page 15.

F. Taking Payments on Work Order

To accept payments for a Work Order click on the “Payments” button located at the top of the screen on the tool bar. Please notice that Payment 1 is already filled in with the total amount due. The drop down box allows you to select the method of payment. When you are finished taking the payment click on the “Update” button. You then have the option to close the Work Order.

You have now completed your first Work Order. Please remember if you have any questions please contact Jazz Designs at (888) 792-8867 and we will be glad to answer any questions you might have.

ADDING A NEW CUSTOMER / VEHICLE

The “Add Customer” screen is where you can setup all options for any customer. You will notice that there are 4 different tabs on this screen and they are as follows:

1. Personal Information
2. Vehicle Information
3. Internal Comments
4. Alternate Customer Names

1. Personal Information:

On this tab you will notice that there are 26 different fields to give you the ability to enter any and all the prudent information pertaining to this customer. You will notice that there are a few special fields on this screen and they are as follows:

A. Resale Number (this is for your corporate customers)

B. Credit Limit (this is so you can set credit limits for your accounts receivable customers)

C. Default Pricing (this is for when you use scalable pricing for different customers and it will carry over the parts and labor pricing.)

D. Source (this is for tracking where your customers are coming from so you can tell what type of marketing works best for you.)

E. Customer Type (this is for setting up what type of customer they are IE: retail, wholesale, etc)

F. Tax Exempt (this is for tax exempt customers so it will create new work orders as non taxed.)

Vehicle Information:

This is where you can add all the customer vehicles. You will also notice that there is a big field for "Comments". This area is for making notes pertaining to this vehicle IE: "left front fender has a large scratch which was there when vehicle came in".

Alternate Customer Names:

The alternate customer names is intended for when you have a customer that has multiple people that you want to list under one account. The following are a few examples on how this can be used.

1. Lets say you have a fleet account with multiple vehicles and each one has a driver assigned to it and you want to be able to bill XYZ Fleet but you want the drivers name to print out on the work order. Under the personal information tab you can setup all the company information and then list all the drivers and their vehicles.
2. Now lets say you have a family that has multiple vehicles and each vehicle has only has one driver. You can setup the entire family under one account and be able to track their spending habits.

A D D I N G P A R T S / I N V E N T O R Y I T E M S

The “Add Part” is where you can add parts into the system and setup your inventory items. You will notice that there are 5 different tabs on this screen and they are as follows:

1. Part Information
2. Alternate Part Numbers
3. Alternate Vendors
4. Parts Usage
5. Parts Catalogue

Part Information:

On this tab you will notice that there are 23 different fields to give you the ability to enter any and all the prudent information pertaining to this item. There are a few special fields on this screen and they are as follows:

A. Part Number (this is the actual part number)
B. Part Description (this description will print on the work order)
C. Group (the part grouping is for 1. reporting and 2. defining your own markup matrix for this part. To find out more about parts groups please see the “Adding parts groups section”
D. Vendor (this is the primary vendor that you purchase this part from)
E. Stock Part (this designates whether or not this is an inventory item or just another part in the system)
F. Part Taxable (this is to set whether or not this is a taxable item in your state)
G. Unit Price (this is your cost)
H. Retail Price (this is the retail price)

Alternate Part Numbers:

This is where you can compile a list of Alternate Part Numbers so the system can cross reference the part number from OEM to Aftermarket.

Alternate Vendors:

Here you can compile a list of all the different vendors that you purchase this part from so that you can compare their different prices.

Parts Catalogue:

This is so you can build your own internal catalogue for this part to be referenced at a later time.

When you are finished adding the part click on “Save and Exit” and you are done.

NOTE: Parts can be added from the “Main Menu” under “Parts Maintenance” or from within a “Canned Job”, “Work Order”, or “Estimate”.

ADDING PARTS GROUPS

The “Add Part Groups” is where you can add parts groups into the system and setup your markup matrix.

1. Group ID: For this, use a four to seven letter description: IE: Electrical Work, you might use ELECT.
2. Description: this is a short description of this group IE: Alignment
3. Use Markup: This is where you can tell the system whether or not you would like to use the matrix pricing for this group.
4. Min/Max 1-5: This is for setting mark-ups based on cost IE: if a part costs between 0.00 and 100.00 mark it up X percent or if it costs between 100.01 and 500.00 mark it up a different X percent.

NOTE: Groups can be added under “Parts Maintenance” or while you are adding a new part to the system. When entering % please type it in as a decimal IE: 50% would be .50

ADDING NEW LABOR TYPES

From the main menu, click on “Labor Maintenance”. Then click on “Add Labor Types”. You will find four fields on the left.

1. Labor Type ID: For this, use a four to seven letter description: IE: Electrical Work, you might use ELECT.
2. Labor Track Type: This is important, as it is used in reports and setting pricing levels. In this field, use the entire word, such as “Electrical”. If you add a word that is not in the drop down list, the system will ask you if you want to add it.
3. Title: This is used when doing a search, so you need to be more specific, such as “Replace Starter”.
4. Description: This is where you put the entire description of the work being performed. The description can be as long as you want.

On the right, you will find:

1. Taxable: Put a check mark in the box if labor is taxable in your area.
2. Labor Rates A,B,C, and D: Labor Rate A is generally your retail rate, and is used most frequently. B, C, and D are for discounted labor rates, IE commercial accounts. You must put something in all four fields, for the system to work correctly (even if it is $0.00).
3. Hours: Simply type in the number of hours you charge for that service. This figure will be used in reporting as the “Billed Hours”.

Click “Save and Exit”, and you are done. This same screen can also be accessed from an open work order, if you add a labor type that is not in the system.

ADDING NEW EMPLOYEES

From the main menu, click on “Employee Maintenance”. Then click on “Add Employee”.

1. Employee ID: You can use a number, an abbreviation of the person’s name, or whatever works for you. Keep in mind that the Employee ID terms will appear on a dropdown list in an open work order. This enables you to indicate which employee performed a particular labor type.
2. Pay Type and Pay: Pick from the dropdown list. If you do not find it in the list, type it in, and the system will ask if you want to add it. Pay is the amount that person is paid.
3. Fill in all the employee’s contact and personal information, and indicate with the check boxes, whether or not the employee is male and actively employed.
4. Current Status: You can use this to indicate the employee’s title, IE: “Technician”.
5. Comments: Anything you want to remember about that employee, IE: what skills they have, disciplinary actions, etc.

ADDING NEW VENDORS

From the main menu, click on “Vendor Maintenance”. Click on “Add Vendor”.

1). Vendor ID: This is best kept to one word, from the vendor's company name, IE “Dealer”.
2). Look-up Code: This is best kept to one word. In fact, it is often the same as the “Vendor ID”, IE “Dealer”. This can be used when doing a search for a vendor.
3). Company Name: Simply enter the entire company name. This can also be used when doing a search for a vendor.
4). Contact: The first and last name of the person you most frequently talk to.
5). Address, City, State, Zip, Phone, Fax and E-mail Address: Simply enter them.
6). Payment Terms: Pick from the drop-down list. If your payment terms are not on the list, type it in, and the system will ask you if you want to add it.
7). Comments: Any notes you want your staff to see about this vendor.
8). Date Started: Today’s date will appear, unless you change it. It is the date you began doing business with this vendor.
9). Last Charge Date, Amount Last Charged, Last Payment Date and Amount of Last Payment: Optional fields you can use for your own information.
10). Credit Limit: How much you can charge with this vendor. A pop-up will appear when adding a part from a vendor whose credit limit you have exceeded.
11). Federal and State Tax #’s: To be used for your own information only.

NOTE: Vendors can also be added to the system while you are adding a new part/inventory item.

EDIT WORK ORDER SCREEN

While you are in an Open Work Order you will notice the button “Edit Work Order” at the top of the screen. Clicking on this will take you to the “Edit Work Order” screen. There you should notice 3 tabs.

1. Work Order Information
2. Estimate Revisions
3. Sublet Charges

Under the "Work Order Information Tab" you will notice 18 different fields, as listed below:

1. Alternate Customer (by clicking the drop down arrow you can assign an alternate customer to this work order. To find out more about alternate customers please see section “Adding a New Customer”)
2. Service Writer (by clicking the drop down arrow you can assign a service writer to this work order. To find out about adding employees to the system please see the section “Adding a New Employee”
3. PO Number (if you have a PO Number that you would like to assign to this work order you can enter it here)
4. Date Received (this is the date that you received the vehicle)
5. Date Required (this is the date that your customer needs the car by)
6. Tax Exempt (by checking this you can set this work order as Tax Exempt)
7. Warranty Work (this designates the work order as being warranty work)
8. Parts Discount, Labor Discount (this is where you can enter discounts)
9. Mileage (here you can edit the “Mileage in” of the vehicle)
10. Mileage Out (this is where you can enter the “Mileage out” of the vehicle. To find out more about options on printing this please see section 1 “Company Setup”)
11. Sales Tax Rate (this is where you can edit the Sales Tax Rate assigned to this work order.)
12. Date Finished (this is the date that the vehicle was completed. This is also the date that will print on the final invoice)
13. Date Picked Up (this is the date that the customer picked up the vehicle)
14. Warranty Miles
15. Warranty Months
16. Work Declined Amount
17. Show Rec Next Work Order (by setting this option to "Yes" the next time the vehicle comes into your shop the system will let you know that there are previous recommendations, and ask you if you would like to view them.)

You will also notice that there are 2 separate buttons at the top of the screen and they are.

1. Custom Reminder: By clicking on this you can set a "Custom Reminder" for this customer.
2. Update: When you are finished with your entire editing just click on “Update.”