TRACS Enterprise Manual

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Welcome to NAPA TRACS

Congratulations on selecting NAPA TRACS software! NAPA TRACS not only automates all of your data management requirements, it allows you to have more control over your productivity and profitability. You now have the flexibility to evaluate the overall performance for all of your shops, or view information specific to a single shop, repair order, parts supplier or employee.

Use this guide and accompanying Help system to:

- Create detailed customer estimates and invoices
- Generate and send e-mail estimates, repair orders, invoices and recommended service reminders
- Create preventive maintenance integration points and worksheets
- Schedule and track customer orders
- Create, track and receive purchase orders
- Analyze detailed customer, vehicle and parts history
- Create sales and productivity analyses on every aspect of your business
- Manage your accounts receivables
- Control inventory
- Use bar code scanning
- Integrate with QuickBooks
- View and manage customer appointments
- Purchase parts and manage your parts inventory
- Track and manage the performance of your employees
- Analyze and track efficiency of your marketing and promotions tasks

What's New in NAPA TRACS

NAPA TRACS, as an enterprise application, will continue to meet and transcend existing needs for your repair shops. **New features and enhancements in NAPA TRACS include**:

- **Pricing and Labor Matrixes**
    - Capability to clone existing matrixes and quickly modify them to create new matrixes
- **Taxes**
    - Capability to create tax classes at the federal, state and city level
- **Accounts Receivable**
    - Add a Message of the Day to any customer invoice
- **Searching, Filtering, and Grouping**
    - Use detailed Tire and Wheel search criteria
    - Capability to clear the fields of a search screen to change search criteria by clicking the **Clear** button
    - Save previous customer search criteria by clicking the **Save** button

    - Use Pick Lists to search for specific vehicle information for a customer
    - Use column filtering to quickly display customer or vehicle information
    - Capability to group columns of related data by dragging and dropping to a single row
    - Use enhanced data filtering to view specific information in a column
- **Reporting**
    - Exporting printed documents to a wide variety of formats
- **Permissions**
    - Addition of permission groups and assigned roles to enhance system security
- **Work Orders**
    - Added field to include key tag number
    - Capability to assign multiple technicians to a work order
    - Ability to copy sub-estimates to a work order
- **Customer Data**
    - Include an unlimited number of e-mail addresses and phone numbers to a customer record
    - View multiple vehicles associated with a customer
- **Shop Management**
    - Ability to manage multiple shop locations from one interface via the **Change Shop** function
- **Repair Orders**
    - Add an unlimited number of sub-estimates to a repair order
- **Distribution Center**
    - Perform bulk orders from a distribution center at a set time of day

Registering your NAPA TRACS Application

The first time you run NAPA TRACS, the program will prompt you to register online. To register your NAPA TRACS software, complete the following steps:

1. Enter your Product Key when the registration window appears. Your Product Key can be found with the assistance of your NAPA TRACS support agent.
2. Click the **Register Online** button.

Your software is now registered. You only have to do this one time. If an error message appears, check that your Internet connection is working properly and try again.

Backing Up NAPA TRACS

The Backup function enables you to periodically backup your database. Your NAPA TRACS support agent can assist you in setting up this feature.

Online Updates

NAPA TRACS users with specially assigned permissions will see software update notifications when logging into the system. Once the update runs, NAPA TRACS completes the required processes.

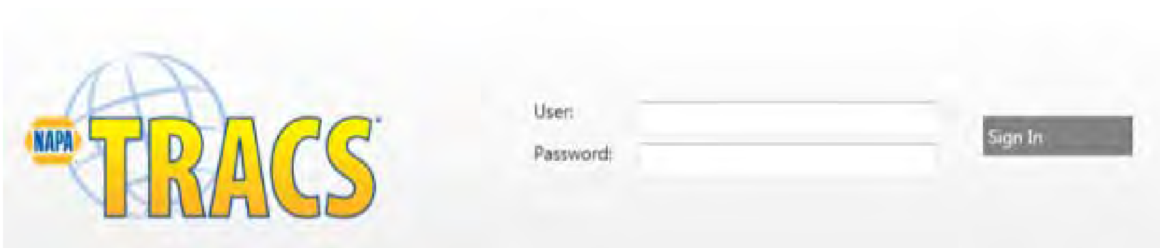
Chapter 1 TRACS Overview

Logging into NAPA TRACS

The installation process adds the NAPA TRACS icon to your desktop.

1. To log into NAPA TRACS, double-click the NAPA TRACS icon.

   The NAPA TRACS Login window appears.



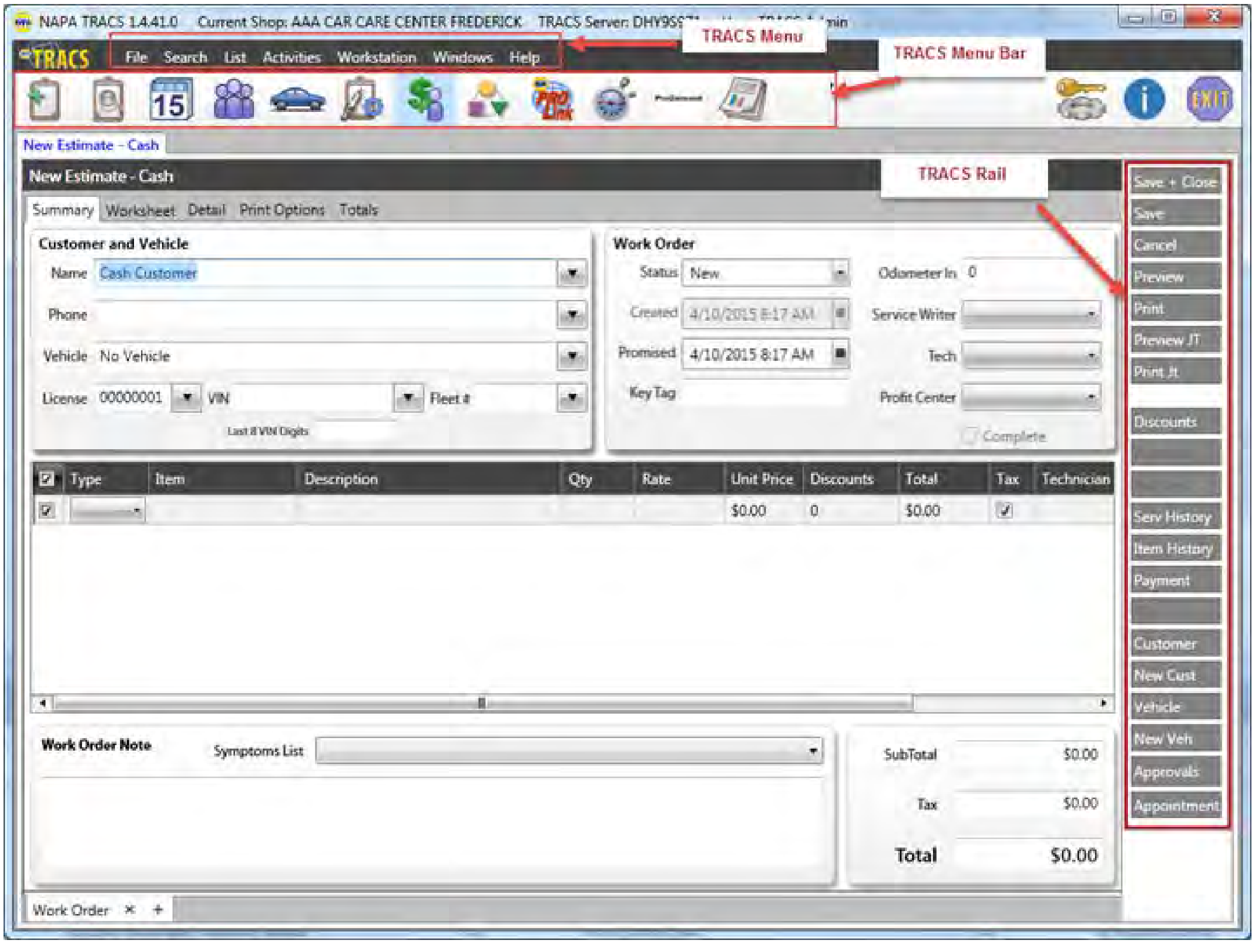
2. Type your user name and password into the respective fields.
3. Click the **Sign In** button.

Navigating Your NAPA TRACS Program

The NAPA TRACS interface is in many ways similar to what you use every day on your personal computer. Use the information in this section to learn how to navigate the NAPA TRACS application.

NAPA TRACS Screen Navigation

You access information and perform tasks and functions using the **TRACS menu** and the **menu bar** at the top of the screen. You can also click on an action from the **TRACS Rail** on the right side of the screen.



- **TRACS Menu:** Select an item on the TRACS menu to display a cascading list of selections. Move your mouse pointer to the option you need and click to select it.

- **TRACS Menu Bar:** Each of the icons in the TRACS menu bar represents a quick-access option to a specific action or program.
- **TRACS Rail:** The TRACS Rail is a vertical set of action buttons that changes depending on the screen displayed. The TRACS Rail action buttons are specific to the task being performed.

NAPA TRACS Menu

The following table describes the **File** menu commands and sub-menu commands:

Menu	Command	Sub-Menu Command	Function
File	New		
		Account	Add and maintain accounts

		A/R Transaction	Add and maintain A/R transactions
		Bay	Add and maintain service bays
		Category	Add and maintain categories
		Credit Card	Add and maintain accepted credit cards
		Customer	Add and maintain customers
		Employee/Technician	Add and maintain employees and technicians
		Estimate	Add and maintain estimates
		Item	Add and maintain items and sub-items
		Labor Rate	Add and maintain labor rates
		Manufacturer	Add and maintain manufacturers
		Purchase Order	Add purchase orders
		Stock Order	Note: Functionality for this feature will be available in a future release of NAPA TRACS.
		Tax Class	Add and maintain tax classes (rules)
		Vehicle	Add customer vehicles
		Vendor	Add vendors
		Zip Code	Add zip codes to all shops
	Setup	N/A N/A N/A	Display the **Preference** and **Lists** settings
	Import		Import parts from an

		N/A	Excel spreadsheet
	Backup		Backup TRACS data
	Exit		Close TRACS

The following table describes the **Search** menu commands:

Menu	Command	Function
Search		
	Work Order by Number	Find a specific work order number
	Work Orders	Displays the Work Order List
	Customers	Find customers
	Vehicles	Find vehicles
	A/R Transactions	Find customer transactions
	Items	Find items and sub-items
	Purchase Orders	Find purchase orders

The following table describes the **List** menu commands:

Menu	Command	Function
List		
	Account	Add and maintain accounts
	Bay	Add and maintain service bays
	Category	Add and maintain categories
	Charge Options	Add and maintain preferences and lists
	Credit Card	Add and maintain accepted credit cards
	Customer	Add and maintain customers
	Employee/Technician	Add and maintain employees and technicians
	Item	Add and maintain items and sub-items
	Labor Rate	Add and maintain labor rates
	Manufacturer	Add and maintain manufacturers

	Pricing Profile	Add and maintain pricing profiles
	Tax Class	Add and maintain tax classes (rules)
	Vehicle	Add customer vehicles
	Vendor	Add and maintain vendors
	Zip Code	Add zip codes to all shops

The following table describes the **Activities** menu commands:

Menu	**Command**	**Function**
Activities		
	Create New Estimate	Create an estimate for a customer
	Create New Appointment	Create an appointment for a customer
	Create New Customer	Create a new customer
	Create Purchase Order	Create a new purchase order.
	Create Stock Order	Create a stock order
	Receive Purchase Order	Mark purchase order as received.
	Receive Payment	Note: Functionality for this feature will be available in a future release of NAPA TRACS.
	Schedule	Schedule appointments
	PROLink Catalog	Add and maintain labor rates
	Flatrate Estimating	Display the Labor Guide
	Accounting Export	Note: Functionality for this feature will be available in a future release of NAPA TRACS.
	Apply Finance Charges	Apply finance charges to a specific date.
	Unapply Finance Charges	Unapply finance charges to a specific date.
	Cash Drawer	Note: Functionality for this feature will be available in a future release of NAPA TRACS.

	Costing	Note: Functionality for this feature will be available in a future release of NAPA TRACS.
	Financial Health Check	Note: Functionality for this feature will be available in a future release of NAPA TRACS.
	Financial Profile	Note: Functionality for this feature will be available in a future release of NAPA TRACS.
	Monthly Statements	Note: Functionality for this feature will be available in a future release of NAPA TRACS.
	TRACS Email	Note: Functionality for this feature will be available in a future release of NAPA TRACS.
	Unapply Finance Charges	Note: Functionality for this feature will be available in a future release of NAPA TRACS.
	Physical Inventory Reconcile	Note: Functionality for this feature will be available in a future release of NAPA TRACS.
	Read Barcode	Note: Functionality for this feature will be available in a future release of NAPA TRACS.

The following table describes the **Workstation** menu command:

Menu	**Command**	**Function**
Workstation	Workstation Printer Setup	Set up default printer and printers to use for specific reports.
	Change Shop	Display another shop
_	Logoff/Logon	Log off current session and

		log in to new session

The following table describes the **Windows** menu command:

Menu	Command	Function
Windows	Window name	Display another open NAPA TRACS window

The following table describes the **Help** menu command:

Menu	Command	Function
Help	TRACS Online Help	Display this Help system
	Send Log	Sends log to TRACS Support
	About	Display the current NAPA TRACS software version

NAPA TRACS Menu Bar

The following table describes the menu bar icons. Hover your mouse over the icon in the application to display a description.

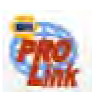
Icon	Description
	**New Estimate** - Creates an estimate for a customer. You can also click **Create New Estimate** from the **Activities** menu.
	**Work Order** - Search for orders that are in the Estimate, Repair Orders, Complete, Invoices, Canceled, or All status. You can also click **Work Order by Number** or **Work Order** from the **Search** menu.
	**Schedule** - Access the appointment calendar for your shop. You can also click **Create New Appointment** from the **Activities** menu.
	**Customers** - Search for a specific customer or group of customers. Use the special search characters to control the results of your search. You can also click **Customers** from the **Search** menu.

Vehicles - Search for a specific vehicle or group of vehicles. You can use the special search characters to control the results of your search. You can also click **Vehicles** from the **Search** menu.

Purchase Orders - View purchase orders that are in the Not Ordered, Ordered, Received, or Canceled status. You can also click **New** from the TRACS Rail, or click **Create Purchase Order** from the **Activities** menu.

Accounts Receivable - Access the **Customer Account History** screen where you can view outstanding balances on customer accounts. You can also click **A/R Transactions** from the **Search** menu.

Items - Search for a specific item or group of items. You can use the special search characters to control the results of your search. You can create a new item by clicking **New** from the TRACS Rail. You can also click **Items** from the **Search** menu.



NAPA PROLink Catalog - Opens a fully-functioning NAPA PROLink application within a NAPA TRACS window. See your PROLink reference information for instruction on using PROLink. You can also click **PROLink Catalog** from the **Activities** menu.

Note: The PROLink catalog in this version of NAPA TRACS replaces the local parts catalog associated with previous versions of NAPA TRACS.

Flatrate Estimating Guide - Access the labor estimating guide. You can also click **Flatrate Estimating** from the **Activities** menu.

NAPA TRACS Reporting - Access and print NAPA TRACS reports.

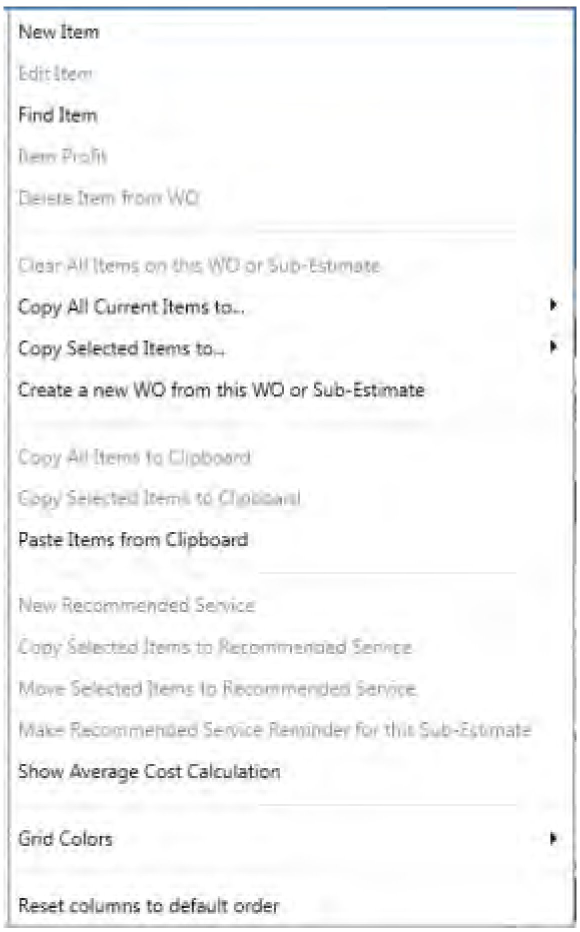
TRACS Online Help - Displays the online help for TRACS.

Settings (Key and Gear) - Access the NAPA TRACS Preferences and Lists settings. You can also click **Setup** from the **File** menu.

Exit - Close NAPA TRACS. You can also click **Exit** from the **File** menu.

NAPA TRACS Pop-up Menu

Pop-up menus are available from certain NAPA TRACS screens. These pop-up menus contain additional functionality specific to tasks and functions available from a particular screen in the application. Perform a right-click to display a pop-up menu.

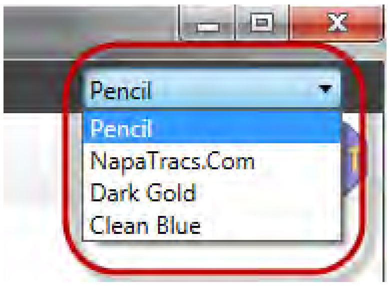


NAPA TRACS Color Scheme

Note: Functionality for this feature will be available in a future release of NAPA TRACS.

Use the color scheme control located in the top right area of the NAPA TRACS application to select a color scheme for the screens and menu bars. There are four different color schemes:

- Pencil
- NapaTracs.com
- Dark Gold
- Clean Blue



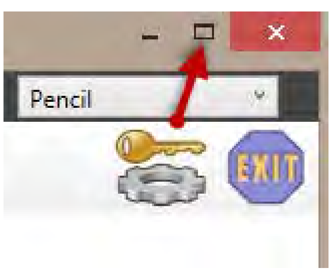
Note: Changing the color scheme does not affect how the program performs.

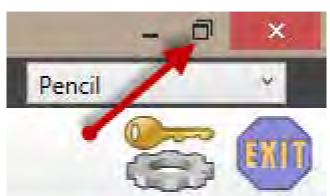
Sizing the Windows

You can quickly control the size of the NAPA TRACS window by clicking the **Minimize** or **Maximize** buttons in the upper right corner.

Note: You can only view one NAPA TRACS window at a time, so you may need to enlarge the window to view all the options for a specific NAPA TRACS function.

- Click the Maximize or Minimize buttons in the upper right corner to resize the window.





Special Search Characters

Use special characters to create powerful searches for data within the NAPA TRACS program. The following table describes the special character and its related function.

Character	Function	Example	Result
>	Greater Than	>0	Values will be 1 and higher
<	Less Than	<0	Values will be -1 and lower

=	Equal To	=1	Value will be 1
=>	Equal To or Greater Than	=>1	Value will 1 or higher than 1
=<	Equal To or Less Than	=<1	Value will be 1 or lower than 1
<>	Not Equal To	<>1	Value will be anything other than a 1
:	Within Range	01/01/2011:12/31/2011	Value will be anything between and including the beginning and ending numbers or letters
|	Or Statement	Bob|Robert	Value will include either name
*	Wildcard	*1*	Value will include anything with a 1; use the wildcard in front of the 1 to find anything that starts with a 1

Using the Tabbed Interface

All screens used in NAPA TRACS display in separate tabbed windows. Tabs are displayed near the top of screen. Use tabs to quickly move among several open screens at a time. The tabbed view is the default view.

Click a tab to display the associated screen in NAPA TRACS.

Working with Tabbed Windows

Tabs allow you to organize and view information in NAPA TRACS to meet your needs. Move tabbed screens to specific docked areas of the NAPA TRACS screen or float them to any location on your desktop.

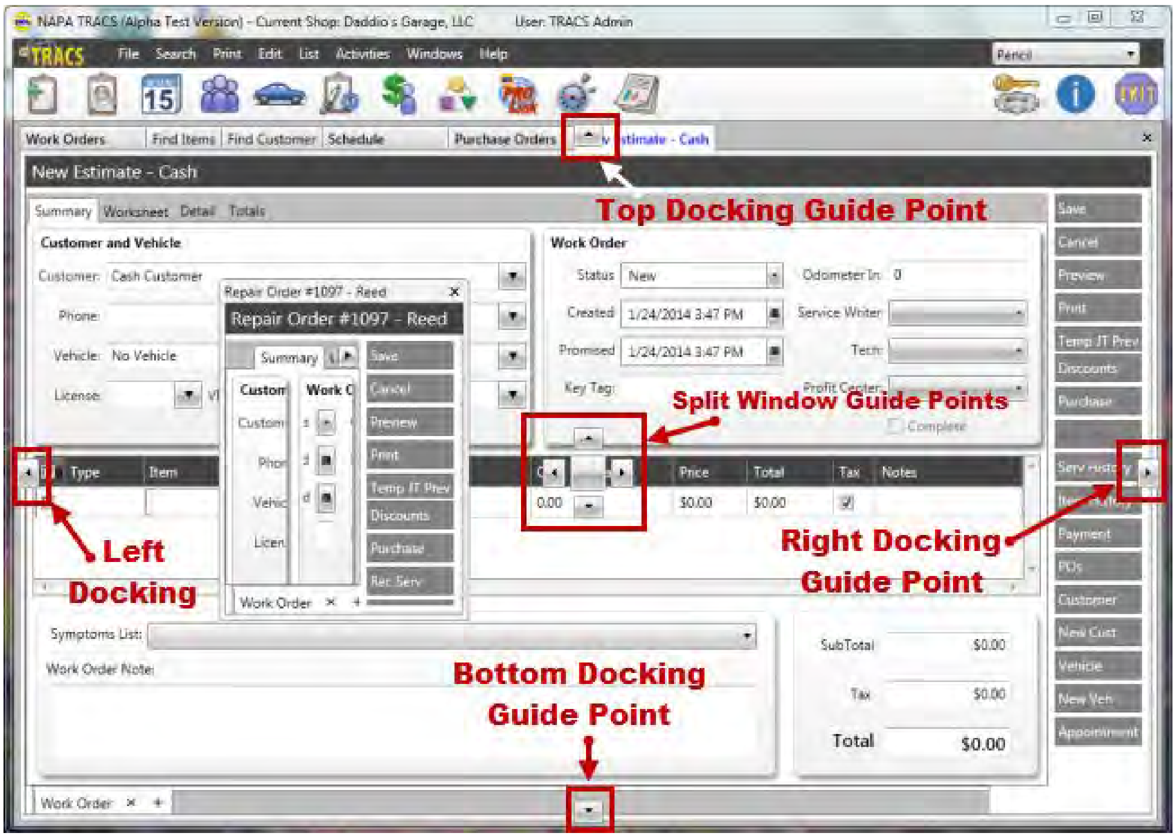
Docking a Tabbed Screen

Docked screens display as separate, fully functional windows in NAPA TRACS. Docked windows can be moved, re-sized or re-tabbed according to your needs.

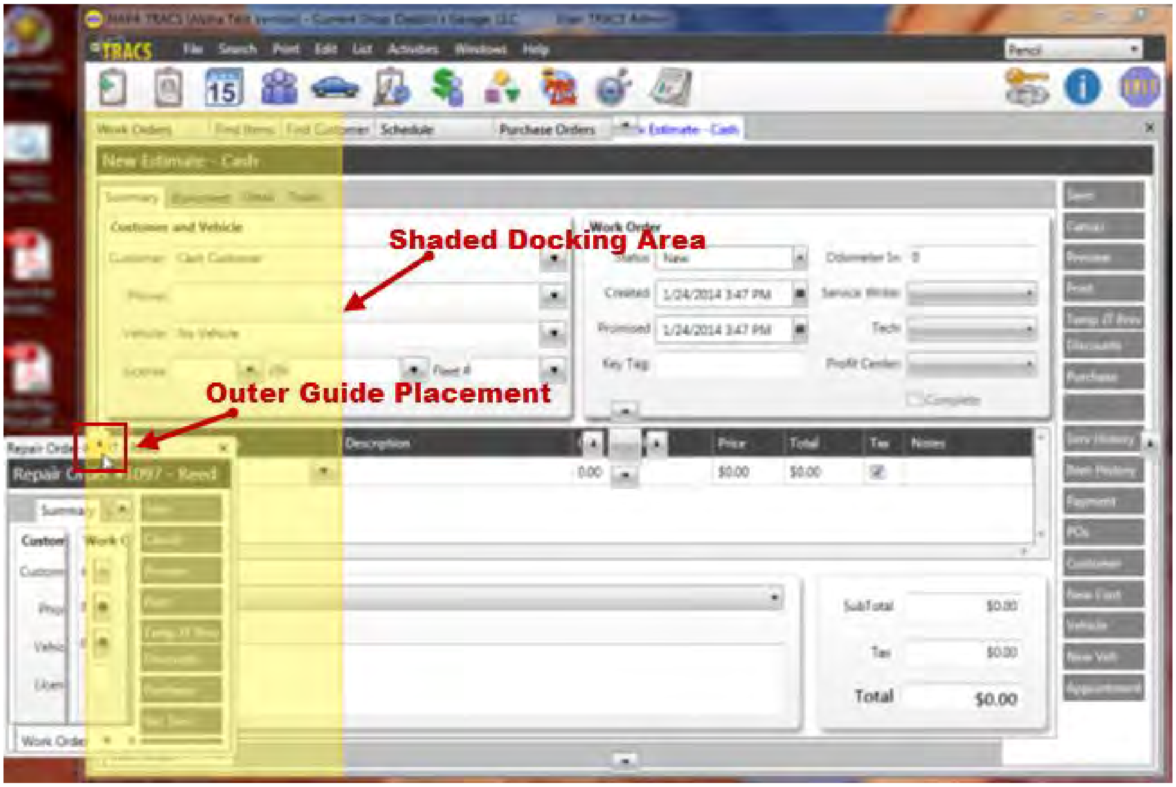
To dock a screen as a separate window:

1. Select a tab, hold down your mouse key and drag the tab downward.

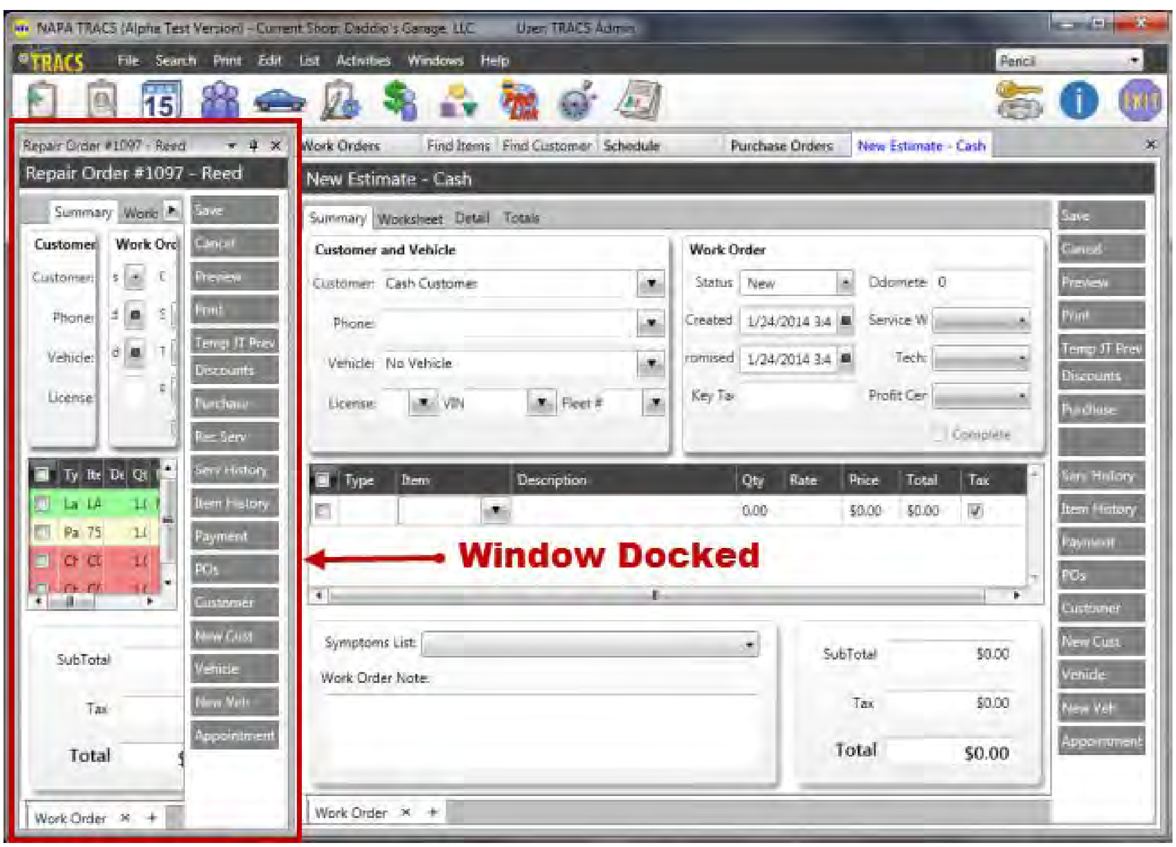
   Guide points appear showing where the window will placed.



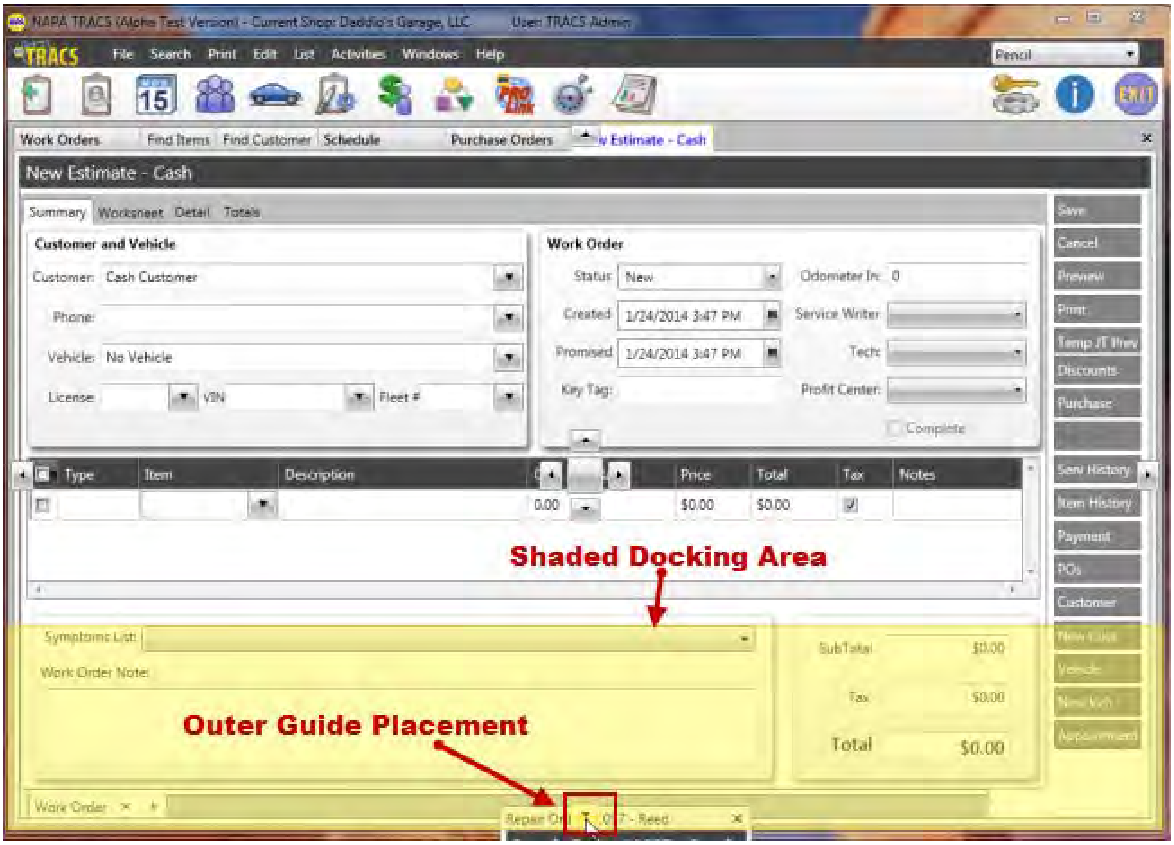
2. Drag the window to one of the four outer guides to display a shaded area where the window will be placed, and release the mouse button.



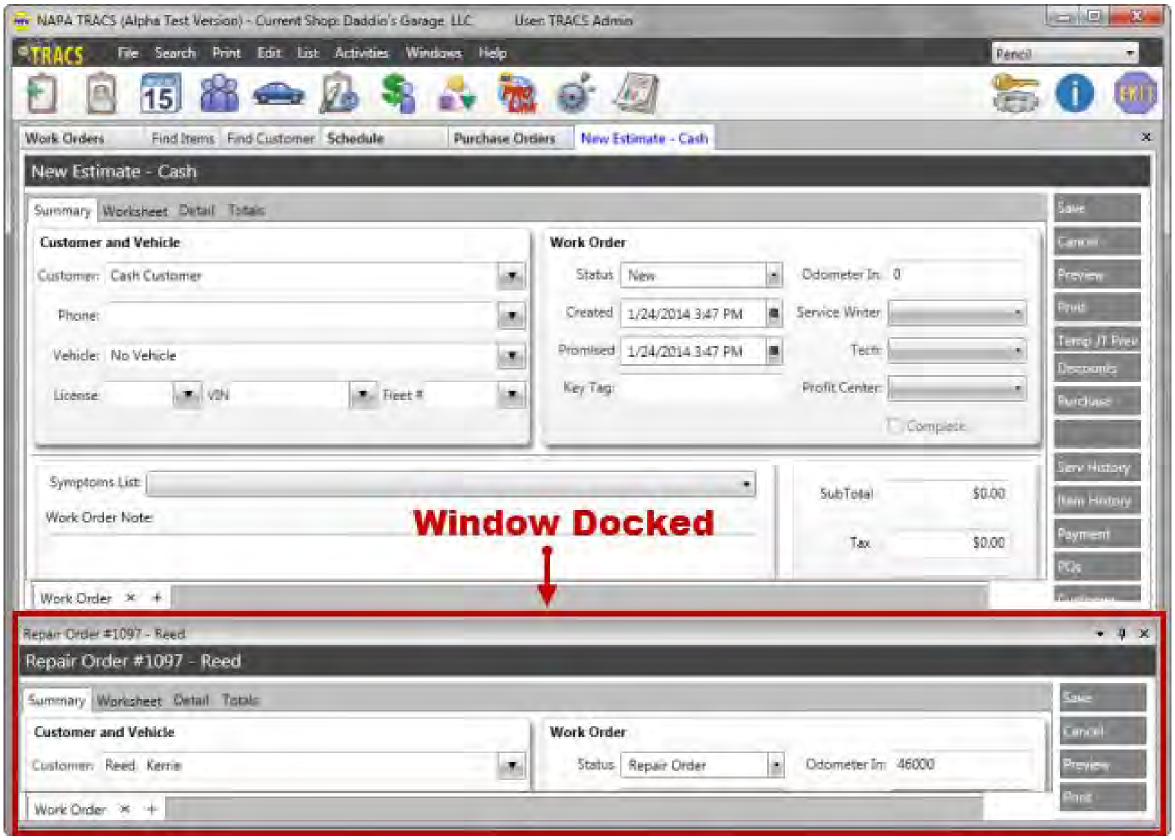
Example - Docking Area Location Left



Example - Window Docked Left



Example - Docking Area Location Left



Example - Window Docked Bottom

Splitting a Screen into Separate Windows

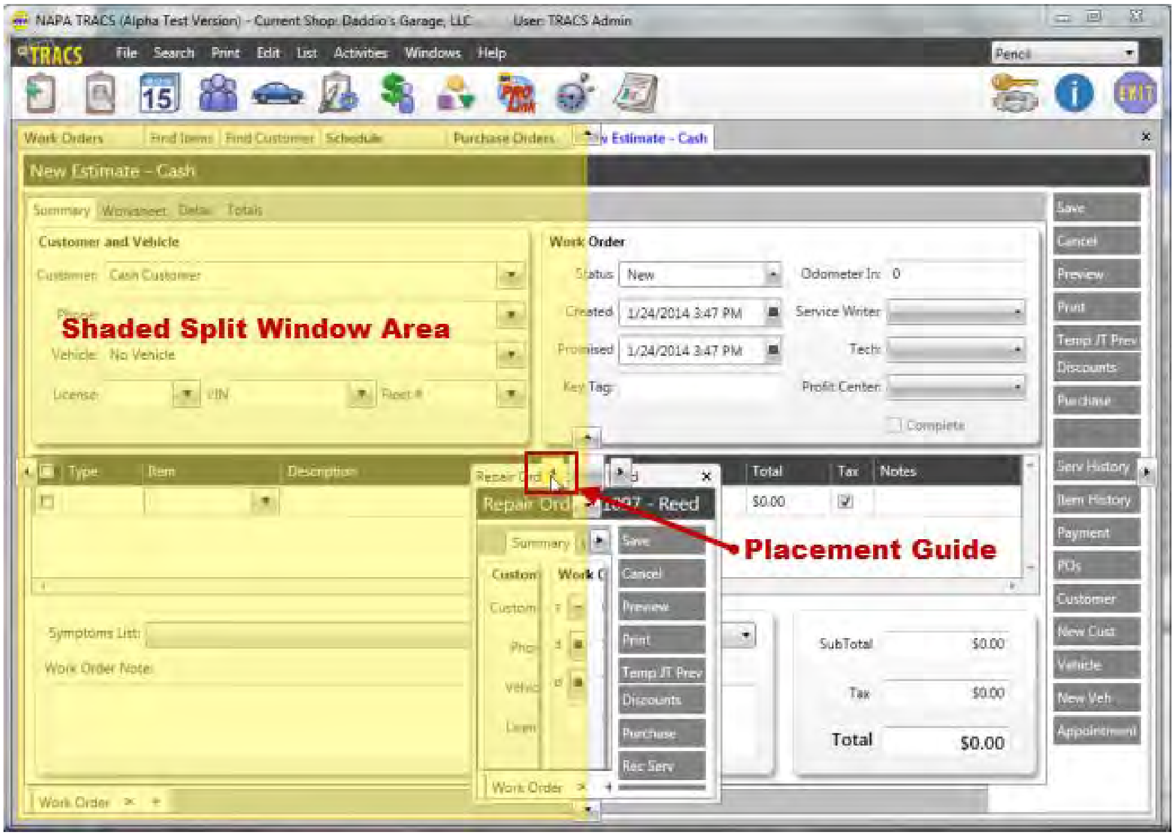
Splitting screens separates the tabbed windows equally on your NAPA TRACS interface.

To split a screen into separate windows:

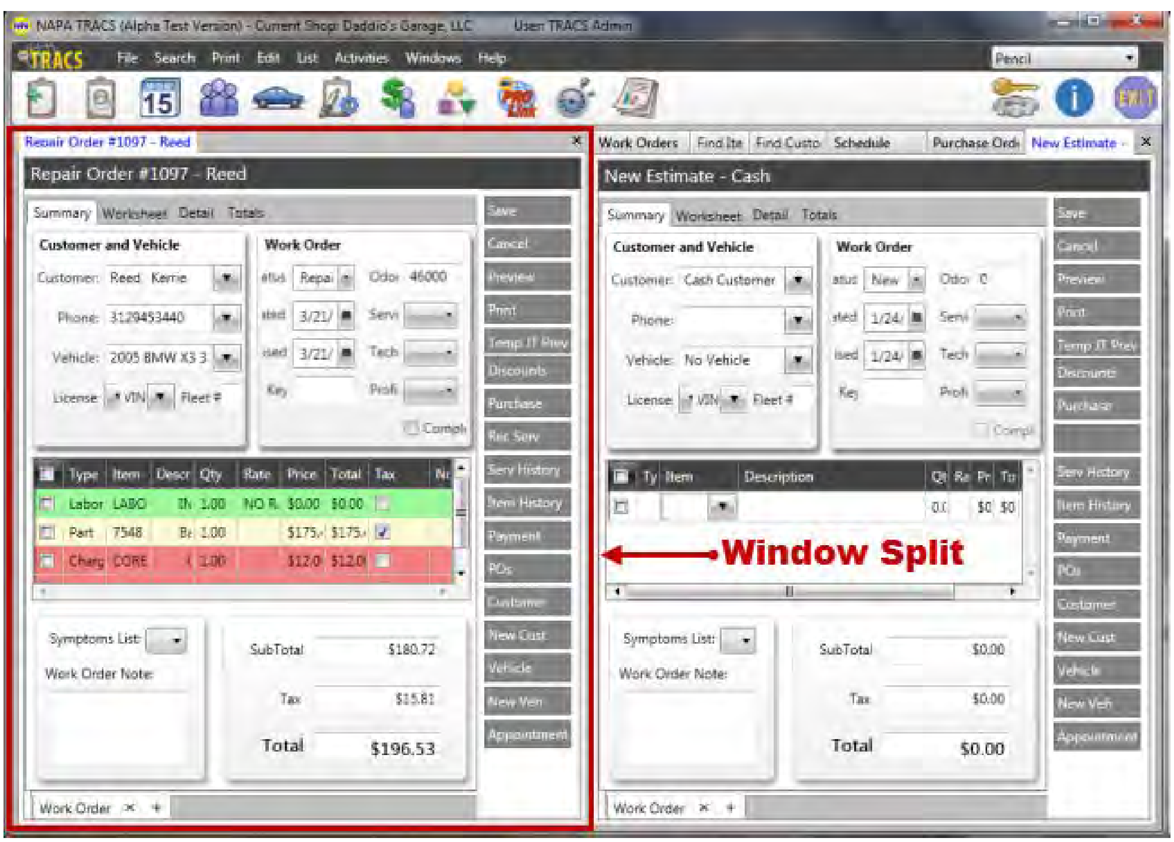
1. Select a tab, hold down your mouse key and drag the tab downward.

   Guide points appear showing where the window will placed.

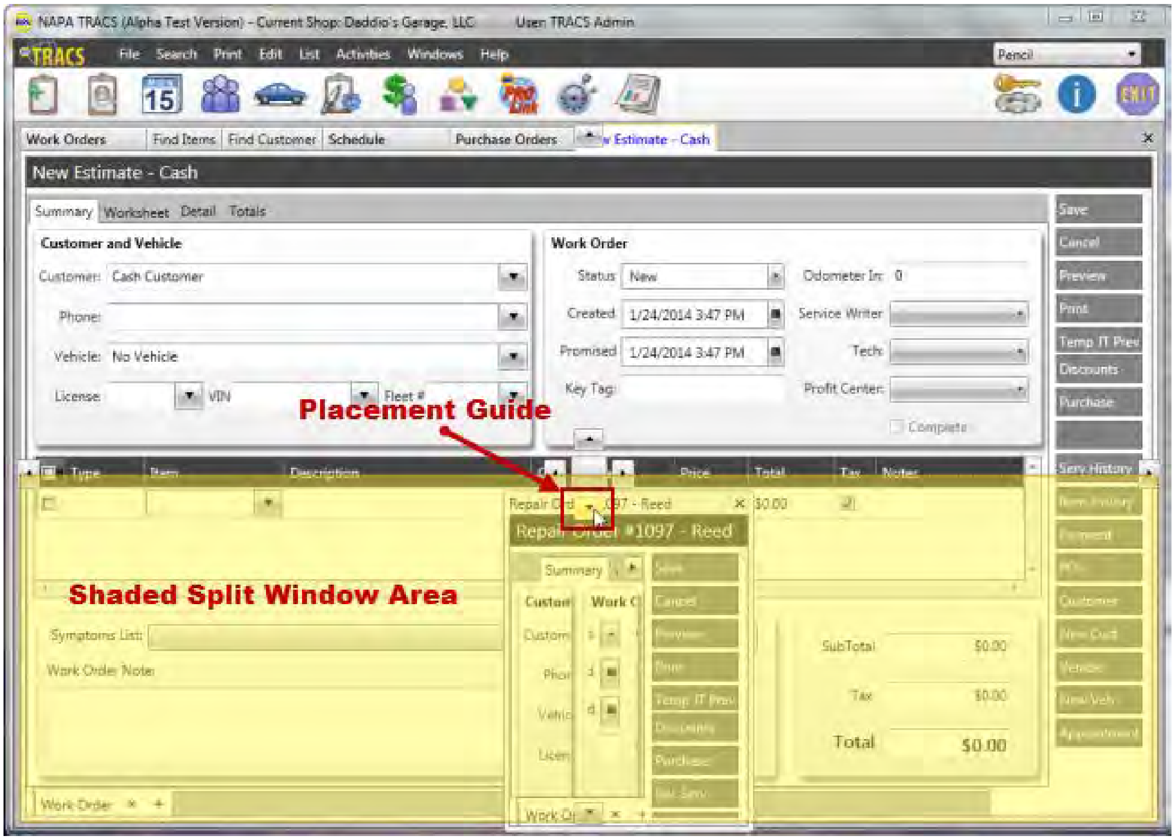
2. Drag the window to one of the four inner guide points to display a shaded area where the window will be placed, and release the mouse button.



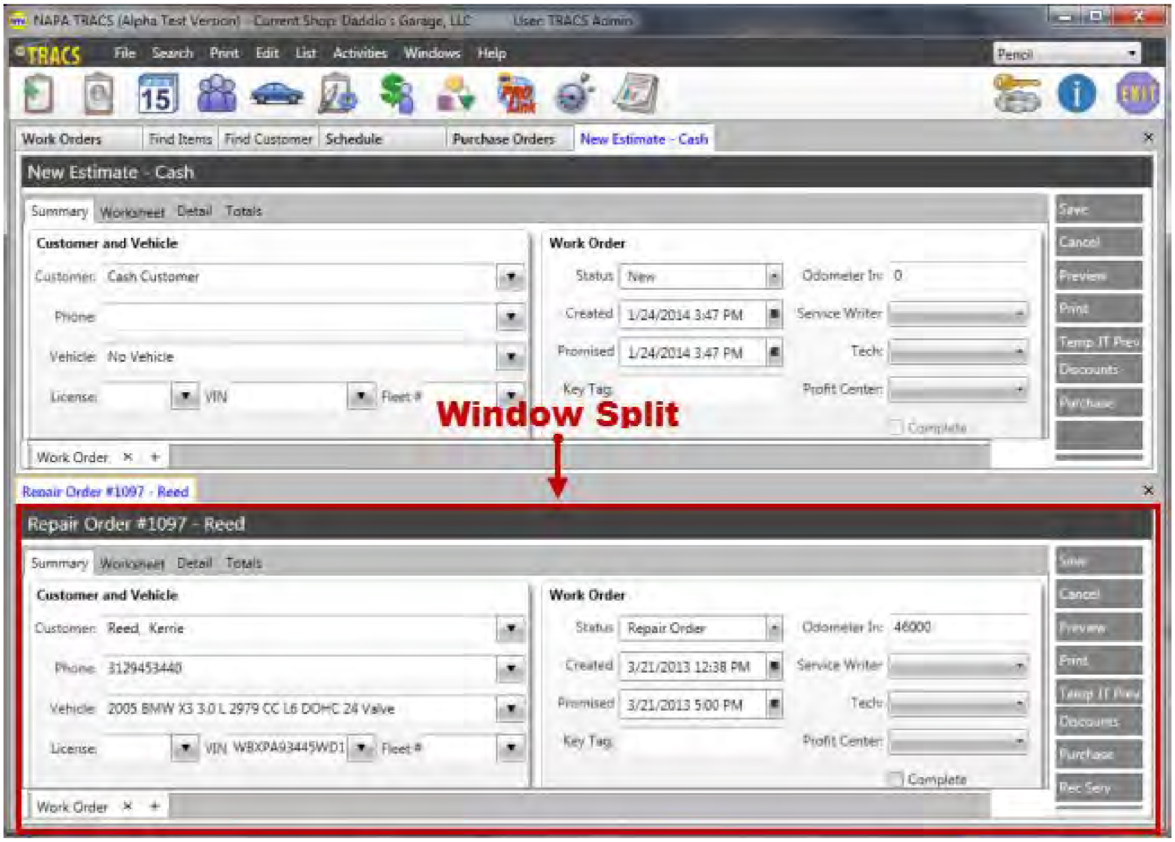
Example - Split Screen Area Location Left



Example - Screen Split Left



Example - Split Screen Area Location Bottom



Example - Screen Split Bottom

Floating a Tabbed Screen to Your Desktop

Float tabbed screens to an area on your desktop outside of your NAPA TRACS interface.

To float a tabbed screen to your desktop:

1. Select a tab, hold down your mouse key and drag the tab to a location on your desktop.

2. Repeat Step 1 for each additional tab, and arrange and re-size the windows.

Example - Two Work Orders Arranged on Desktop

Using Keyboard Shortcuts

TRACS provides keyboard shortcuts to streamline your work. Keyboard shortcuts are combinations of keys such as **Ctrl** (Control), **Shift**, or **Alt** (Alternate) plus letters or numbers to activate a function. It is standard practice to have shortcut keys available for the main menu.

Typically, the first letter of the menu command is underlined. For example, the letter **F** in the **File** menu is underlined to indicate the shortcut letter for that menu.

TRACS provides the following types of keyboard shortcuts:

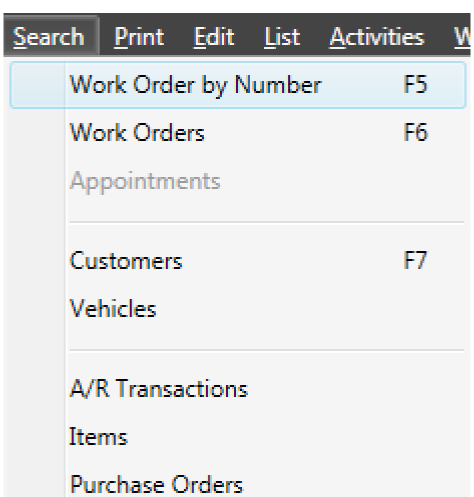
- **Menu** – The menu commands use the format **Alt**+letter (underlined)
- **Drop-down menus** – Function keys (F1 – F12)

Menu

To access a menu, press the **Alt** (Alternate) key and a letter key at the same time. For example, on the TRACS screen, press **Alt+f** to open the **File** menu. The following table explains the menu shortcut keys:

Menu Name	Shortcut Keys
File	Alt+f
Search	Alt+s
List	Alt+l
Activities	Alt+a
Workstation	Alt+w
Windows	Alt+w
Help	Alt+h

Drop-down Menu



To select a choice on the drop-down menu, press a Function key. For example, open the **Activities** menu, and press the **F4** Function key for **Create New Customer**. You can also press the down arrow on the keyboard until **Create New Customer** is highlighted, and then press the **Enter** key. The **Add New Customer** screen opens.

The following table explains the drop-down menu shortcut keys:

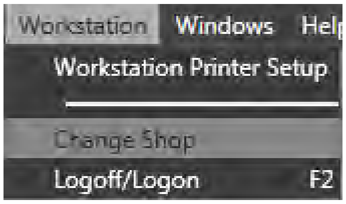
Menu Name	**Drop-down Menu Commands**	**Shortcut Keys**
File	Select **New** to open the submenu, and then select:	
	Customer	F4
	Estimate	F3
Search	Work Order by Number	F5
	Work Orders	F6
	Customers	F7
Activities	Create New Estimate	F3
	Create New Customer	F4
	Logoff/Logon	F2

Changing Shops in NAPA TRACS

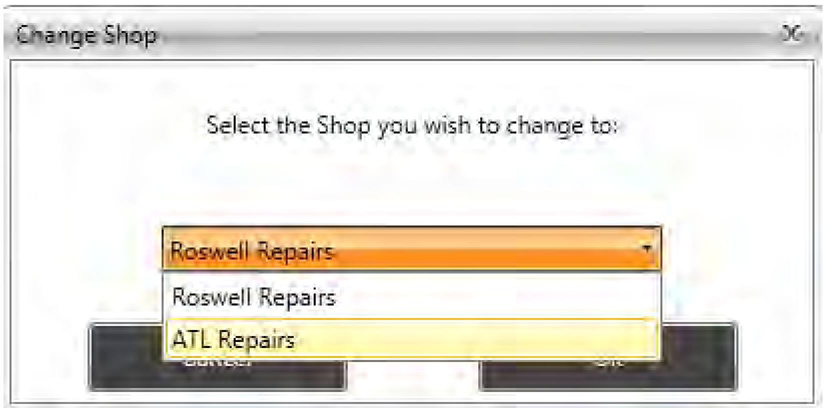
The NAPA TRACS multi-shop environment enables you to manage several different locations from within the application. Always save your work before you change to another shop.

To change your shop:

1. Click **Change Shop** from the **Workstation** menu. The **Change Shop** dialog box appears.



2. Select the shop from the list.



3. Click **OK** to change the shop.

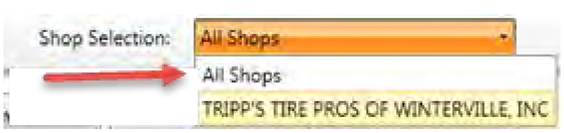
NAPA TRACS Common List Functions

The NAPA TRACS application includes lists that you can manipulate to better view your data. Some of these functions include the ability to select shops, sort columns, add, edit and delete rows, apply filters and group items.

Shop Selection

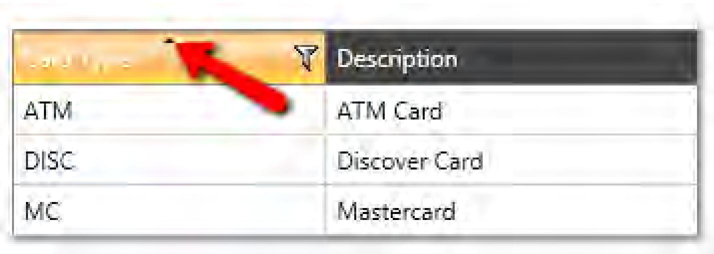
The **Shop Selection** function lists each shop managed by NAPA TRACS. You can display one shop by selecting it from the list. You can also view all your shops by selecting **All Shops**. Some examples where you can show shops are Credit Cards, Customer Groups, Vehicle Colors and Zip Codes.

1. Click the down arrow on the **Shop Selection** box.
2. Select **All Shops** or a single shop.



Sort by Column

Use the Sort option to select one column and arrange column data in ascending or descending order. A small triangle in the column heading indicates the list is sorted in ascending or descending order.



1. Click the column heading to sort in ascending order.
2. Click the column heading to sort in descending order.

Adjust Column Width

You can adjust the width of any column within NAPA TRACS to display more or less information within a specific column.

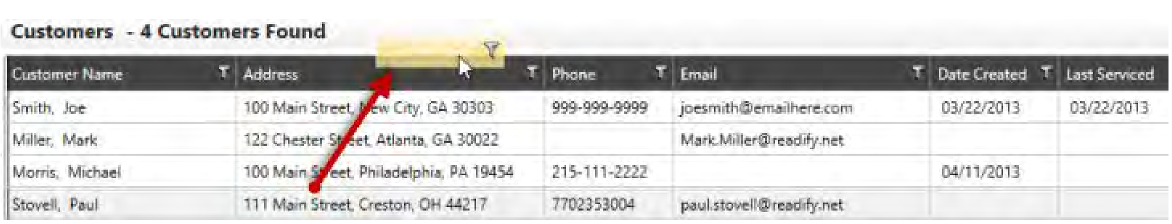
1. Position the mouse pointer between columns. The mouse pointer will change to a double arrow.

2. Click and hold the left mouse down as you move your cursor left or right to change the width of the column.

Move Column Headings

When working with lists, you may find that it is easier to have columns arranged in a specific order. With the **Move** function, you can select a column by dragging that column to the specific desired location within the heading row.

1. Click and hold the left mouse button down on the column you wish to move.
2. Drag the column to its new position.



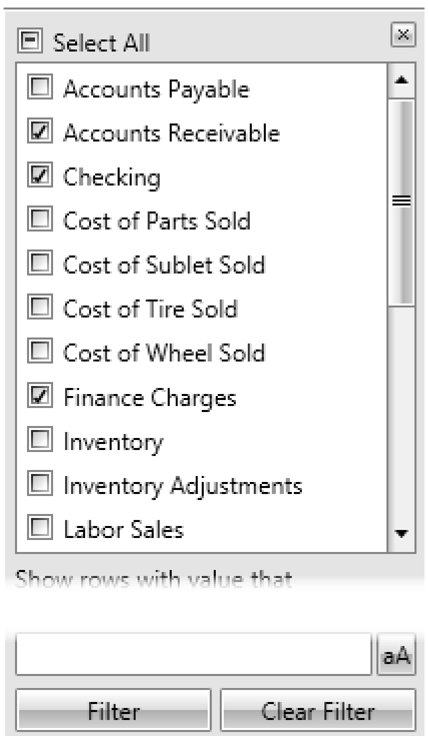
3. Release the mouse button to drop the column in its new location.

Filter List Results

Use the **Filter** option to limit the amount of data displayed on the screen. The filter tool, which looks like a funnel, appears to the right of a column name. You can select specific items to display or use combination boxes at the bottom of the screen to build a conditional statement.

Filter by Selection

You can filter what is displayed on the screen by checking one or more of the check boxes at the top of the Filter options. Use the scroll bar to view additional selections, or click **Select All** at the top of the screen to display everything listed.



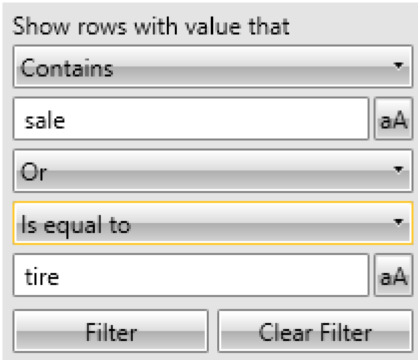
1. Click the **Filter** button.
2. Click the **Select All** check box, or one or more of the check boxes for the individual list items.
3. Click the **Filter** or **Clear Filter** button to apply or discard your filter options.

Filter by Conditions

Use the options at the bottom of the Filter to build a conditional and / or statement. Conditions such as "Contains", "Is Equal to", or "Starts with", can be paired with text you enter to create a custom result.

1. Click the **Filter** button.

2. Click the down arrow for the **Show rows with values that** field to view and select the appropriate condition for your sort.



3. Type the text for your filter.
4. Click the down arrow for the **And** field to select the **And** or the **Or** option.
5. Type text for your second filter.

   Note: You can leave this field blank.

6. Click the **Filter** or **Clear Filter** button to apply or discard your filter options.

Clear Existing Filters

Once a filter is selected, only data that matches the filter is displayed. The funnel button in the column heading will change color to indicate that a filter is applied. A filter will be cleared if you click a different list button.

1. Click the **Filter** button.
2. Click **Clear Filter** button to discard your filter options and display all list results.

Grouped By Function

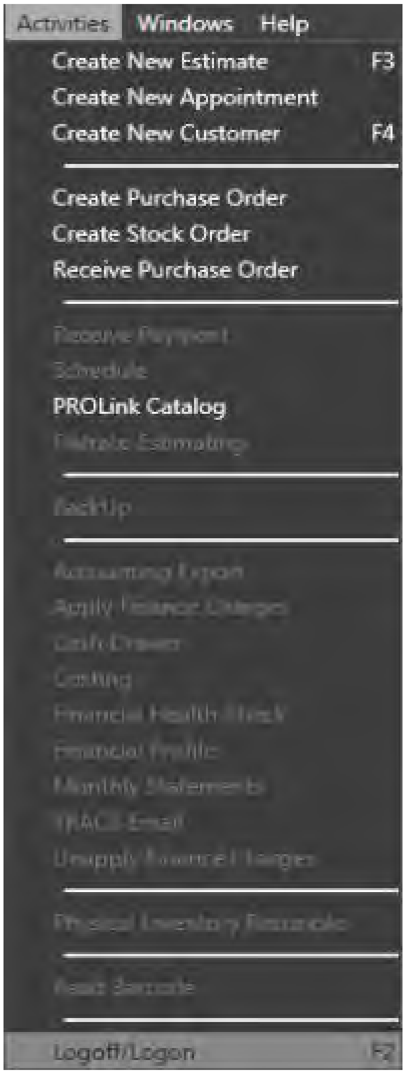
Use the Grouped By function to change your display by selecting and dragging individual columns to the top of the screen, thus creating groups of data. You can collapse or expand each row to view additional details. The Grouped By function is helpful when you want to analyze data based on one criteria such as a city or shop name. Include additional columns to your grouping to further define results. Use the Group by function with Employee, Pricing Profiles and Vendor lists.

1. Click and hold your left mouse button on the column you want to group, then drag the column name to the screen header area.

2. Release the left mouse button to drop the column name in the screen header area.
3. Click the small up or down arrows to expand or collapse a Group.
4. Click the **X** symbol to remove the column from the grouping.

Logging Out of NAPA TRACS

Select **Logoff/Logon** from the **Activities** menu or press **F2** to log out of NAPA TRACS.



The NAPA TRACS Logon window appears.

Notes: Make sure you save any open work before you log out of NAPA TRACS. Security must be enabled in order to log out of TRACS.

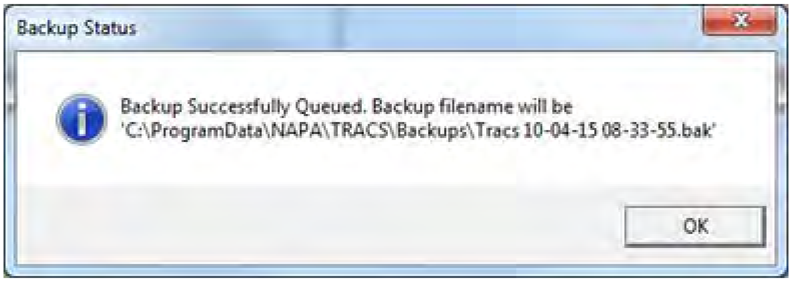
Backing Up the NAPA TRACS System

This topic explains how to back up your the NAPA TRACS system files.

Perform a Backup of the NAPA TRACS System

1. From the TRACS **File** menu select **Backup**.

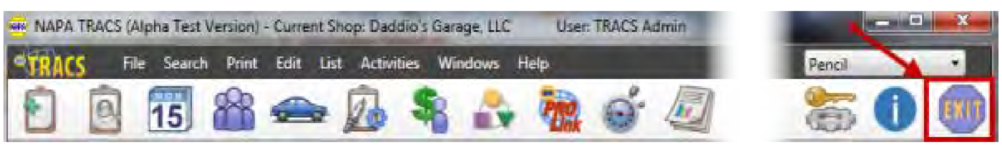
The **Backup Status** window appears.



2. Click the **OK** button.
3. The system saves the backup file in the format, "Tracs xx-xx-xx xx-xx-xx.bak." The first xx-xx-xx is the month, date, and year, and the second xx-xx-xx is the hour, minutes, and seconds when the backup was created.

Exiting NAPA TRACS

Click the **Exit** icon or select **Exit** from the **File** menu to close NAPA TRACS.



Note: Make sure you save any open work **before** you exit NAPA TRACS.

Importing Parts from an Excel Spreadsheet

NAPA TRACS enables you to import an Excel spreadsheet from your vendors which contains part information such as manufacturer, part number, description and more.

To import an Excel spreadsheet:

1. Select **File > Import** from the command bar. The **Part Import** window appears.
2. Click the **Browse** button to display Windows Explorer.
3. Locate and double-click on the Excel file.

4. Click the **Import** button on the TRACS Rail.
5. Click the **Done** button.

Chapter 2 TRACS Settings

Creating or Modifying Settings

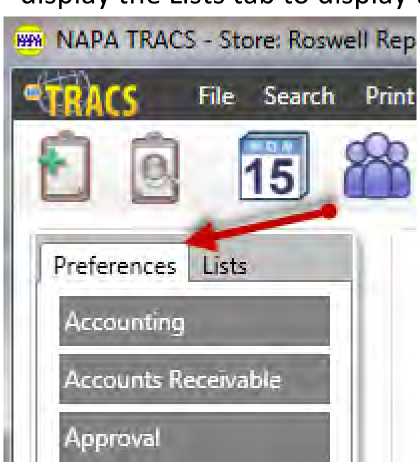
The **Preferences** and **Lists** settings represent two major components of the NAPA TRACS application. Use these settings to enter data and make selections that control how the NAPA TRACS application performs when entering orders, pricing items, labor and billing.

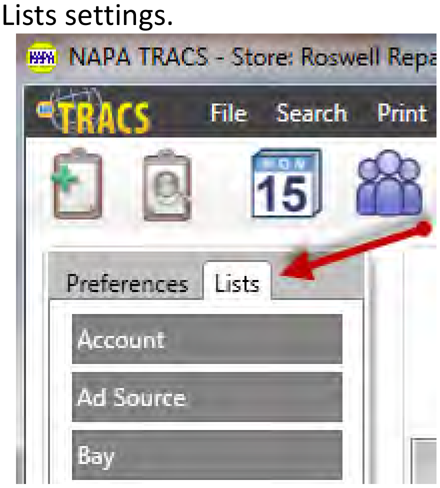
Note: Some items in **Preferences** and **Lists** impact one specific store; while others are global settings that are universal for all of the shops you manage.

Working with Settings

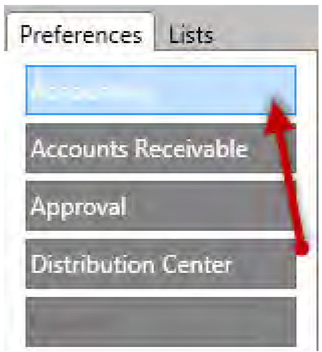
1. Click the **Settings** (Key and Gear) icon in the upper right corner.

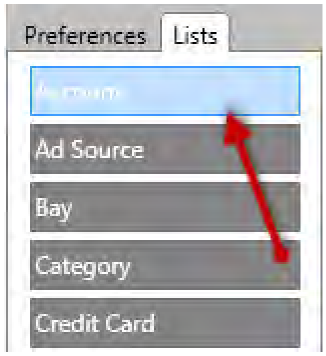
2. Click the **Preferences** tab to display the Preferences settings or click the **Lists** tab to display the Lists tab to display the Lists settings.





3. Click a button from the **Preferences** or **Lists** tabs. The button changes color when selected.





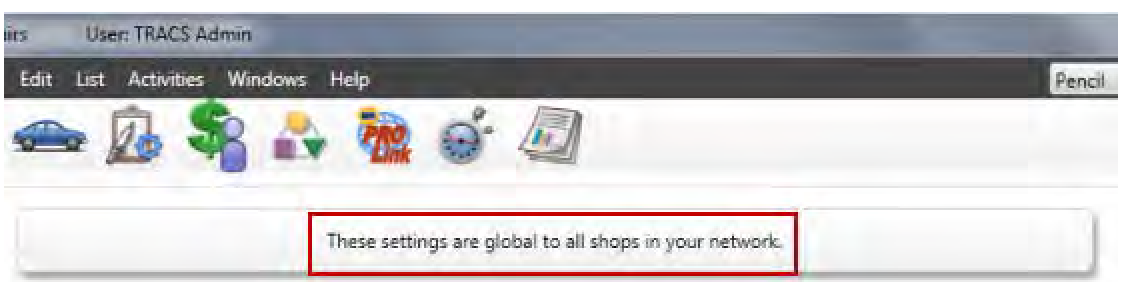
Global and Location Specific Settings

The NAPA TRACS multi-shop environment enables you to manage several different locations. In some cases there are lists or preferences settings applicable to more than one shop; while others apply to only one shop.

Global settings means that anything you enter or select is applied across all locations managed by NAPA TRACS. A location specific setting means you can pick and choose which settings apply to only one location to determine what is displayed. This flexibility allows you to apply different policies, such as approvals, to different locations; or identify and name specifics for your service bays.

The individual preferences or lists settings at the top of the page indicate if a setting is global or specific to a particular shop location.

The following example shows how settings appear when they are global. You do not have the ability to select a specific shop.



Location Specific Preferences and Lists Settings

The following example shows the ability to select one specific shop location.

The following example shows the ability to select one specific shop location or all the shop locations managed by your NAPA TRACS application.

Chapter 3 TRACS Preferences

Accounting Preference Settings

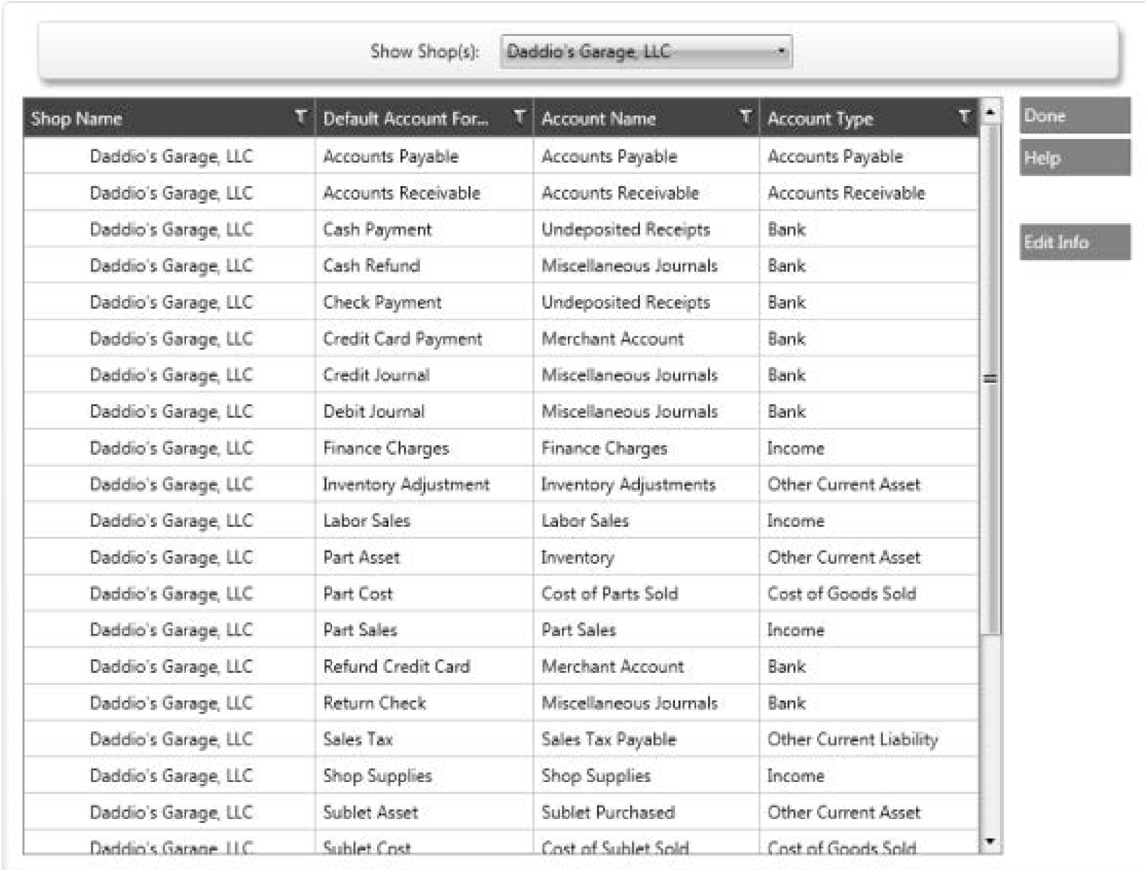
The **Accounting** preference displays a table containing default account information. You can associate the preferences of an account name to an account type. The table also displays the relationship between the common account names in QuickBooks™ and their default account types in your TRACS software. It is usually not necessary to add or edit this information.

Access Accounting Preference Settings

To access the **Accounting** preference settings:

1. Click the **Settings (Gear and Key)** icon.
2. Click the **Preferences** tab.
3. Click the **Accounting** button.

The table of accounts information is displayed.



Shop Name	Default Account For...	Account Name	Account Type
Daddio's Garage, LLC	Accounts Payable	Accounts Payable	Accounts Payable
Daddio's Garage, LLC	Accounts Receivable	Accounts Receivable	Accounts Receivable
Daddio's Garage, LLC	Cash Payment	Undeposited Receipts	Bank
Daddio's Garage, LLC	Cash Refund	Miscellaneous Journals	Bank
Daddio's Garage, LLC	Check Payment	Undeposited Receipts	Bank
Daddio's Garage, LLC	Credit Card Payment	Merchant Account	Bank
Daddio's Garage, LLC	Credit Journal	Miscellaneous Journals	Bank
Daddio's Garage, LLC	Debit Journal	Miscellaneous Journals	Bank
Daddio's Garage, LLC	Finance Charges	Finance Charges	Income
Daddio's Garage, LLC	Inventory Adjustment	Inventory Adjustments	Other Current Asset
Daddio's Garage, LLC	Labor Sales	Labor Sales	Income
Daddio's Garage, LLC	Part Asset	Inventory	Other Current Asset
Daddio's Garage, LLC	Part Cost	Cost of Parts Sold	Cost of Goods Sold
Daddio's Garage, LLC	Part Sales	Part Sales	Income
Daddio's Garage, LLC	Refund Credit Card	Merchant Account	Bank
Daddio's Garage, LLC	Return Check	Miscellaneous Journals	Bank
Daddio's Garage, LLC	Sales Tax	Sales Tax Payable	Other Current Liability
Daddio's Garage, LLC	Shop Supplies	Shop Supplies	Income
Daddio's Garage, LLC	Sublet Asset	Sublet Purchased	Other Current Asset
Daddio's Garage, LLC	Sublet Cost	Cost of Sublet Sold	Cost of Goods Sold

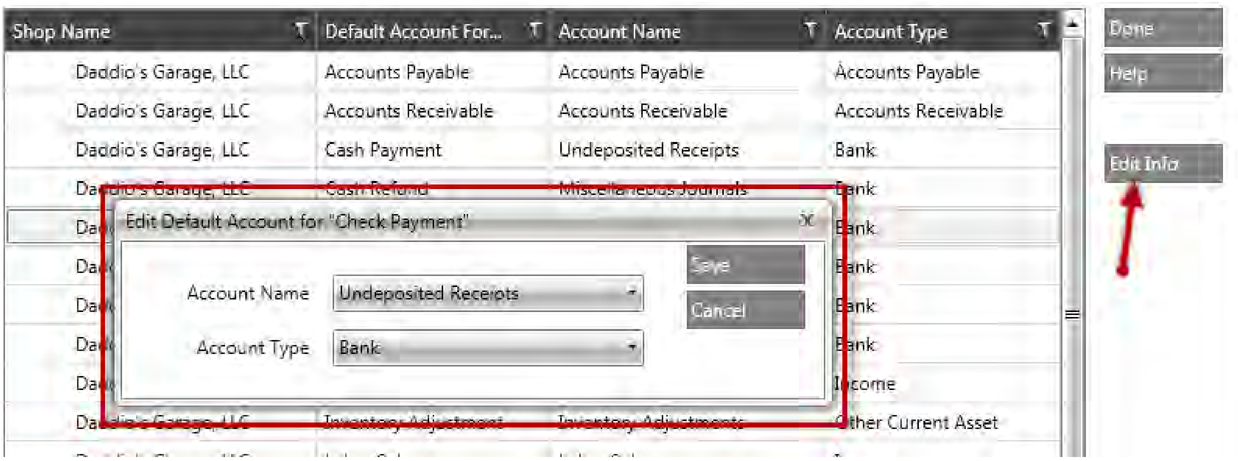
4. Select the shop from the Shop Selection box..

Show Shop(s) Sample Only

Editing Accounting Configuration

To edit the accounting configuration:

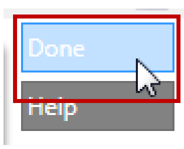
1. Click to highlight the account to edit from the list.
2. Click **Edit Info** button to display the **Edit Default Account** dialog box.



3. Click the **Account Name** option to change the current account name.
4. Click the **Account Type** option to change the current account type.
5. Click the **Save** or **Cancel** button to save or discard your accounting changes.

Saving Accounting Preference Settings

Click **Done** to save your changes and close the Accounting preferences task.



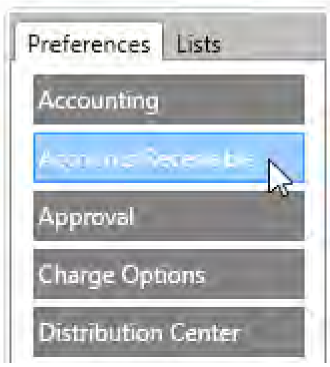
Accounts Receivable Preference Settings

Use the **Accounts Receivable** preference settings to customize customer accounts and generate statements. You can also define options controlling finance charges, grace periods, and other settings that affect your customer billing.

Accessing Accounts Receivable Preference Settings

To access the **Accounts Receivable** preference settings:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Preferences** tab.
3. Click the **Accounts Receivable** button.



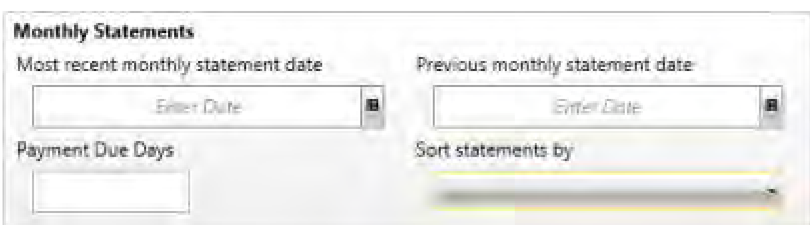
4. Click the **Shop Selection** box and select a shop.

Show Shop(s) Sample Only

Reviewing Accounts Receivable Fields

The **Accounts Receivabl**e screen has many fields allowing you to setup and maintain your shop accounts. Use the scroll bar to display all the options on the **Accounts Receivable** screen.

Monthly Statements Section:

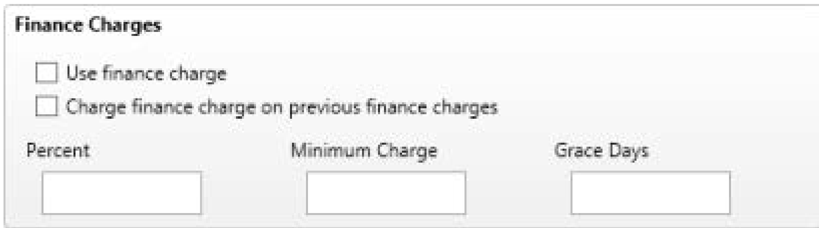


Use the **Most recent monthly statement date** and **Previous monthly statement date** fields to set date ranges for generating statements.

Payment Due Days - The number of days a customer has to pay their bill before finance charges are applied.

Sort statements by - Used to sort statements by customer name or zip code when a statement is printed.

Finance Charges Section:



Use Finance Charge - Check this box to calculate finance charges.

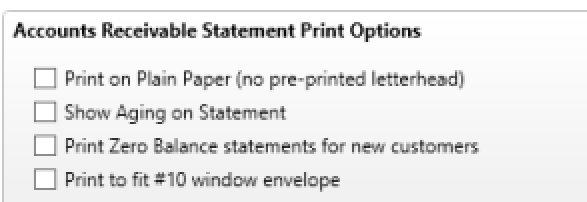
Charge finance charge on previous finance charges - Check this box to include previous finance charges in the current accounts receivable statement.

Percent - The finance charge percentage you wish to use.

Minimum Charge - The lowest finance charge a customer can receive regardless of account balance.

Grace Days - The number of days you will extend the payment due date before assessing finance charges.

Accounts Receivable Statement Print Options Section:



Print on Plain Paper (no pre-printed letterhead) - Used to print statements on plain paper.

Show Aging on Statement - Used to include past activity on statements.

> **Note:** Selecting this option can result in very long statements.

Print Zero Balance statements for new customers - Used to print statements for new customers who have a zero balance.

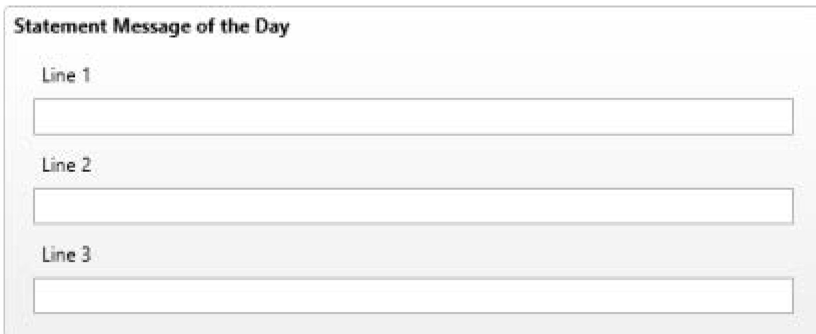
Print to fit #10 window envelope - Used to print customer names and addresses in a specific part of the statement so it can be viewed through an envelope window.

Receipt Print Options Section:

Print on Plain Paper (no pre-printed letterhead) - Used to print receipts on plain paper.

Prompt for receipt on payment - Prompts you to print a receipt at the time of payment.

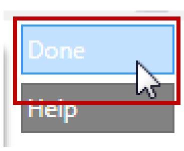
Statement Message of the Day Section:



Lines 1, 2, and 3 - Enter text to represent information you want displayed on a statement or receipt.

Saving Accounts Receivable Preference Settings

Click the **Done** button to save your changes and close the Accounts Receivable preferences task.



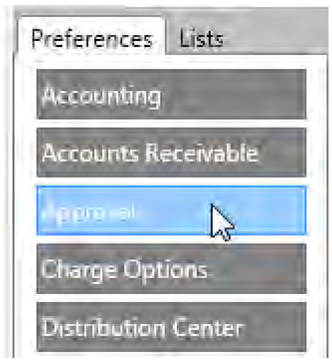
Approval Preference Settings

Use the **Approval** preference setting to protect your customer and service writer by setting price limits on the amount a work order can exceed an estimate before you must receive approval from the customer. You can set limits to a percentage or an actual dollar amount. An on-screen warning alerts you when a limit is exceeded.

Accessing Approval Settings

To access **Approval** settings:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Preferences** tab.
3. Click the **Approval** button.

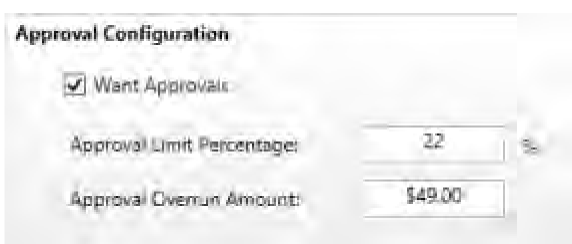


4. Use the **Shop Selection** box to select the shop you want to set Approval preferences.

Show Shop(s) Sample Only

Setting Approval Preferences

1. Click the **Want Approvals** check box to enable the approval options.
2. Enter a number in the **Approval Limit Percentage** field or type in a dollar value in the **Approval Overrun Amount** field to set the approval limit.



Saving Approval Preference Settings

Click the **Done** button to save your changes and close the Approval preferences task.

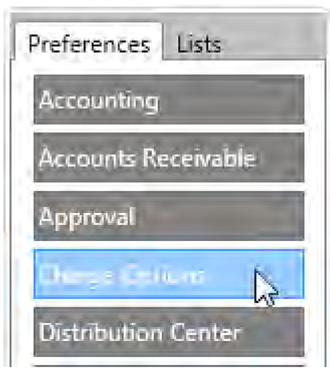
Charge Options Preference Settings

Use the **Charge Options** preference setting to copy vehicle repair related charges to a Purchase Order.

Accessing the Charge Options Preference Settings

To access the **Charge Options** preference settings:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Preferences** tab.
3. Click the **Charge Options** button.



The **Charge Options** screen appears.

Charge	Description	Copy to PO
AF	ANTIFREEZE	☑
CORE	Core Charge	☑
DEX	DEXCOOL	☑
DF1C	1% NC DISPOSAL FEE	☑
DF2C	2% NC DISPOSAL FEE	☑
FET	Federal Excise Tax	☑
INCB	INSTALL & COMPUTER BALANCE	☑
LOC	LABOR ON OIL CHANGE	☑
STEM	VALVE STEM	☑

Editing a Charge Options List Entry

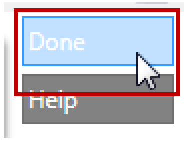
Note: You can edit a charge from the **Items > Charges** screen.

Deleting a Charge Options List Entry

Note: You can delete a charge from the **Items > Charges** screen.

Exiting the Charge Options Preference Settings

Click the **Done** button to close the Charge Options preference screen.



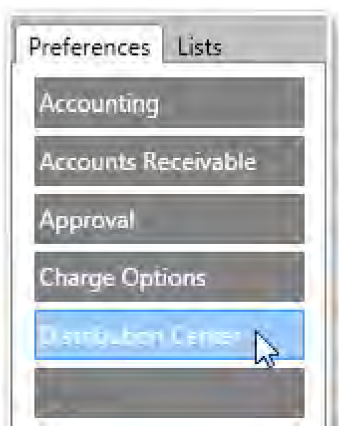
Distribution Center Preference Settings

Use the **Distribution Center** preference settings to select the NAPA distribution center warehouse that ships your parts.

Accessing Distribution Center Settings

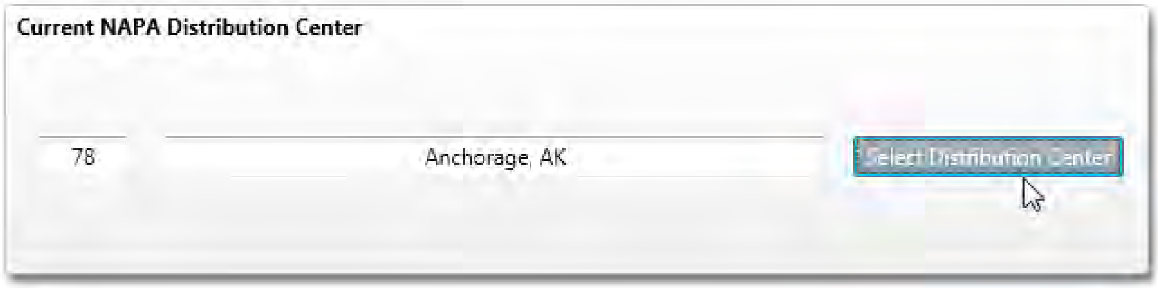
To access the **Distribution Center** settings:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Preferences** tab.
3. Click the **Distribution Center** button.

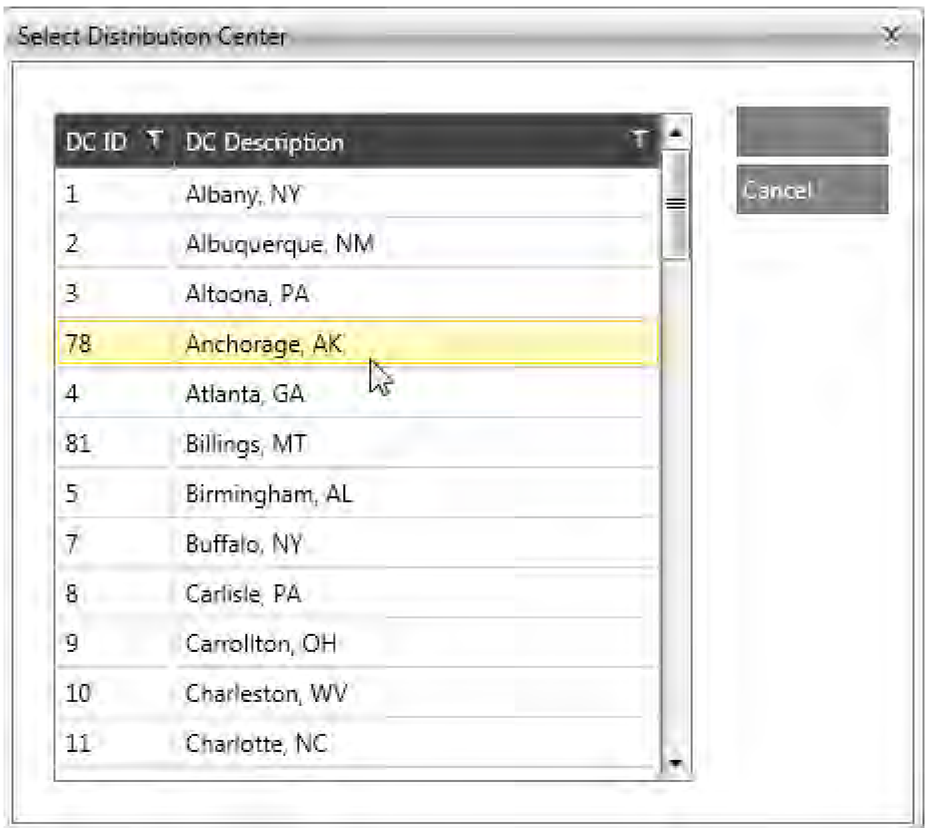


4. Use the **Shop Selection** box to select the shop.

5. Click the **Select Distribution Center** button.



6. Choose a distribution center from the **Select Distribution Center** window.



7. Click **Save**. The window closes.

Saving Distribution Center Preference Settings

Click the **Done** button to close the Distribution Center preferences window.

Exports Preference Settings

The Exports preference setting functionality available in future release of NAPA TRACS

Use the **Exports** preference setting to identify a path for exporting TRACS information. You can export accounting information to Quickbooks™, an optional accounting package used in the industry. You can export customer mailing lists to Microsoft Word™, another optional package. You also can specify where to export mailing information. You can send notices of special offerings or services to your customers using this information.

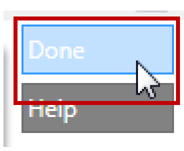
Accessing the Exports Preference Settings

To access the **Exports** settings:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Preferences** tab.
3. Click the **Exports** button.

Saving Exports Preference Settings

Click the **Done** button to save your changes and close the Exports preference window.



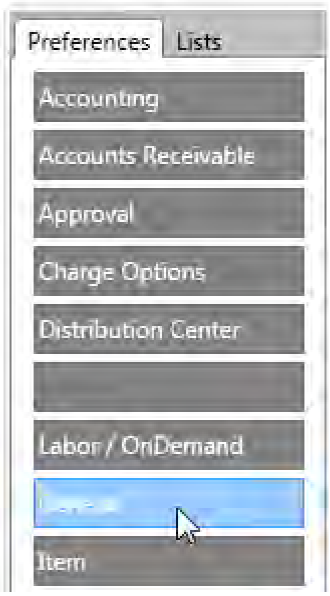
General Preference Settings

Use the **General** preference settings and the corresponding **Shop Information** and **Email** tabs to set preferences for your shop.

Access General Preference Settings

To access **General** preference settings:

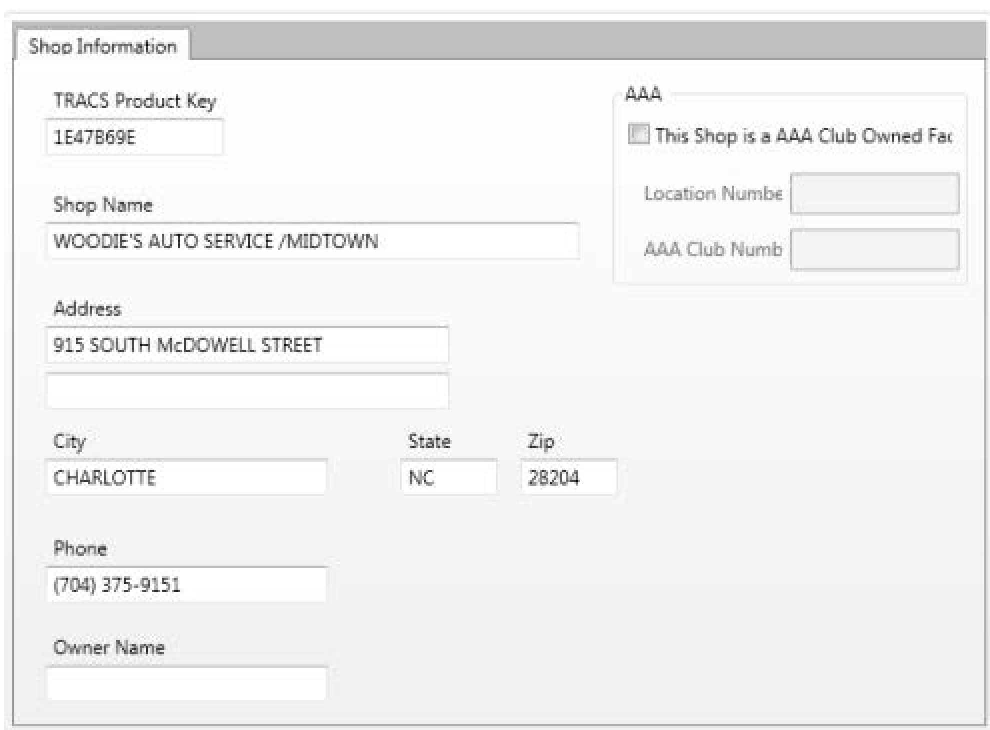
1. Click the **Settings** (Gear and Key) icon.
2. Click the **Preferences** tab.
3. Click the **General** button.



4. Use the **Shop Selection** box to select the shop.

Show Shop(s) Sample Only

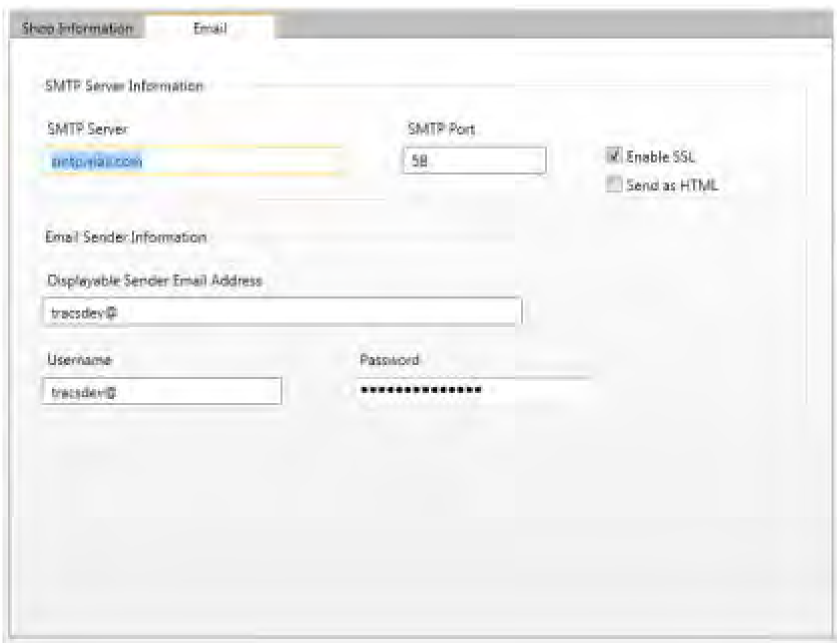
Shop Information Tab



1. Enter your **TRACS Product Key** or verify that the code entered is accurate.
2. Type in your shop information in the fields provided.
3. Click the **This business must collect and track the Virginia Repair Tax** check box, if applicable.

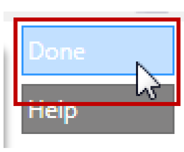
Email Tab

Use the **Email** tab to enter settings for the SMTP mail server and email sender information. You can select to send the email in HTML format.



Saving General Preference Settings

Click the **Done** button to save your changes and close the general preferences task.



Item Preference Settings

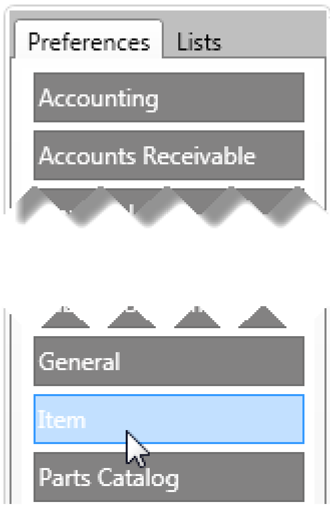
Use the **Item** preference settings to control which fields appear when you display a list of items.

Accessing Item Settings

To access **Item** preference settings:

1. Click the **Settings** (Gear and Key) icon.

2. Click the **Preferences** tab.
3. Click the **Item** button.

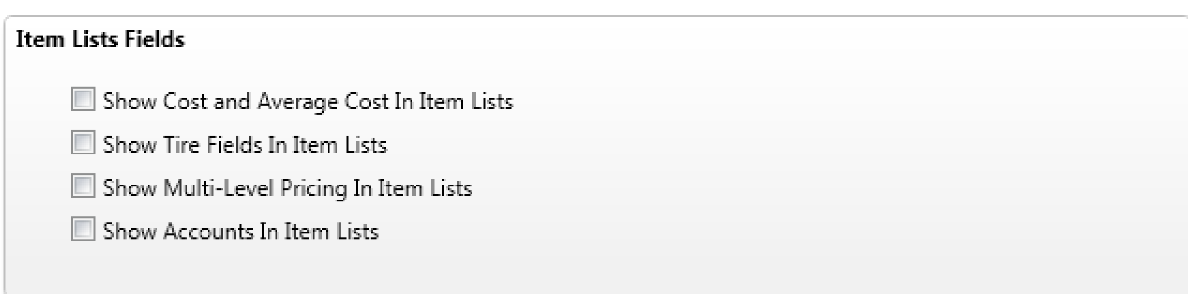


4. Use the **Shop Selection** box to select the shop.

Select Item Lists Fields

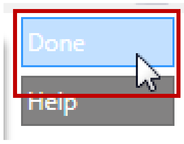
Click to select on or more of the following options:

- Show Cost and Average Cost in Item Lists
- Show Tire Fields in Item Lists
- Show Multi-Level Pricing in Item Lists
- Show Accounts in Item Lists



Saving Item Preference Settings

Click the **Done** button to save your changes and close the Item preferences task.



Mitchell ProDemand Preference Settings

Use the **Mitchell ProDemand** preference settings to control login information and the notes that will be copied to work orders.

Accessing Mitchell ProDemand Settings

To access **Mitchell ProDemand** preference settings:

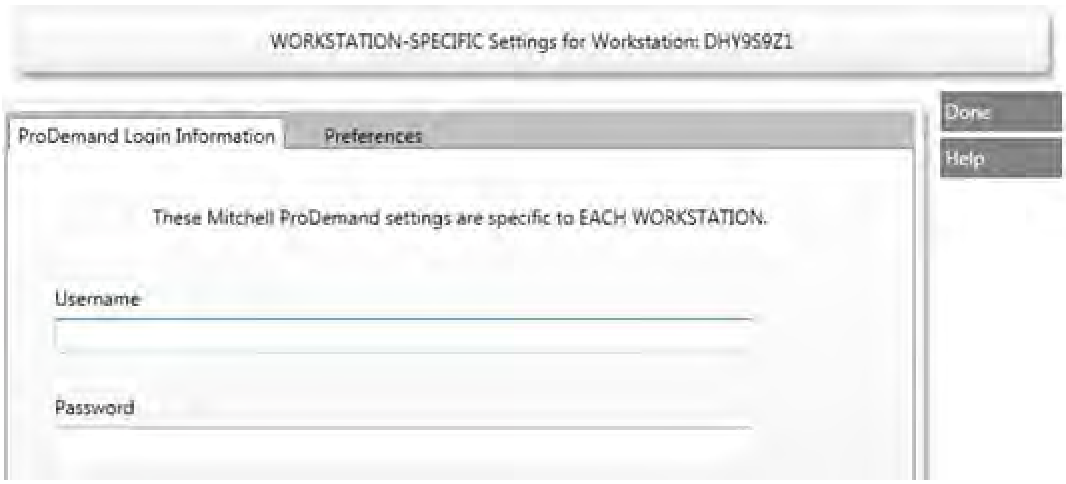
1. Click the **Settings** (Gear and Key) icon.
2. Click the **Preferences** tab.
3. Click the **Mitchell ProDemand** button.

4. Use the **Shop Selection** box to select the shop.

Add ProDemand Login Information

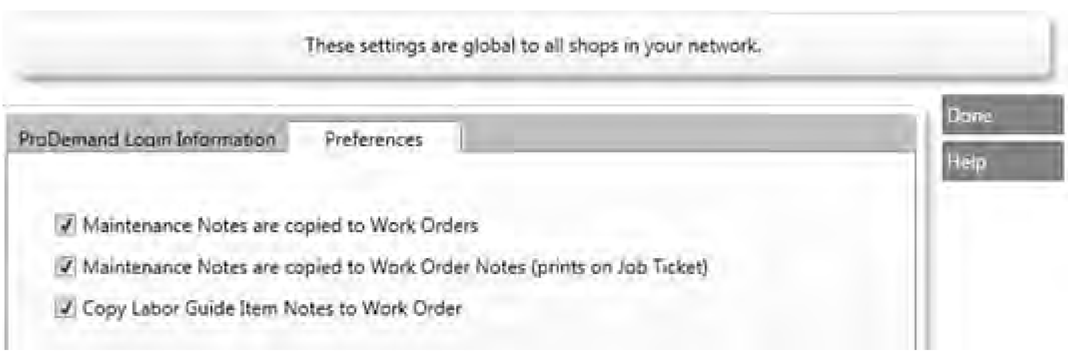
To add ProDemand login information for a specific workstation:

1. Click the **ProDemand login Information** tab to view settings.
2. Enter a user name and password.



Select Preferences Options

1. Click the **Preferences** tab.
2. Check a check box to select one or more of the following options:
    - Maintenance Notes are copied to Work Orders
    - Maintenance Notes are copied to Work Order Notes (prints on Job Ticket)
    - Copy Labor Guide Item Notes to Work Order



Saving Mitchell ProDemand Preference Settings

Click the **Done** button to save your changes and close the **Mitchell ProDemand** preferences task.

Parts Catalog Preference Settings

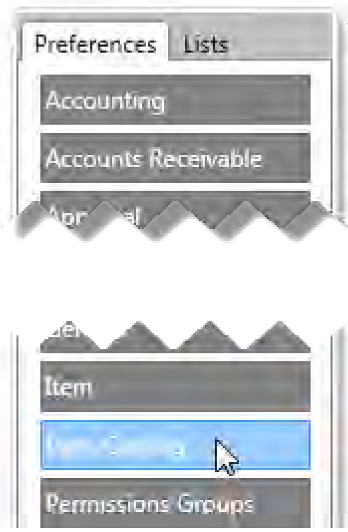
Use the **Parts Catalog** preference settings to define the location settings for your NAPA Parts Catalog. These preferences are very important to the proper operation of the system, and will be helpful later when you work with estimates and work orders to provide your customers with the most current and accurate costs.

Note: The PROLink Catalog replaces the local parts catalog in previous versions of NAPA TRACS.

Accessing Parts Catalog Preference Settings

To access the **Parts Catalog** preference settings:

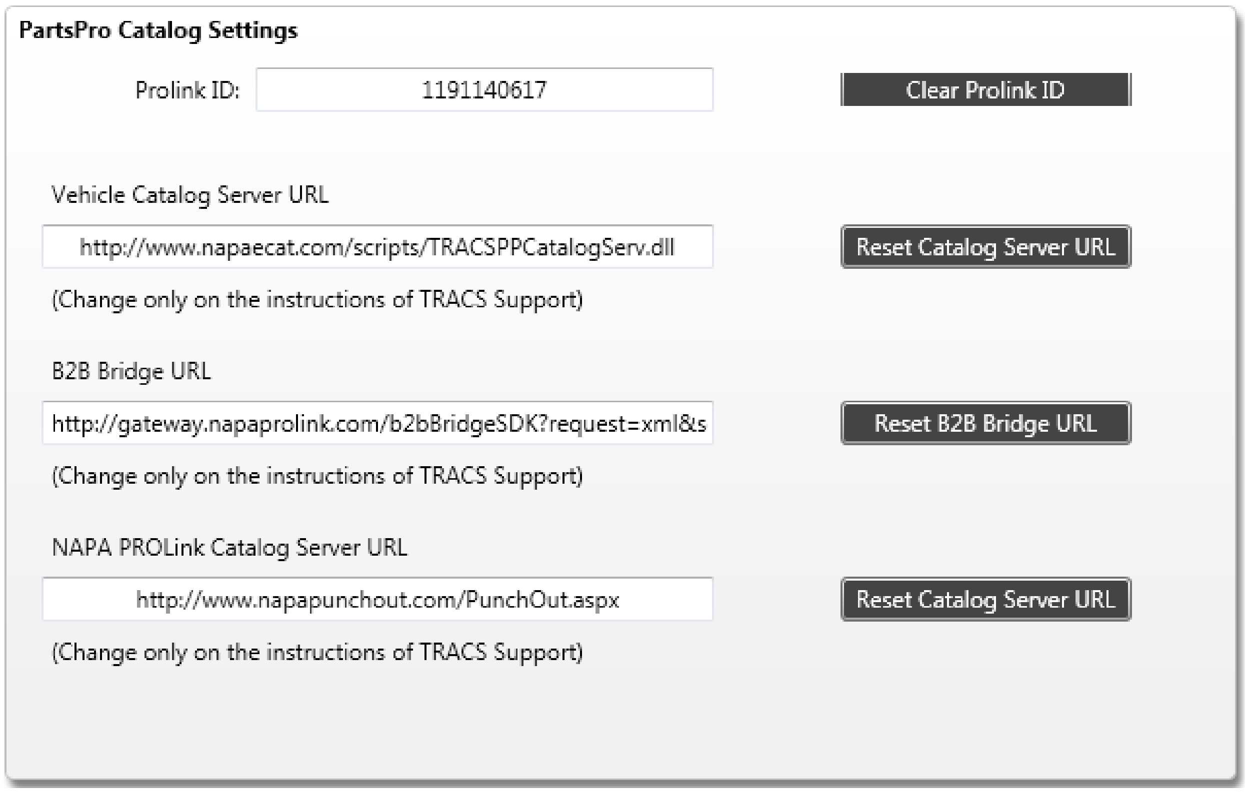
1. Click the **Settings** (Gear and Key) icon.
2. Click the **Preferences** tab.
3. Click the **Parts Catalog** button.



4. Use the **Shop Selection** box to select the shop.

Set PartsPro Catalog Settings Preferences

Note: Ask your NAPA TRACS support agent before changing any of these settings.



- **Prolink ID** field - The Pro Link ID set during the software registration process.
- **Vehicle Catalog Server URL** field - The vehicle catalog server URL set during the software installation process.
- **B2B Bridge URL** field - The B2B bridge URL set during the software installation process.
- **NAPA PROLink Catalog Server URL** field - The NAPA PROLink catalog server URL set during the software installation process.

Saving the Parts Catalog Preference Settings

Click the **Done** button to save your changes and close the Parts Catalog preferences task.

Purchasing Preference Settings

Use the **Purchasing** preference settings to indicate how to handle purchase orders. There are three configuration options within this setting.

Accessing Purchasing Preference Settings

To access **Purchasing** preference settings:

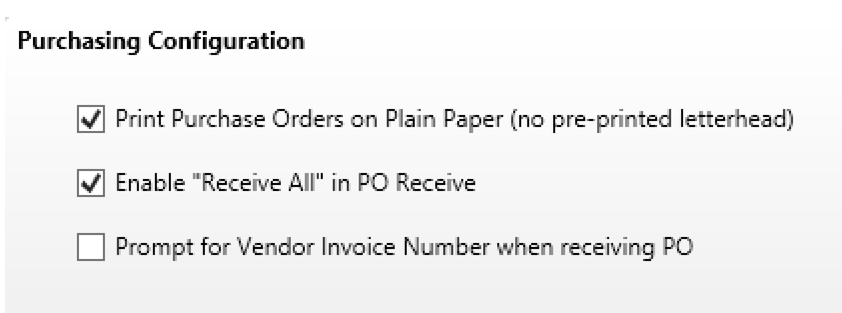
1. Click the **Settings** (Gear and Key) icon.
2. Click the **Preferences** tab.
3. Click the **Purchasing** button.

4. Use the **Shop Selection** box to select the shop.

Set Purchasing Preferences

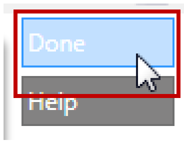
Click to select the **Purchasing Configuration** list options:

- Print Purchase Orders on Plain Paper (no pre-printed letterhead)
- Enable "Receive All" in PO Receive
- Prompt for Vendor Invoice Number when receiving PO



Saving Purchase Preference Settings

Click the **Done** button to save your changes and close the preferences task.



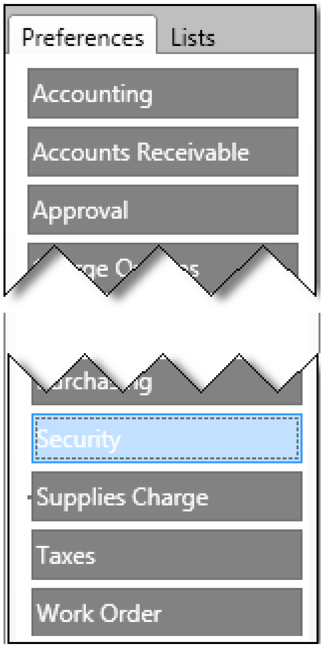
Security Preference Settings

Use the **Security** preference settings to turn security on and off and to create different security profiles called **Roles**. Permissions preferences are global and therefore apply to all shops managed by NAPA TRACS.

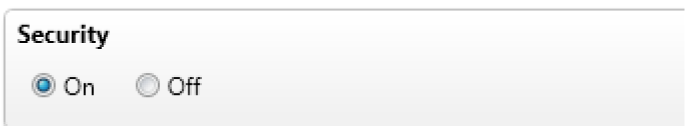
An example of a role you might create could be Technician or Manager. Once a role is created, you can set the type of capabilities and access permissions for that role. Defining roles streamlines the process of assigning specific system settings to an individual employee. When you create an employee record, you can assign one or more roles to that employee. Learn more about assigning permissions.

Accessing Security Settings

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Preferences** tab.
3. Click the **Security** button.



Set Security

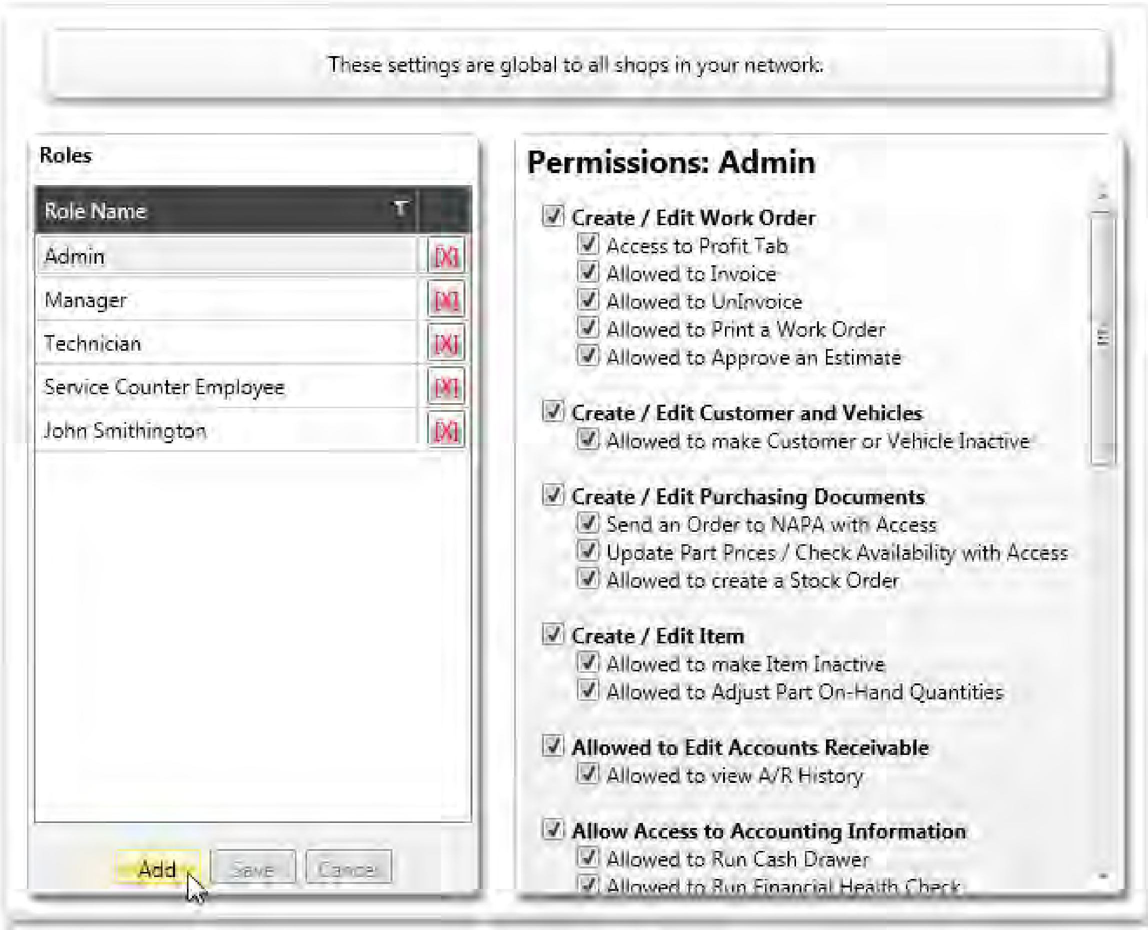


Select a radio button to turn TRACS Security **On** or **Off**.

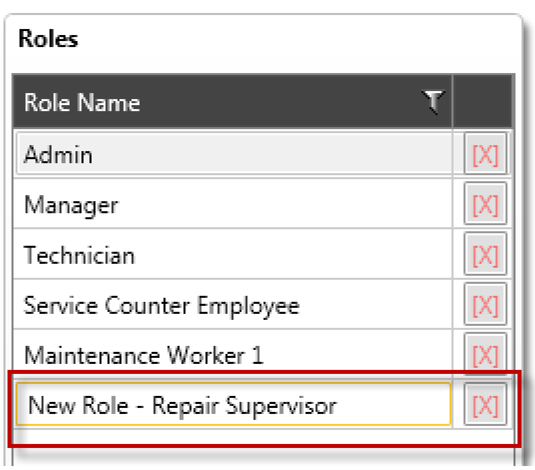
Create a Permissions Groups Role

To create permissions:

1. Click **Add** to create a new row in the **Role Name** table.



2. Enter the name of the new role.

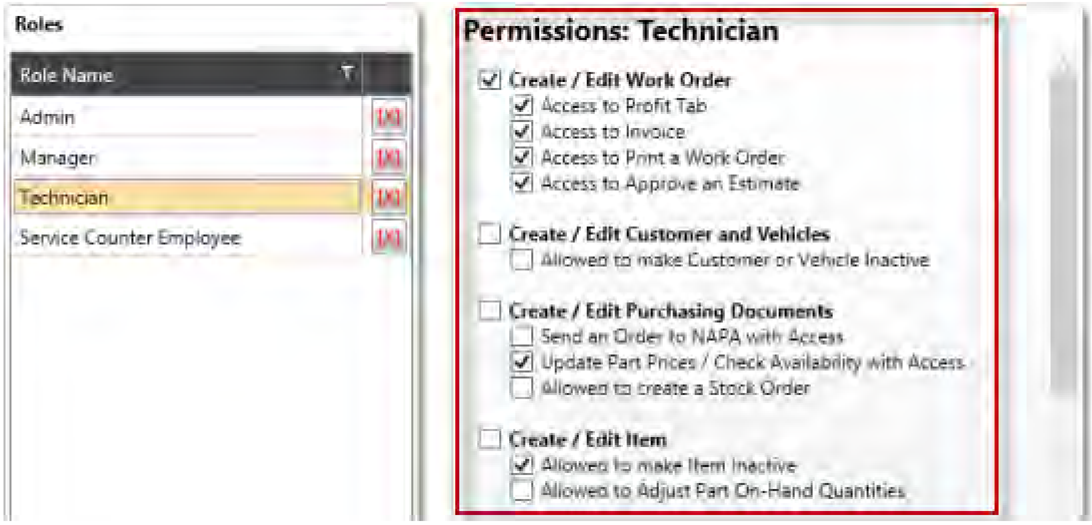


3. Click **Save** or **Cancel** to confirm or discard your entry.

Assign Permissions to a Role

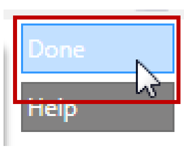
1. Click a role name from the **Role Name** list.

2. Click to select the items to assign to the role.



Saving Security Preference Settings

Click the **Done** button to save your changes and close the **Preferences** task.



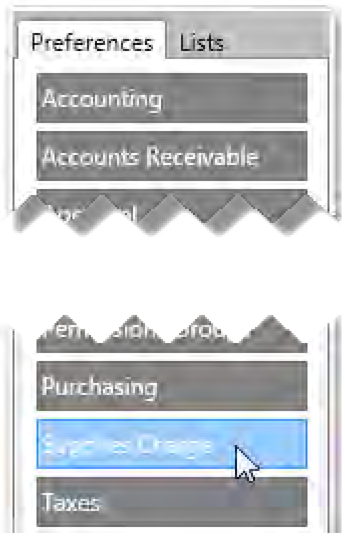
Supplies Charge Preference Settings

Use the **Supplies Charge** preference settings to determine if you want to charge for supplies, change the supplies charge name that appears on the work order, indicate a tax rate, identify if the charge will be based on labor or total, and pre-set minimum and maximum charge amounts.

Accessing Supplies Charge Settings

To access the **Supplies Charge** preference settings:

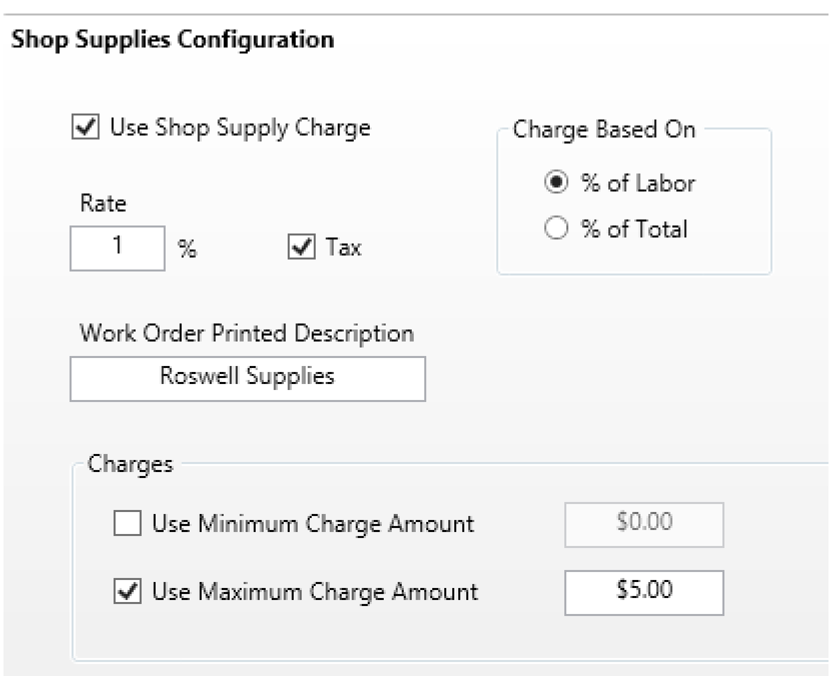
1. Click the **Settings** (Gear and Key) icon.
2. Click the **Preferences** tab.
3. Click the **Supplies Charge** button.



4. Use the **Shop Selection** box to select the shop.

Set Supplies Charge Preferences

1. Click the **Use Shop Supply Charge** check box to activate the supplies charge preference settings.



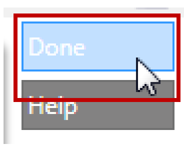
2. Enter the percentage to charge for supplies in the **Rate** field. The **Rate** field has a default value of 1%.
3. Click the **Tax** check box to charge tax on supplies. The **Tax** field is selected by default.
4. Enter a description for your supplies charge in the **Work Order Printed Description** field.

   Note: The description entered in this field will print on the work order.
5. Click either the **Use Minimum Charge Amount** or **Use Maximum Charge Amount** field in the **Charges** section.
6. Click the **% of Labor** or **% of Total** radio button in the **Charged Based on** field to indicate your preference of charging supplies based on the total amount of labor or the total amount of the work order.

   The **Charged Based on** field has a default value of **% of Labor**.

Saving Supplies Charge Preference Settings

Click the **Done** button to save your changes and close the preferences task.



Taxes Preference Settings

Use the **Taxes** preference settings to enable your business to comply the collection of various taxes for items such as labor, parts, and supplies through the use of tax classes. A tax class consists of one or more tax rules that you set up.

Note: Tax classes that are designated as tax exempt cannot be modified.

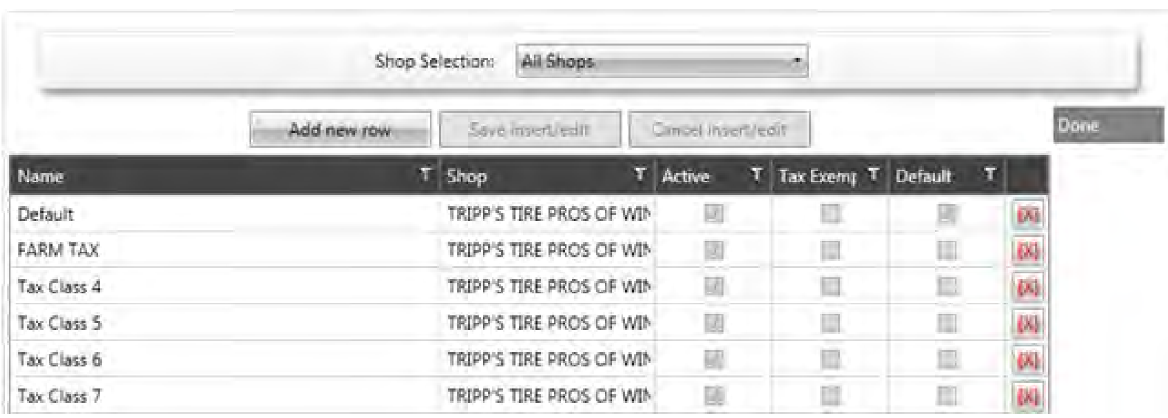
Accessing Taxes Preference Settings

To access the **Taxes** preference settings:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Preferences** tab.
3. Click the **Taxes** button.

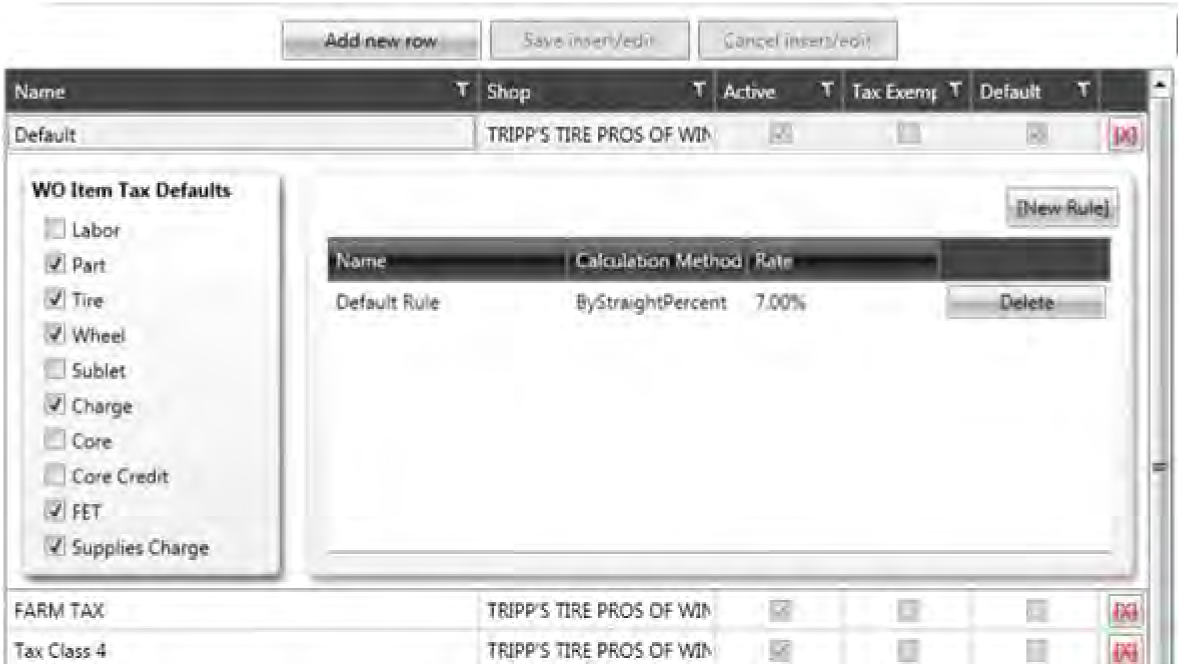
4. Use the **Shop Selection** box select a shop.

The tax class preferences screen is displayed. **All Shops** is depicted in this example.



Viewing Tax Classes

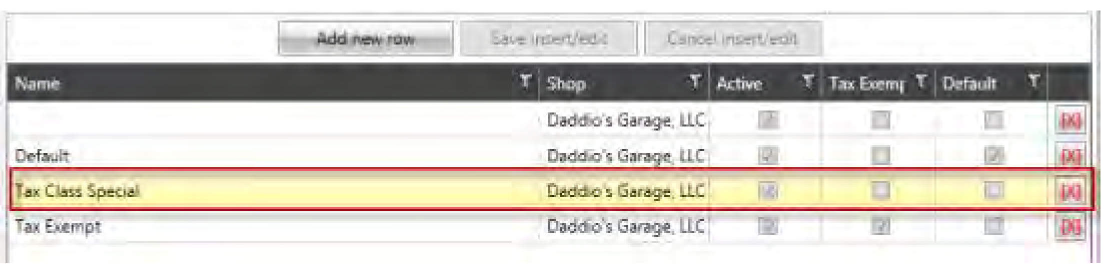
To view a tax class, click the row to view the associated tax rules.



Creating a New Tax Class

1. Select a specific shop from the **Shop Selection** box, if applicable.
2. Click the **Add new row** button to add an empty row.
3. Type a name for the tax class.
4. Click the **Save insert/edit** button.

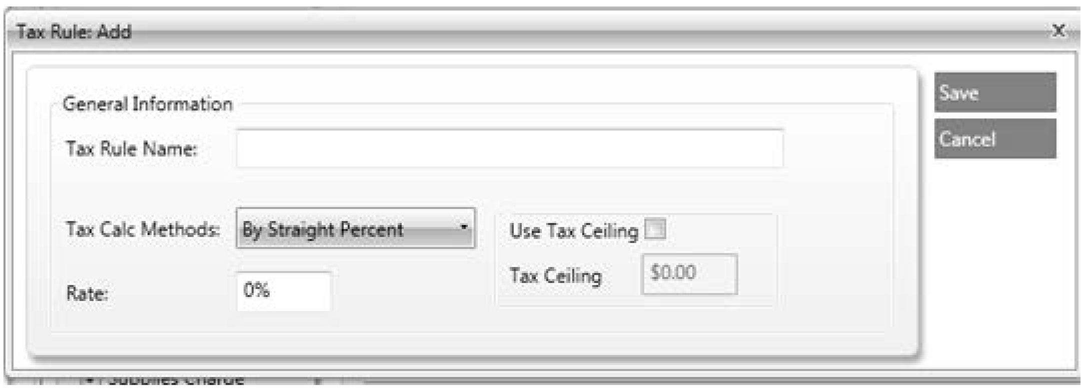
The new tax class is added alphabetically to the existing list.



Adding a New Rule to an Existing Tax Class

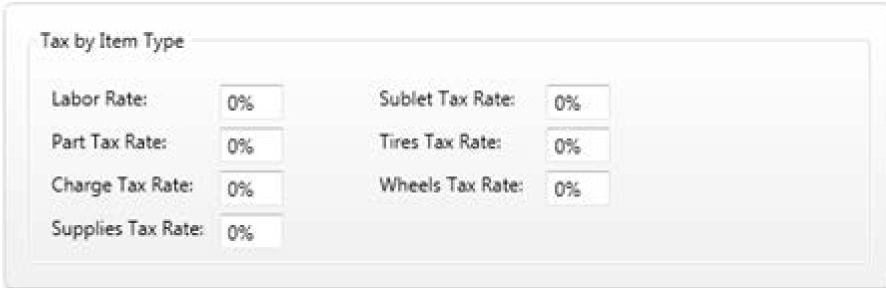
1. Select the row for the tax class.
2. Click the **New Rule** button.

The **Tax Rule: Add** window appears. The **Tax Calc Methods** field defaults to **By Straight Percent**.



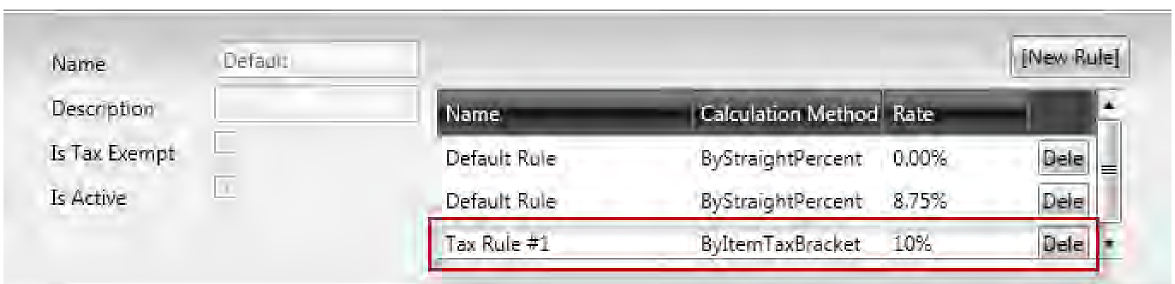
3. Type in a name for the tax rule in the **Tax Rule Name field**, and select a tax calculation method from the **Tax Calc Methods** list. Options are:
    - By Straight Percent
    - By Item Type (requires additional tax rate percentage information)
    - By Tax Bracket (requires additional tax amount information)
4. Type a rate percentage in the **Rate** field.
5. Optional, check the **Use Tax Ceiling** check box and enter a dollar amount in the **Tax Ceiling** field.
6. Specify the tax defaults in the **Tax Defaults** section.
7. Click **Save** to create the new tax rule.

Sample Tax by Item Type



Sample Tax by Brackets

The tax rule you created is added to the list.



Deleting an Existing Tax Class

1. Click the **[X]** button next to the row to delete it from the list.

Note: Deleting a tax class entry is permanent. Verify the row **before** clicking the [X] button to delete it.

Exiting Tax Preference Settings

Click the **Done** button to close the Taxes preferences task.

Work Order Preference Settings

Use the **Work Order** preference settings to control how work orders are generated and appear to your customers. You can determine general settings, create reminders and messages of the day, set print options and disclaimer information.

Accessing Work Order Preference Settings

To access **Work Order** preference settings:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Preferences** tab.
3. Click the **Work Order** button.

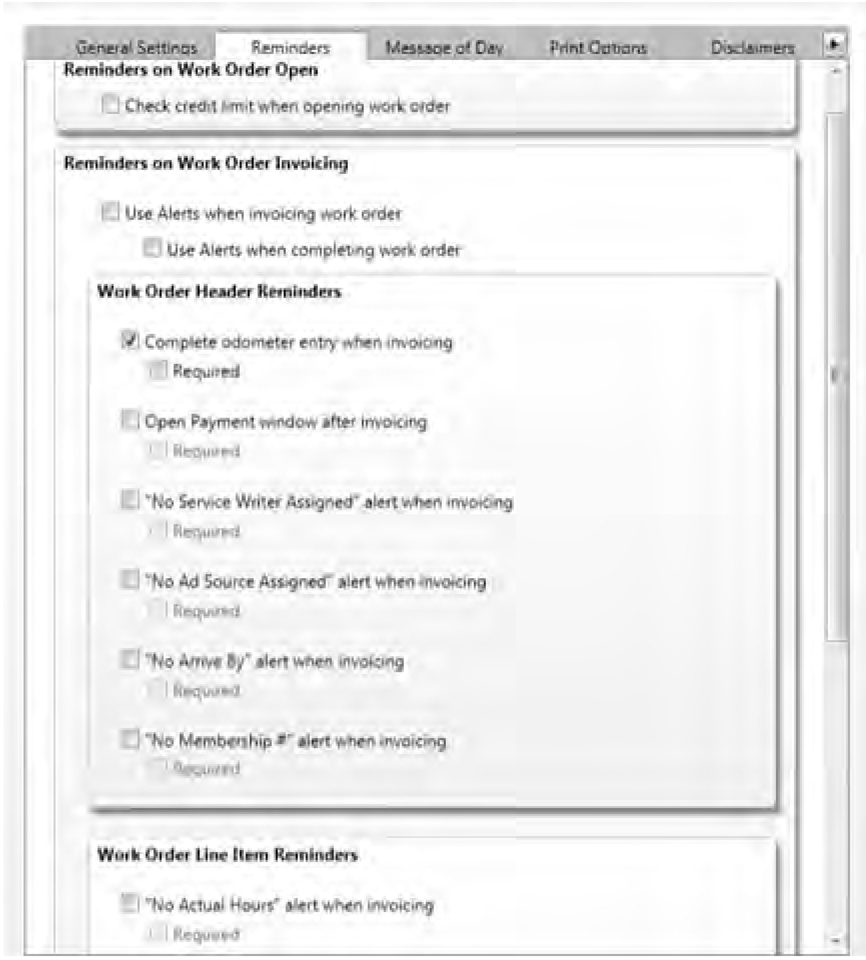
4. Use the **Shop Selection** box to select the shop.

Work Order General Settings Tab

Select and enter the **General Settings** to apply to your location(s). Use the scroll bar to view additional options.

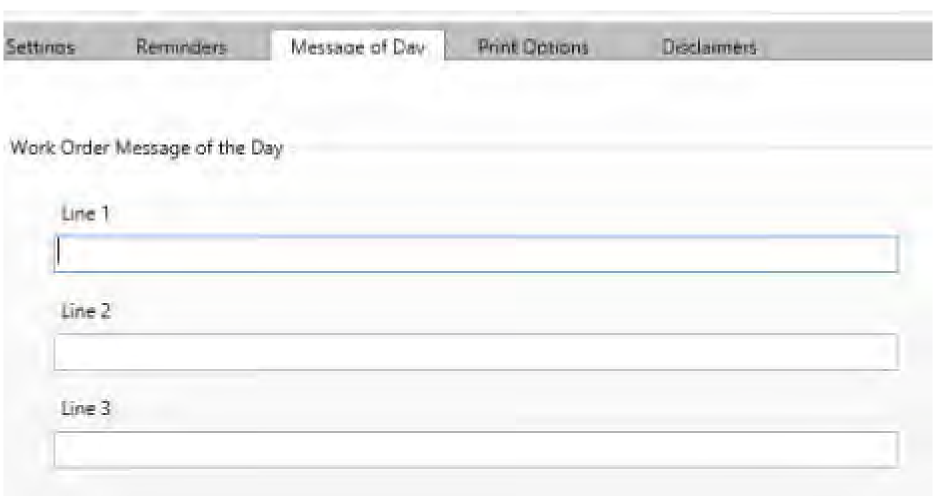
Work Order Reminders Tab

Click the check box next to the **Reminders** options you want to activate.



Work Order Message of Day Tab

Enter any text to print on the Work Order in the **Line 1**, **Line 2** and **Line 3** fields.

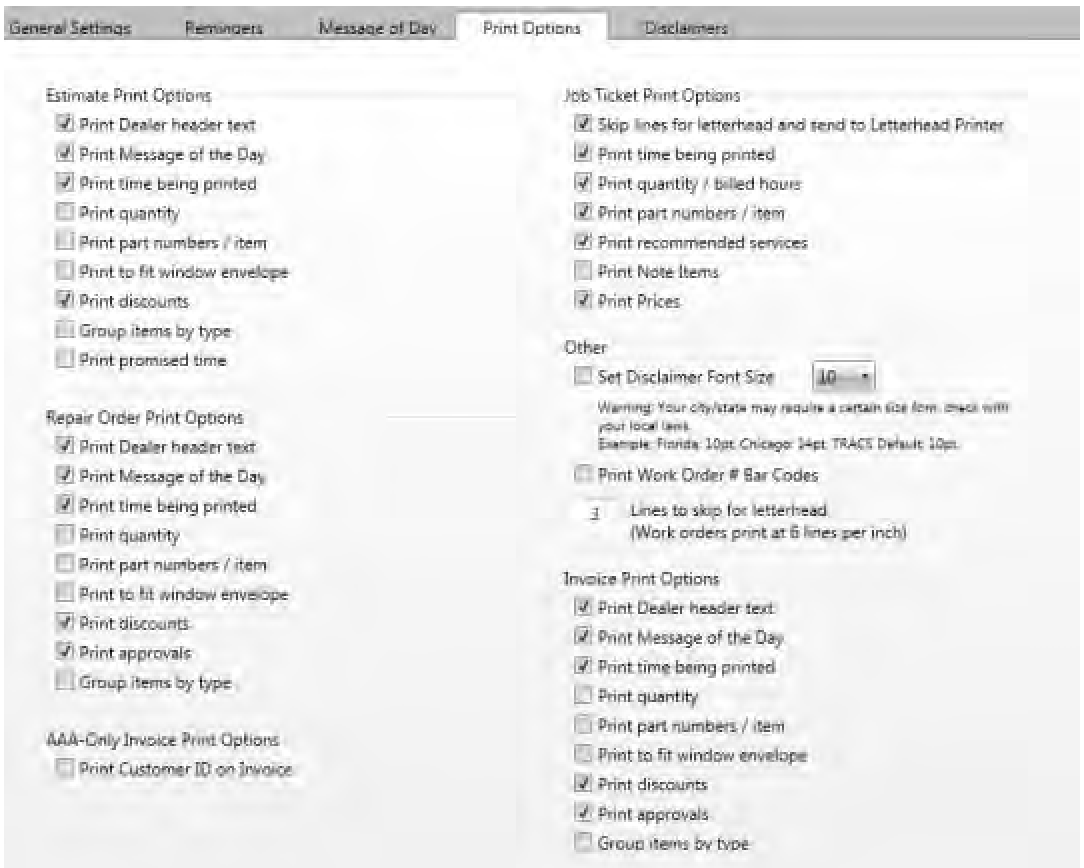


Print Message of the Day options must be selected on the **Print Options** tab to make them visible to customers.

Work Order Print Options Tab

Select and enter the print options to apply to your location(s).

Note: You can set options for your estimates, work orders, job tickets and invoices from this screen.



Set Disclaimer Font Size

1. Click the **Set Disclaimer Font Size** check box.
2. Click the down arrow to select the font size for disclaimer text.

Note: Remember to check local laws in case of a mandated font size for printed disclaimers.

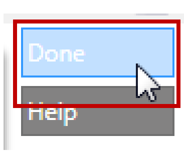
Work Order Disclaimers Tab

1. Click the **Estimate, Repair Order, Invoice** or **Job Ticket Notes** radio button to display the current disclaimer language.

2. Click the **Edit** button to change the text displayed on the screen.
3. Add, remove, or otherwise modify text for the existing disclaimer.
4. Click the **Save** button to update the disclaimer language that will print on your paperwork.

Saving Work Order Preference Settings

Click the **Done** button to save your changes and close the preferences task.



Chapter 4 TRACS Lists

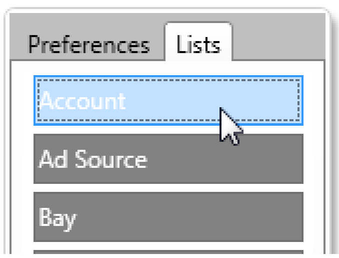
Account List Settings

Use the **Account** List settings to create a list of accounts for the shops managed by NAPA TRACS.

Accessing Account List Settings

To access **Account** list settings:

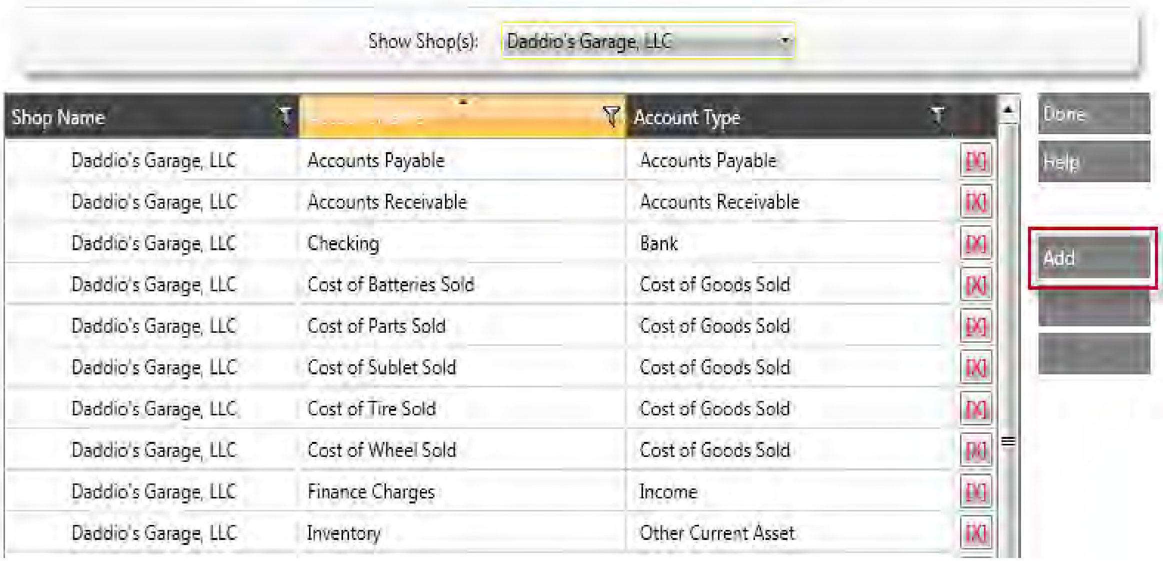
1. Click the **Settings** (Gear and Key) icon.
2. Click the **Lists** tab.
3. Click the **Account** button.



4. Use the **Shop Selection** box to select the shop.

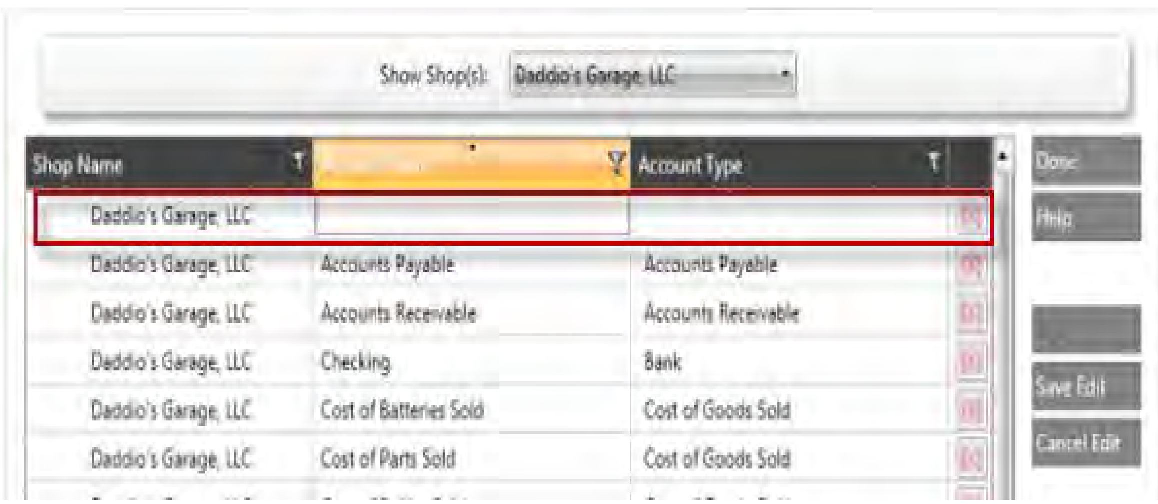
Show Shop(s) Sample Only

The list of accounts screen appears.



Creating a New Account List Item

1. Click the **Add** button.

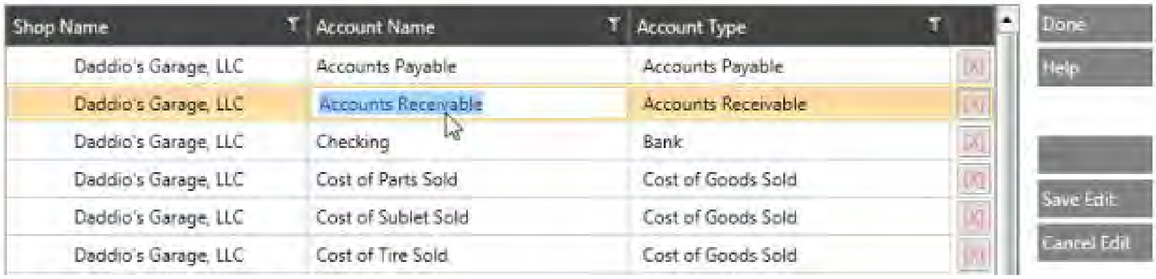


2. Enter the name of the account in the **Account Name** field.
3. Click the down arrow for the **Account Type** field, and then select an account type.
4. Repeat Steps 1 - 3 to include additional items.
5. Click the **Save Edit** button to save the entry.

Modifying an Existing Account List Entry

To modify an existing account list entry:

1. Double-click the **Account Name** field, and retype the account name information.

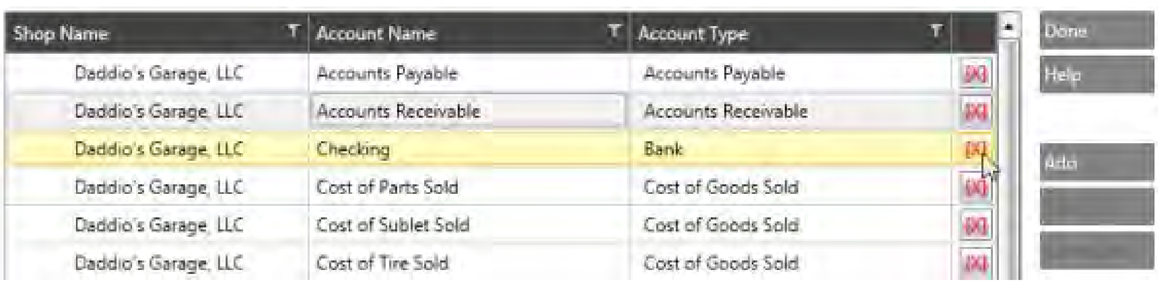


2. Click the down arrow for the **Account Type** field, and then select an account type.
3. Repeat Steps 1 and 2 to modify additional items.
4. Click the **Save Edit** button to save the edited information.

Deleting an Account List Entry

To delete an account list entry:

1. Select the account to delete.

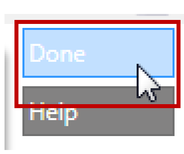


2. Click the **[X]** button next to the row to delete the entire entry.

   Note: Deleting an account is permanent. Verify the row **before** clicking the **[X]** button to delete it.

Exiting Account List Settings

Click the **Done** button to close the Account list window.



Ad Source List Settings

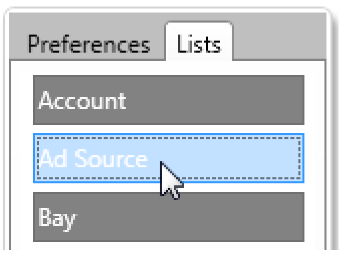
Use the **Ad Source** list settings to create a list of the advertisement or coupons. After you create the list, you can associate an ad with a work order to learn which ads are the most effective.

Note: The **Ad Source** list is global and applies to all locations managed by NAPA TRACS.

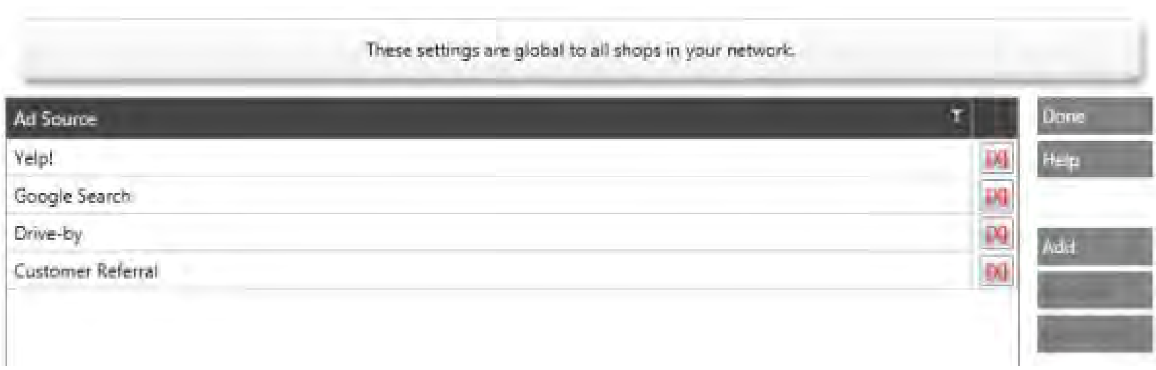
Accessing Ad Source List Settings

To access the **Ad Source** list settings:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Lists** tab.
3. Click the **Ad Source** button.

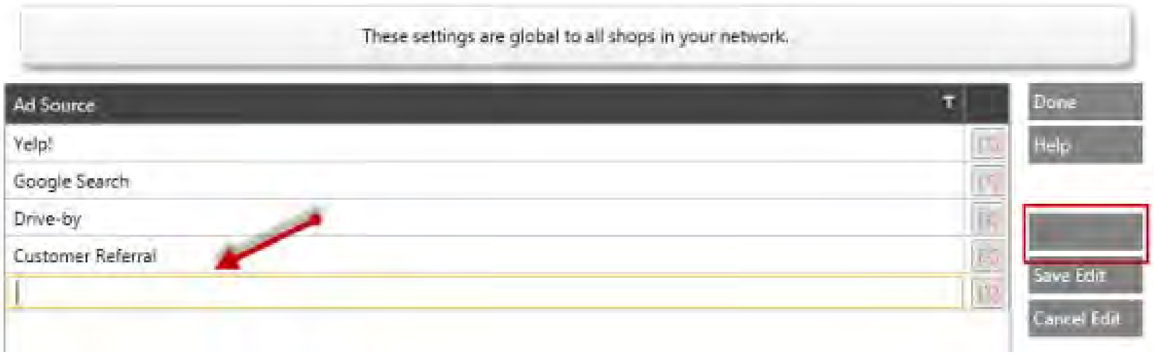


The **Ad Source** screen appears.



Creating a New Ad Source List Entry

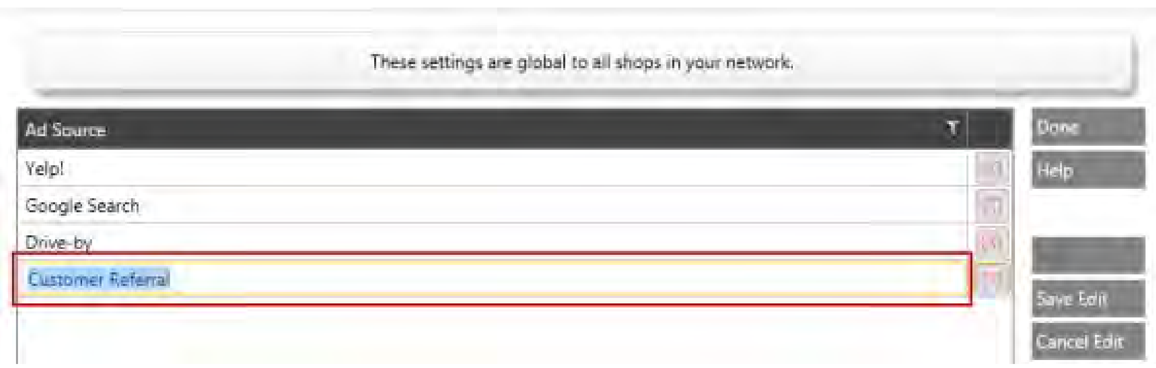
1. Click the **Add** button and type the ad source in the **Ad Source** field.



2. Click the **Save Edit** button to save the entry.
3. Repeat Steps 1 and 2 to include additional rows.

Editing an Existing Ad Source List Entry

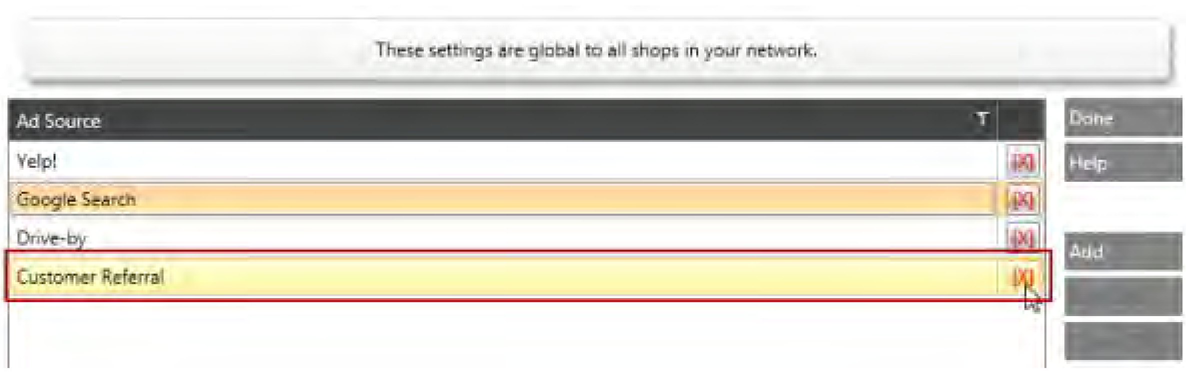
1. Double-click the Ad Source row and retype the information.



2. Click the **Save Edit** button to save the edited information.
3. Repeat Step 1 to edit additional items.

Deleting an Ad Source List Entry

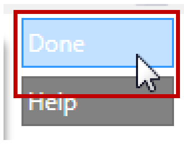
Click the [X] button next to the row to delete the entire row.



Note: Deleting an ad source entry is permanent. Verify the row before clicking the **[X]** button.

Exiting the Ad Source List Settings

Click the **Done** button to close the Ad Source list window.



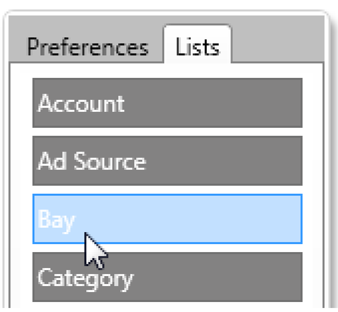
Bay Lists Settings

Use the **Bay** lists setting to create a list of the name and number of service bays at your shop location(s).

Accessing the Bay List Settings

To access the **Bay** list settings:

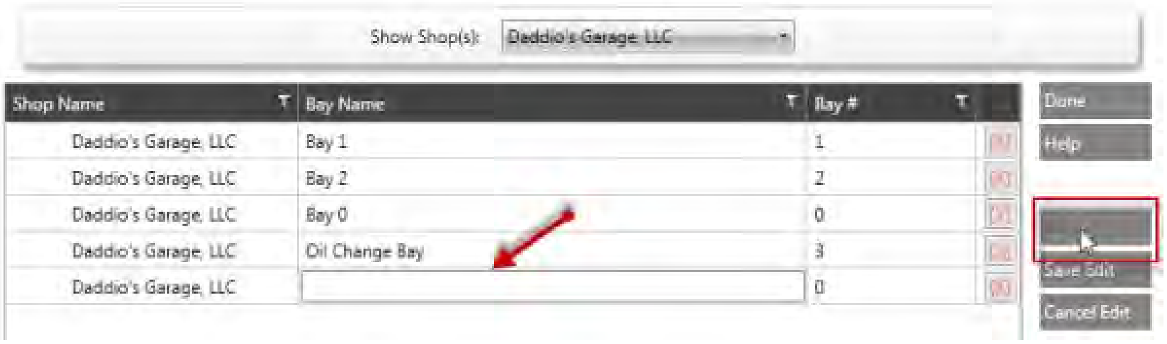
1. Click the **Settings** (Gear and Key) icon.
2. Click the **Lists** tab.
3. Click the **Bay** button.



4. Use the **Show Shop(s)** option to select the shop.

Creating a New a Bay List Item

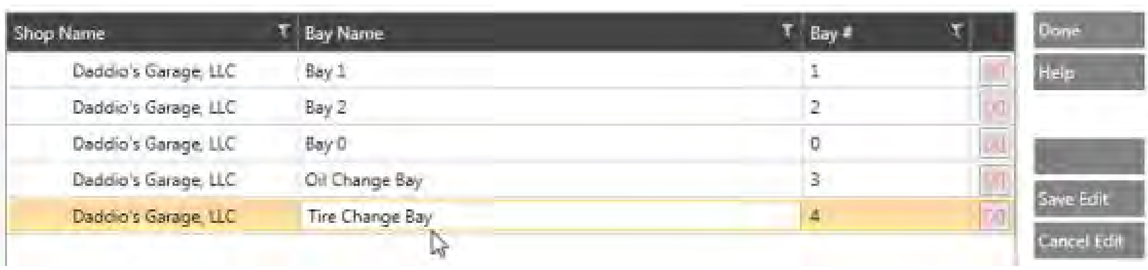
1. Click the **Add** button.



2. Enter the name of the bay and bay number in the **Bay Name** and **Bay #** fields.
3. Click the **Save Edit** button to save the bay entry.
4. Repeat Steps 1 - 3 to include additional rows.

Editing an Existing Bay Entry

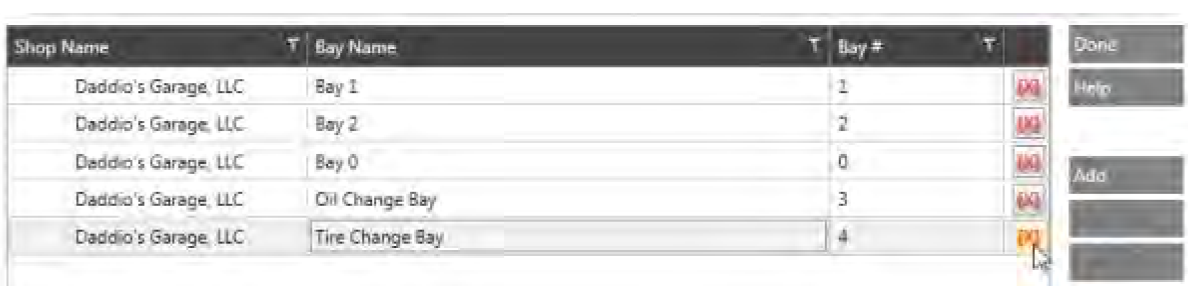
1. Double-click the **Bay Name** or **Bay #** field and retype the information.



2. Click the **Save Edit** button to save the edited information.
3. Repeat Steps 1 and 2 to edit additional items.

Deleting a Bay Entry

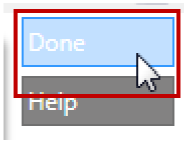
Click the **[X]** button next to the row to delete the entire entry.



Note: Deleting a bay is permanent. Verify the row **before** clicking the **[X]** button to delete it.

Exiting the Bay List Settings

Click the **Done** button to close the Bay List window.



Category List Settings

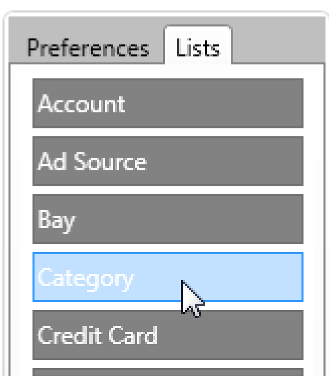
Use the **Category** list settings to identify the kind of work you do at your location(s) so you can associate a category to an item on an order. Once you start assigning categories to orders, you can determine how much business you are doing in a particular area, and analyze which repairs are the most profitable.

Note: The category list is global and applies to all locations managed by NAPA TRACS.

Accessing the Category List Settings

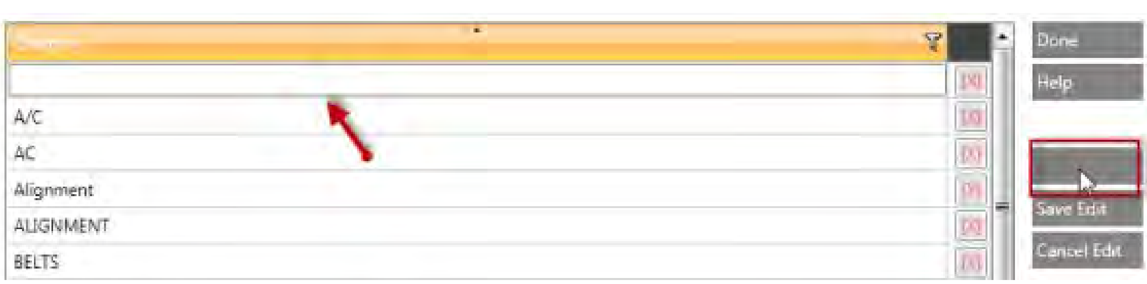
To access the **Category** list settings:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Lists** tab.
3. Click the **Category** button.



Creating a Category List

1. Click the **Add** button.



2. Enter the name of the category in the **Category** field.
3. Click the **Save Edit** button to save the new category.
4. Repeat Steps 1 - 3 to include additional rows.

Editing a Category List Entry

1. Double-click the **Category** row and retype the information.

2. Click the **Save Edit** button to save the edited information.
3. Repeat Step 1 and 2 to edit additional items.

Deleting a Category List Entry

Click the **[X]** button next to the row to delete the entire entry.

Note: Deleting a category entry is permanent. Verify the row before clicking the [X] button to delete it.

Exiting the Category List Settings

Click the **Done** button to close the Category list window.

Credit Card List Settings

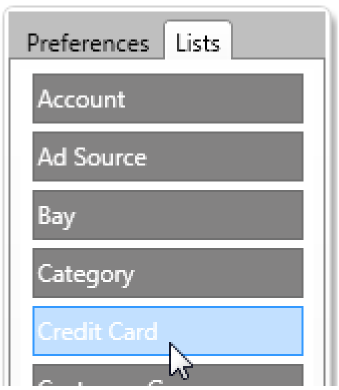
Use the **Credit Card** list setting to record the credit cards accepted by your shop.

Note: The credit card list is global and applies to all locations managed by NAPA TRACS.

Accessing Credit Card List Settings

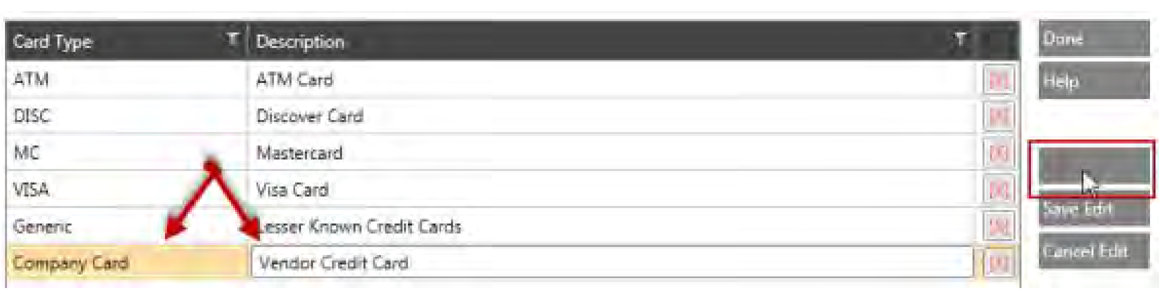
To access the **Credit Card** list settings:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Lists** tab.
3. Click the **Credit Card** button.



Creating a Credit Card List

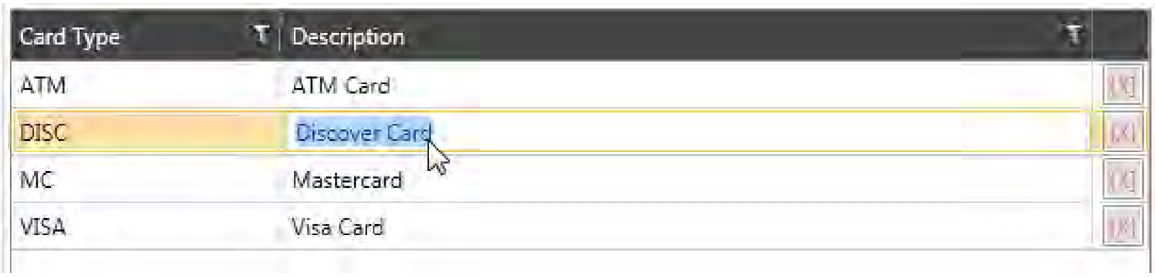
1. Click the **Add** button.



2. Enter the name and description in the **Card Type** and **Description** fields.
3. Click the **Save Edit** button to save the entry.
4. Repeat Steps 1 - 3 to include additional rows.

Editing a Credit Card List Entry

1. Double-click the **Card Type** and **Description** fields to edit the information.



2. Click the **Save Edit** button to save the information.
3. Repeat Steps 1 and 2 to edit additional items.

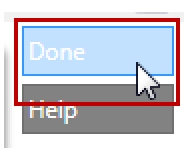
Deleting a Credit Card List Entry

Click the **[X]** button next to the row to delete the entire entry.

Note: Deleting a credit card entry is permanent. Verify the row before clicking the [X] button to delete it.

Exiting the Credit Card List Settings

Click the **Done** button to close the Credit Card list window.



Customer Group Lists Settings

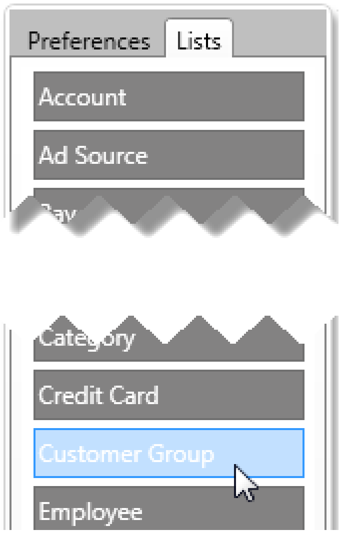
Use the **Customer Group** lists settings to group your customers according to pre-determined group types.

Note: The customer group list is global and applies to all location managed by NAPA TRACS.

Accessing the Customer Group List Settings

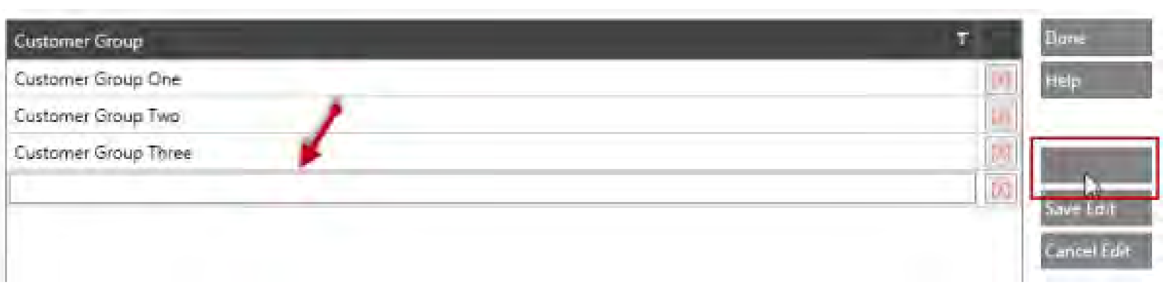
To access the **Customer Group** list settings:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Lists** tab.
3. Click the **Customer Group** button.



Creating a Customer Group List

1. Click the **Add** button.



2. Type the name of the customer group in the **Customer Group** field.
3. Click the **Save Edit** button to save the new entry.
4. Repeat Steps 1 - 3 to include additional rows.

Editing a Customer Group List Entry

1. Double-click the customer group row to edit the information.

2. Click the **Save Edit** button to save the edits.
3. Repeat Steps 1 and 2 to edit additional items.

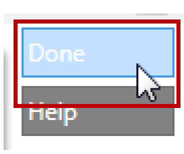
Deleting a Customer Group List Entry

Click the **[X]** button next to the row to delete the entire entry.

Note: Deleting a customer group is permanent. Verify the row before clicking the [X] button to delete it.

Exiting the Customer Group List Settings

Click the **Done** button to close the Customer Group list window.



Employee Lists Settings

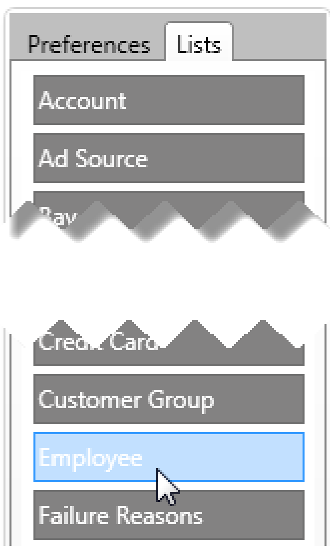
Use the **Employee** lists settings to enter and edit the employees information. Employees information can include an employee code, certification number, a default bay assignment, cost per hour, region, default shop, and permissions role.

Use this information to process employee payroll and labor rates, change employee passwords, indicate active employees or change their permissions, and assign employees to a region.

Access Employee Lists Settings

To access the **Employee** lists settings:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Lists** tab.
3. Click the **Employee** button.

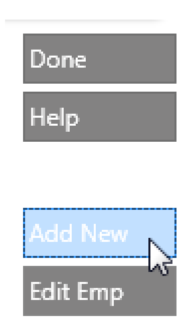


4. Use the **Show Shop(s)** option to select the shop.

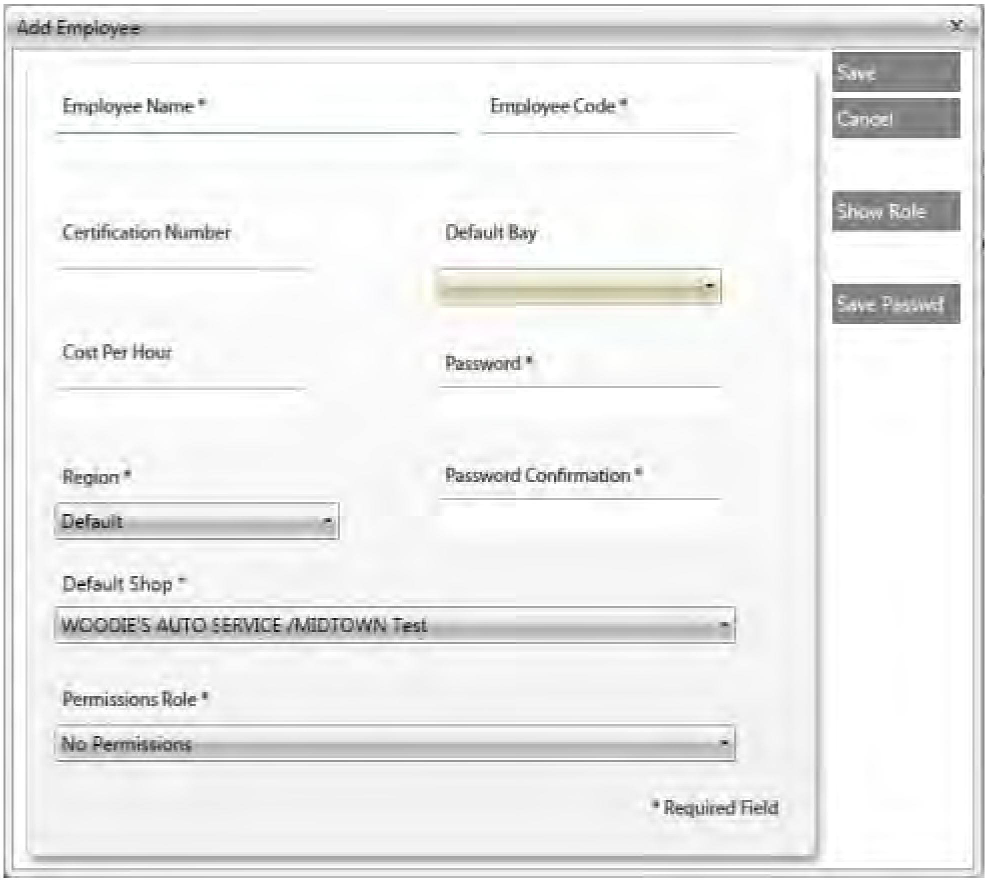
Show Shop(s) Sample Only

Adding a New Employee Record

1. Click the **Add New** button.



The **Add Employee** window appears.



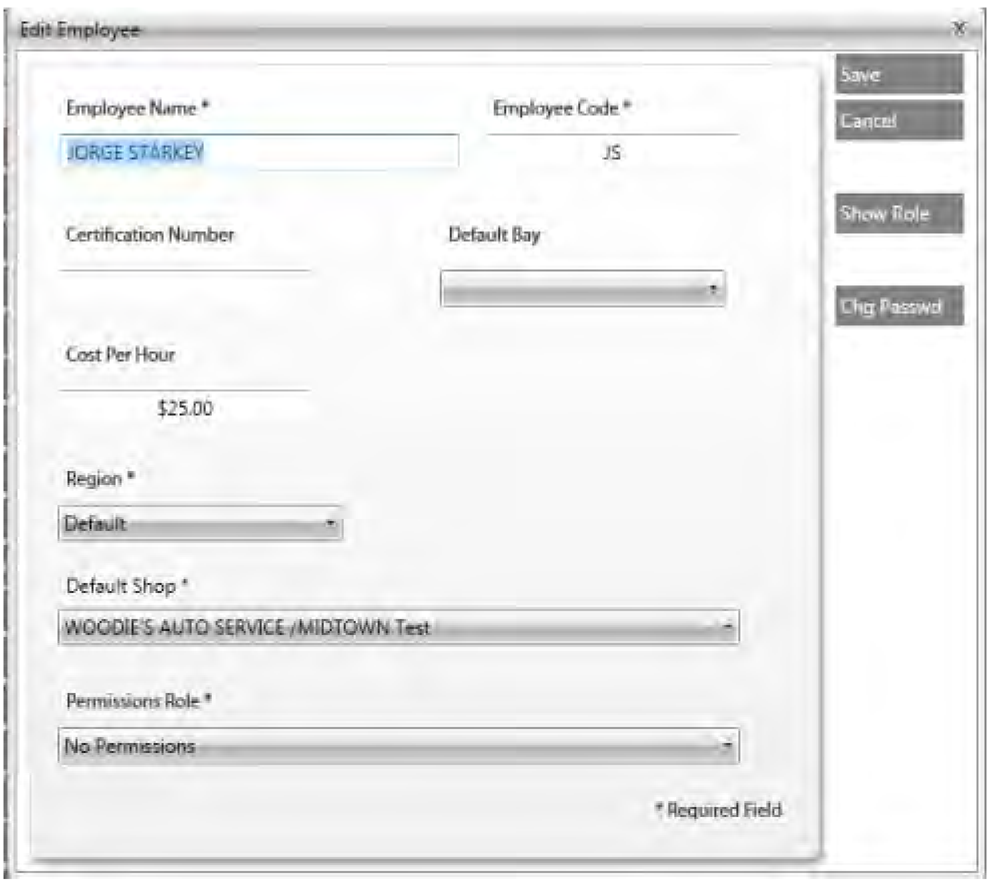
2. Enter information in the fields provided.

   Note: Click the **Show Role** button to display the permissions for the employee role. You cannot edit the employee permissions or roles from this window. See Permissions Groups for information on editing employee permissions and roles.
3. Assign a password.
4. Re-enter the password in the **Password Confirmation** field.
5. Click the **Region**, **Default Shop**, and **Permissions Role** fields to select an option or accept the defaults.
6. Click the **Save** button to add the new employee record.

Editing an Existing Employee Record

1. Click the name of the employee, and click the **Edit Emp** button.

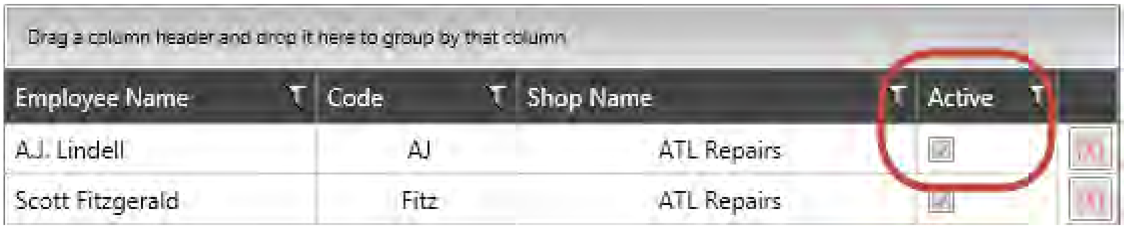
The **Edit Employee** window appears.



2. Edit the employee information.
3. Click the **Save** button.

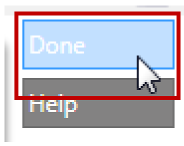
Changing an Employee Status

Click the **Active** check mark to indicate employee status.



Exiting the Employee List Settings

Click the **Done** button to close the Employee list window.



Failure Reasons Lists Settings

Use the **Failure Reasons** lists settings to designate the most common reasons for vehicle repairs or service. You can add customized line items to the list.

Note: The Failure Reasons list is a global and applies to all locations managed by NAPA TRACS.

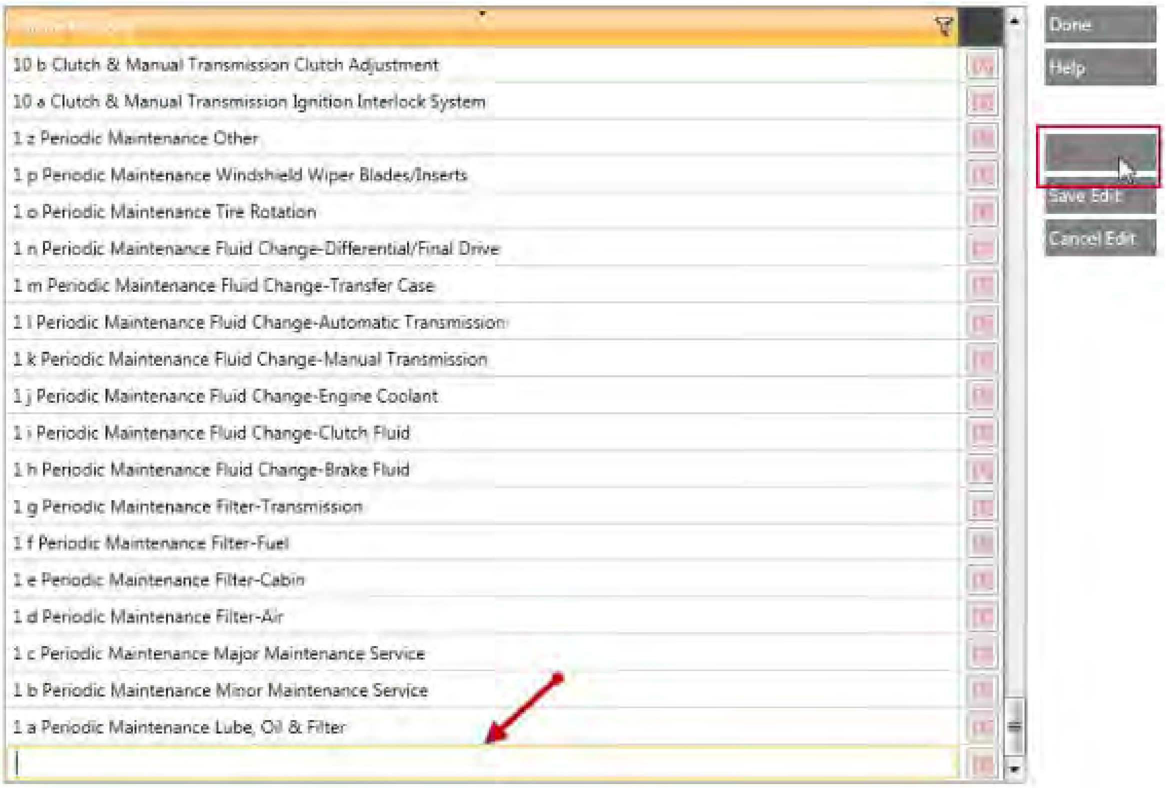
Accessing the Failure Reasons Lists Settings

To access the **Failure Reasons** lists settings:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Lists** tab.
3. Click the **Failure Reasons** button.

Adding a New Failure Reason Item

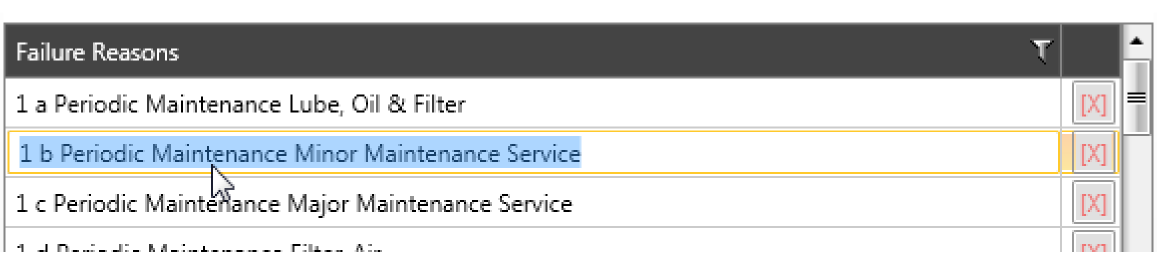
1. Click the **Add** button and type the failure reason in the **Failure Reasons** field.



2. Click the **Save Edit** button to save the entry.
3. Repeat Steps 1 - 2 to include additional rows.

Editing an Existing Failure Reason Item

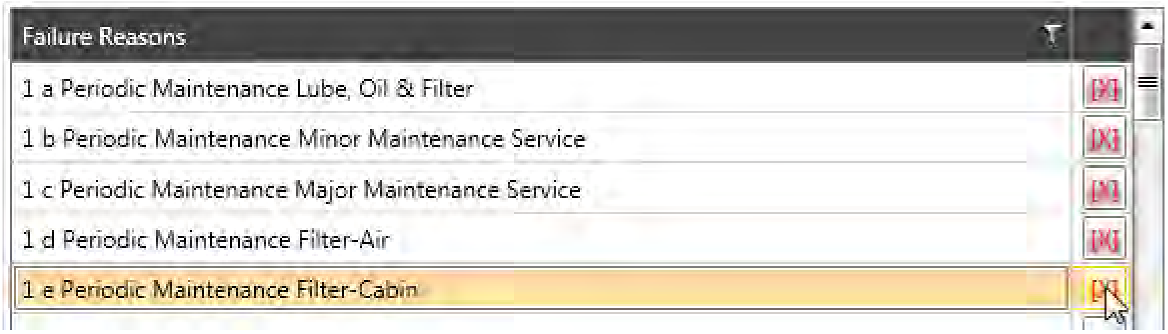
1. Double-click the **Failure Reasons** field to edit the information.



2. Click the **Save Edit** button to save the edited information.
3. Repeat Steps 1 and 2 to edit additional items.

Deleting a Failure Reasons List Entry

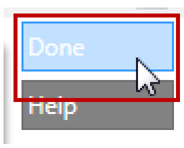
Click the **[X]** button to delete the entire failure reason entry.



Note: Deleting a failure reason entry is permanent. Verify the row **before** clicking the [X] button to delete it.

Exiting the Failure Reasons List Settings

Click the **Done** button to close the Failure Reasons list window.



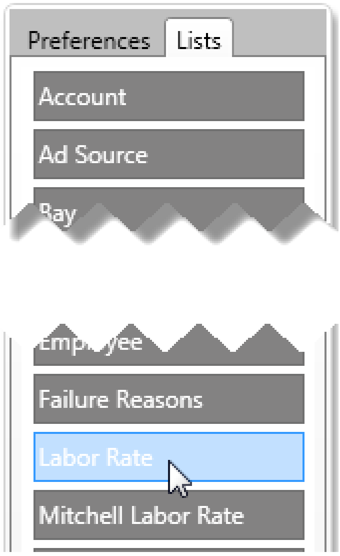
Labor Rate List Settings

Use the **Labor Rate** lists settings to establish default hourly service charges. You can also combine individual rates with pricing profiles to create special pricing such as a Friends and Family discount. See Pricing Profiles to learn how labor rates interact with pricing profiles.

You can also associate each of your labor rates with specialized skills level as established by the Mitchell Mechanical Labor Estimating Guide. Labor rates included in this list also appear in the Mitchell Labor Rates settings list.

Accessing Labor Rate Lists Settings

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Lists** tab.
3. Click the **Labor Rate** button.

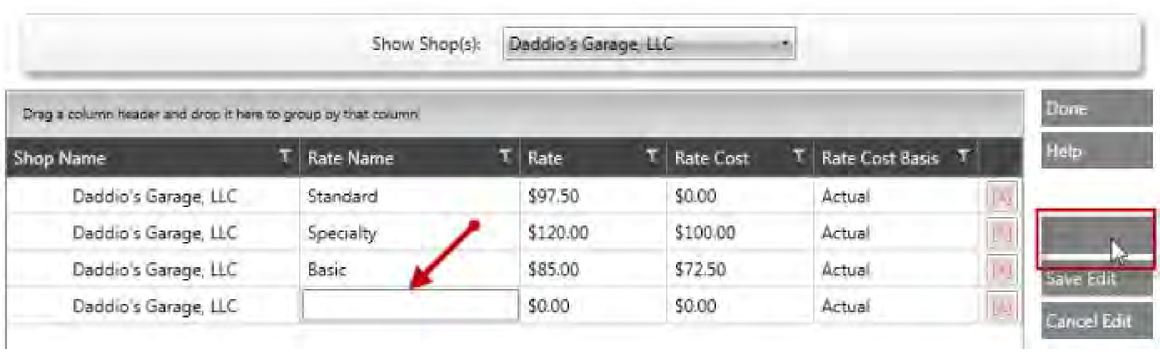


4. Use the **Show Shop(s)** option to select the shop.

Show Shop(s) Sample Only

Creating a New Labor Rate

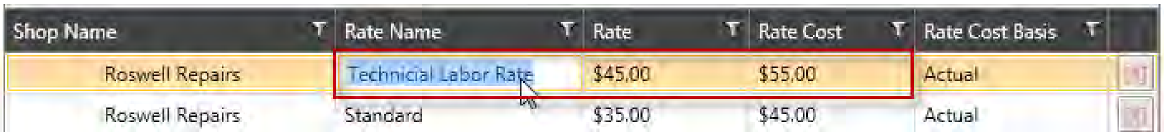
1. Click the **Add** button.



2. Enter the rate name, rate amount and the rate cost in the **Rate Name, Rate** and **Rate Cost** fields.
3. Click the **Save Edit** button to save the entry.
4. Repeat Steps 1 - 3 to include additional rows.

Editing an Existing Labor Rate Entry

1. Double click the labor rate fields to edit the information.



2. Click the **Save Edit** button to save your edits.
3. Repeat Steps 1 and 2 to edit additional items.

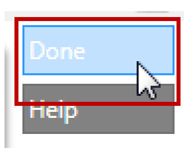
Deleting a Labor Rate Entry

Click the **[X]** button next to the row to delete the entire entry.

Note: Deleting a labor rate is permanent. Verify the row **before** clicking the **[X]** button to delete it.

Exiting the Labor Rate List Settings

Click the **Done** button to close the Labor Rate list window.



Mitchell Labor Rate List Settings

Use the **Mitchell Labor Rate** list settings to associate your labor rates with the Mitchell Mechanical Labor Estimating Guide. The Mitchell Mechanical Labor Estimating Guide contains five skill levels. Each skill level can be assigned a different labor rate or the same labor rate.

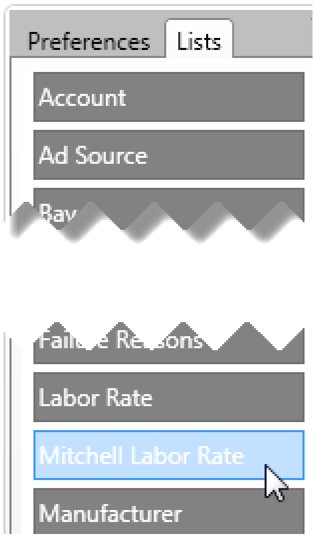
Note: Labor rates must already be set up using the Labor Rate list setting to select the rate names. You must select a rate for each skill level, even if it is the same rate. If you do not select a rate for each level, or you select a non-defined rate, the system sets the bill rate to $0.00 on the repair order.

Accessing the Mitchell Labor Rate List Settings

To access the **Mitchell Labor Rate** list settings:

1. Click the **Settings** (Gear and Key) icon.

2. Click the **Lists** tab.
3. Click the **Mitchell Labor Rate** button.

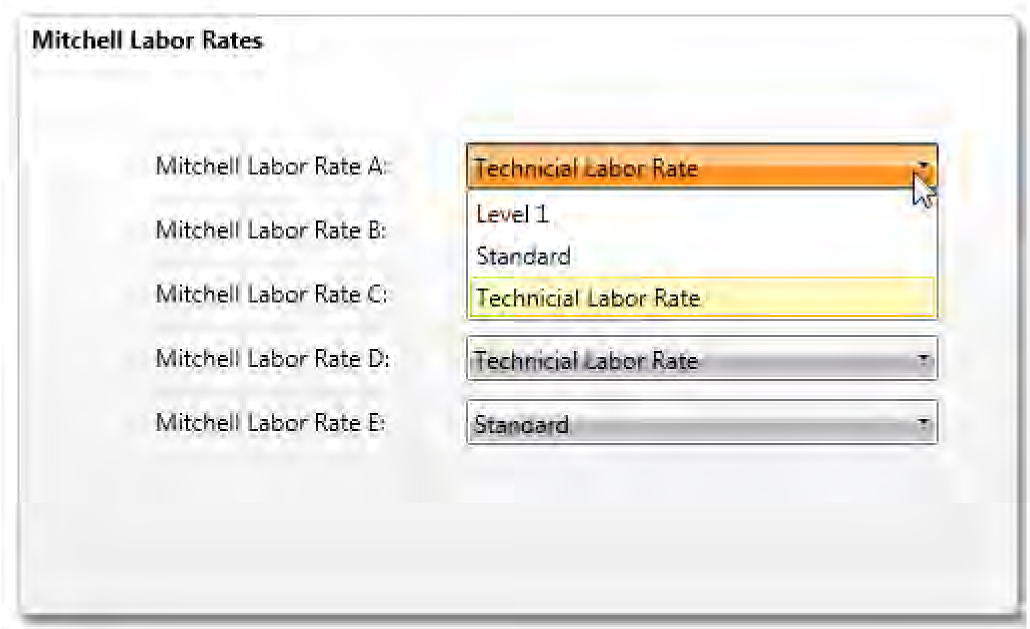


4. Use the **Shop Selection** box to select the shop.

Selecting a Labor Estimating Guide Rate

To select a labor estimating guide rate:

1. Click the down arrow next to each Mitchell Labor Rate.



Rate A is the most difficult repair procedure; whereas, Rate E is the easiest.

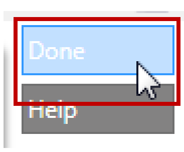
2. Select one of the rates available on the drop-down list.

   Note: This list displays the rates that you set in the Labor Rate List settings, and are unique to each shop location.

3. Repeat steps 1 and 2 until all fields have been defined.

Saving Mitchell Labor Rate List Settings

Click the **Done** button to save and close the Mitchell Labor Rate list window.



Manufacturer List Settings

Use the **Manufacturer** list settings to create a list of part manufacturers.

Note: The manufacturer list is global and applies to all locations managed by NAPA TRACS.

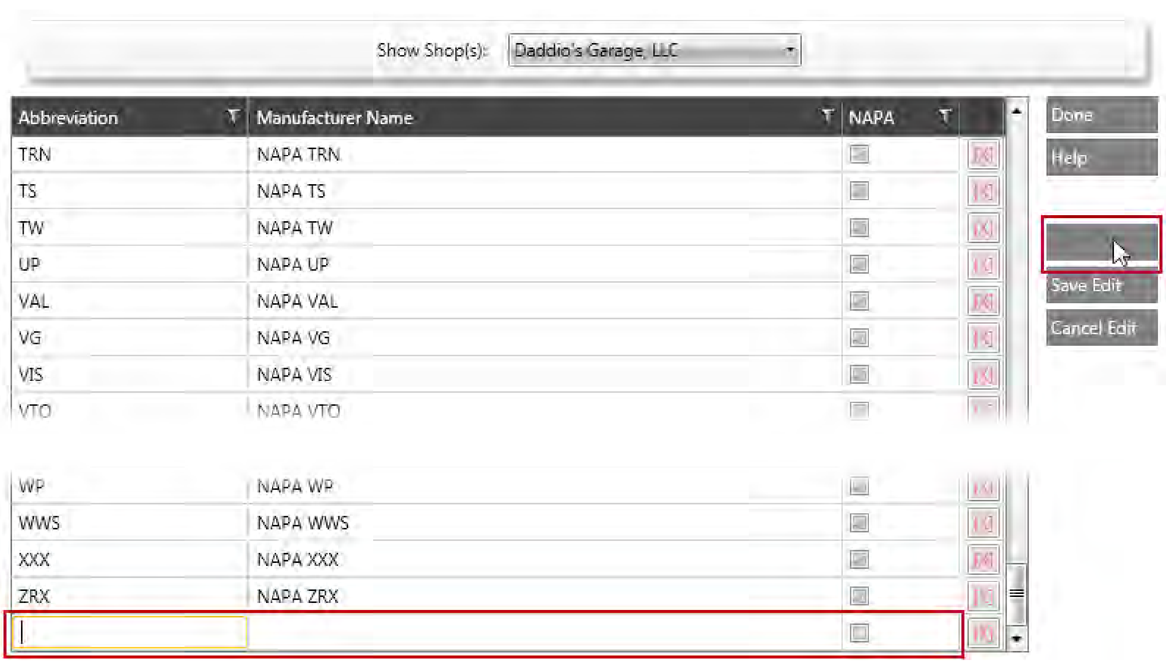
Accessing the Manufacturer List Settings

To access the **Manufacturer** list settings:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Lists** tab.
3. Click the **Manufacturer** button.

Creating a Manufacturer List

1. Click the **Add** button.



2. Enter an abbreviation and manufacturer name in the **Abbreviation** and **Manufacturer Name** fields.

Note: NAPA assigns a three-letter abbreviation to each manufacturer. This code appears before the item number. For non-NAPA vendors, assign a four to ten-letter abbreviation.

3. Check the **NAPA** check box to associate the manufacturer with the NAPA database.
4. Click the **Save Edit** button to save the entry.
5. Repeat Steps 1 - 4 to include additional rows.

Editing an Existing Manufacturer List Entry

1. Double-click any field in the list of manufacturers to edit the information.

2. Click the **Save Edit** button to save the edited information.

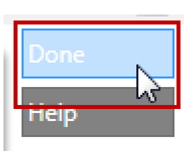
Deleting a Manufacturer List Entry

Click the **[X]** button next to the row to delete the entire entry.

Note: Deleting a manufacturer entry is permanent. Verify the row **before** clicking the **[X]** button to delete it.

Exiting the Manufacturer List Settings

Click the **Done** button to close the Manufacturer list window.



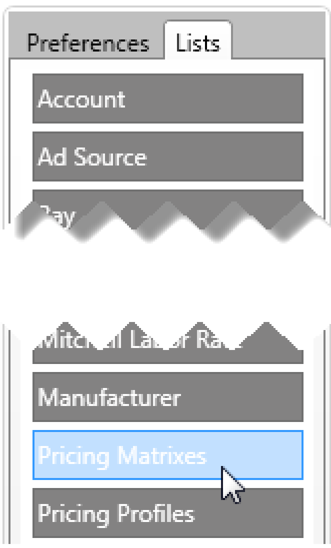
Pricing Matrixes Lists Settings

Use the **Pricing Matrixes** lists settings to determine price range costs and price markup parameters for pricing and labor. Pricing and labor settings are located on **Pricing Matrixes** and **Labor Matrixes** tabs.

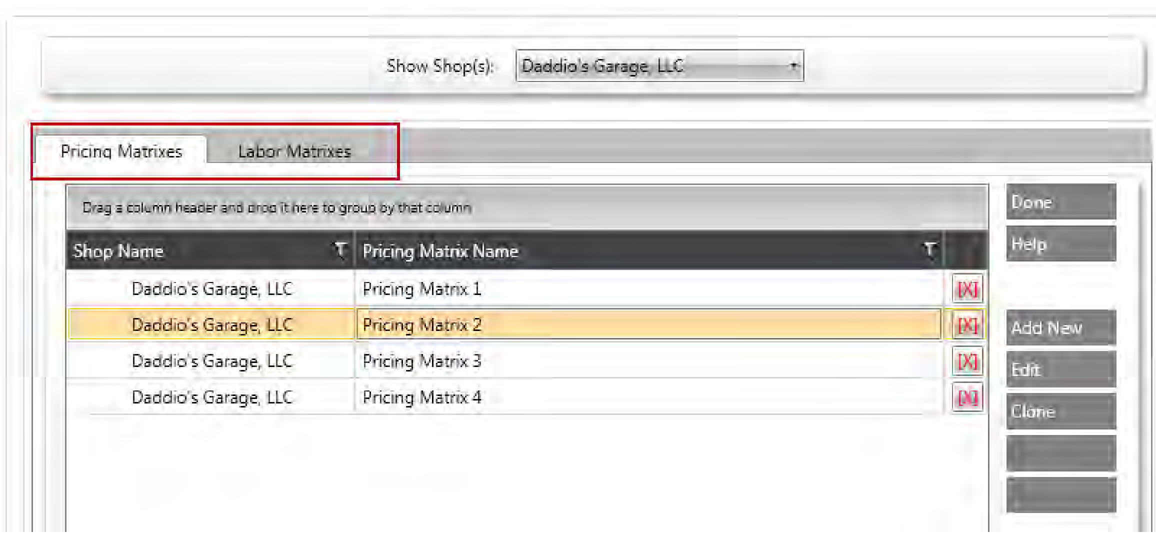
Accessing the Pricing Matrixes Lists Settings

To access the **Pricing Matrixes** lists settings:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Lists** tab.
3. Click the **Pricing Matrixes** button.



The Pricing Matrixes window displays the **Pricing Matrixes** table as the default view.

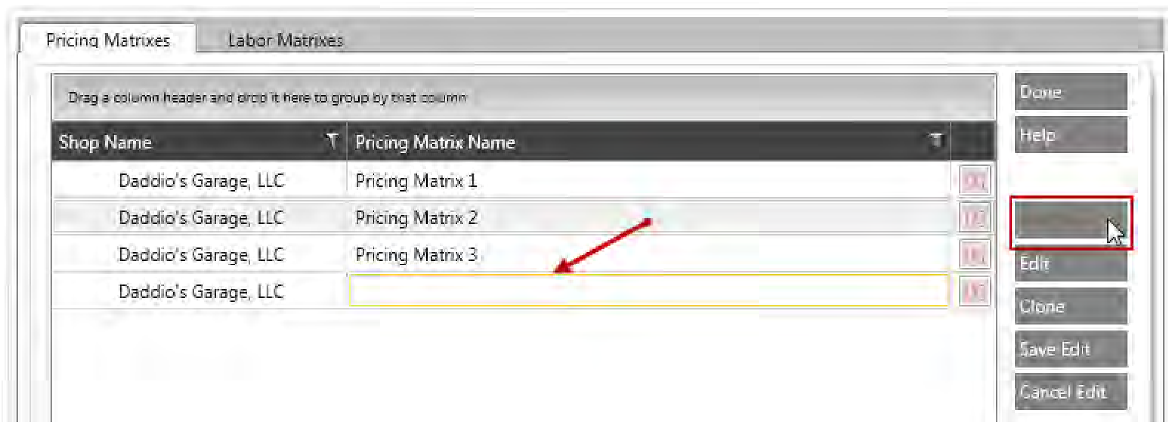


4. Use the **Shop Selection** box to select the shop.

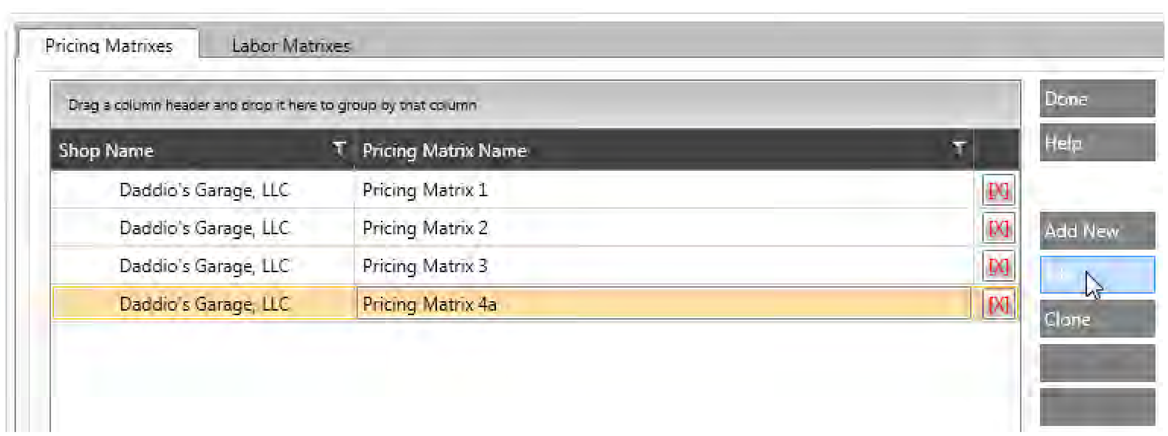
Adding a Pricing Matrix

To add a pricing matrix:

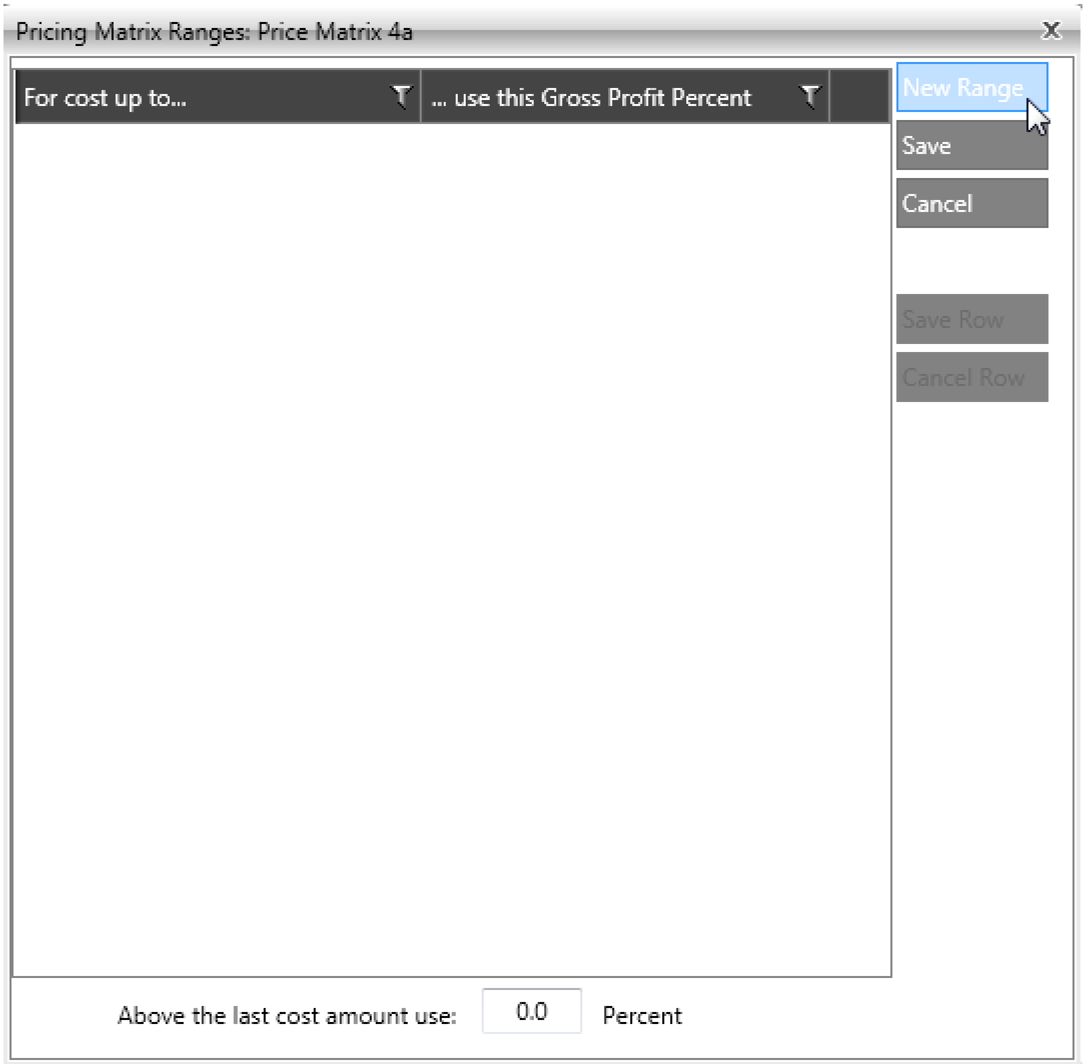
1. Click the **Add New** button and type the name of the matrix in the **Pricing Matrix Name** field.



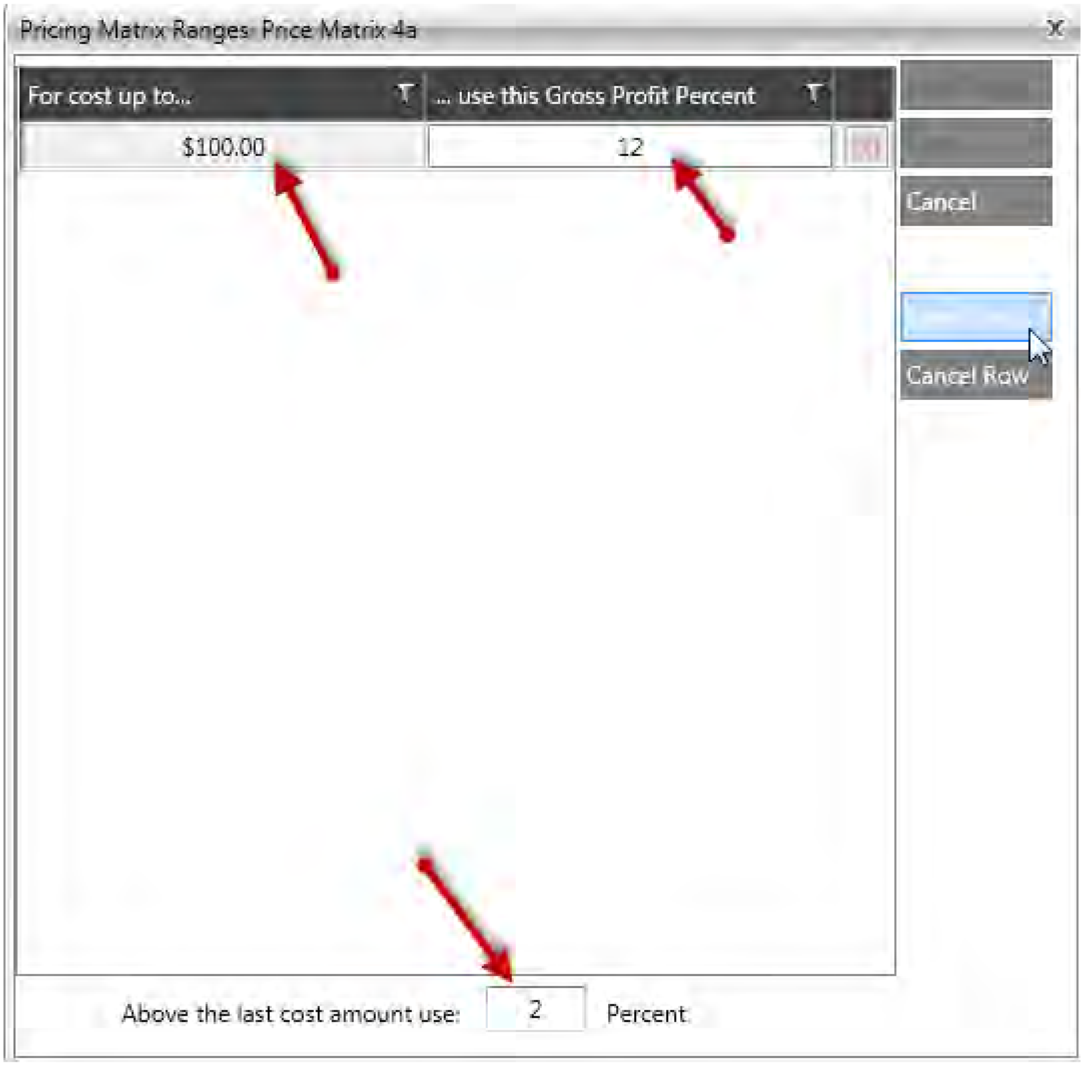
2. Click the **Save Edit** button to save your pricing matrix
3. Click the new pricing matrix row to highlight it and click the **Edit** button.



The **Pricing Matrix Ranges** window appears.



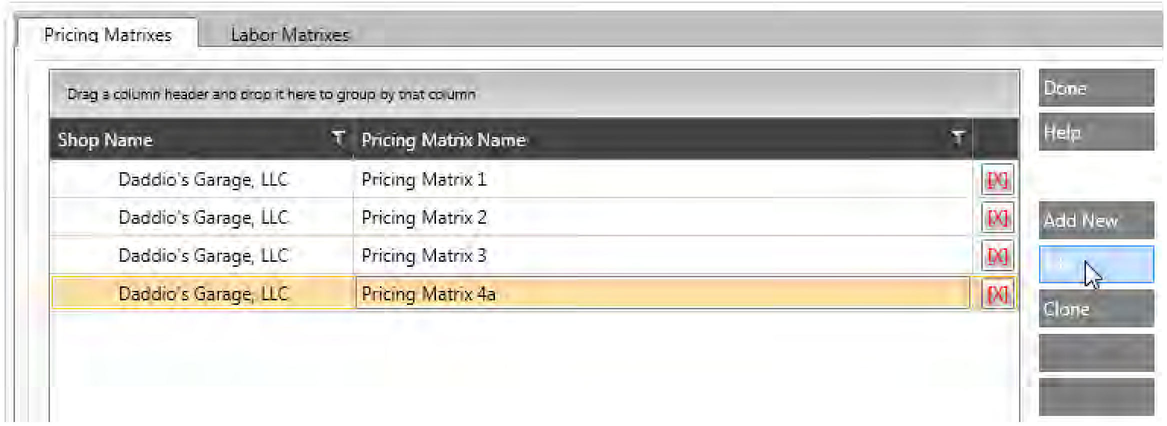
4. Click the **New Range** button to display the **Pricing Matrix Ranges** window.



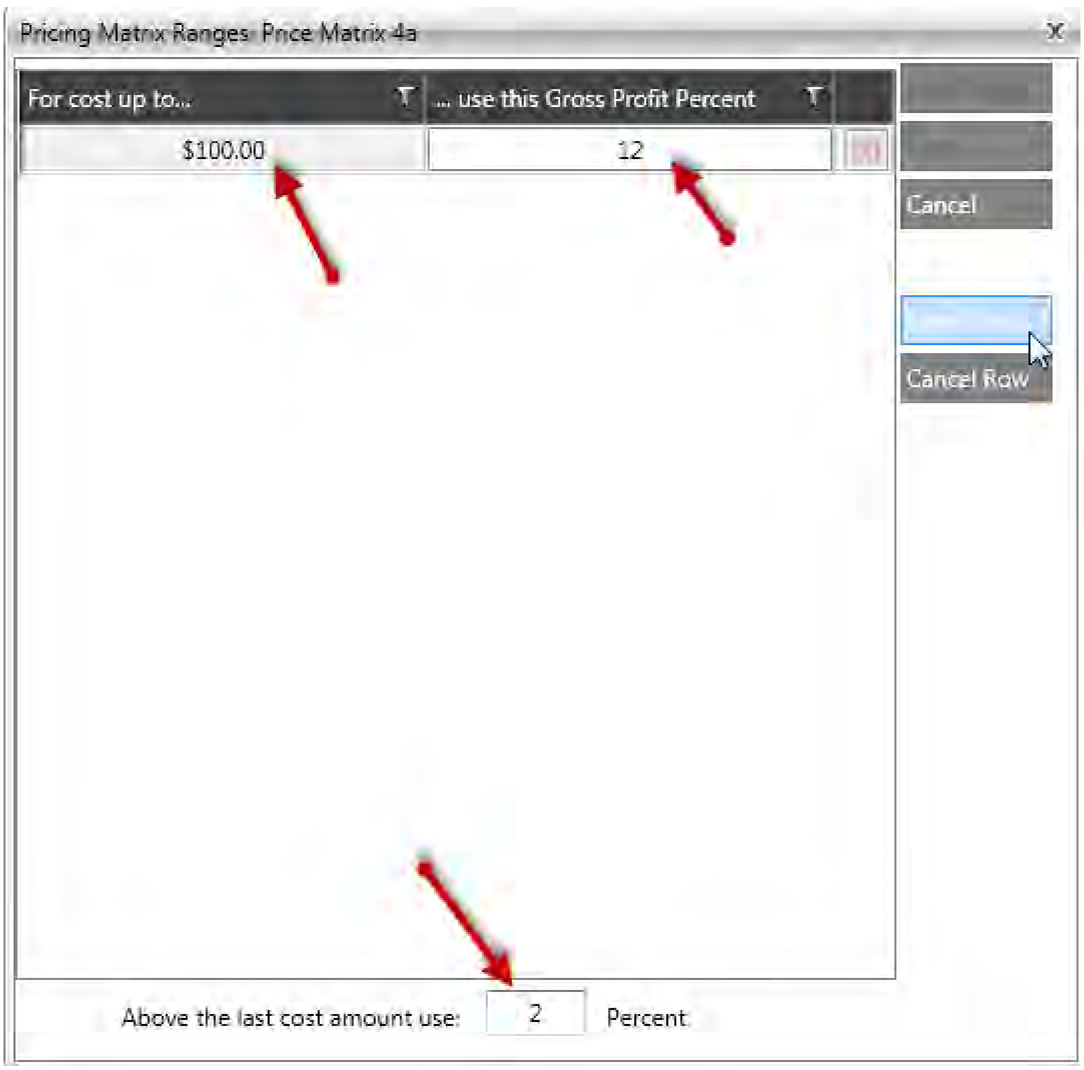
5. Enter values in the fields, and click the **Save Row** button.
6. Click the **Save** button to return to the pricing matrix window.

Editing a Pricing Matrix

1. Click a pricing matrix row and click the **Edit Pricing Matrix** button.



The **Pricing Matrix Ranges** window displays.

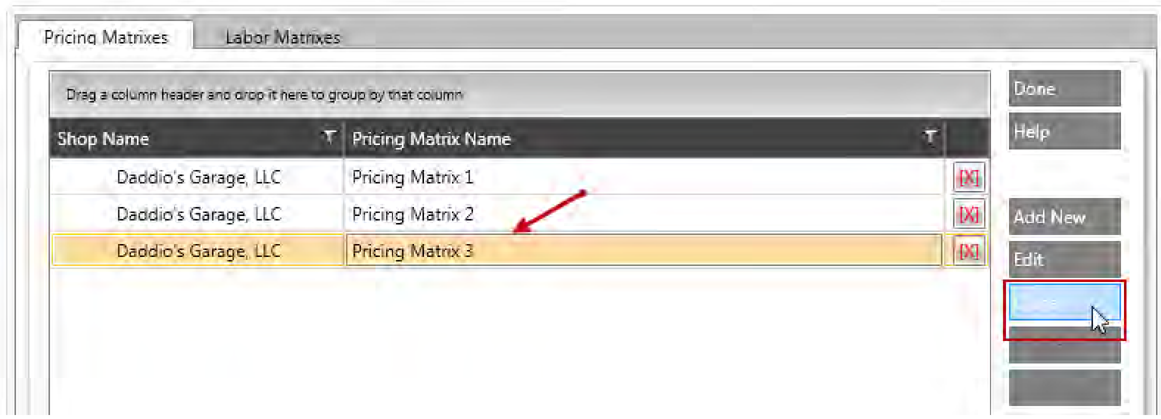


2. Update the fields and click the **Save** button to return to the pricing matrix window.
3. (Optional) Enter a value in the **Above the last cost amount use** field.

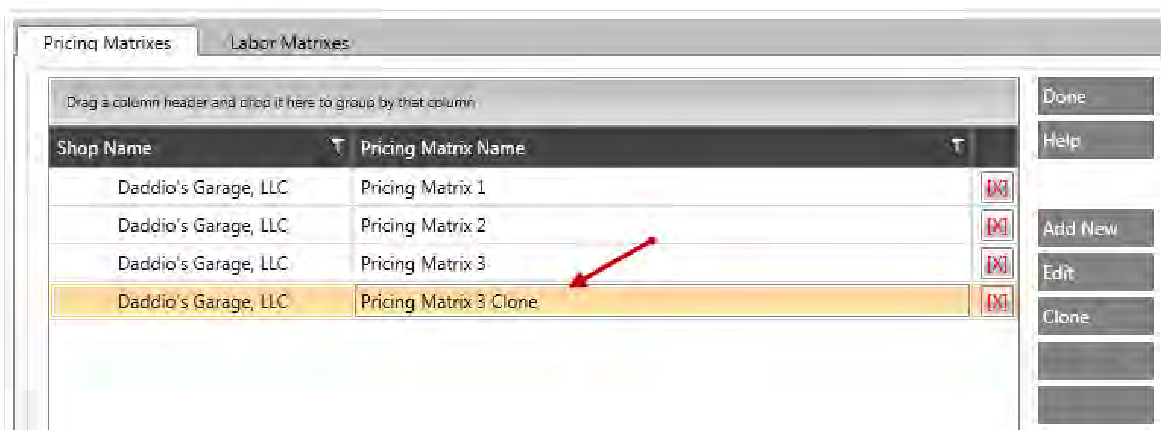
Cloning a Pricing Matrix

Cloning enables you to quickly create, rename and modify a pricing matrix instead of creating a new matrix.

1. Click the pricing matrix and click the **Clone** button.



The cloned item appears directly below the matrix you selected with the word, **Clone** after it.

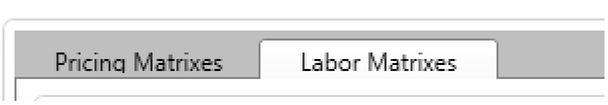


2. Double-click the profile name in the **Pricing Matrix Name** field, and rename it.
3. Click the **Save Edit** button to save the information.
4. Follow the steps listed under [Editing a Pricing Matrix] to complete the pricing matrix.

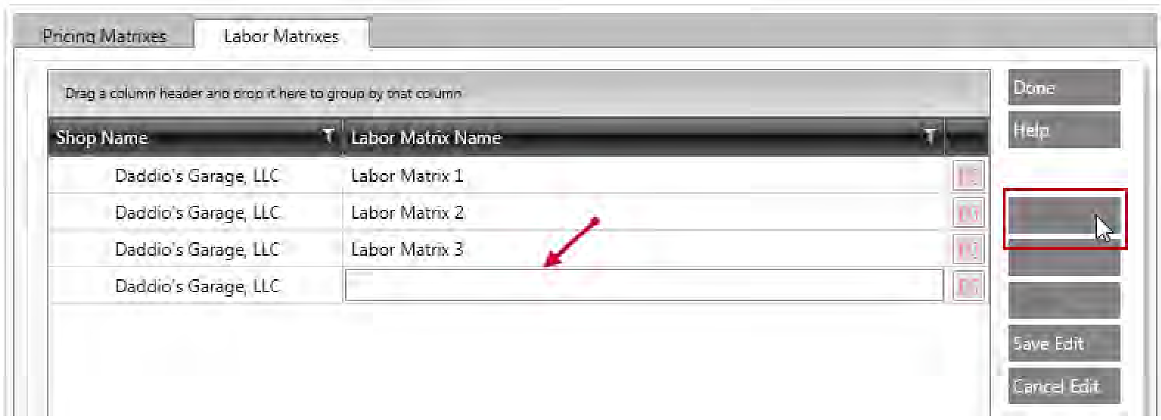
Adding a Labor Matrix

To add a labor matrix:

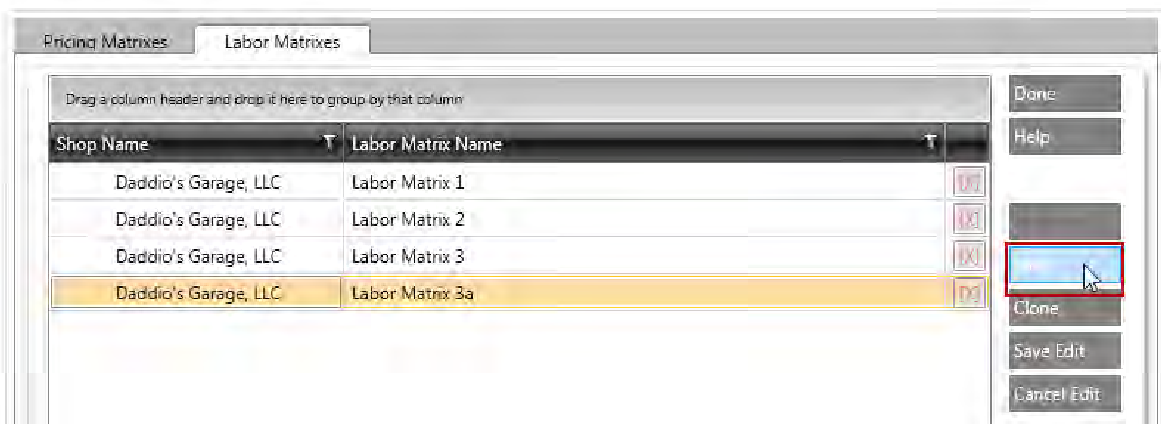
1. Select the **Labor Matrix** tab.



2. Click the **Add New** button and enter the name of the new matrix in the **Labor Matrix Name** field.

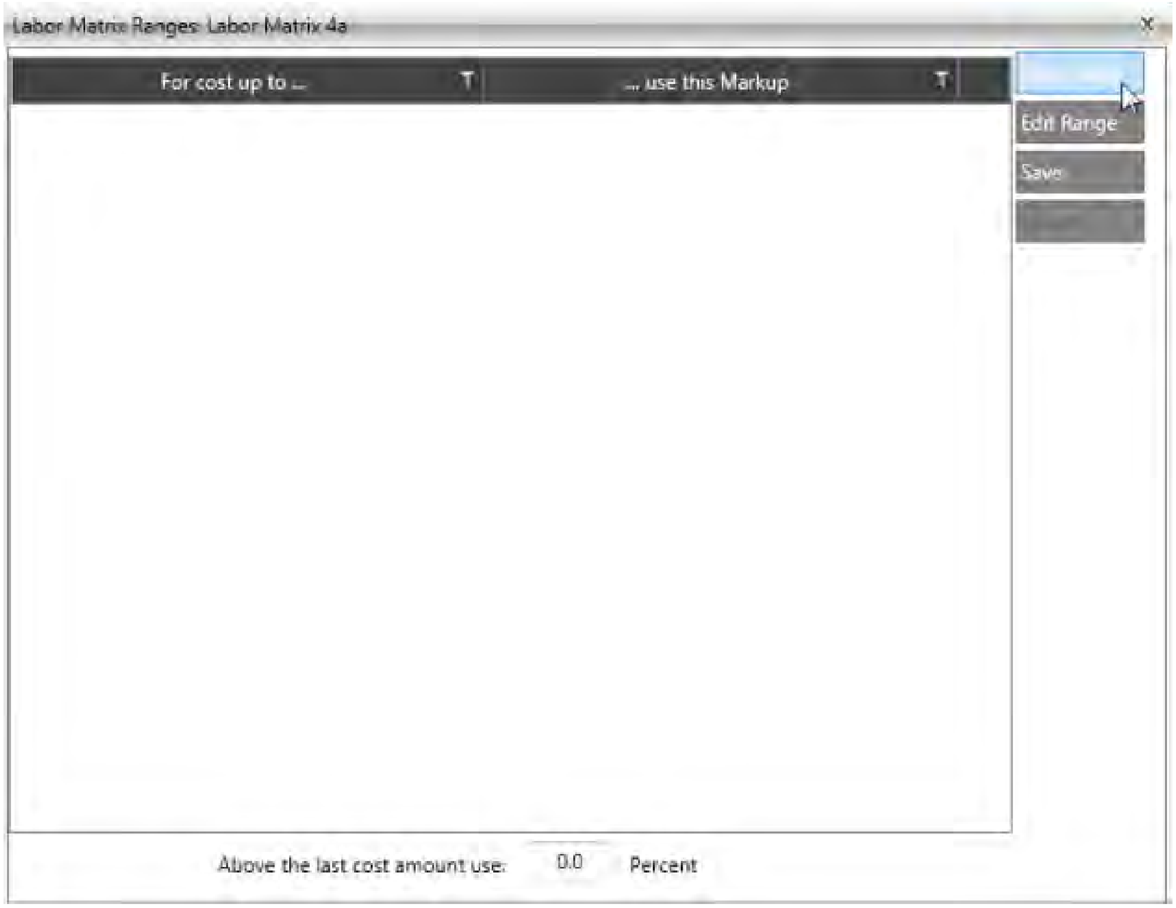


3. Click the **Save Edit** button to save the labor matrix.
4. Select the new matrix, and click the **Edit Labor Matrix** button.



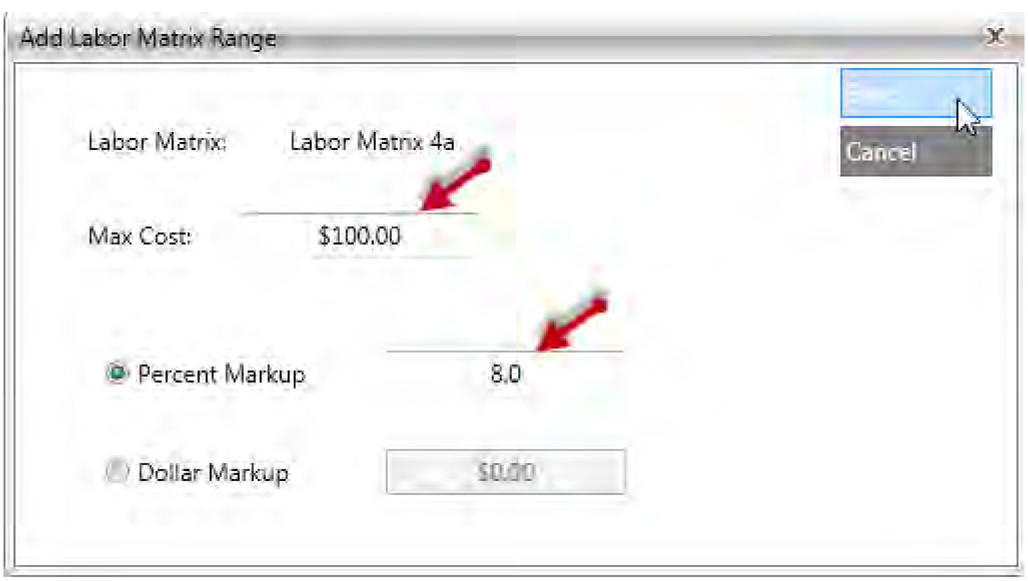
The **Labor Matrix Ranges** window appears.

5. Click the **New Range** button.



The **Add Labor Matrix Range** window appears.

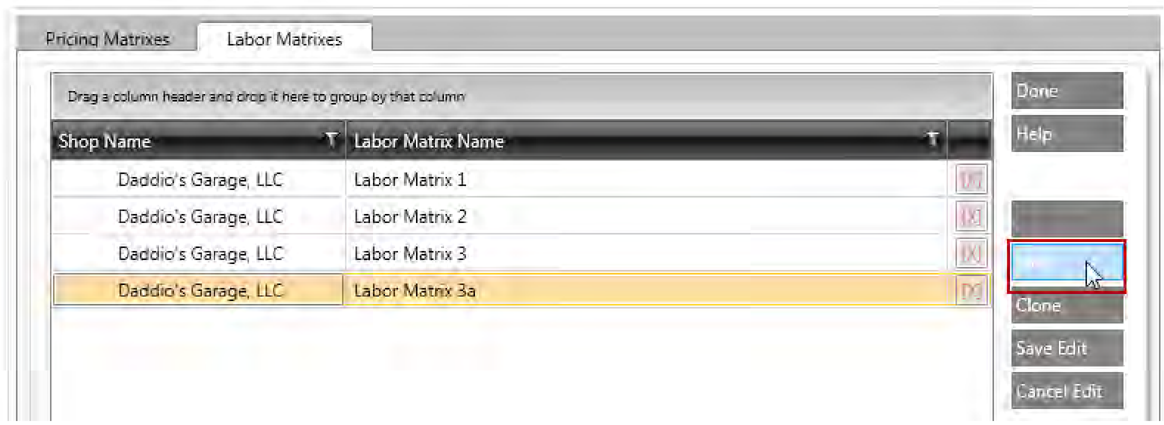
6. Enter values in the fields, and click the **Save** button to return to display the **Labor Matrix Ranges** window.



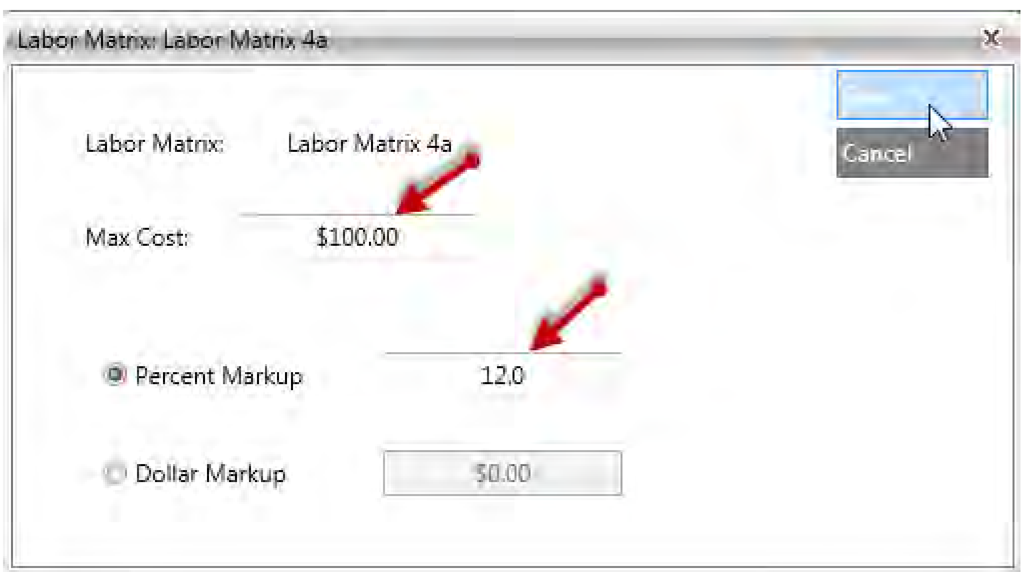
7. (Optional) Enter a value in the **Above the last cost amount use** field.
8. Click the **Save** button to display the labor matrix window.

Editing a Labor Matrix

1. Single click a labor matrix row to highlight it, then click the **Edit** button.



The **Labor Matrix** pop-up window appears.

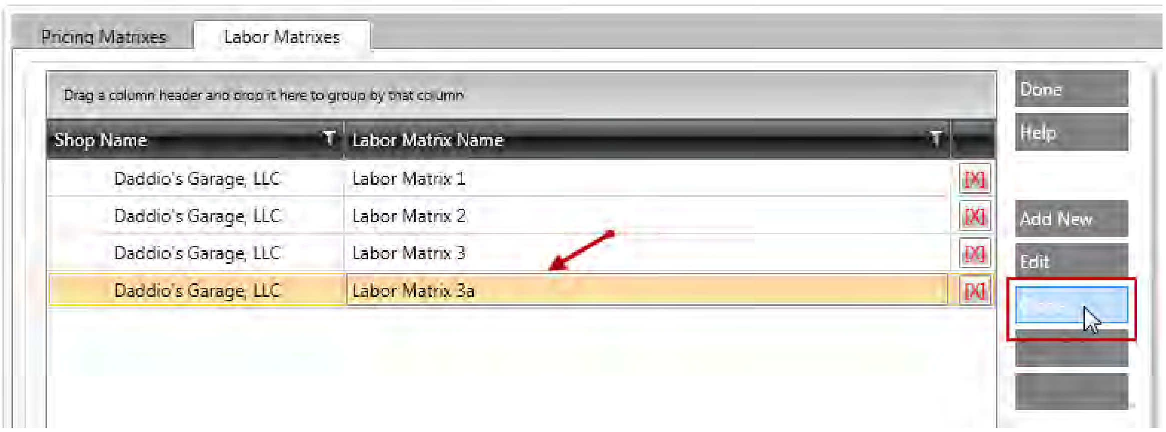


2. Update the fields as needed and click the **Save** button to return to the **Labor Matrix Ranges** window.
3. Click the **Save** button to return to the labor matrix window.

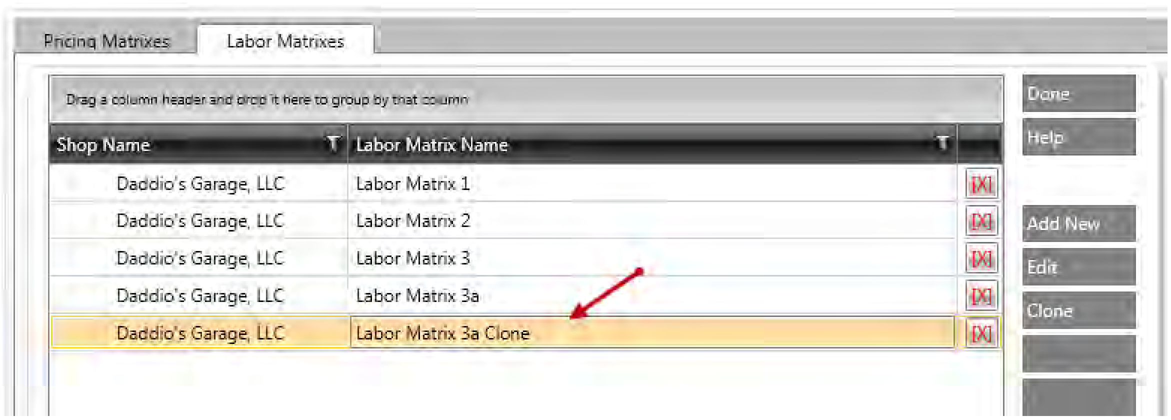
Cloning a Labor Matrix

Cloning enables you to quickly create, rename and modify a matrix instead of creating a new matrix.

1. Click the pricing profile name to highlight it, and click the **Clone** button.



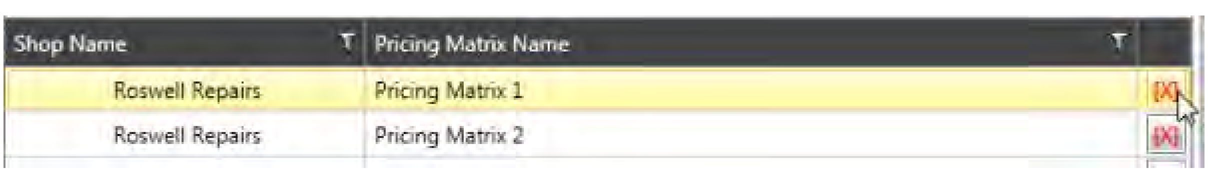
The cloned item appears below the matrix you selected with the word, **Clone** after it.

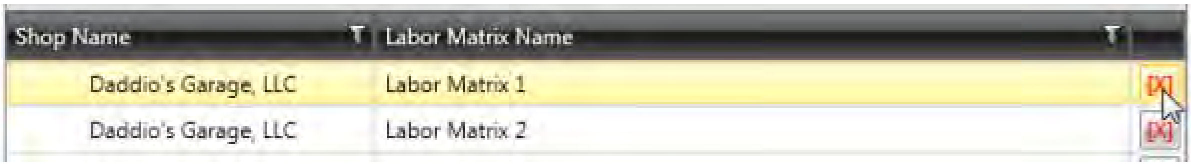


2. Double-click the profile name in the **Labor Matrix Name** field and rename it.
3. Click the **Save Edit** button to save the information.
4. Follow the steps listed under **Editing a Labor Matrix** to complete the labor matrix.

Deleting a Pricing or Labor Matrixes List Entry

Click the **[X]** button next to the row to delete the entire entry.

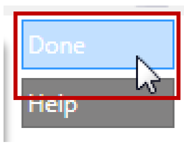




Note: Deleting a pricing or labor matrix is permanent. Verify the row **before** deleting it.

Exiting the Pricing Matrix List Settings

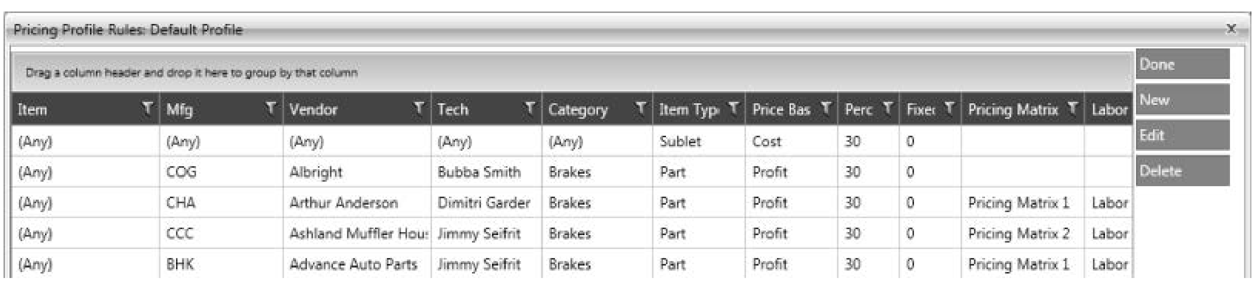
Click the **Done** button to close the Pricing Matrixes list window.



Pricing Profiles Lists Settings

Use the **Pricing Profile** list setting to create rules related to pricing.

A pricing profile called Friends and Family, would enable you to sell parts at cost and labor at a discount that is $15 less than your default labor rate; a county profile would enable you to give a 10% discount for all parts sold to police officers and firefighters. NAPA TRACS comes pre-loaded with one default pricing profile ready for use unless you create your own profiles. Once a profile is created, you can associate specific conditions and rules to dictate how pricing is impacted. The following is a sample of the default pricing profile:



Item	Mfg	Vendor	Tech	Category	Item Typ	Price Bas	Perc	Fixe	Pricing Matrix	Labor
(Any)	(Any)	(Any)	(Any)	(Any)	Sublet	Cost	30	0		
(Any)	COG	Albright	Bubba Smith	Brakes	Part	Profit	30	0		
(Any)	CHA	Arthur Anderson	Dimitri Garder	Brakes	Part	Profit	30	0	Pricing Matrix 1	Labor
(Any)	CCC	Ashland Muffler Hou:	Jimmy Seifrit	Brakes	Part	Profit	30	0	Pricing Matrix 2	Labor
(Any)	BHK	Advance Auto Parts	Jimmy Seifrit	Brakes	Part	Profit	30	0	Pricing Matrix 1	Labor

Sample: NAPA TRACS Default Pricing Profile

Accessing the Pricing Profiles List Settings

To access the **Pricing Profiles** list settings:

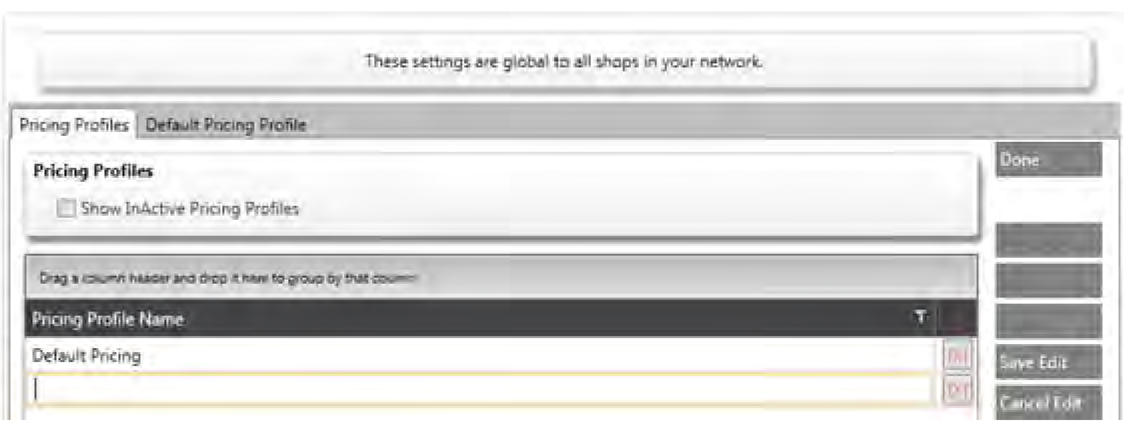
1. Click the **Settings** (Gear and Key) icon.
2. Click the **Lists** tab.
3. Click the **Pricing Profiles** button.

4. Use the **Shop Selection** box to select the shop.

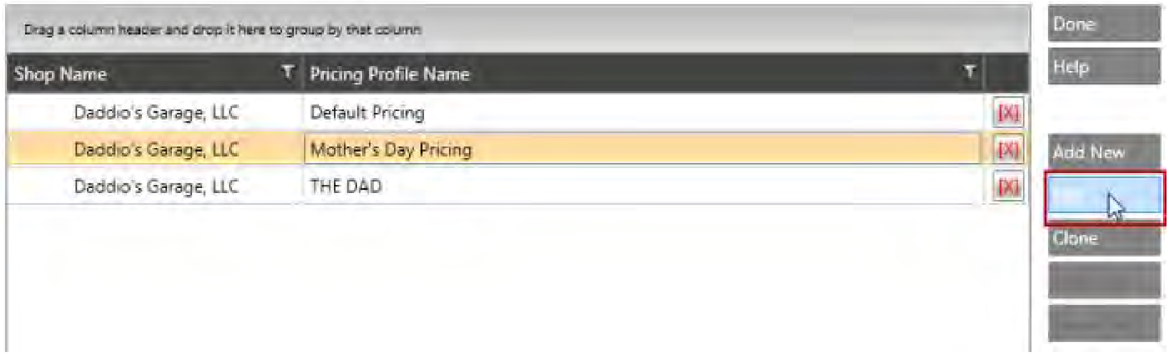
Creating a New Pricing Profile

To create a new pricing profile:

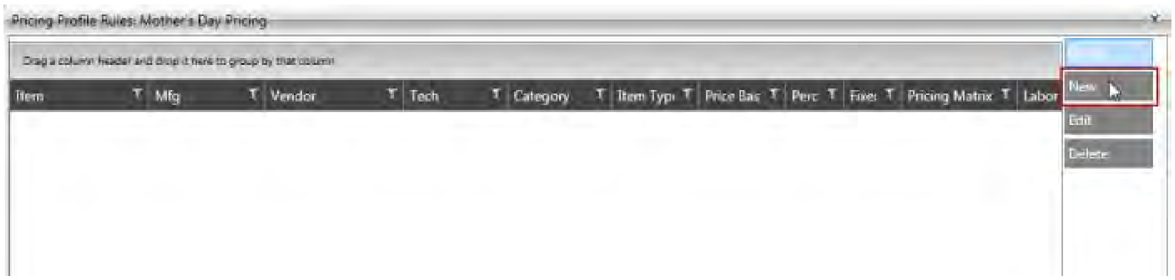
1. Click the **Add New** button and enter the name of your new pricing profile in the **Pricing Profile Name** field.



2. Click the **Save Edit** button to save the new pricing profile.
3. Select the new pricing profile you just created, and click the **Edit** button.

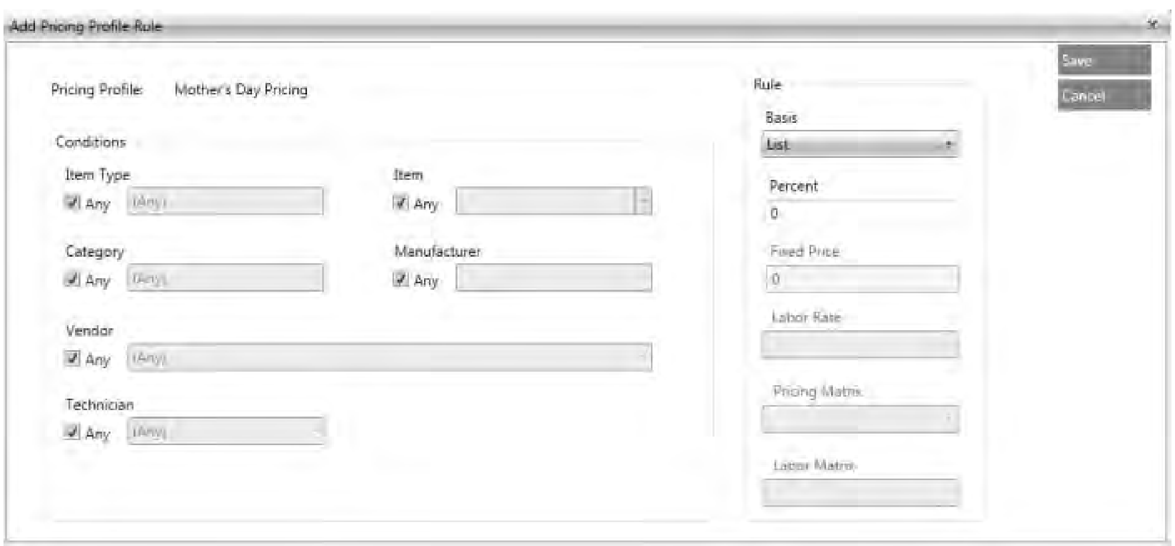


An empty **Pricing Profile Rules** window appears.



4. Click the **New** button.

The **Add Pricing Profile Rule** window appears.



5. Select the conditions for this pricing profile by deselecting one or more of the **Any** check boxes in the **Conditions** section. Once deselected, you can click the drop down arrow to select criteria for this condition; such as a specific Item Type or Vendor. Leaving the **Any** check boxes checked will ensure that no conditions are applied.

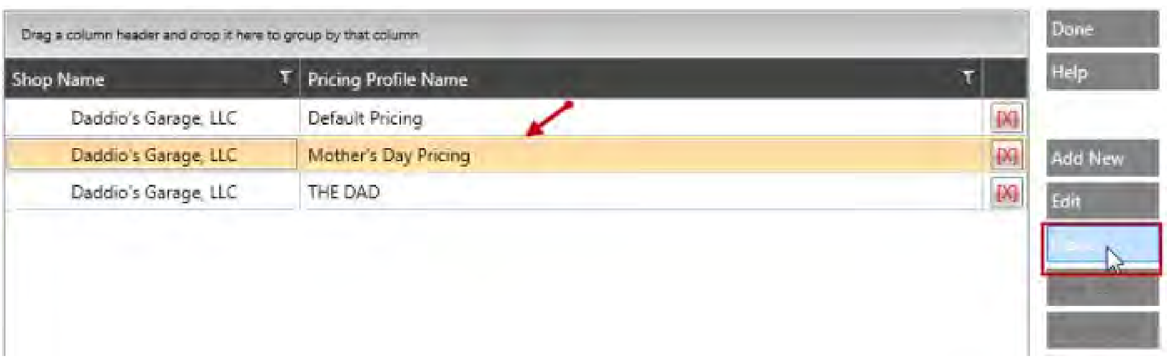
6. Select the rules for this pricing profile by clicking the drop down arrow for the **Basis** field and then entering the corresponding information in the **Basis** section.

   Selecting **Labor Matrix** from the **Basis** drop down list, for example, enables the **Labor Matrix** field where you can select an option from that drop down list. If you select **Fixed Price**, the **Fixed Price** field is enabled so you can type a numerical value in that field.

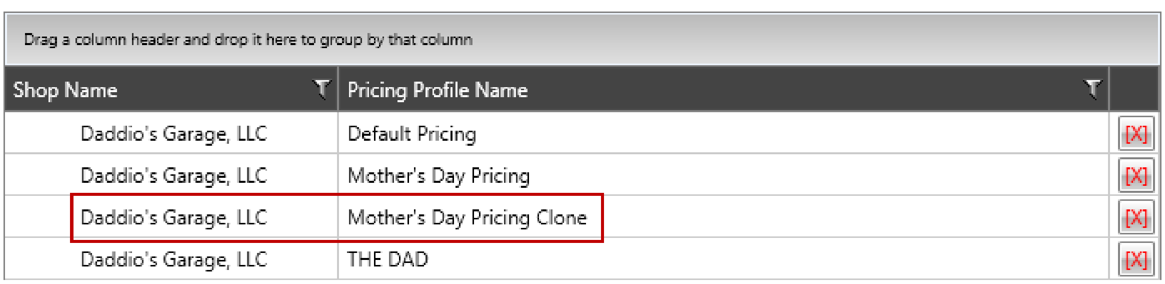
7. Click the **Save** button to save or the new rule.
8. Return to Step 5 if you want to create another rule.
9. Click the **Done** button to return to the **Pricing Profiles** lists screen.

Cloning a Pricing Profile

1. Single click a pricing profile row to highlight it, and click the **Clone** button.



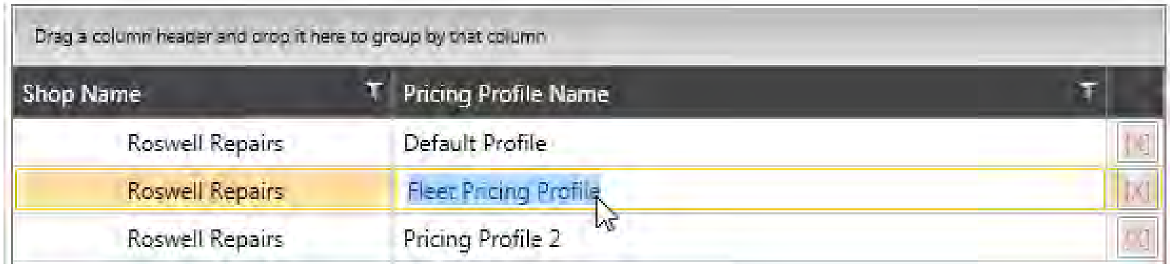
The cloned profile appears directly below the profile you selected with the word **Clone** after it.



2. Click the name in the **Pricing Profile Name** field and rename the profile.
3. Click the **Save Edit** button to save the profile.
4. Single click the **Shop Name** field for the profile you just saved to highlight it, and click the **Edit** button.
5. Follow Steps 5 - 9 in the **Creating a New Pricing Profile** section of this topic.

Editing a Pricing Profile List Entry

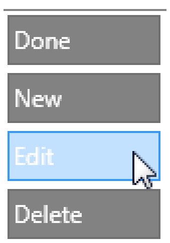
1. Single click the **Pricing Profile Name** field for the item name you want to edit.
2. Change the name as needed.



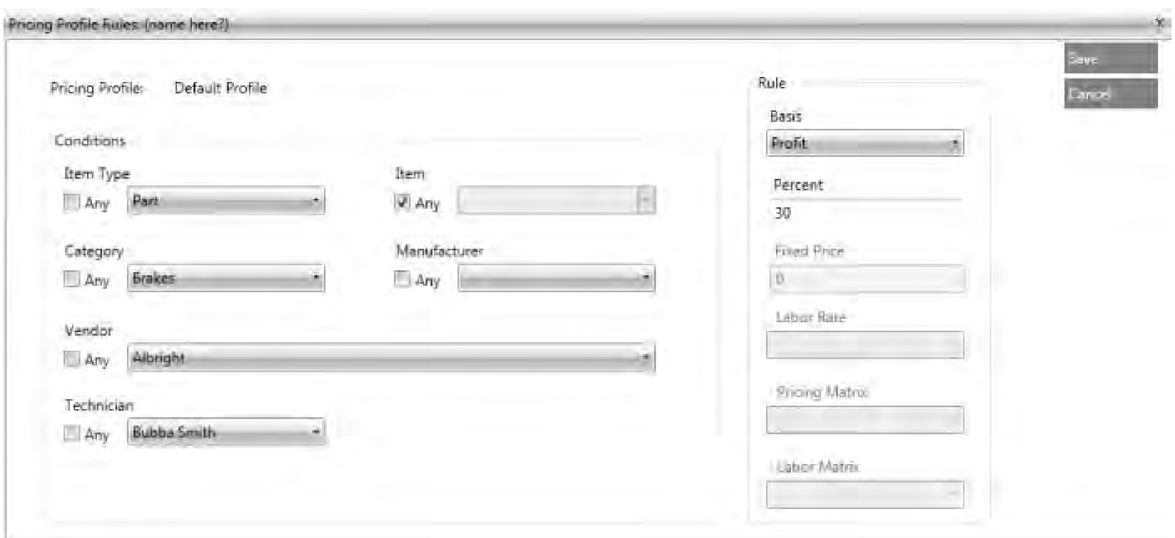
3. Click the **Save Edit** button to save the edits.

Editing a Pricing Rule

1. Single click the desired pricing profile item to highlight it.
2. Click the **Edit** button to open the rules dialog box.
3. Click the rule to highlight the one you want to edit.
4. Click the **Edit** button.



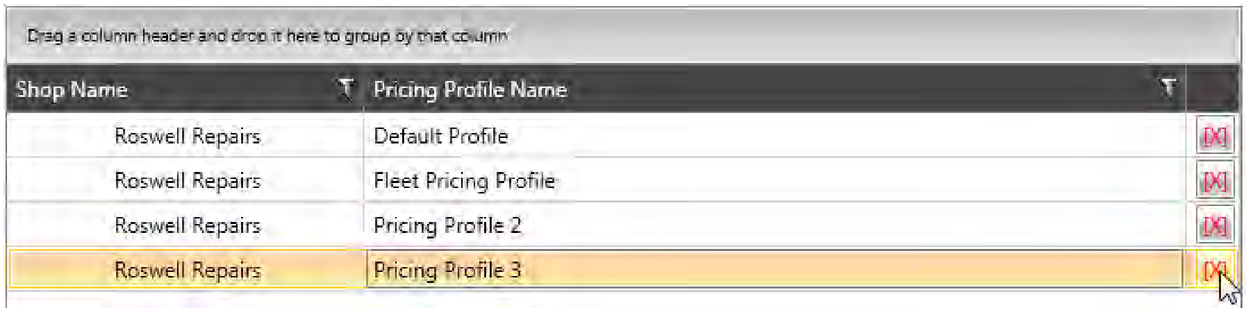
5. Make the necessary edits in the **Pricing Profile Rules** window.



6. Click the **Save** button.
7. Click the **Done** button.

Deleting Pricing Profile List Entry

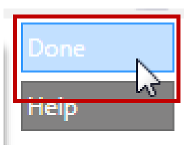
To delete a pricing profile list entry, click the **[X]** button next to the row you want to delete.



Note: Deleting a pricing profile entry can not be undone. Make sure you have the correct row selected **before** deleting it.

Exit the Pricing Profiles List Settings

Click the **Done** button to close the Pricing Profiles list window.



Profit Center Lists Settings

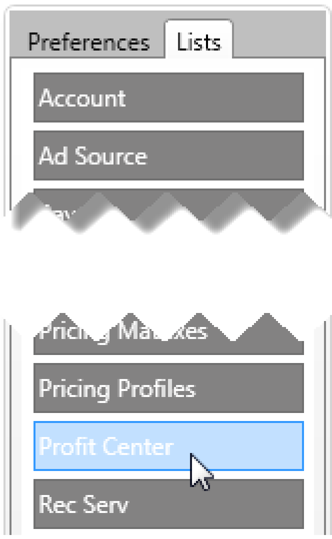
Use the **Profit Center** lists setting to classify invoices and assign them to a particular group. Assigning invoices to a specific Profit Center enables you to see profits by location, salesperson, or promotion.

Note: The profit center list is global and applies to all locations.

Accessing the Profit Center Lists Settings

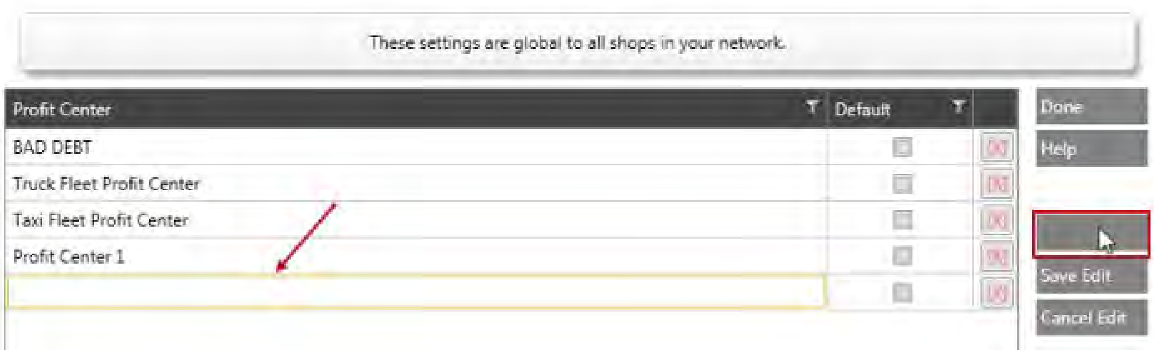
To access the **Profit Center** lists settings:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Lists** tab.
3. Click the **Profit Center** button.



Creating a Profit Center List

1. Click the **Add new row** button.



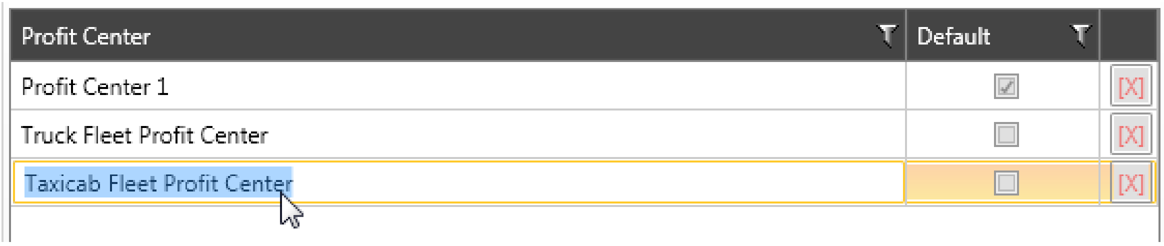
2. Enter the name of the profit center in the **Profit Center** field.
3. (Optional) Click the **Default** check box to assign a default profit center.

   Note: You should have at least one item marked as a default profit center.

3. Click the **Save Edit** button to save the entry.
4. Repeat Steps 1 - 4 to include additional rows.

Editing an Existing Profit Center List Entry

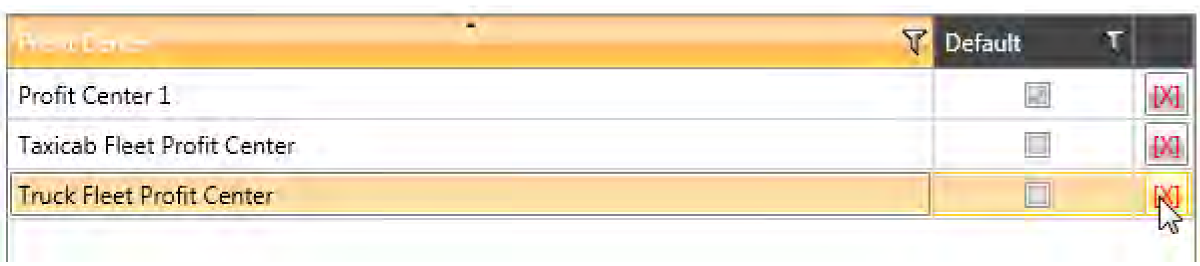
1. Double-click the **Profit Center field** for the item you want to edit and update the information.



2. (Optional) Click the **Default** check box to set this profit center as the default.
3. Click the **Save Edit** button to save the edited information.
4. Repeat Steps 1 - 3 to include additional rows.

Deleting a Profit Center List Entry

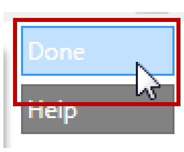
Click the **[X]** button next to the row to delete.



Note: Deleting a profit center entry is permanent. Verify the row **before** clicking the **[X]** button to delete it.

Saving Profit Center List Settings

Click the **Done** button to save your changes and close the Profit Center list window.



Regions Lists Settings

Use the **Regions** lists setting to create regions and assign shops to a region. Once the shops are assigned to a region and you have permission rights, you can assign employees to a region and a default shop. If employees have permission rights, they can only change shops within their region.

Note: The regions list is global and applies to all locations.

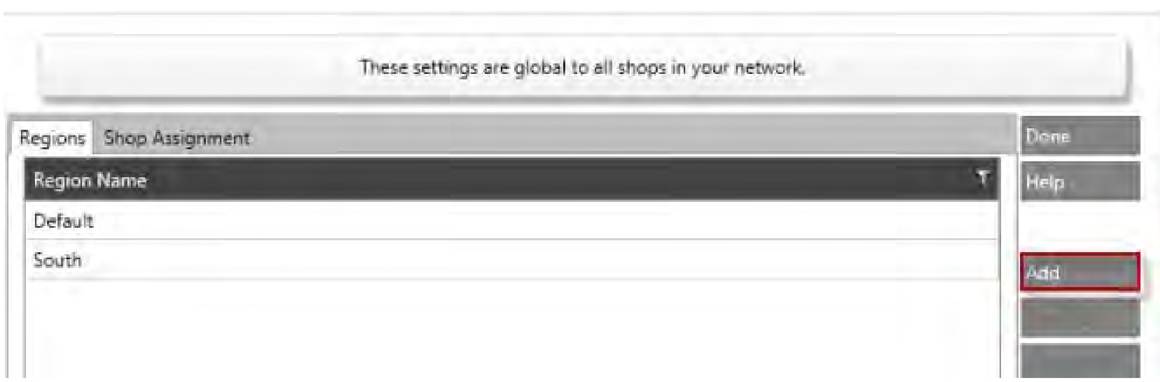
Accessing the Regions Lists Settings

To access the **Region** lists settings:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Lists** tab.
3. Click the **Regions** button.

Creating a Region List

1. Click the **Add** new row button.



2. Enter the name of the region in the **Regions** field.

   Note: The system adds a row with **Default** as the region name; however. You can rename the region.

3. Click the **Save Edit** button to save the entry.
4. Repeat Steps 1 - 3 to include additional rows.

Editing a Region List Entry

1. Double-click the **Region Name** field to select and edit the information.

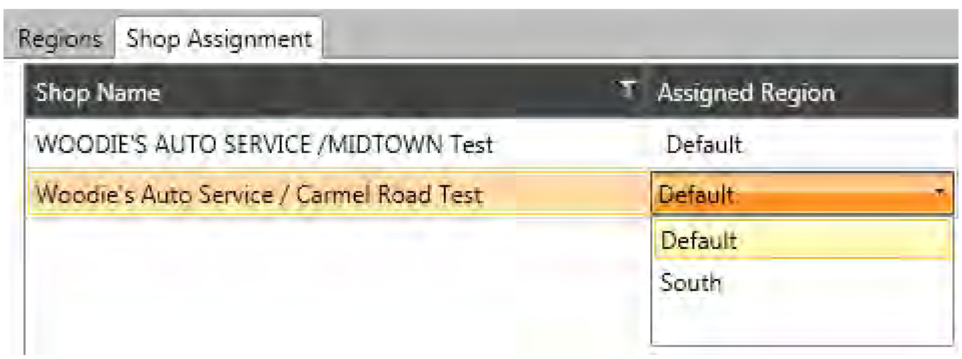
2. Type your changes and click the **Save Edit** button to save the information.

Deleting a Region List Entry

- Double-click the region name to be deleted and click the **Cancel Edit** button.

Assigning Shops to a Region

1. Click on the **Shop Assignment** tab.



2. Double-click on the **Assigned Region** field to display the drop-down list.
3. Select a region.
4. Click the **Done** button to save and close the **Lists** window.

Closing the Regions List Settings Window

- Click the **Done** button to close the **Regions** list window.

Recommended Services List Settings

Use the (**Std Rec Serv) Standard Recommended Services** list to identify specific vehicle services that should be performed on a scheduled basis such as tune-ups or oil changes. The recommended services list can also be used to generate mailings or new business. When a customer recommended service performed on a vehicle, you can copy that item from the recommended services list to the current work order.

Note: The items file must contain items in order for you to include them in your standard recommended services list.

Accessing the Recommended Services List Settings

To access the **Standard Recommended Services** list settings:

1. Click the **Gear and Key** icon.
2. Click the **Lists** tab.
3. Click the **Std Rec Serv** button.

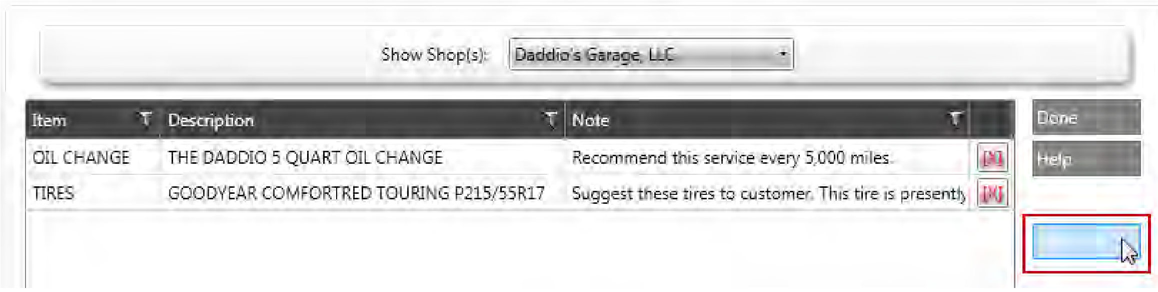
4. Use the **Show Shop(s)** option to select the shop.

Show Shop(s) Sample Only

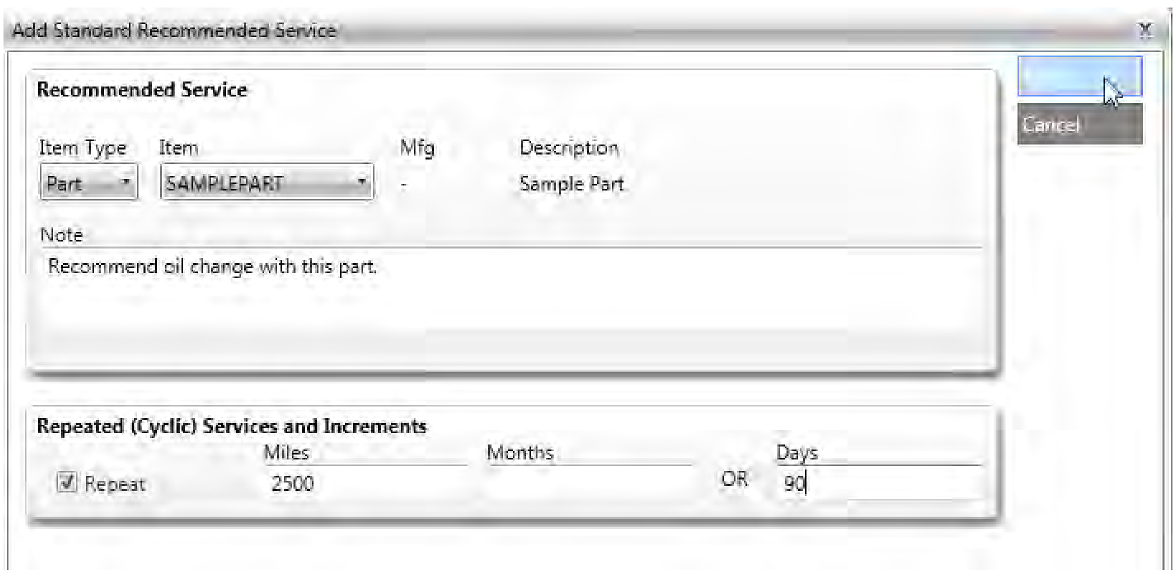
Adding a Recommended Service

Note: You must create an item **first,** and then create a new recommended service. See Chapter 6, Creating a New Item to learn more about creating new items.

1. Click the **Add New** button.



The **Add Standard Recommended Service** window appears.



2. Select an item type from the **Item Type** list.
3. Select an item from the **Item** drop down list.

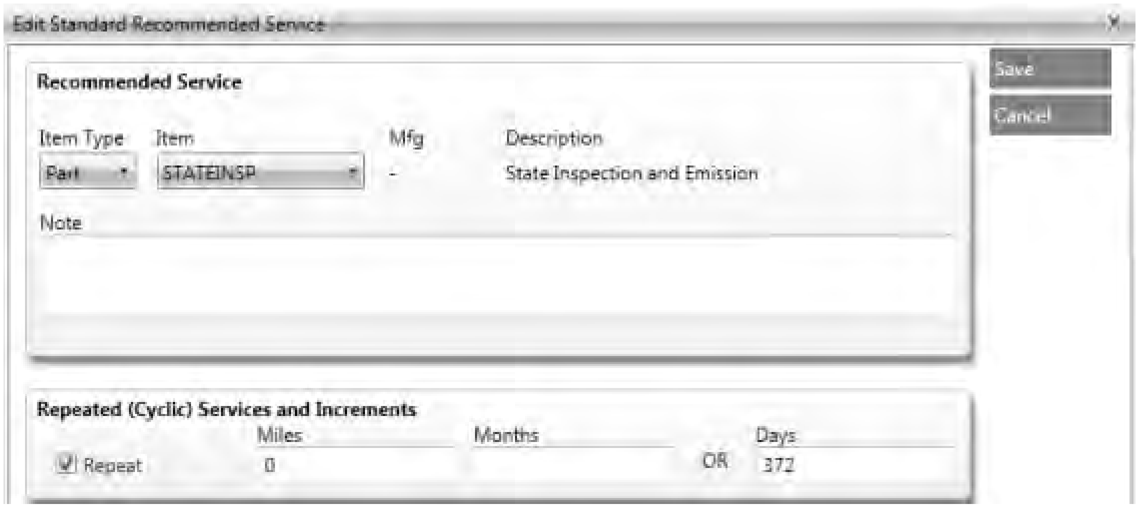
The **Mfg** and **Description** fields will auto-fill if data is available in the system.

4. Add text to the **Note** field, if desired.
5. Click the **Repeat** check box to enable the **Miles**, **Months**, and **Days** fields.
6. Enter the number of miles, months or days to set the interval for the recommended service reminder.
7. Click the **Save** button to save the entry.

Editing a Recommended Service

1. Double-click the recommended service item to edit.

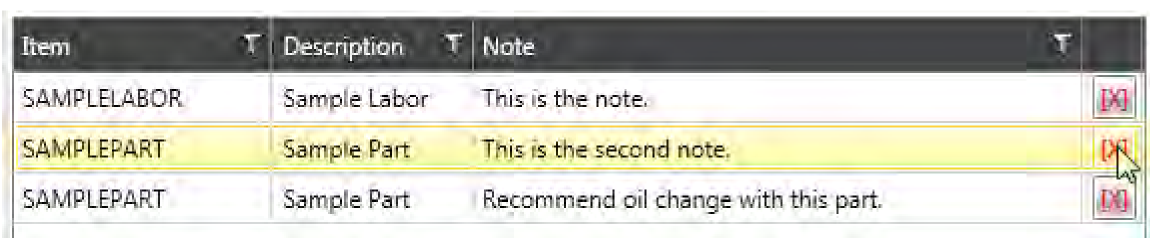
The **Edit Standard Recommended Service** window appears.



2. Follow steps 2 - 7 described in Adding a Recommended Service.

Deleting a Recommended Services Entry

Click the **[X]** button next to the row to delete the entire entry.



Note: Deleting a recommended service entry is permanent. Verify the row **before** clicking the **[X]** button to delete it.

Exiting the Recommended Services List Settings

Click the **Done** button to close the Recommended Services list window.

Symptoms Lists Settings

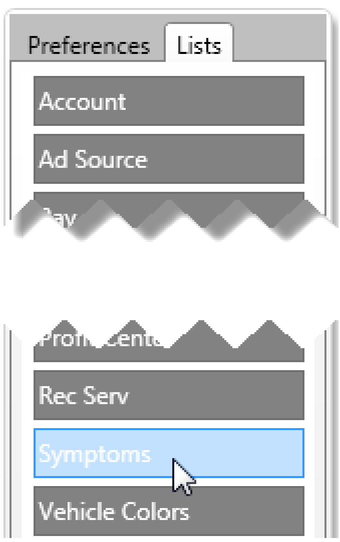
Use the **Symptoms** list settings to record the vehicle symptoms described by a customer. Items in this list are included in the selection lists in NAPA TRACS.

Note: The symptoms list is global and applies to all location managed by NAPA TRACS.

Access Symptoms List Settings

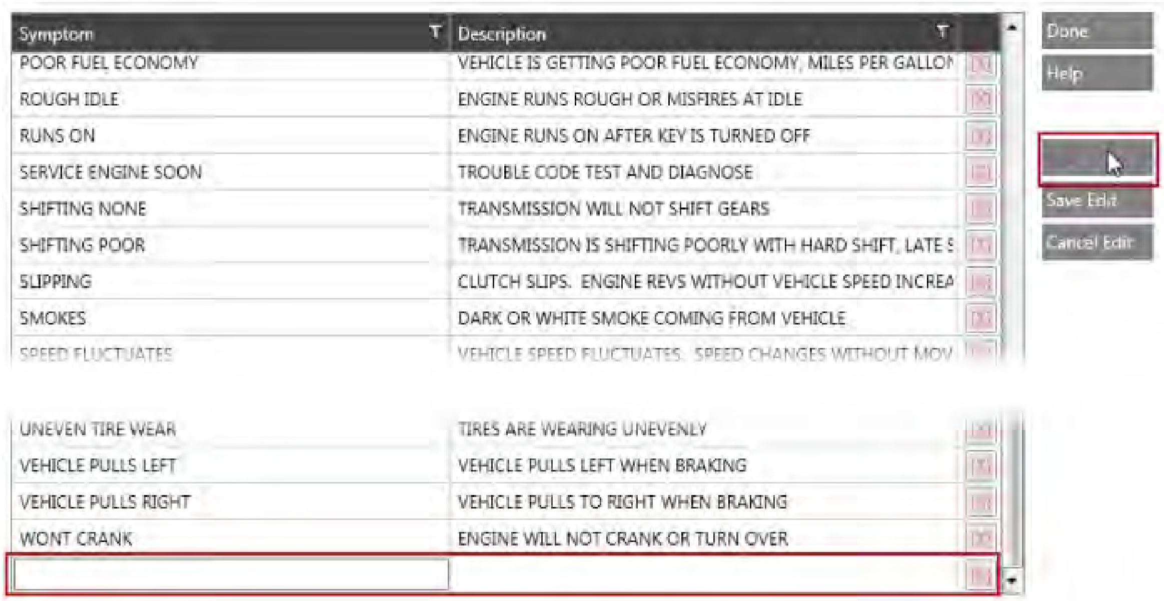
To access the **Symptoms** list settings:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Lists** tab.
3. Click the **Symptoms** button.



Creating a Symptoms List

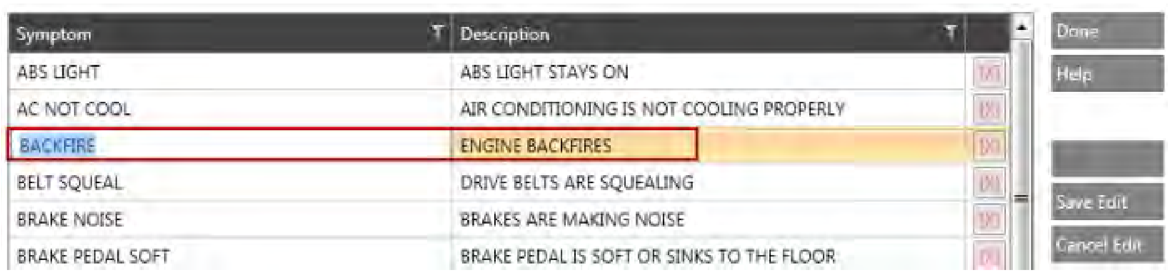
1. Click the **Add** button and type the name and description in the **Symptom** and **Description** fields.



2. Click the **Save Edit** button to save the entry.
3. Repeat Steps 1 and 2 to include additional symptoms.

Editing a Symptoms List Entry

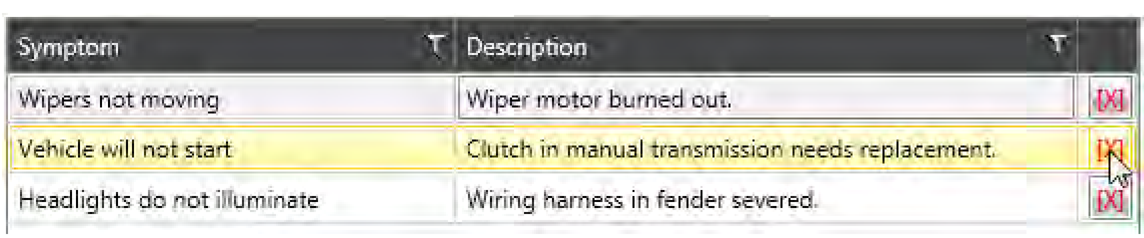
1. Double-click the **Symptom** and **Description** fields, and retype the information.



2. Click the **Save Edit** button to save the edited information.
3. Repeat Steps 1 and 2 to edit additional rows.

Deleting a Symptoms List Entry

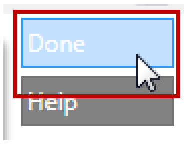
Click the **[X]** button next to the row to delete the entire entry.



Note: Deleting a symptoms entry is permanent. Verify the row **before** clicking the **[X]** button to delete it.

Exit Symptoms List Settings

Click the **Done** button to close the Symptoms list window.



Vehicle Colors Lists Settings

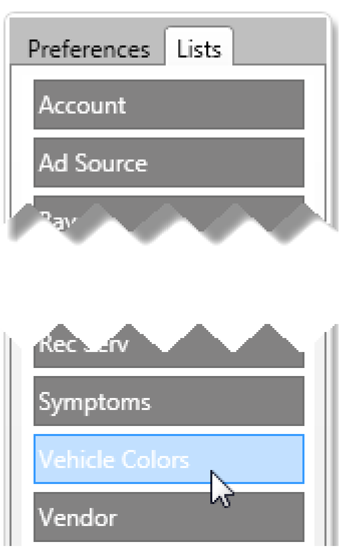
Use the **Vehicle Colors** lists settings to indicate the customer vehicle color. Items in this list are included in the selection lists in NAPA TRACS.

Note: The symptoms list is global and applies to all locations managed by NAPA TRACS.

Accessing Vehicle Colors List Settings

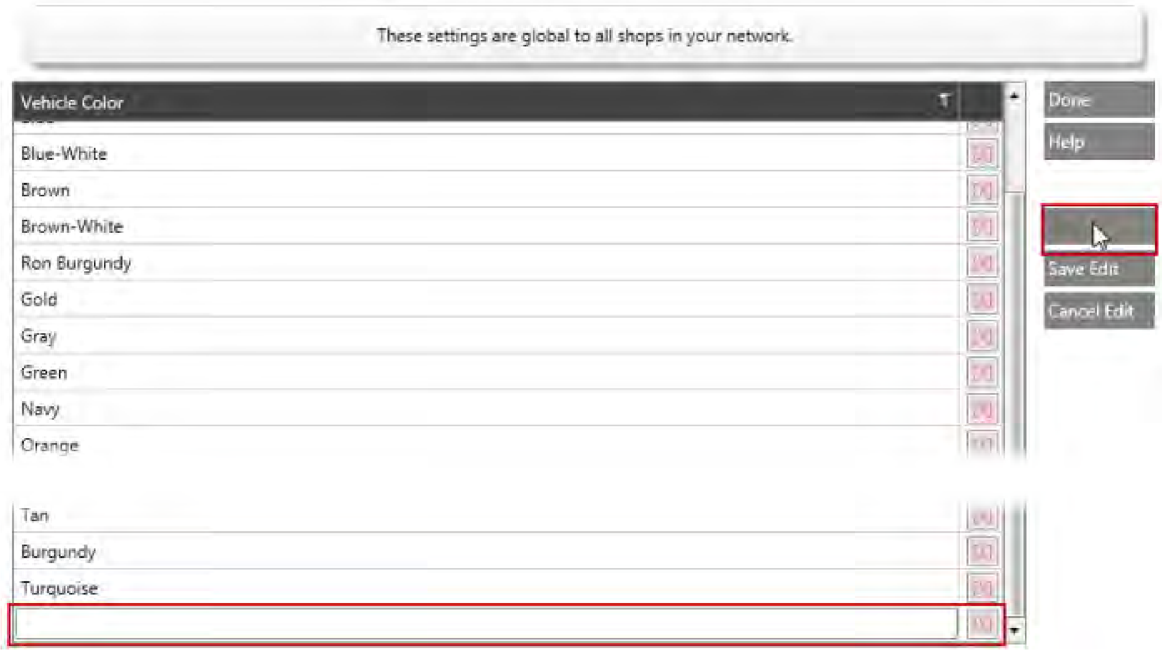
To access the **Vehicle Colors** list settings:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Lists** tab.
3. Click the **Vehicle Colors** button.



Creating a Vehicle Colors List

1. Click the **Add** button and type a color in the **Vehicle Color** field.



2. Click the **Save Edit** button to save information.
3. Repeat Steps 1 and 2 to include additional rows.

Editing a Vehicle Colors List Entry

1. Double-click the vehicle colors item you want to edit in the **Vehicle Color** field, and update the color information.

2. Click the **Save Edit** button to save the edited information.
3. Repeat Steps 1 and 2 to edit additional rows.

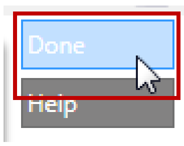
Deleting a Vehicle Colors List Entry

Click the [X] button next to the row to delete it.

Note: Deleting a vehicle colors entry permanent. Verify the row **before** clicking the **[X]** button to delete it.

Exiting the Vehicle Color List Settings

Click the **Done** button to close the Vehicle Colors list window.



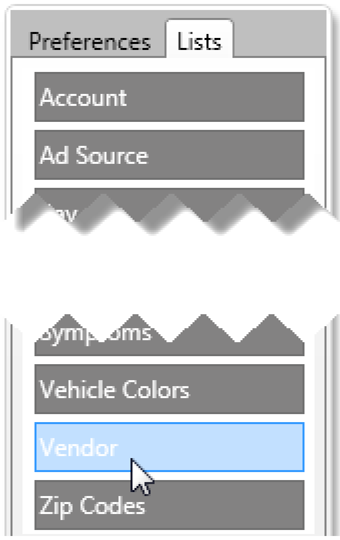
Vendor Lists Settings

Use the **Vendor l**ists settings to identify and associate all of the vendors to be used by your NAPA TRACS managed locations. Items in this list are included in the selection lists in NAPA TRACS.

Accessing Vendor List Settings

To access the **Vendor** lists settings:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Lists** tab.
3. Click the **Vendor** button.

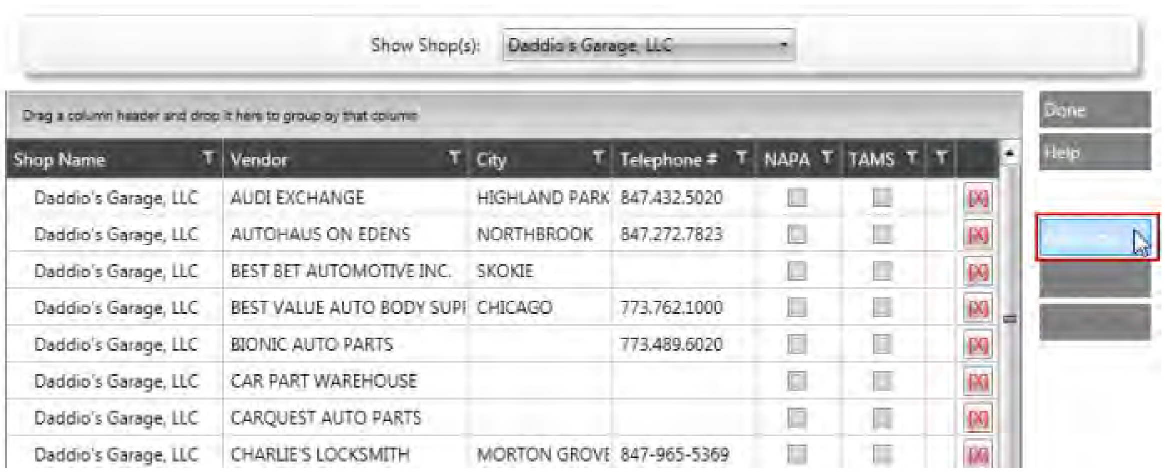


4. Use the **Show Shop(s)** option and select a shop.

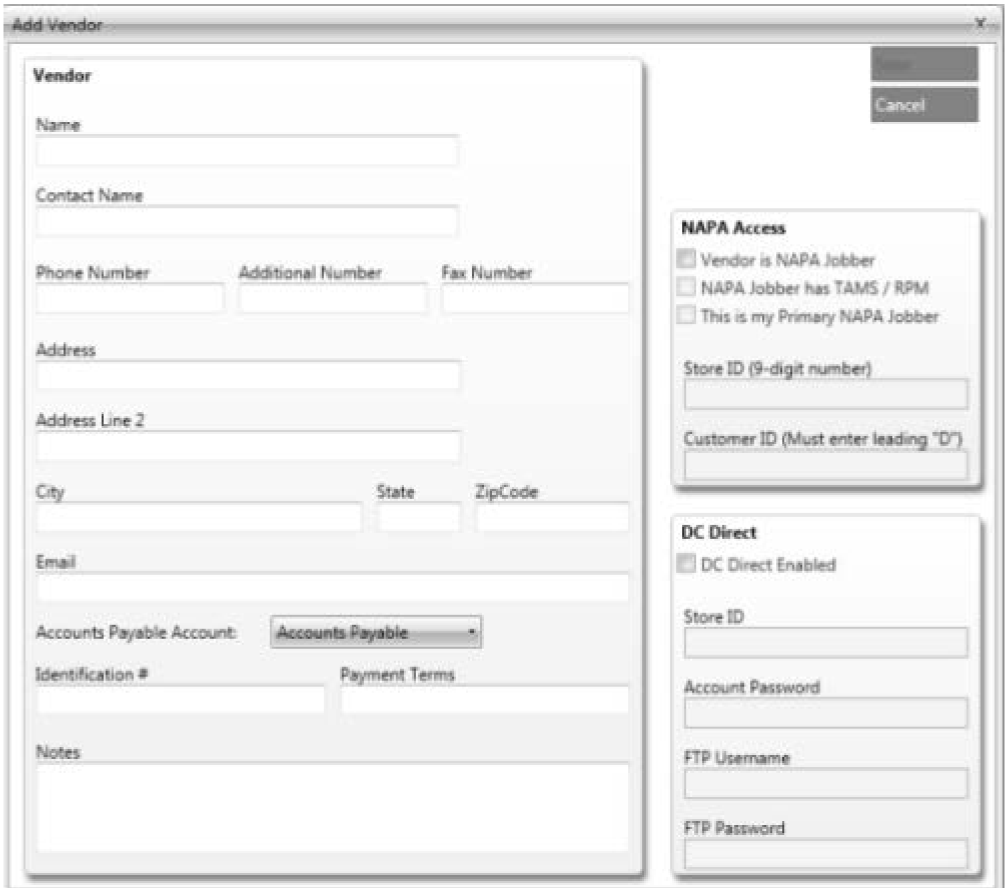
Show Shop(s) Sample Only

Creating a New Vendor

1. Click the **Add New** button.

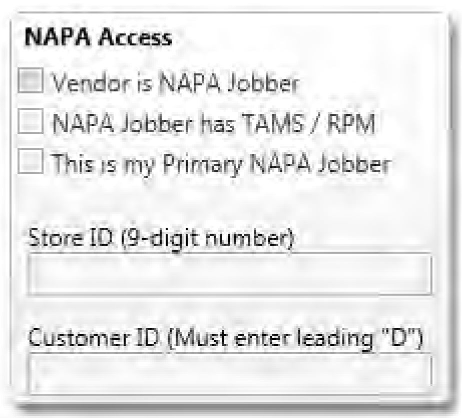


The **Add Vendor** window appears.



2. Enter the vendor information in the **Vendor** section of the form.
3. Click the **Accounts Payable Account** down arrow to associate an account with the vendor, and complete the **Identification Number**, **Payment Terms** and **Notes** fields.

4. Complete the NAPA Access section.



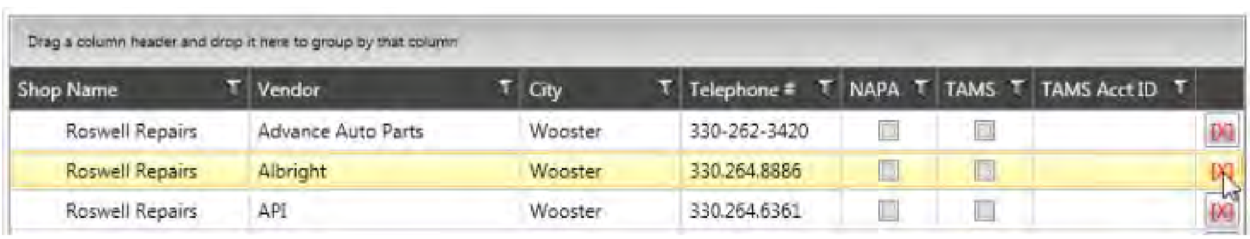
5. Complete the DC Direct section.

Editing Vendor List Entries

1. Double-click the **Vendor** field and retype the information.
2. Click the **Save Edit** button to save the edited information.

Deleting a Vendor List Entry

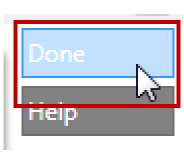
Click the **[X]** button next to the row to delete it from the list.



Note: Deleting a vendor list entry is permanent. Verify the row **before** clicking the **[X]** button to delete it.

Exiting the Vendor List Settings

Click the **Done** button to close the Vendor list window.



Zip Codes Lists Settings

Use the **Zip Codes** list setting to create and maintain a list of your shops' zip codes. Items in this list are included in the selection lists in NAPA TRACS.

Note: The **Zip Codes** list is global and applies to all locations managed by NAPA TRACS.

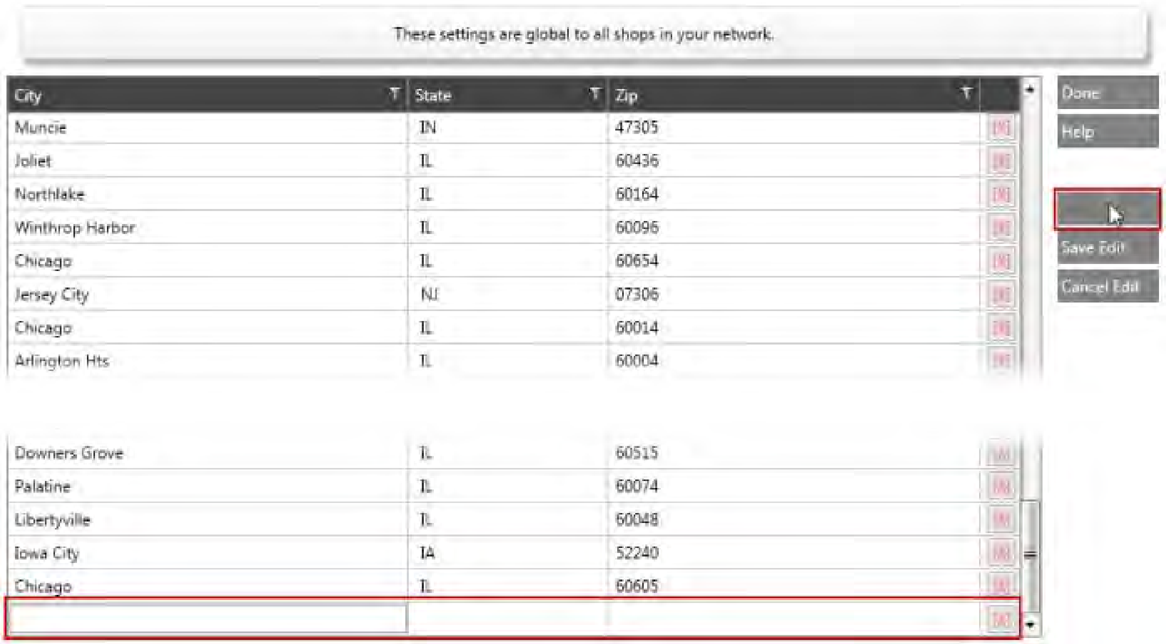
Accessing the Zip Codes List Settings

To access the **Zip Codes** list settings:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Lists** tab.
3. Click the **Zip Codes** button.

Create a Zip Codes List

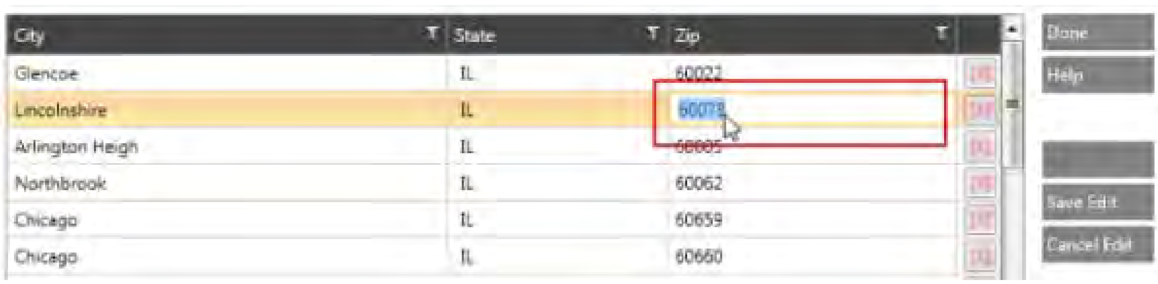
1. Click **Add** button and enter the city, state and zip code.



2. Click the **Save Edit** button to save the information. (RIGHT HERE BUDDY!!!)

Editing a Zip Codes List Entry

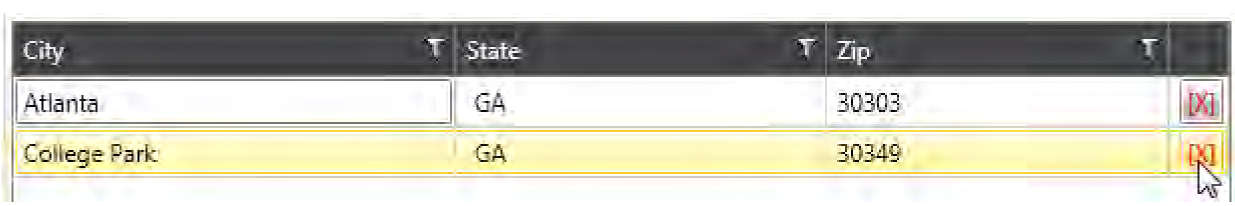
1. Double-click the **Zip Codes** field and retype the information.



2. Click the **Save Edit** button to save the edited information.

Deleting Zip Codes List Entry

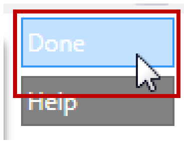
Click the **[X]** button next to the row to delete it.



Note: Deleting a zip code entry is permanent. Verify the row **before** clicking the **[X]** button to delete it.

Exiting the Zip Code List Settings

Click the **Done** button to close the Zip Codes list window.



Chapter 5 Internet and Email

Batch Emails

Note: Functionality for this feature will be available in a future release of NAPA TRACS.

Email Templates

Note: Functionality for this feature will be available in a future release of NAPA TRACS.

Sending Email

The email functionality enables you to email an estimate, work order, and invoice to one or more customers. The **Email** tab on the **General Preferences** window must be set up correctly to send email.

To send an estimate, work order, or invoice:

1. Open an estimate, work order, or invoice.
2. Click the **Preview** button. A preview of the estimate, work order, or invoice appears.
3. Click the **Email** button. The **Email** window appears. The **Subject** and **Body** fields are filled in.
4. Verify the recipients email in the **To** field.
5. Add more text in the body of the email if needed.
6. Click the **Send** button to send the email. The system displays a message box when the email is sent.

7. Click the **OK** button to close the message box.

8. Click the **Done** button to close **Preview** screen.

Internet and Email

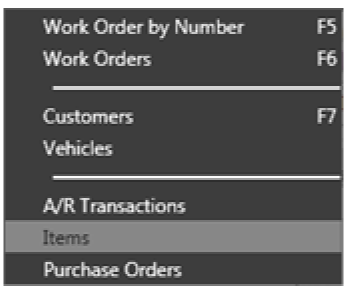
Note: Functionality for this feature will be available in a future release of NAPA TRACS.

Chapter 6 Items

Learning About Items

There are three ways to display a list of all items in NAPA TRACS:

- The **Menu** tool bar, click the **Items**  icon
- The **Search** menu, click **Items**
- The **List** menu, click **Item**



1. Use any of the above options to display the **Search Items** tab. The **Search Items** tab displays search criteria fields that enable you to target your item list results.

   Note: Leave the fields blank to produce a list of all available items.

2. Click the **Find Items** button.

The system displays a list all items in the system on the **All** tab by default. The number of item entries appears on the upper-left portion of the window, below the tab headings. Items are color-coded according to type. For example, parts are highlighted yellow, and labor items are highlighted green.

Labor Parts Tires Wheels Sublets Charges Notes All

Found 1547 Item entries

Type	Item	Description	Mfg	List	Category	Shop Name
Part	ES3181	Tie Rod End - Outer	MRC	$21.55		Daddio's Garage, LLC
Part	ES3182	Tie Rod End - Inner	MRC	$28.58		Daddio's Garage, LLC
Part	ES3238	Tie Rod End - Outer	MRC	$28.58		Daddio's Garage, LLC
Part	ES3374	Tie Rod End - Outer	MRC	$22.43		Daddio's Garage, LLC
Part	ES3401	Tie Rod End - Outer	MRC	$18.32	STEERING	Daddio's Garage, LLC
Part	ES3452	Tie Rod End - Outer	MRC	$29.32		Daddio's Garage, LLC
Part	ES3455	Tie Rod End - Outer	MRC	$33.72		Daddio's Garage, LLC
Part	ES3669	TIE ROD END - OUTER	MOO	$53.53	STEERING	Daddio's Garage, LLC
Part	ES72196	Cylinder Head Bolt Set	FPG	$170.90		Daddio's Garage, LLC
Part	ES722492	Cylinder Head Bolt Set	FPG	$58.36		Daddio's Garage, LLC
Part	ESA1	TAIL LIGHT HOUSING ASSEMBLY (RIGHT)	-	$72.00	BODY	Daddio's Garage, LLC
Part	F1000-174382	SPARK PLUGS - IRIDIUM	DEN	$29.88	TUNE UP	Daddio's Garage, LLC
Part	F3TZ7L278A	BUSHING - STEERING SHIFTER SHAFT	FRD	$0.00	STEERING	Daddio's Garage, LLC
Charge	FET	FEDERAL EXCISE TAX	---	$2.00		Daddio's Garage, LLC
Part	FF-0114	FUEL FILTER	-	$25.41	FUEL	Daddio's Garage, LLC
Part	FG0331	FUEL PUMP	DFI	$0.00	FUEL	Daddio's Garage, LLC
Part	FG0375	Fuel Pump Assy - (Electric In-Tank Type) - Actual	DFP	$416.18		Daddio's Garage, LLC
Part	FG126	TRANSMISSION PAN GASKET	ATP	$7.56	TRANSMISSION	Daddio's Garage, LLC
Labor	FILTERCABINAIR	R&R CABIN AIR FILTER	---	$0.00	PREVENTATIVE	Daddio's Garage, LLC

Item List Overview

The items list includes the following tabs:

- Labor – Use this folder to enter information about the labor items on a customer repair order.
- Parts – Use this folder to enter information about the parts used on a customer repair order.
- Tires - use this folder to enter tire information.
- Wheels - Use this folder to enter wheel information.
- Sublets – Use this folder to enter information about subcontracted services such as towing.
- Charges – Use this folder to enter information about other items such as recycling and disposal fees, freight charges, and recycling. You can attach a charge to an item. When you add that item to the work order, the associated charge will also be added.
- Notes – Use this folder to enter notes that will appear on a customer repair order.
- All – Use this folder to access all items.

Drag-and-drop column headings such as **Item** and **Description**, to rearrange the column order.

The following functions can be performed from any tab:

- Create a new item
- Edit an item
- Delete an item
- Copy an item
- Search for an item
- Un-find (remove) an item from the search results list
- Make a change to all items on the search results list
- View work orders that include the selected item.
- View purchase orders that include the selected item.

The following additional functions can be performed from the Parts, Tires, and Wheels tabs:

- Set on hand quantities for all items on the search results list.
- Update prices for selected items with NAPA. Functionality for this feature will be available in a future release of NAPA TRACS.

Right-Click Shortcuts

Functionality for this feature will be available in a future release of NAPA TRACS.

Right-click on an item in the item list to display the following functions:

- Create Item
- Edit Item
- Delete Item
- Sort By Item
- Sort by Description

Creating a New Item

The new item feature enables you to add a new item to NAPA TRACS. You can create seven types of items:

1. Labor
2. Part
3. Tire

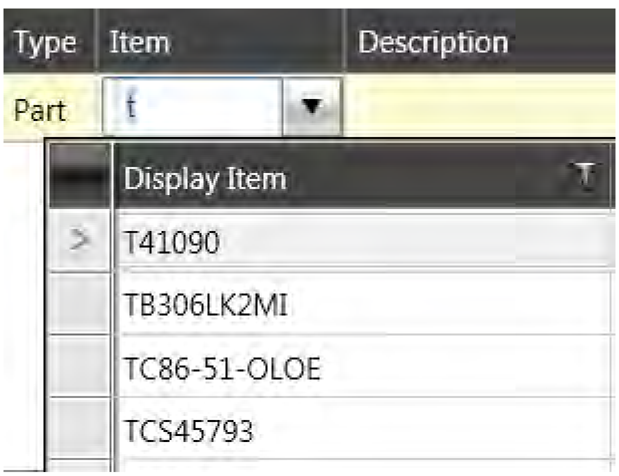
4. Wheel
5. Sublet
6. Charge
7. Notes

New items that are saved are available in the **Display Item** box on the **Estimate** and **Work Order** screens. Use any of these methods to create a new item:

- From the **Items** screen.
- While creating an estimate or work order. NAPA TRACS will add the item to the estimate or repair order.
- While creating several new items using the “Parts Fast” feature.

Note: Functionality for Parts Fast will be available in a future release of NAPA TRACS.

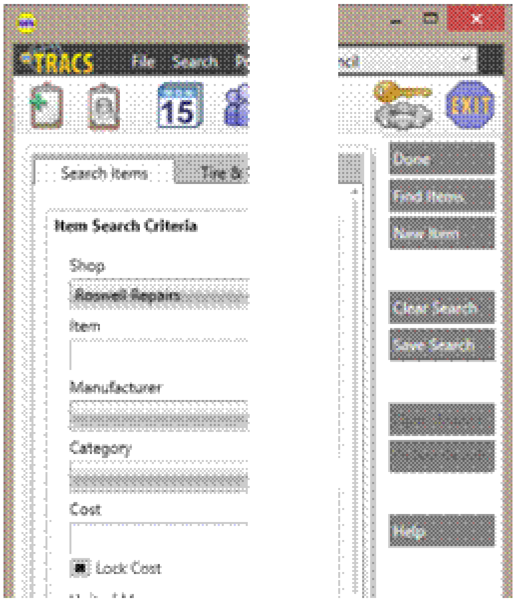
Regardless of which method you use, NAPA TRACS displays the item in the **Display Item** box.



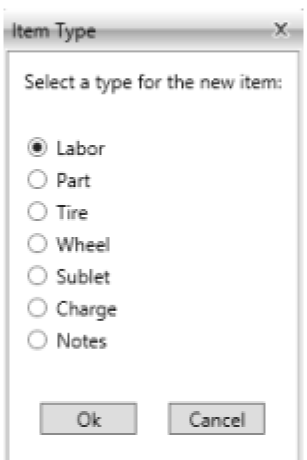
Create an Item from the Item Screen

To create an item from the Item screen:

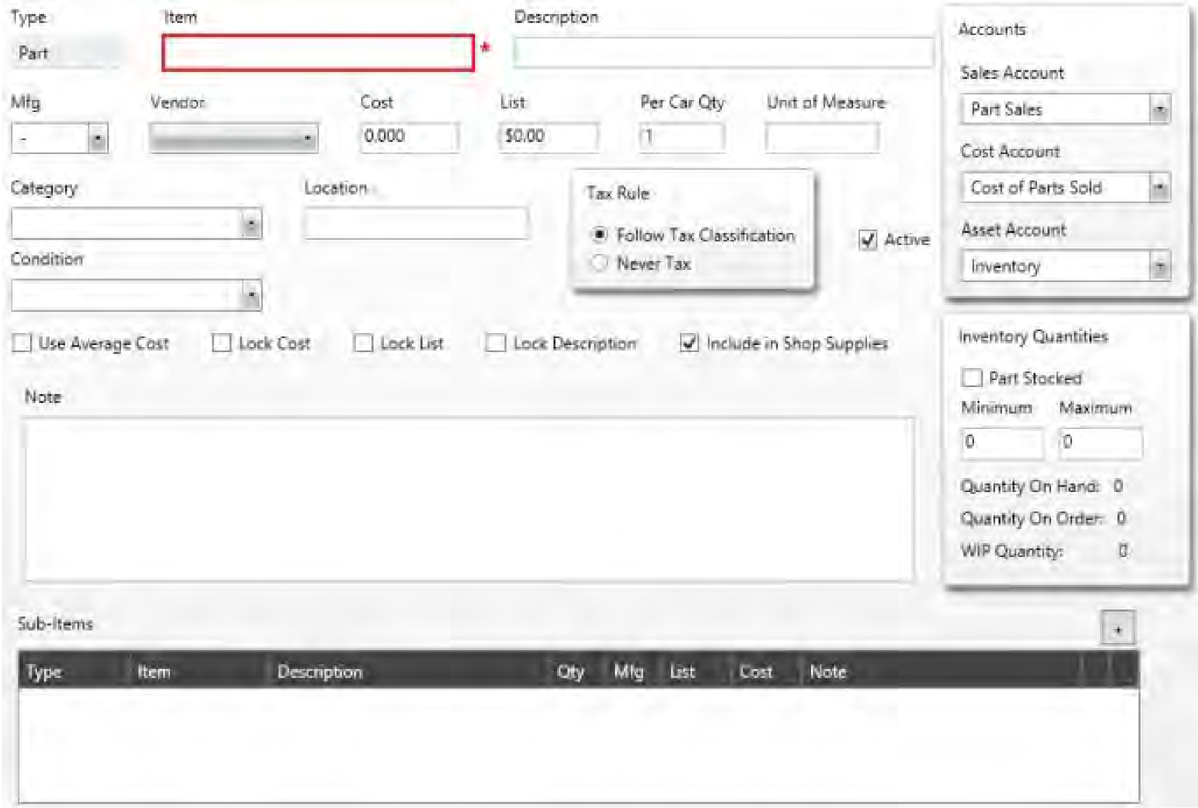
1. Click the **Items**  icon on the menu bar. **The Search Items** screen appears.



2. Click the **New Item** button. The **Item Type** window appears.



3. Click the radio button next to an item type such as **Part**.
4. Click the **OK** button. The system displays the item entry form.



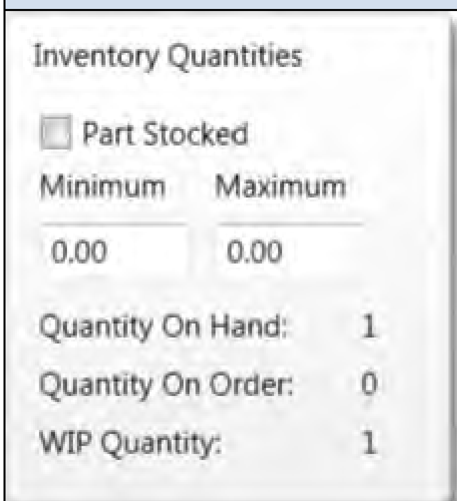
Note: Each entry form will be slightly different for each type of item; however, the following fields are available on all forms:

Common Entry Form Fields

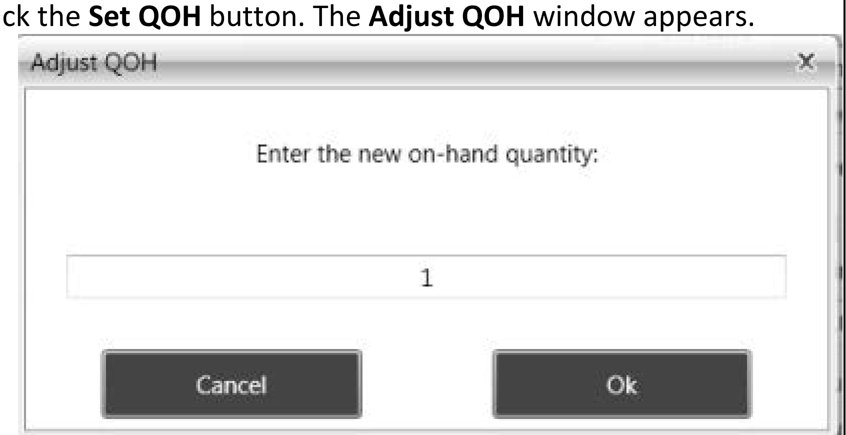
Field Name	Action
Type	
Item	Enter alphanumeric
Description	Enter an item description
Cost	Edit cost amount if the **Lock Cost** field is not checked.
List	Edit list amount if the **Lock List** field is not checked.
Category	Click the down arrow on the field to select from the list.
Lock Cost	Click the check box to place a check mark to prevent cost changes. Click the check box to clear the check box and allow changes to cost price.
Lock List	Click the check box to place a check mark to prevent changes.

	Click the check box to clear the check box and allow changes to the list price.
Include in Shop Supplies	Click the check box to place a check mark to include an item in shop supplies. Click the check box to clear the check box and exclude an item in shop supplies.
Follow Tax Classification	Click the radio button to use tax classification.
Never Tax	Click the radio button to exclude tax.
Note	Enter text.

The following table describes the fields in the **Inventory Quantities** section:

<table>
<tr><th colspan="2">Inventory Quantities Section</th></tr>
<tr><th></th><th>Fields and Action</th></tr>
<tr><td rowspan="6">
</td><td></td></tr>
<tr><td>Part Stocked: Check the check box to place a check mark to indicate the part is stocked.</td></tr>
<tr><td>Minimum: Enter the minimum quantity.</td></tr>
<tr><td>Maximum: Enter the maximum quantity.</td></tr>
<tr><td>Quantity on Hand (QOH): To change the QOH:

1. Click the **Set QOH** button. The **Adjust QOH** window appears.



2. Enter a new value.
3. Click the **OK** button to close the window. The new QOH value is updated in the **Inventory Quantities** section on the item entry form.
4. Click the **Save** button.</td></tr>
</table>

This table describes the fields in the **Accounts** section:

Accounts Section	
	Fields and Action
	The **Sales Account**, **Cost Account**, and **Asset Account** fields default to the value set up in your QuickBooks™ software.

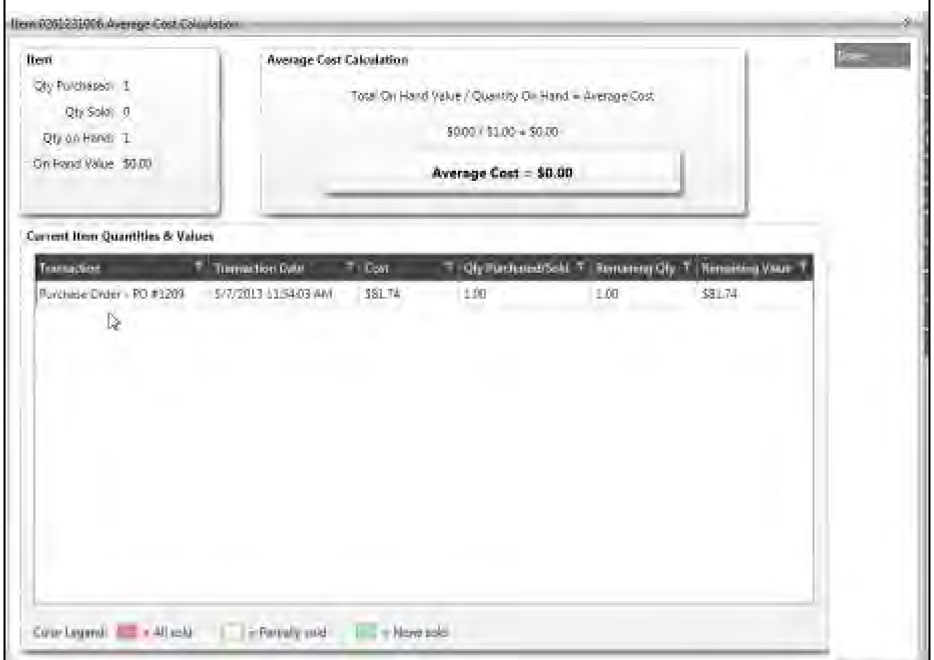
This table describes the fields in the **Use Average Cost Option** section;

Use Average Cost Option
Action

Average cost is calculated based on the total value of the parts on hand, and the quantity of parts on hand.

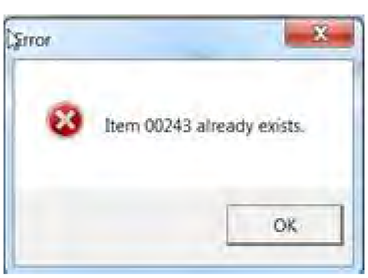
NOTE: If the item does not have a quantity listed, TRACS cannot calculate the average cost.

Check the check box to use average cost.
Click the magnifying glass icon. The **Average Cost Calculation** window appears.

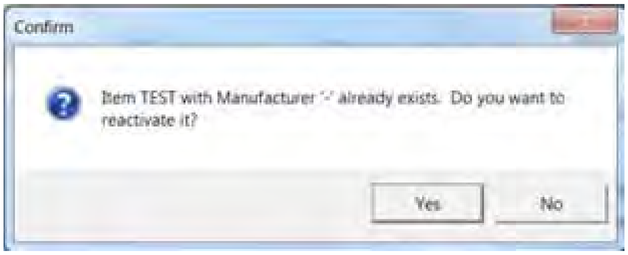


Note: Functionality for this feature will be available in a future release of NAPA TRACS.

5. Enter information in the fields. A red asterisk (*) next to a field indicates it is a required field.
6. If the item is already in the system, the system displays an error message.



7. Click the **OK** button to close the window.
8. If the item you entered matches a deactivated item in the system, a window prompt appears.

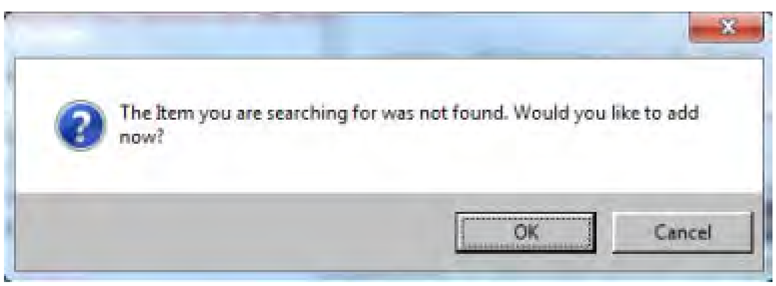


9. Check the **Yes** button to reactivate the existing item, or click the **No** button to ignore and close the window.
10. Click the **Save** button.
11. Click the **Done** button to close the screen.

Creating and Adding a New Item on an Estimate or Repair Order

To create and add an item to an estimate or repair order:

1. Open a work order.
2. From the Work Order Summary or Worksheet tab, click anywhere on the last row of a repair order from the Work Order Summary or Worksheet tab.
3. Press the down arrow key on your keyboard to add a new row.
4. Enter text in the **Item** field. A window prompt appears if the item is not found in the list.



5. Click the **OK** button to add the item.
6. From the **Item Type** window, click the radio button next to the item type.
7. Enter information in the fields, and click the **Save** button. The **Item Type** window closes.
8. Click the **Save** button to save the work order.

Editing and Deleting an Item

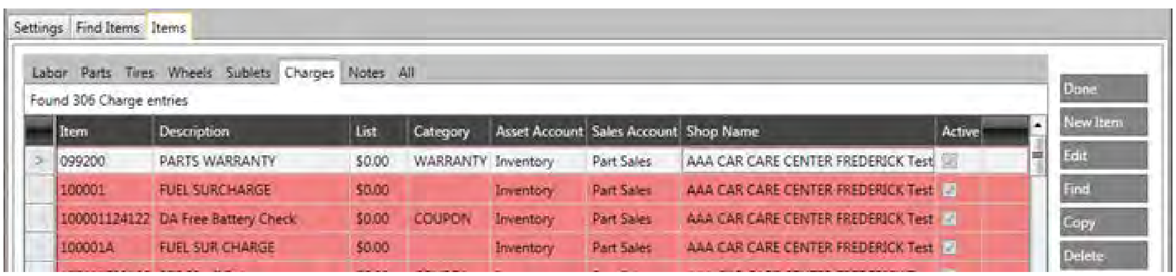
You can edit any of the following items:

1. Labor
2. Part
3. Tire
4. Wheel
5. Sublet
6. Charge
7. Note

Edit an Item from the Item Screen

To edit a Charge item from the Item screen:

1. Click the **Items**  icon on the menu bar. **The Search Items** screen appears.
2. Search for an item or click the **Find Items** button. The system displays a list all items in the system on the **All** tab by default.
3. Click the **Charges** tab.



4. Click on a row to select the item.
5. Click the **Edit** button. The Edit screen appears.
6. Make your changes and click the **Save** button.

Delete an Item from the Item Screen

To delete a Charge item from the Item screen:

1. Click the **Items**  icon on the menu bar. **The Search Items** screen appears.
2. Search for an item or click the **Find Items** button. The system displays a list all items in the system on the **All** tab by default.
3. Click the **Charges** tab.
4. Click on a row to select the item.
5. Click the **Delete** button.
6. Click the **Yes** to delete or click **No** to ignore.

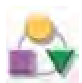
Searching for Items

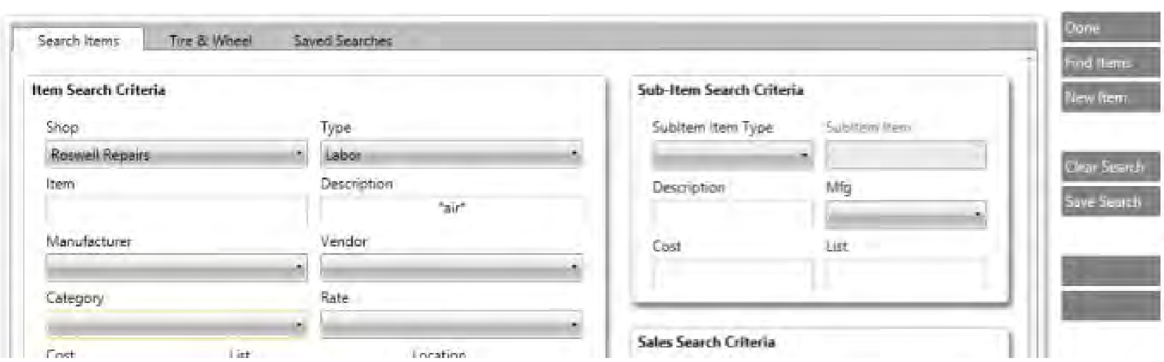
The **Search** function enables you to generate a list of every item in your system, or utilize key words and special characters/wildcard searches to generate a list of specific items. Click here to learn more about special characters/wildcard searches.

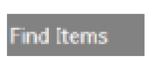
This topic explains how to:

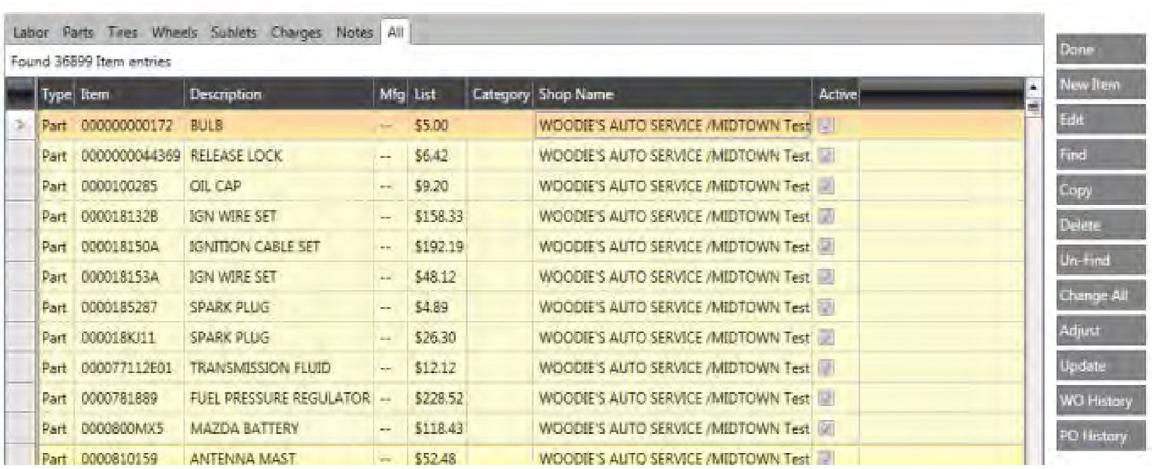
- Search for all items
- Filter criteria to narrow specific results
- Clear criteria
- Remove items from search results

Search for all Items

1. Click the **Items** icon  on the menu bar. The **Search Items** screen appears.



2. Click the **Find Items** button  to display a list of all items. The Items List screen appears.

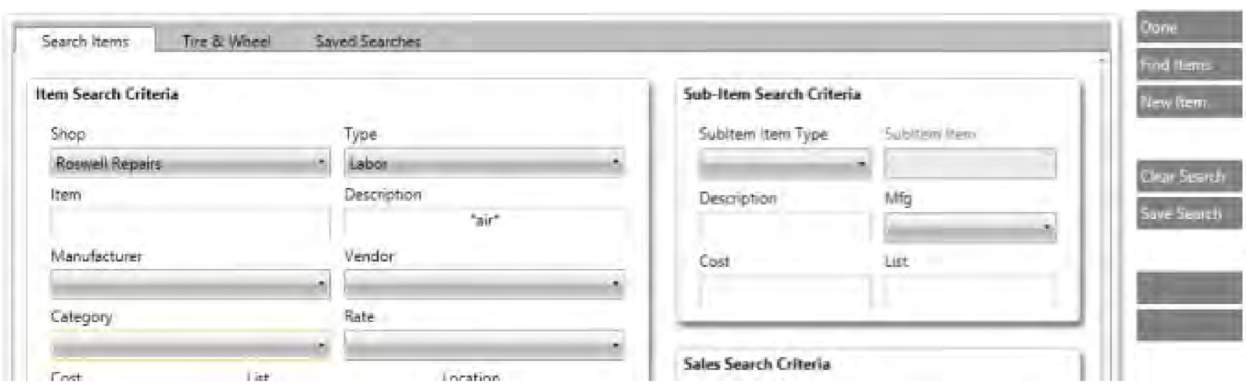


The system displays all items on the **All** tab by default. Click on any tab to filter the results by that item type.

3. Click the **Done** button to close the window.

Use Search Criteria to Filter Results

You can sort, filter, or group the list of results using the techniques reviewed in the Common List Functions topic.



To filter results:

1. On the **Search Items** screen, enter upper or lower case text, with or without wild cards, in the **Item** or **Description** fields to refine your search.
2. Click the down arrow on the fields in the **Item Search Criteria** section to refine your search.
3. Click a check box such as **Never Tax**, to place a check mark. The system will include the option in the filtered results.

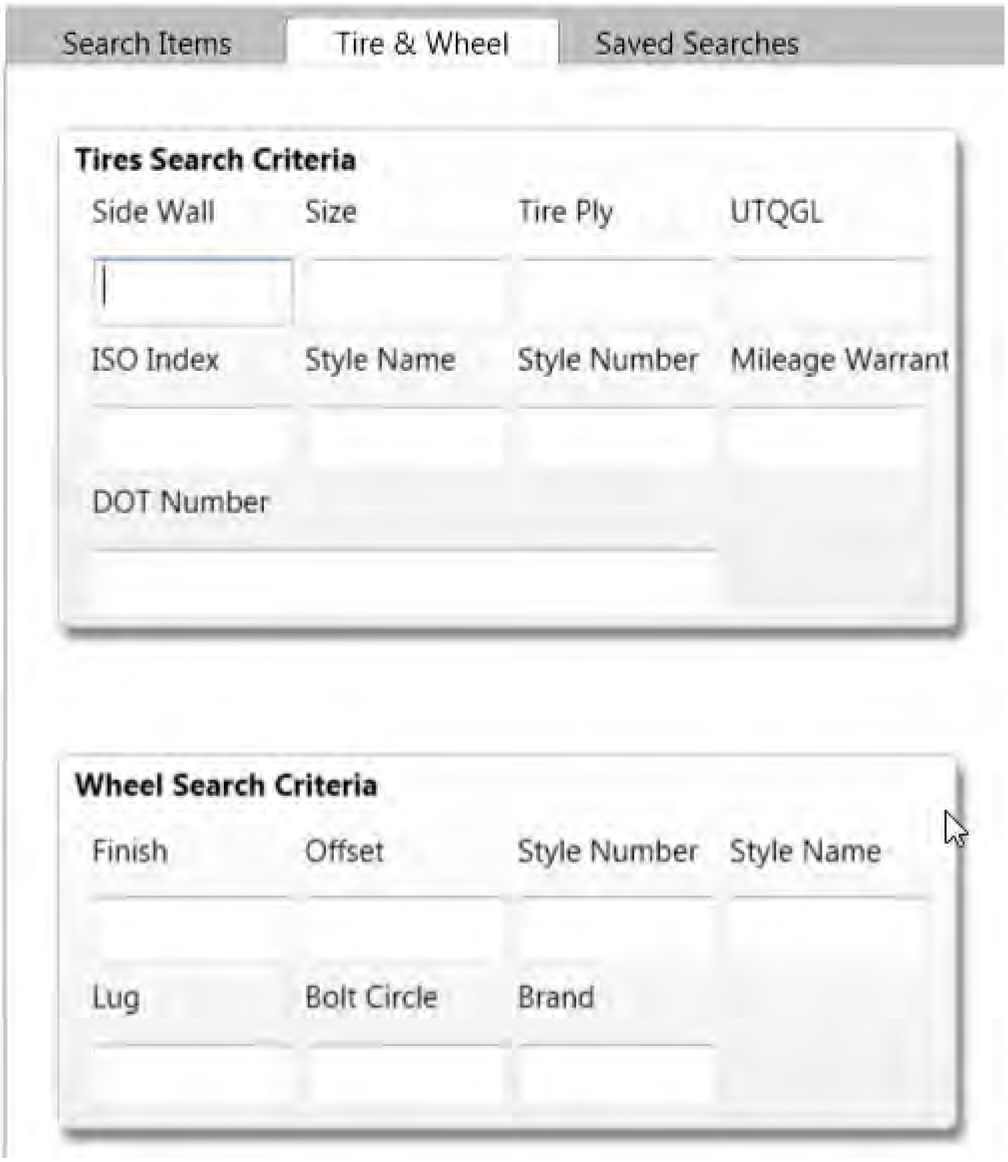
4. Click the **Find Items** button. The search criteria results appear in the **All** tab. Parts that appear in the **All** tab, for example, will also be listed in the **Parts** tab.

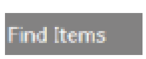
5. Click the **Done** button to close the Items List screen.
6. Click the **Done** button on the **Search Criteria** screen.

Search for Tires or Wheels

To narrow your search for tires or wheels, you use the same method as described above, in the **Use Search Criteria to Filter Results** section; however, the search criteria fields will be different.

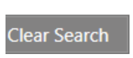
1. Click the **Tire & Wheel** tab and enter information in the fields.



2. Click the **Find Items** 

button to display the search results.

Clear Search Criteria

Use the **Clear Search** button 

to clear the search criteria on the **Search Items** tab or the **Tire & Wheel** tab.

Remove Item from Search Results

Use the **Un-Find** feature if you need to remove an item from the search results list when applying global changes to multiple items.

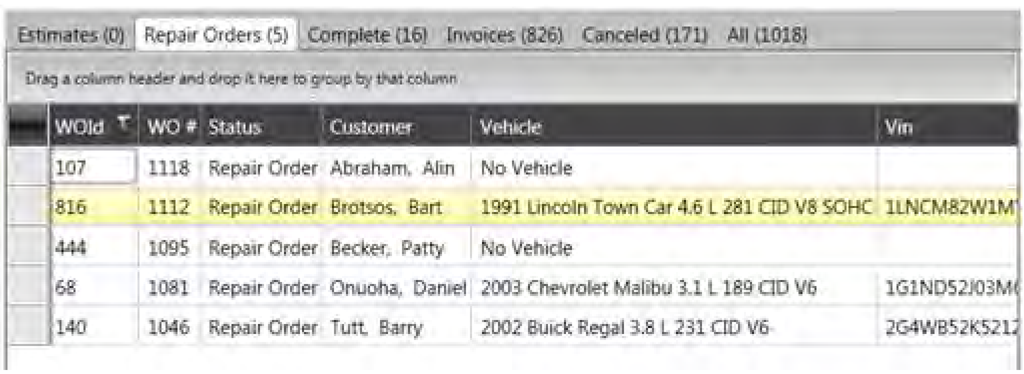
- To remove an item from the Items List screen, select a row and click the **Un-Find** button 

.

Copying Items from the Items List

Use the **Copy** function to copy items from the items list to an open work order. To copy items to your work order:

1. Click the **Work Orders** icon  from the menu bar and double-click a repair order from the **Repair Orders** tab.

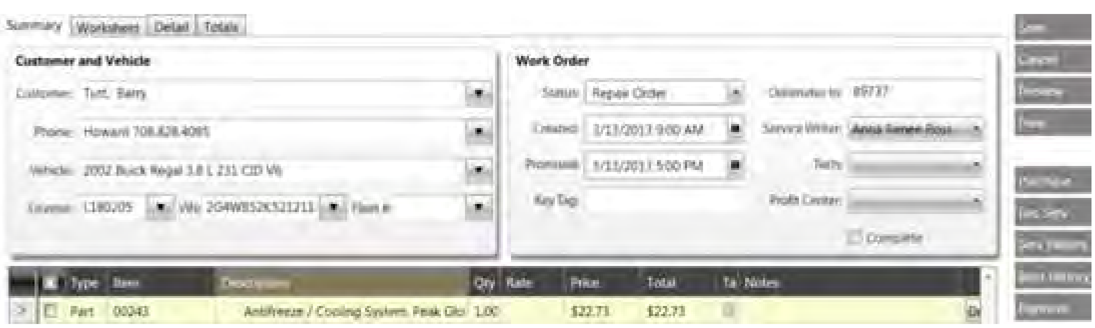


Estimates (0) | Repair Orders (5) | Complete (16) | Invoices (826) | Canceled (171) | All (1018)

Drag a column header and drop it here to group by that column

WOId	WO #	Status	Customer	Vehicle	Vin
107	1118	Repair Order	Abraham, Alin	No Vehicle	
816	1112	Repair Order	Brotsos, Bart	1991 Lincoln Town Car 4.6 L 281 CID V8 SOHC	1LNCM82W1M
444	1095	Repair Order	Becker, Patty	No Vehicle	
68	1081	Repair Order	Onuoha, Daniel	2003 Chevrolet Malibu 3.1 L 189 CID V6	1G1ND52J03M
140	1046	Repair Order	Tutt, Barry	2002 Buick Regal 3.8 L 231 CID V6	2G4WB52K521

The **Work Order** screen appears.



3. Use the Search feature to search for items.
4. Click on a row on the Items List screen to select an item. In the example below, the “ACFLUSH” item on the **Labor** tab is selected.

5. Click the **Copy** button, and then click the **Done** button. The item is copied to the work order and the Items List screen closes.

6. Click the **Purchase** button to view availability of parts for the work order without placing an order. The **Purchase Info** screen appears.
7. Click the **Update** button to update the selected item. The work order is updated.
8. Click the **Done** button to save your changes and close the window.
9. Click the **Save** button on the work order.

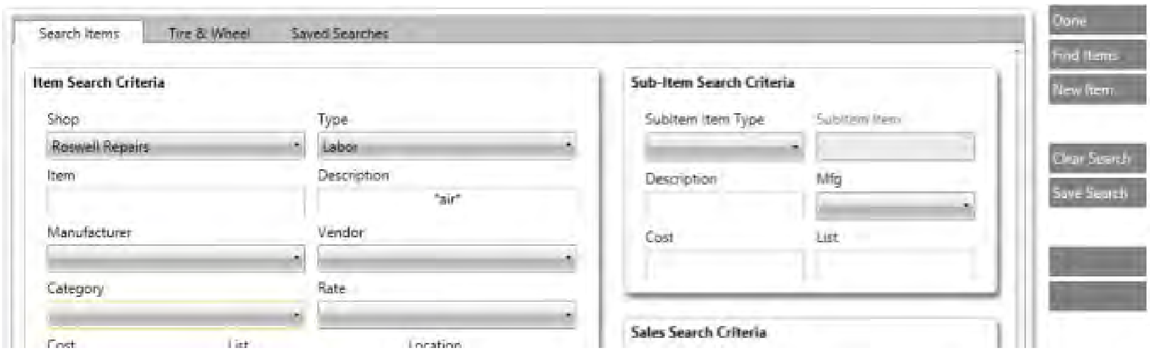
Adding Sub-Items

Sub-items are separate goods and services, such as parts, labor and charges associated with an item. When you add a sub-item, you link (group) the sub-item and item together. When the item is added to a work order, the sub-items are automatically included.

A sub-item must be an item that is in the NAPA TRACS inventory. If the item is not in the inventory, you must create it as a new item, before you can use it as a sub-item.

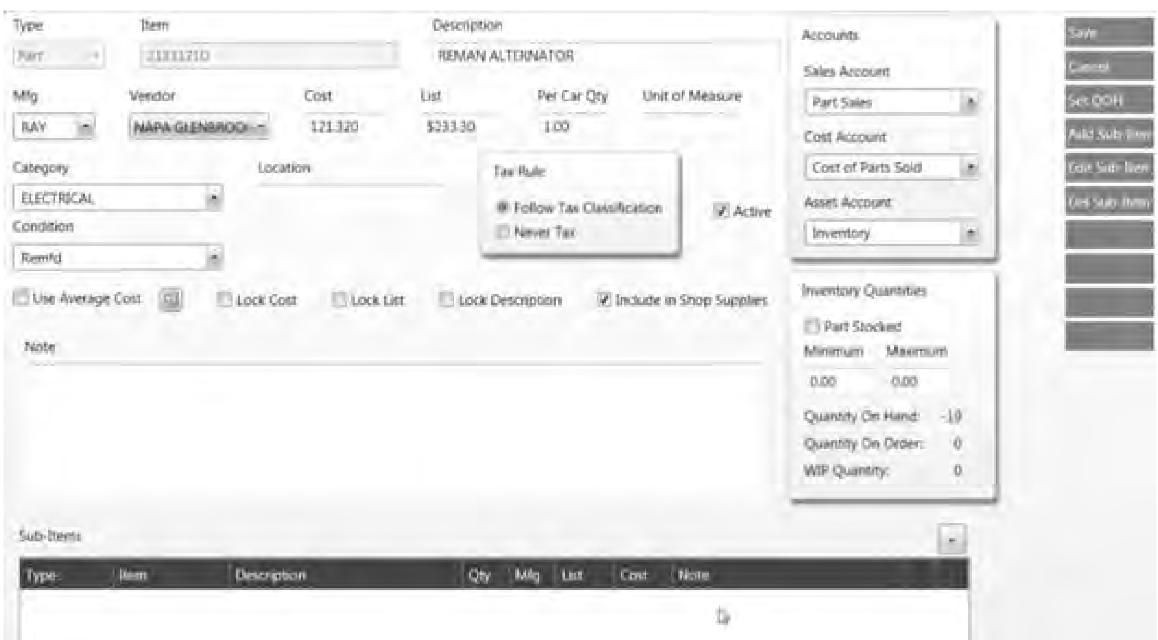
To add a sub-item to an item:

1. Click the **Items** icon  on the **TRACS** menu bar. The **Search Items** screen appears.

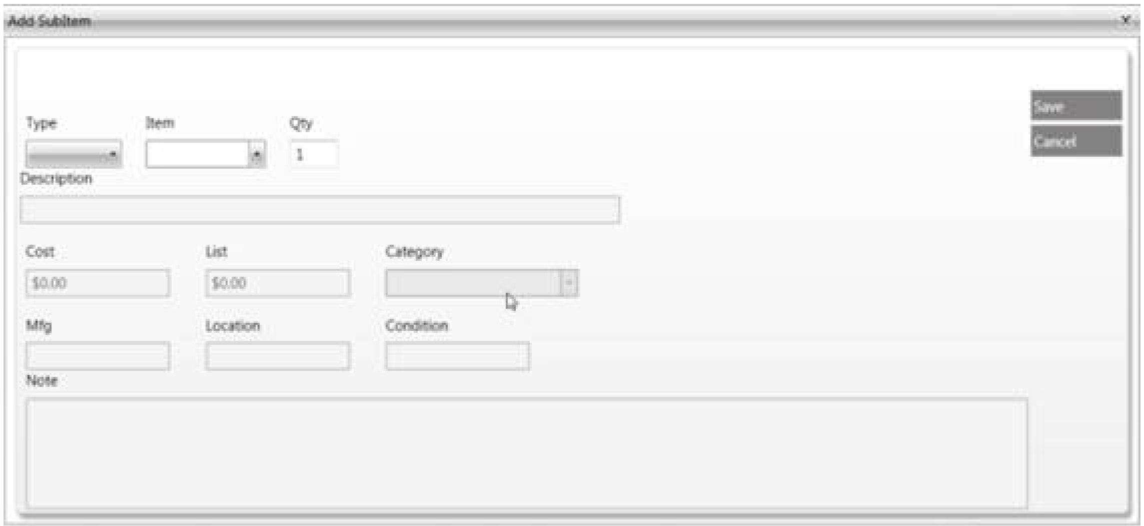


2. Enter search criteria and click the **Find Items** button. The Items List screen appears.

3. Double-click a row to open the item entry form.

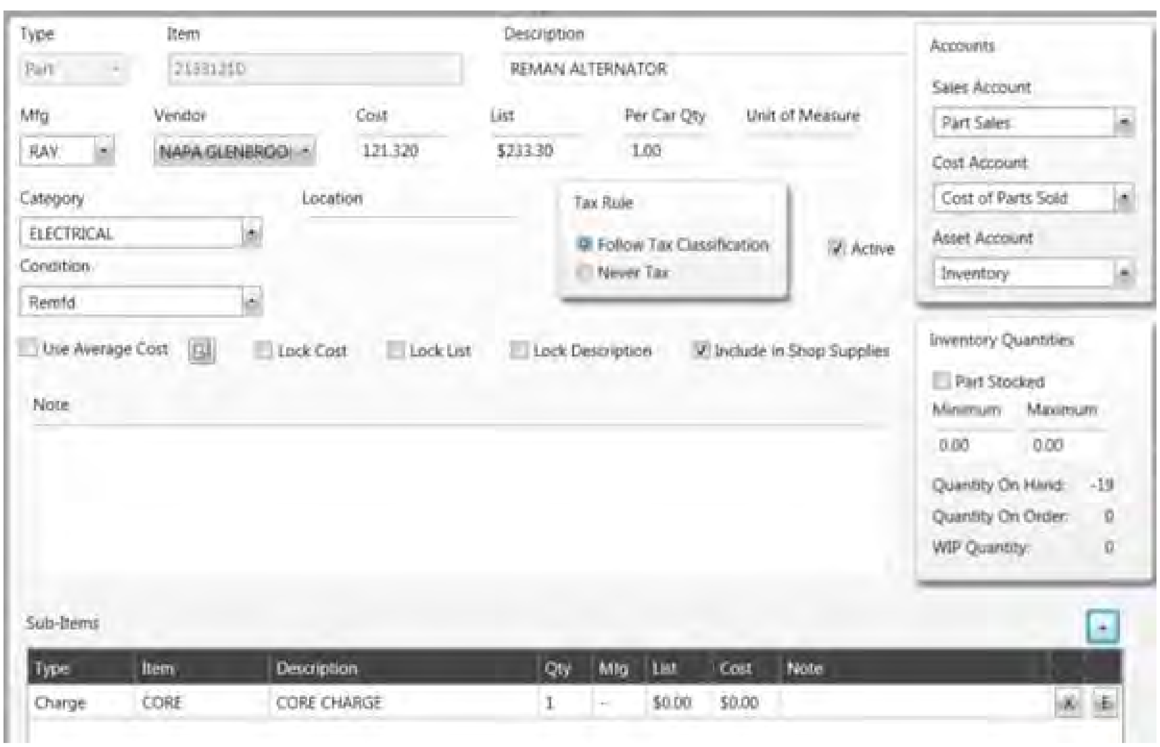


3. Click the **Add Sub-Item** button or click the plus button. The **Add Sub-Item** window appears.



4. Click the down arrow on the **Type** field and select a type.
5. Click the down arrow on the **Item** field and select an item.
6. Optionally, change the value in the **Qty** field.
7. Click the **Save** button. The **Add SubItem** window closes and the sub-item appears on the item entry form in the **Sub-Items** table.

In the example below, a core charge is associated with item 2133121D. When you add item 2133121D to an open work order, the core charge will also be added.



8. Click the **Save** button to close the item entry form.

9. Click the **Done** button to close the Items List screen.

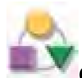
To edit or maintain sub-items, review the Maintaining Sub-Items topic.

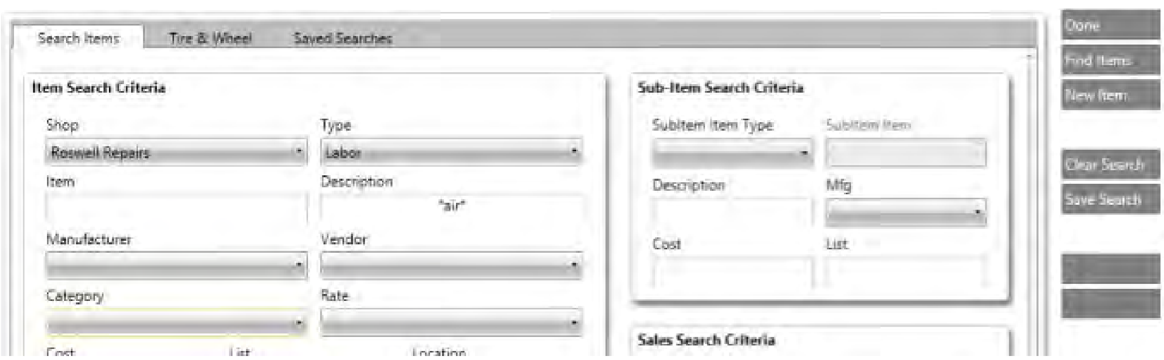
Adjusting On Hand Quantities for a List of Items

Use the **Adjust** feature to adjust or zero out the on-hand quantity for a list of items queried.

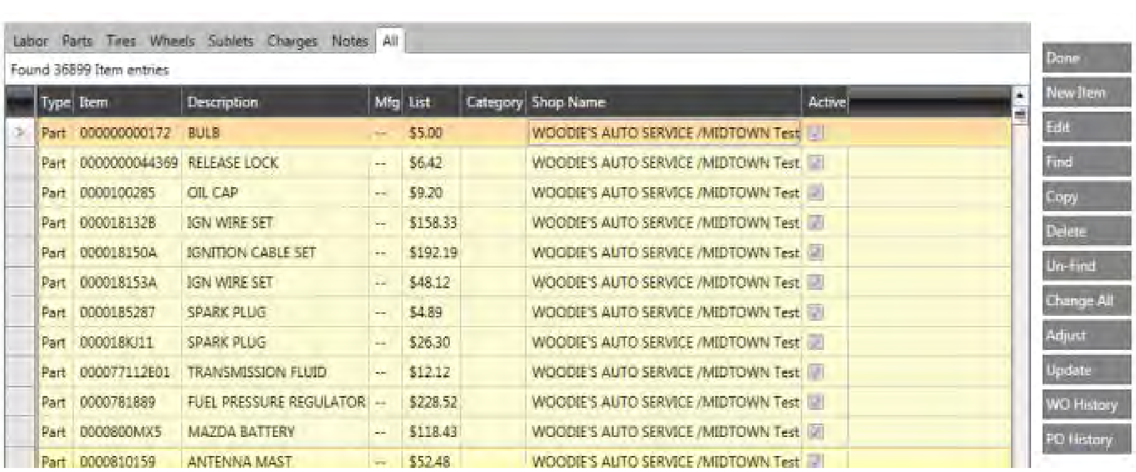
Adjusting On Hand Quantities for a List of Items

To adjust or zero out on hand quantities:

1. Click the **Items** icon  on the menu bar. The **Search Items** screen appears with the **Search Items** tab active by default.



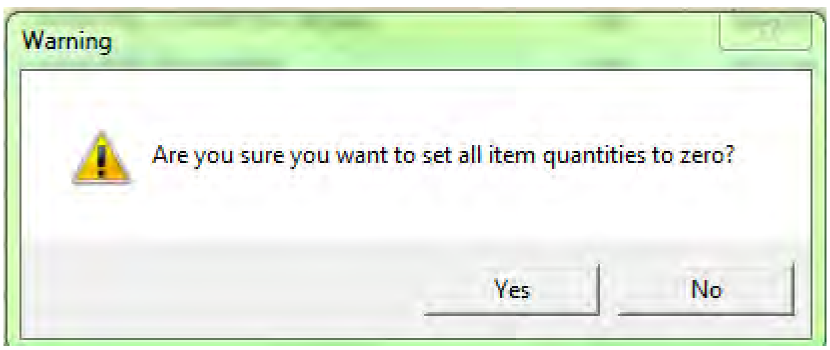
2. Enter search criteria, and then click the **Find Items** button. The Items List screen appears.



3. Click the **Adjust** button. The **Adjust Item On-Hand Quantities** window appears.

Type	Item	Manufacturer	Description	Adjust Qty	Unit Cost	Total	On Hand Qty
Part	0009905307	-	LUG NUTS	0.00	$5.52	$0.00	1.00
Part	00243	PEA	PEAK GLOBAL 50 50	0.00	$12.99	$0.00	0.00
Part	0027600901	-	LOCKING LUG NUTS	0.00	$34.85	$0.00	-14.00
Part	00289ATFWS	-	TOYOTA TRANSMISSION FLUID	0.00	$7.90	$0.00	3.00
Part	0029500103	-	SILCONE SEALER - OIL PAN	0.00	$13.15	$0.00	8.00
Part	0089	-	CENTER SUPPORT BEARING	0.00	$11.20	$0.00	-2.00
Part	0089814325	MER	BALL BEARING	0.00	$11.20	$0.00	1.00
Part	0117C	NCB	BERRYMAN CARB SPR CLN	0.00	$4.29	$0.00	0.00
Part	0120C	NCB	BERRYMAN CARB SPR CLN	0.00	$5.69	$0.00	4.00
Part	01407	MMM	3 DISC	0.00	$2.04	$0.00	9.00
Part	026103085D	ATM	OIL SEAL	0.00	$4.83	$0.00	-7.00
Part	0261231006	ATM	KNOCK SENSOR	0.00	$70.79	$0.00	3.00
Part	032121142	-	U-CLIP (COOLING SENSOR CLIP)	0.00	$0.85	$0.00	0.00
Part	034115147A	VOA	CRANKSHAFT SEAL	0.00	$3.80	$0.00	1.00
Part	038103085E	ATM	OIL SEAL	0.00	$9.91	$0.00	-6.00
Part	05110	CRC	AIR FLOW SENSOR CLNR	0.00	$5.99	$0.00	4.00
Part	053103663	ATM	DIPSTICK FUNNEL	0.00	$1.71	$0.00	-6.00
Part	058145757C	VOA	OIL RETURN GASKET	0.00	$1.90	$0.00	-5.00
Part	058198217	VOA	CAMSHAFT ADJUSTING GASKET	0.00	$3.20	$0.00	0.00

4. Click a row to highlight it and press the **Zero Qtys** button. A warning dialog box appears.



5. Click **Yes** to set the quantity to zero and return to the **Adjust Item On-Hand Quantities** window.
6. Review the changes.
7. Click the **Save** button to save the changes, or click the **Cancel** button to ignore changes. The system closes the **Adjust Item On-Hand Quantities** window.

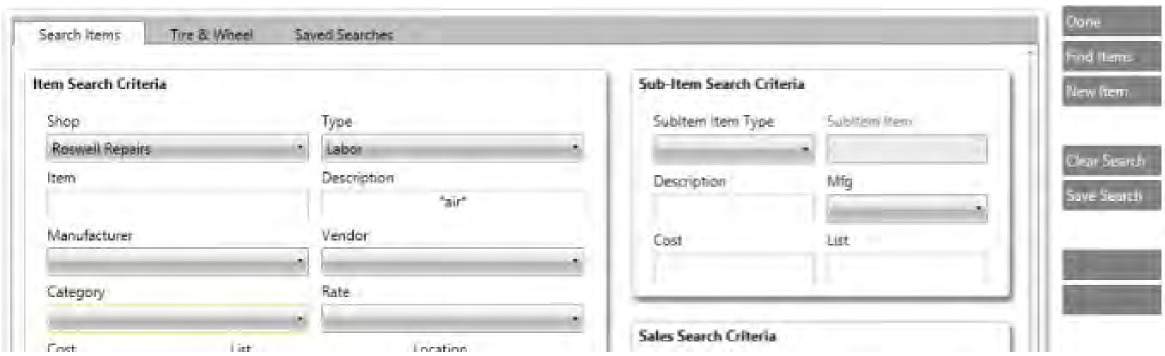
Applying Global Changes to Items and Sub-Items

There may be times when you need to change the vendor, adjust on-hand quantities, or add a sub -tem to a tailored list of items. NAPA TRACS provides options that can be applied to multiple items at one time. Use the **Change All** function to apply these changes.

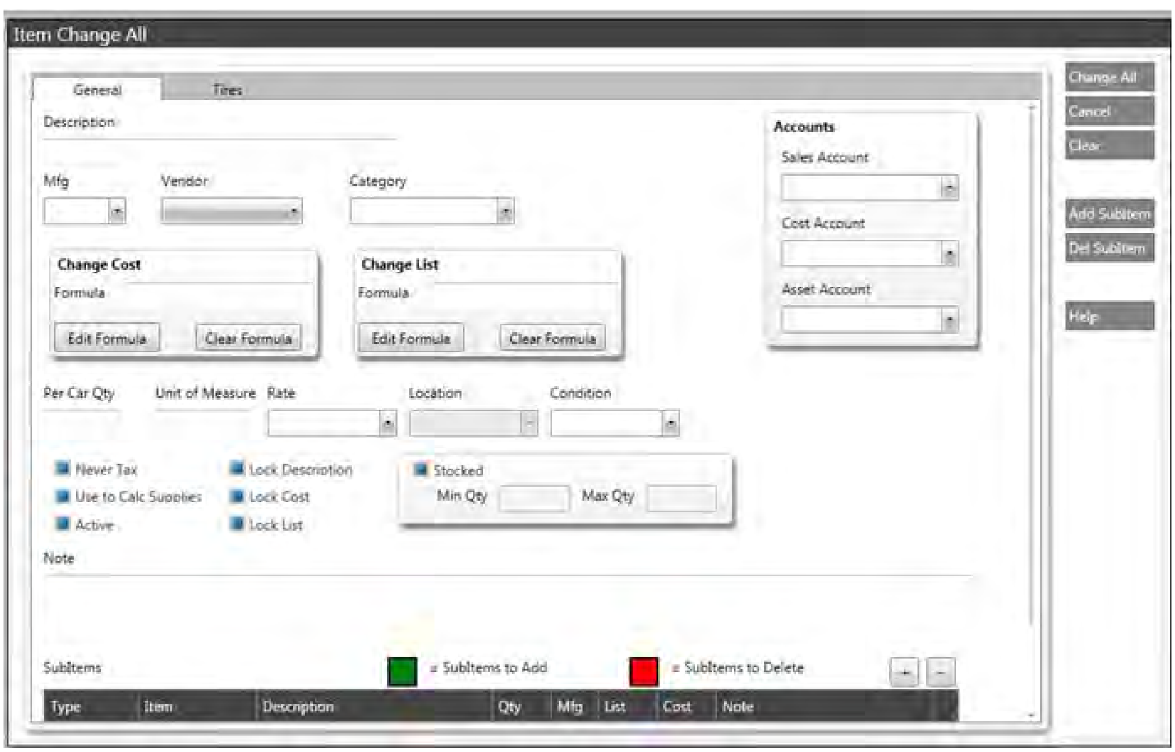
This topic explains how to apply global changes to more than one item, and exclude certain items from the search results list. In the example below, a vendor change is globally applied to items on the search results list.

To apply changes globally to items:

1. Click the **Items** icon  on the menu bar. The **Search Items** screen appears.



2. Click the down arrow on the **Vendor** field and select a vendor.
3. Click the **Find Items** button. The system displays the search results in the Items List screen.
4. Click the **Change All** button . The **Item Change All** screen appears.



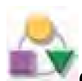
5. Enter information in the applicable fields.
6. Optionally, click the **Add SubItem** button to add sub items. The **Add SubItem to Add** window appears.
7. Enter information in the applicable fields and click the **Save** button. The system displays the sub-item in the **Sub Items** table highlighted in green.
8. Click the **Del SubItem** button to delete sub-items from the Sub Items table.

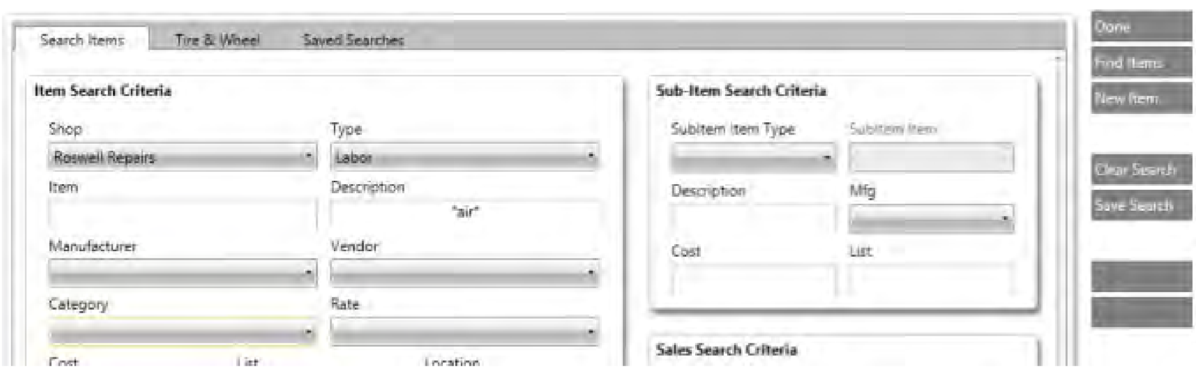
Note: The **Min Qty** and **Max Qty** fields are enabled when **Stocked** is true (min and max are set).

Exclude Items from Global Updates

When you apply global updates to a list of items, all items will be updated. However, you can exclude items from receiving updates by removing them from the search results list. You use the **Un-Find** function to remove items.

Follow these instructions to remove items from the search results list:

1. Click the **Items** icon  on the menu bar. The **Search Items** screen appears.



2. Enter search criteria, and then click the **Find Items** button.The system displays the search results in the Items List screen.
3. Click anywhere on a row to select an item.
4. Click the **Un-Find** button. The system removes that item from the Items List.
5. Click the **Change All** button to apply updated information to all items.

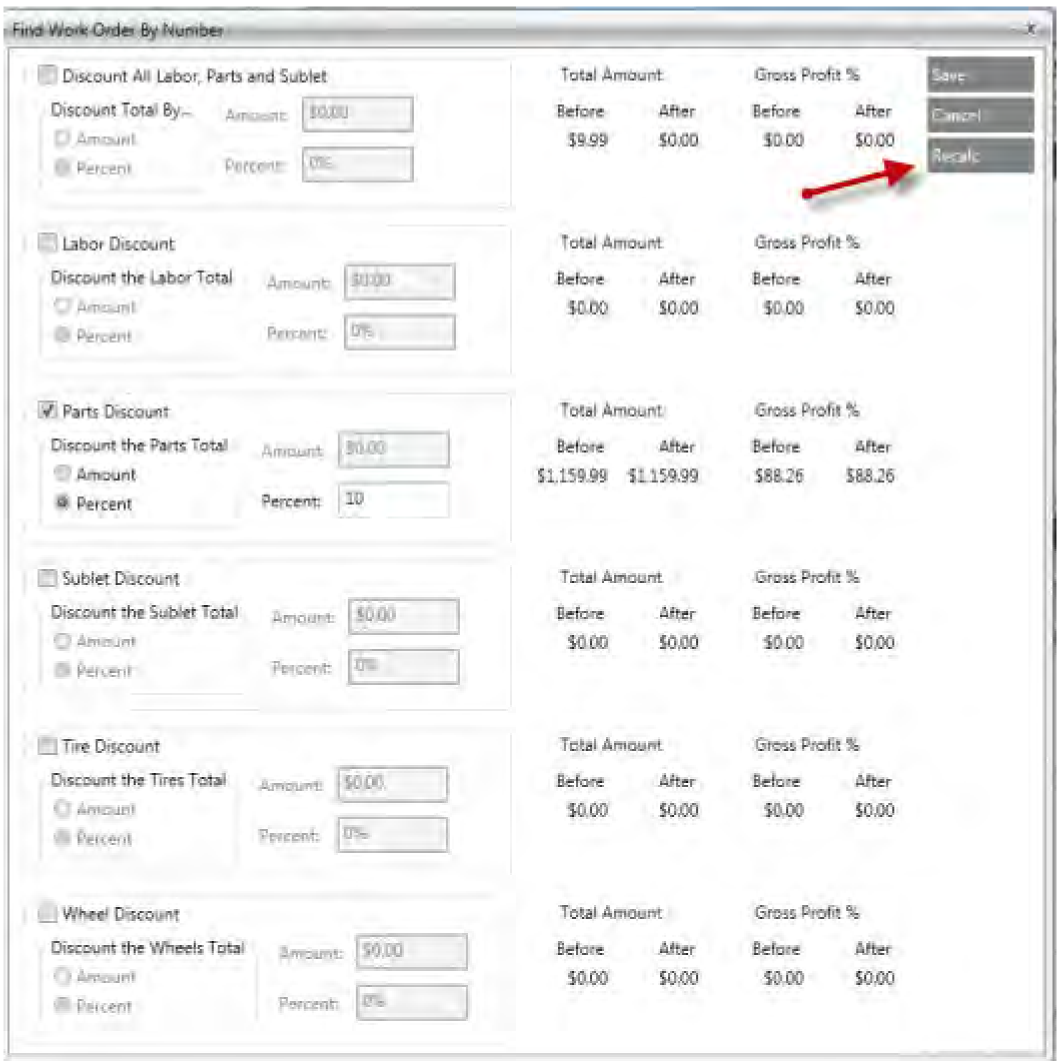
Discounting Items on Work Orders or Estimates

There may be times when you need to discount items on an individual estimate or repair order. In NAPA TRACS, the **Discount** feature enables you to apply a discount on all labor, parts, and sublets, or you can apply a discount on a specific item type such as parts.

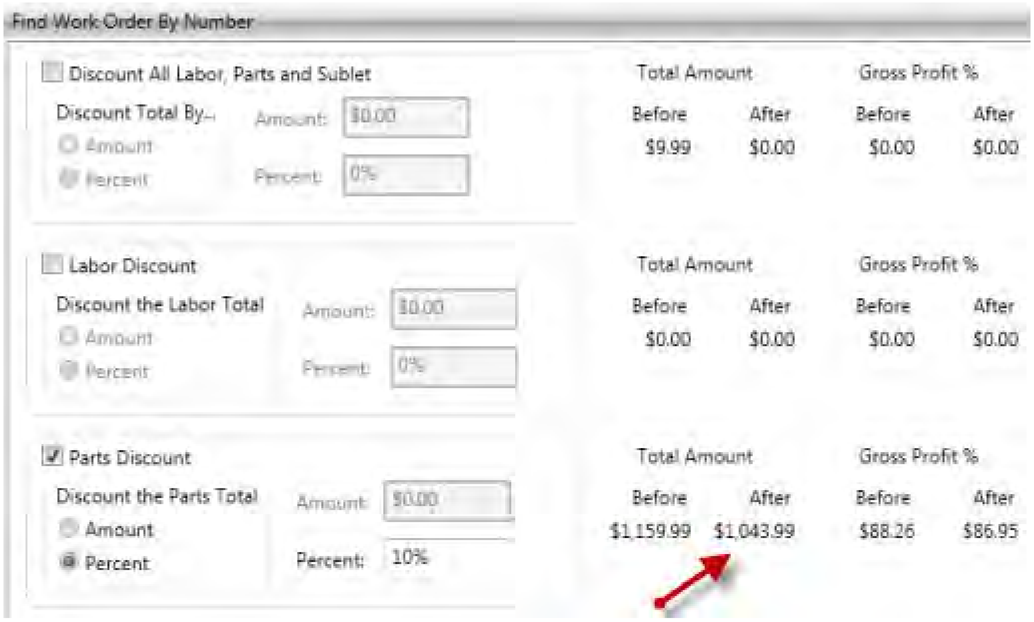
Note: The system discounts off the List price. Certain items such as supplies and disposals are not discounted.

Follow these steps to discount only parts on an estimate or work order:

1. Open a work order or estimate.
2. Click the **Edit** menu and select **Discount**. The **Find Work Order by Number** window appears.



3. Check the **Parts Discount** check box. The **Percent** radio button is selected as default. However, you can select the **Amount** radio button and specify an exact amount to discount.
4. Enter a value such as '10' in the **Percent** field.
5. Click the **Recalc** button. The system displays the updated total amount including the discount.



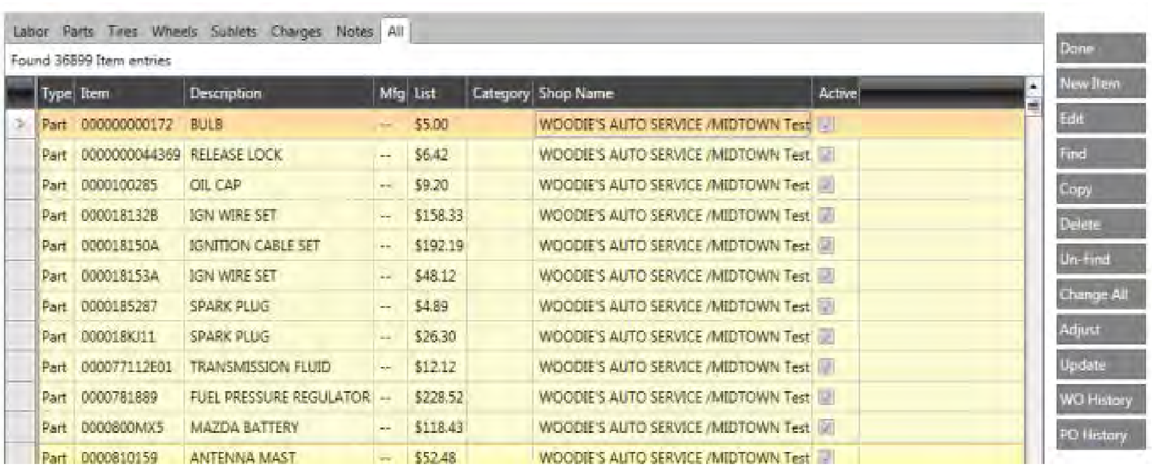
6. Click the **Save** button to discount the individual ticket by 10%. The **Find Work Order By Number** window closes and the work order or estimate totals are updated.

Displaying Item Purchase Order (PO) History

In the course of business, you might want to know when and how many times an item was ordered, or what work orders or purchase orders include that item.

To display purchase order history for an item:

1. Click the **Items** icon  on the menu bar to display the **Search Items** screen.
2. Click the **Find Items** button to display the Items List screen
3. Click a row to select an item.



3. Click the **PO History** button and NAPA TRACS displays a list of all purchase orders for the selected item.

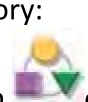
The **Status** column determines what tasks are available for each purchase order listed:

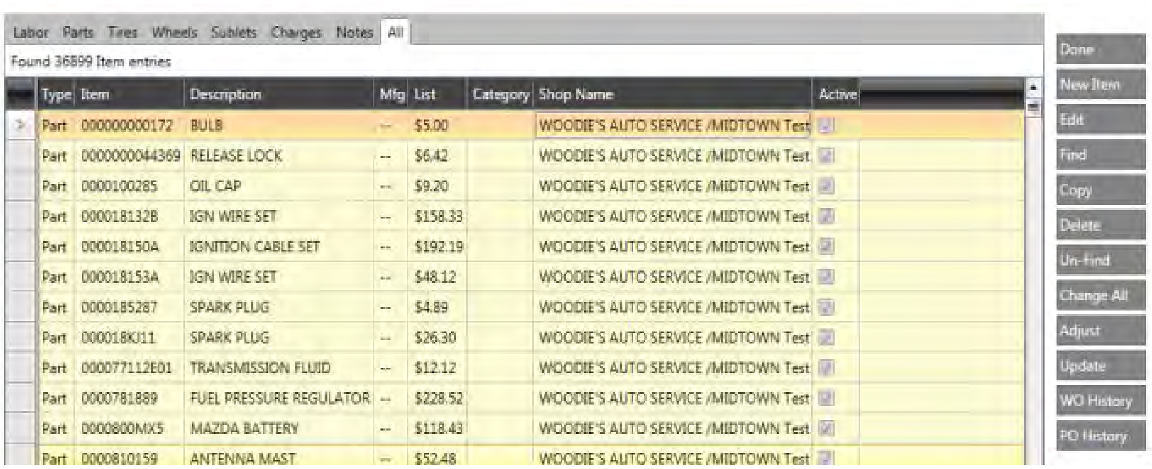
- **Received** PO's can be viewed
- **Not Ordered** PO's can be edited, ordered or cancelled
- **Ordered** PO's can be edited, received, updated or cancelled

4. Click the **Done** button to return to the Search Items screen.

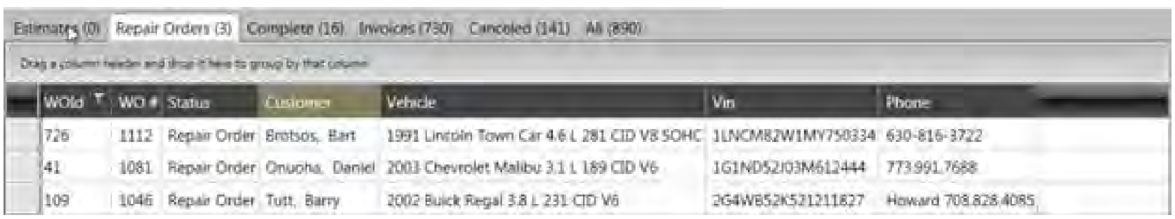
Displaying Work Order (WO) History

To display work order history:

1. Click the **Items** icon  on the menu bar.
2. Click the **Find Items** button to display the **All Items** list screen.



3. Click a row to select an item.
4. Click the **WO History** button. NAPA TRACS displays a list of work orders for the selected item.



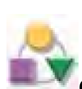
5. (Optional) Click a row to select an item and click the **Edit** button to view or update the work order.
6. Click the **Done** button to close the screen.

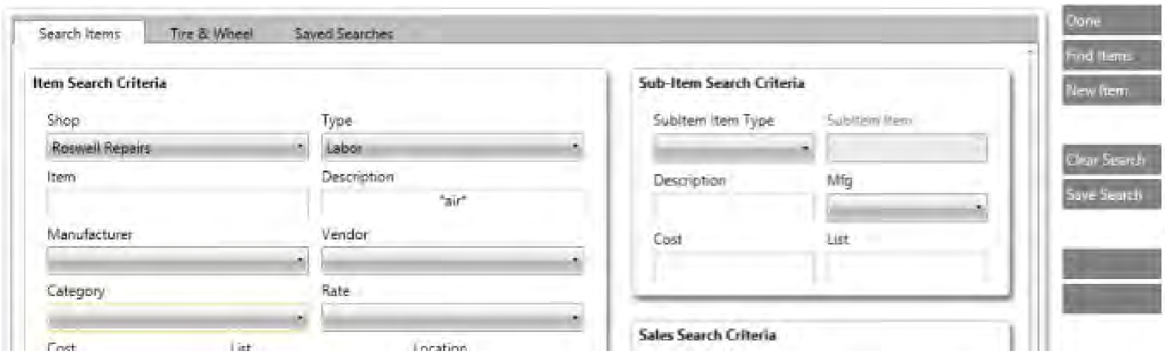
Maintaining Items

Use the Items List screen to edit, re-activate or de-activate items.

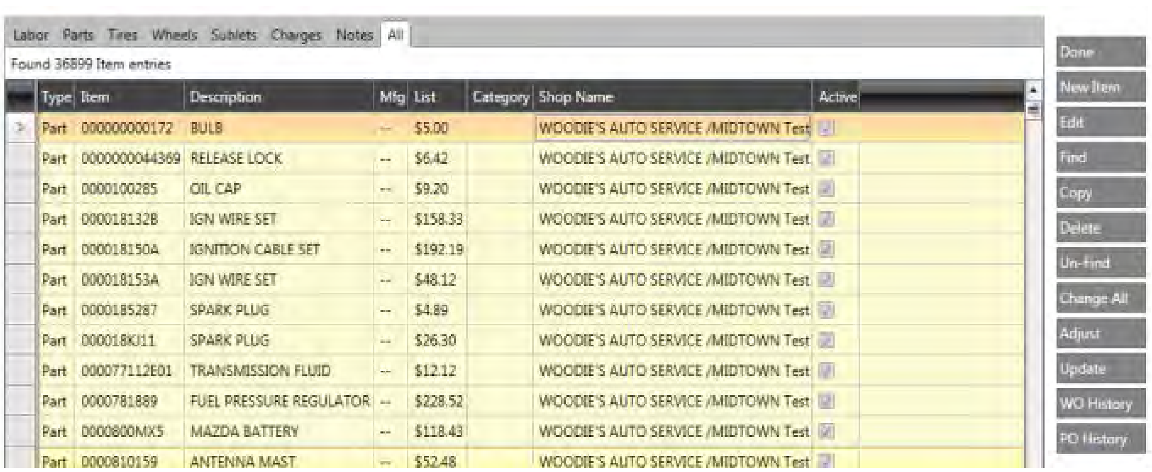
Editing an Item

To edit an item:

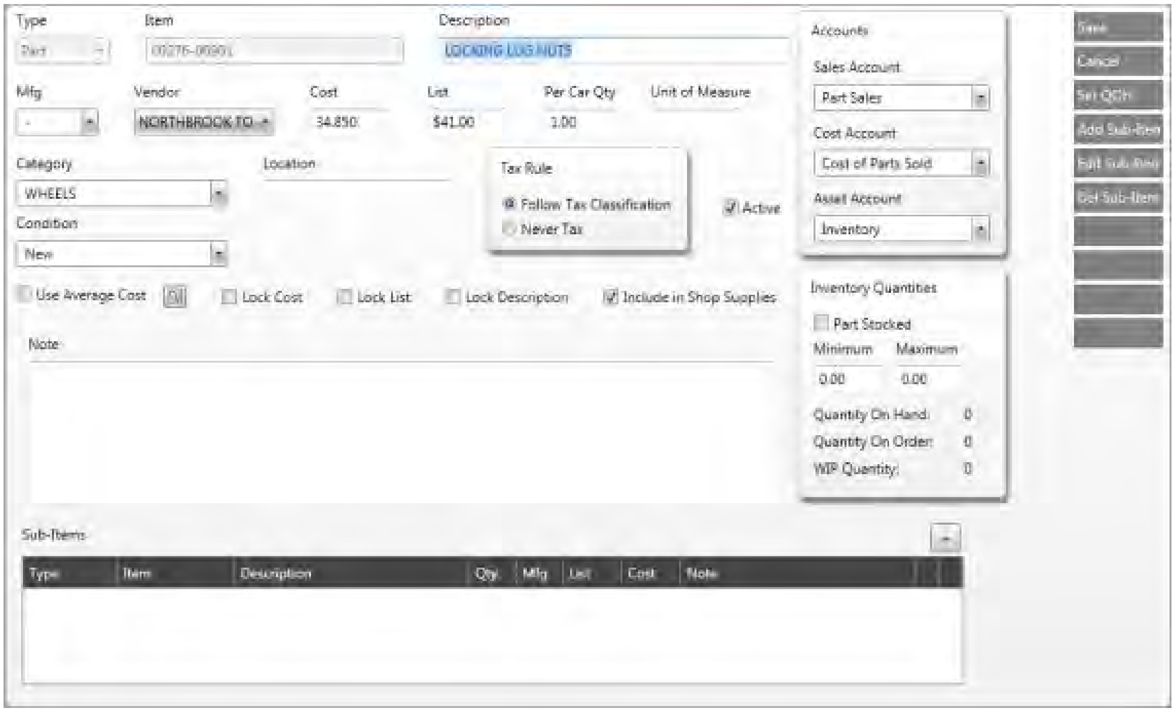
1. Click the **Items** icon  on the menu bar. The **Search Items** screen appears with the **Search Items** tab active by default.



2. Click the **Find Items** button to display a list of all items. The Items List screen appears.



2. Click on a row to select an item, and then click the **Edit** button. The system displays the applicable item entry form for that item.



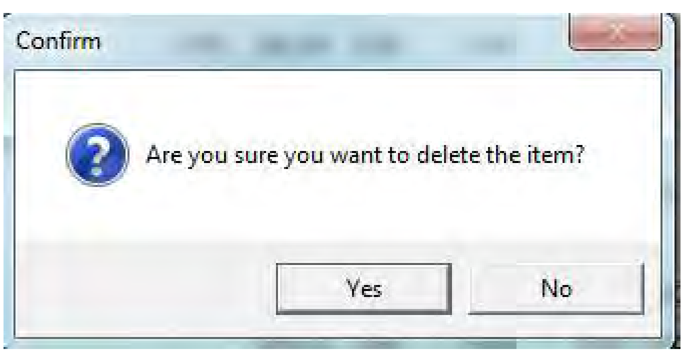
3. Edit the fields.
4. Click the **Save** button. The system saves the changes and the closes the window.

Deleting (Deactivating) an Item

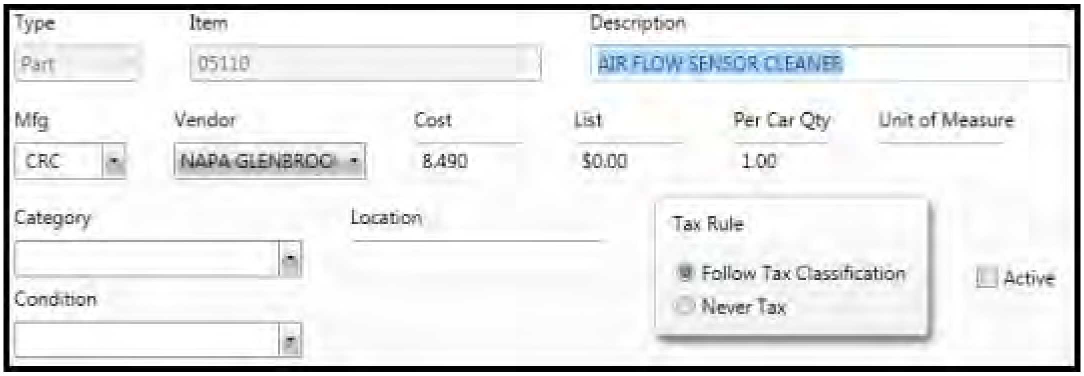
There may be times when an item is discontinued or the item name is misspelled. To maintain historical data and reporting, the system does not delete an item. Instead, the system flags the item inactive. Use the **Delete** function to flag an item inactive.

To delete (deactivate) an item:

1. Click a row on the Items List screen to highlight it.
2. Click the **Delete** button. A system prompt appears.



3. Click **Yes** to delete the item. The item is removed from the list and flagged as inactive. The **Active** check box on the item form is cleared.



4. Click the **Done** button to close the window.

Activating an Item

You can activate an item that was previously set to inactive. To activate an item:

1. Click the **Items** icon  on the menu bar. The **Search Items** screen appears with the **Search Items** tab active by default.
2. Click the **Active** check box to clear the check mark. The search results returns only items that are inactive.

3. (Optional) Narrow the search criteria by selecting other options.
4. Click the **Find Items** button. The inactive items appear in the **All** tab.
5. Double-click on a row to open the item entry form.
6. Click the **Active** check box to place a check mark to activate the item.

7. Click the **Save** button. The system saves the change and closes the screen.

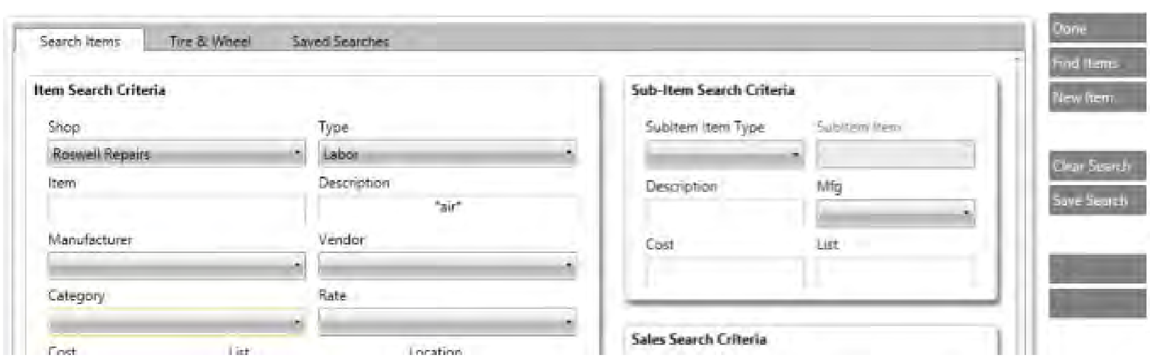
Maintaining Sub-Items

You may need to edit the quantity of a sub-item, or replace the current sub-item with another sub-item. When you change the quantity value, the next time you add that sub-item to another item, the new quantity value will be reflected.

Editing a Sub-Item Quantity

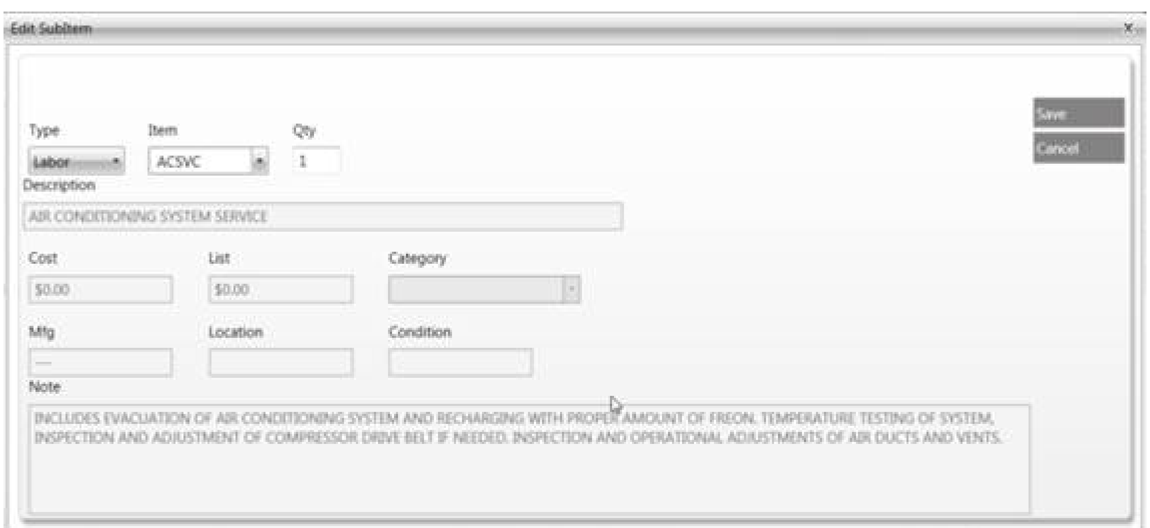
To edit a sub-item quantity:

1. Click the **Items** icon  on the menu bar. The **Search Items** screen appears with the **Search Items** tab active by default.



2. Click the down arrow on the **SubItem Item Type** field and select a type. The system returns all items that contain a sub-item of that type.
3. (Optional) Enter information in the other fields.
4. Click the **Find Items** button to display the search results. The **Items List** screen appears.
5. Double-click a row to display the item entry form.

6. Click on a row in the **Sub-Items** section.
7. Click the **Edit Sub-Item** button, or the edit button  located on the end of the sub-item row. The **Edit Sub-Item** window appears.



8. Click inside the **Qty** field and change the value.
9. Click the **Save** button. The **Edit Sub-Item** window closes.

10. Click the **Save** button on the item entry form to save data and close the window.
11. Click the **Done** button to close the Items List screen.
12. Click the **Done** button to close the **Search Items** screen.

Replacing a Sub-Item

To replace a sub-item with another sub-item:

1. Perform Steps 1-7 in the section, **Edit a Sub-Item**, in this topic.
2. Click the down arrow on the **Type** field and select a type.
3. Click the down arrow on the **Item** field and select an item.
4. Change the quantity value, if needed.

Deleting a Sub-Item

To delete (unlink) a sub-item from an item:

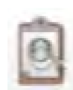
1. Perform Steps 1-6 in the section, **Edit a Sub-Item**, in this topic.
2. Click the **Del Sub-Item** button, or the delete button located on the end of the sub-item row. The system removes the sub-item entry from the item form.
3. Click the **Save** button on the item form to save data and close the window.
4. Click the **Done** button to close the Items List screen.
5. Click the **Done** button to close the **Search Items** screen.

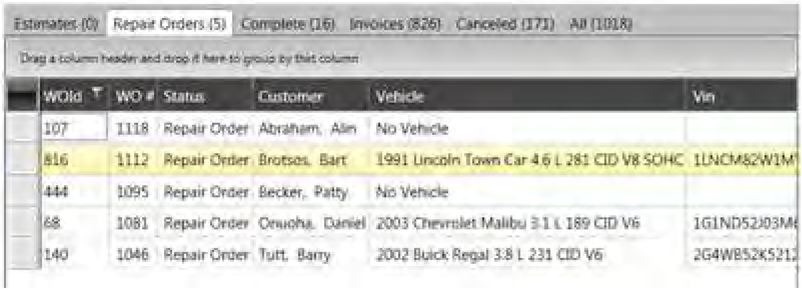
Transferring an Item from PROLink to a Work Order

You can transfer items from PROLink to an open work order.

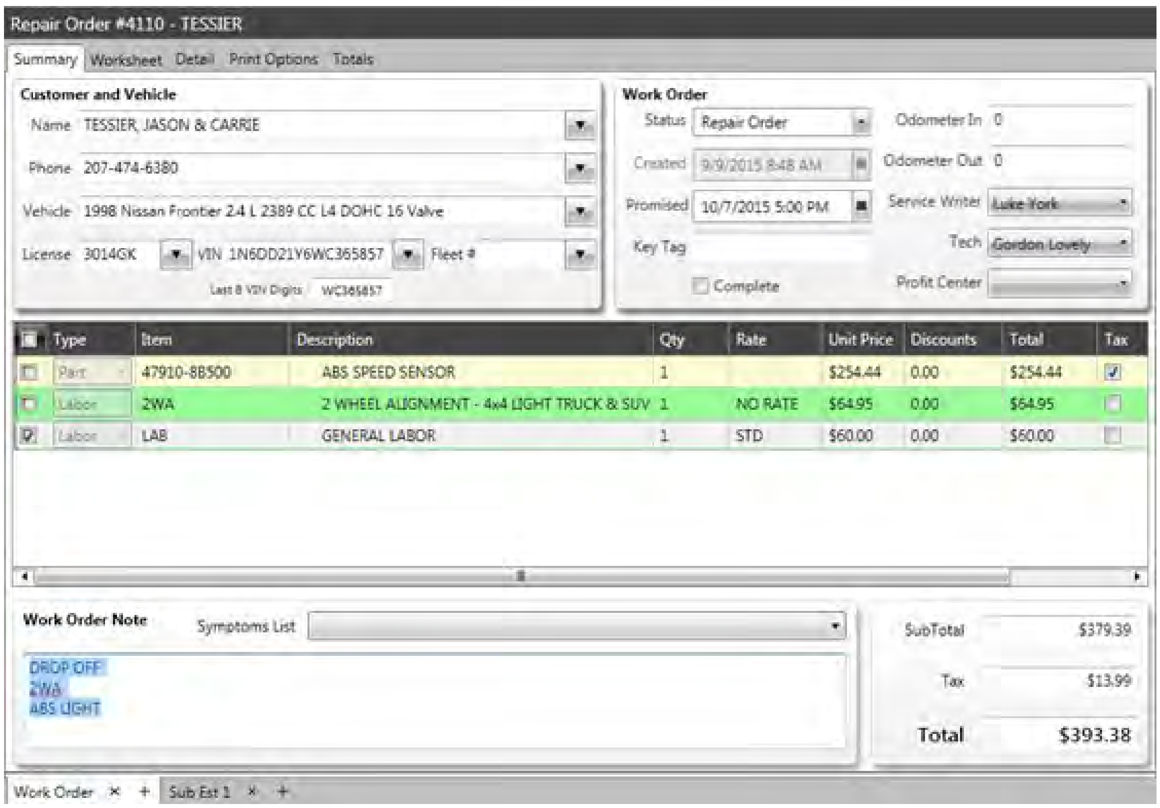
Note: You must have an open work order displayed on the screen, before launching the NAPA PROLink Catalog.

To transfer items to a work order from PROLink:

1. Click the **Work Orders** icon  on the menu bar or press the **F6** key on your keyboard. The Work Order screen appears.
2. Click the **Repair Orders** tab.

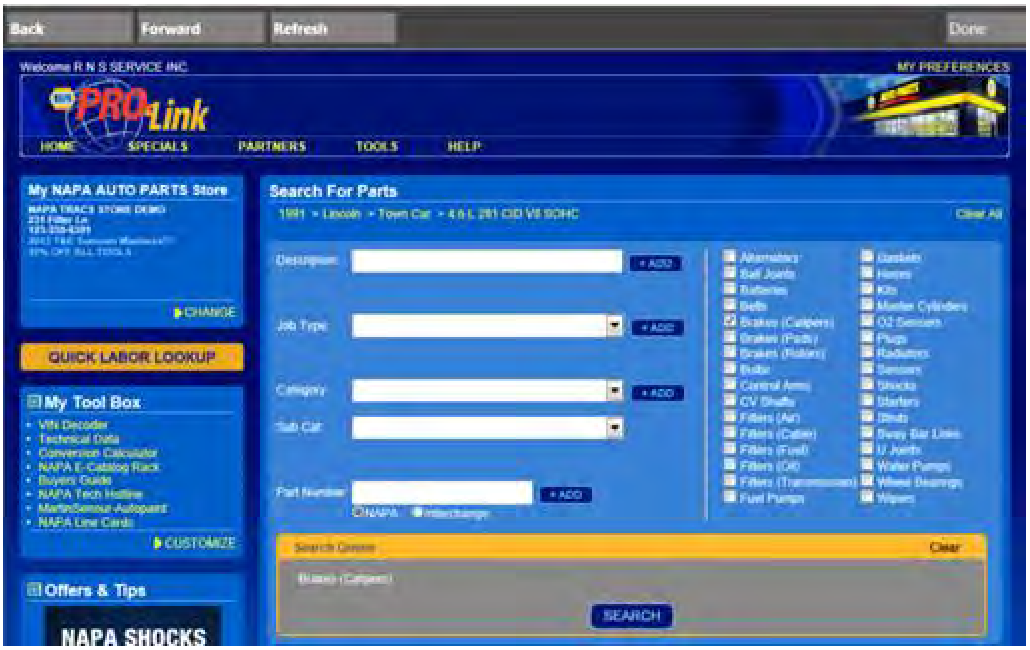


3. Double-click a row to open the work order.



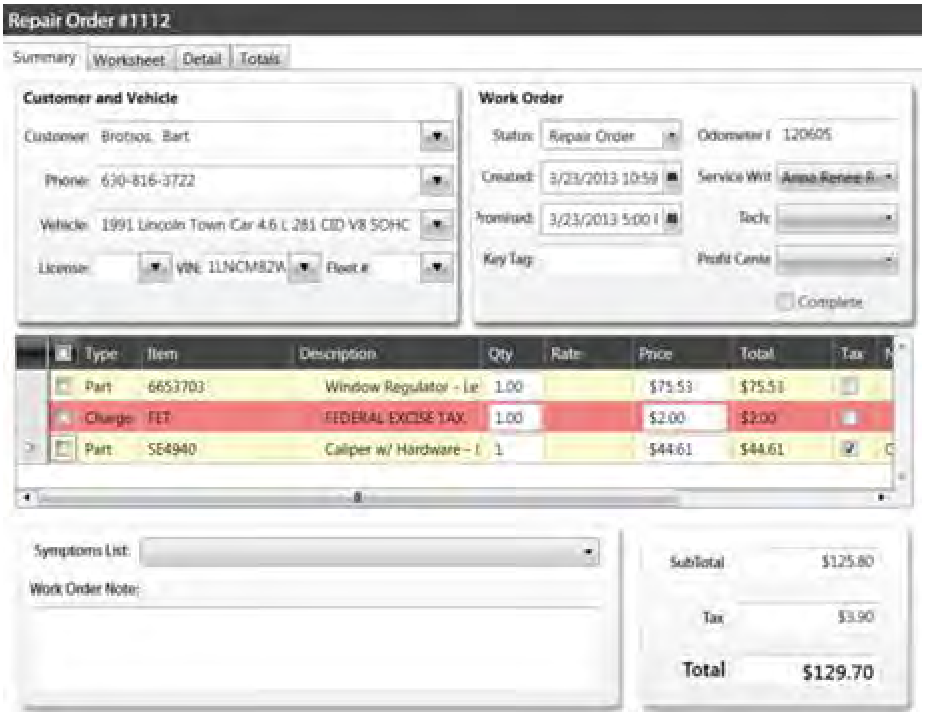
4. Click the **PROLink** icon on the menu bar and the PROLink catalog appears.

Note: The PROLink catalog defaults to the make, model, and year of the automobile on the work order.



5. Select criteria and then click the **SEARCH** button. In this example, the **Brakes (Calipers)** category is selected. The **Search Results** screen appears.

6. Accept or enter the item quantity in the **Quantity** field of the item to be transferred.
7. Click the blue **TRANSFER** button.
8. Click the **Done** button on the top of the PROLink screen to close PROLink. The item appears on the work order.



9. Click the **Save** button to save the changes.

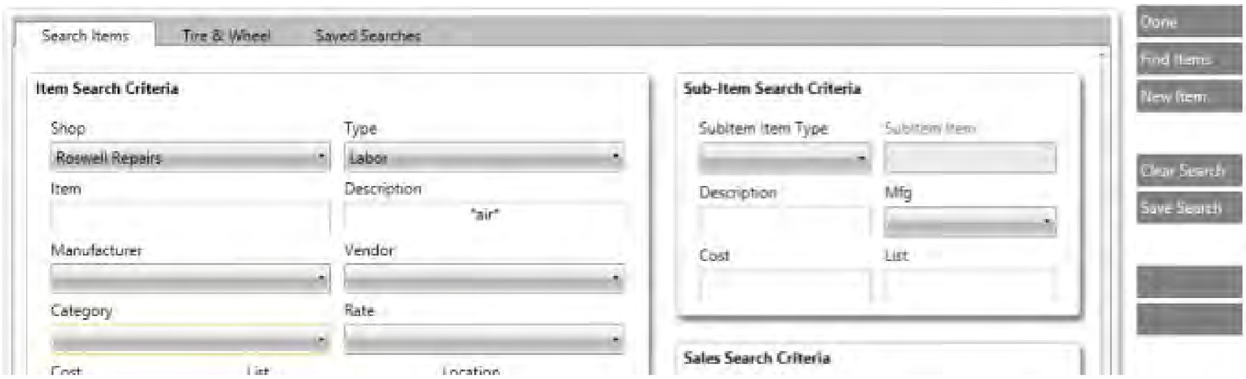
Using Parts Fast to Add Several New Items

Many parts you enter have common fields such as manufacturer, line code, vendor, or category. The **Parts Fast!** feature enables you to enter several new items quickly by creating a template for these common items.

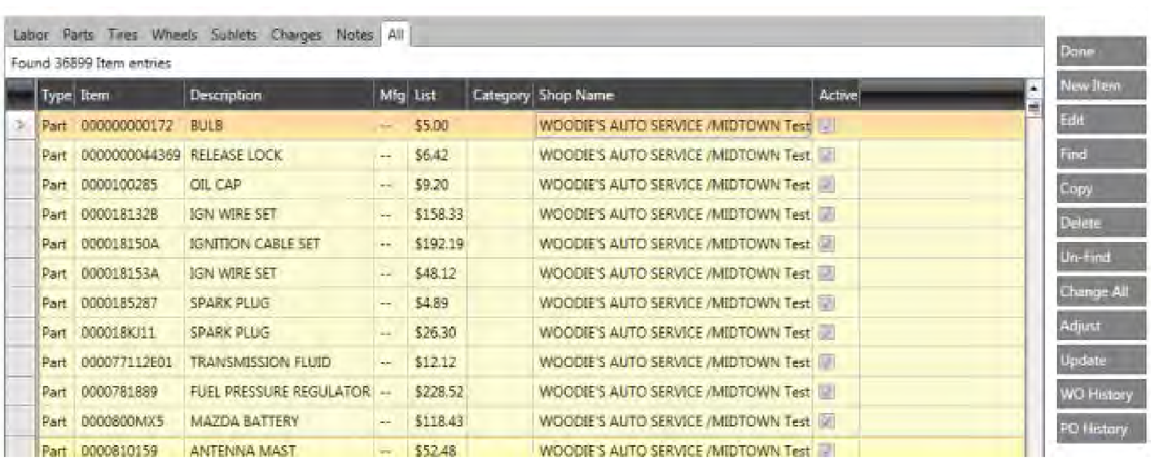
Adding Multiple New Items at Once

To add multiple items at the same time:

1. Click the **Items** icon  on the menu bar. The **Search Items** screen appears with the **Search Items** tab active by default.



2. Click the **Find Items** button to display a list of all items. The Items List screen appears.



3. Note: Functionality steps for this feature will be available in a future release of NAPA TRACS.

Viewing Item Movement

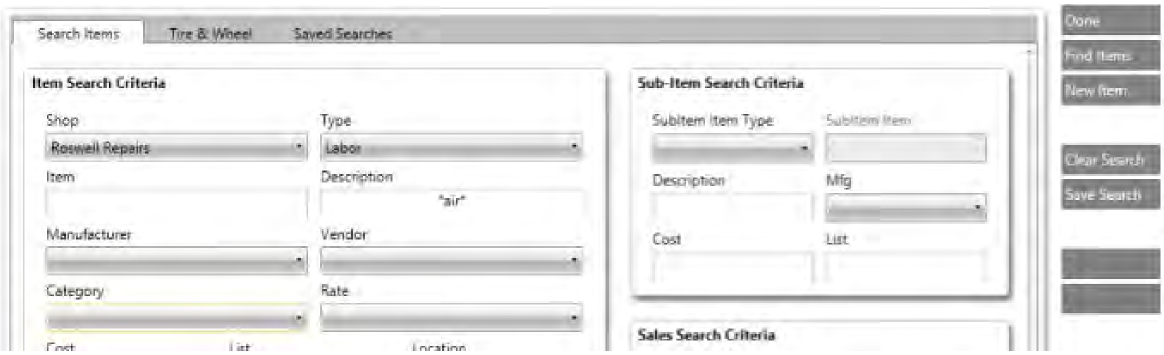
The **Item Movement** function enables you to view items bought and sold. Basically, a view of item inventory movement.

This topic explains how to:

- View work orders or purchase orders associated with an item.

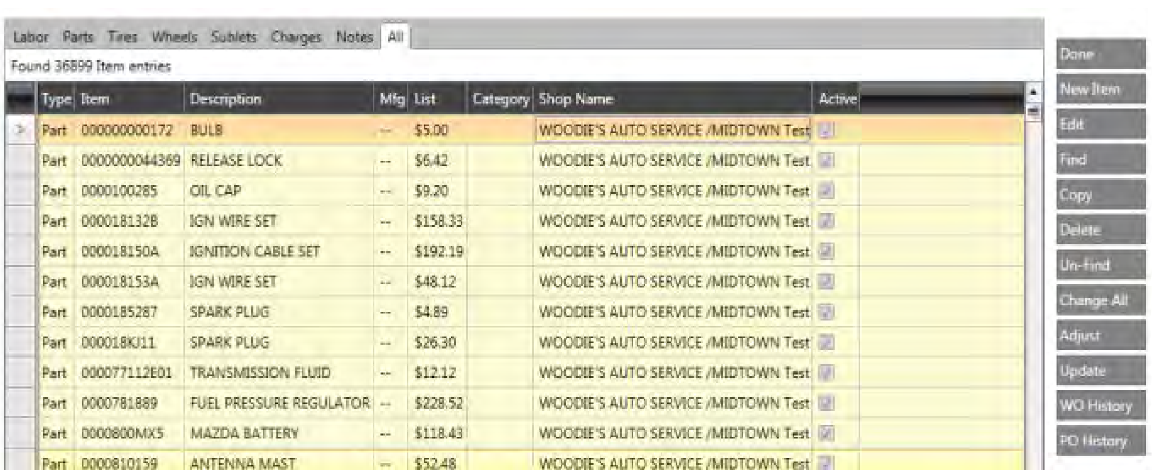
Search for all Items

1. Click the **Items** icon  on the menu bar. The **Search Items** screen appears.

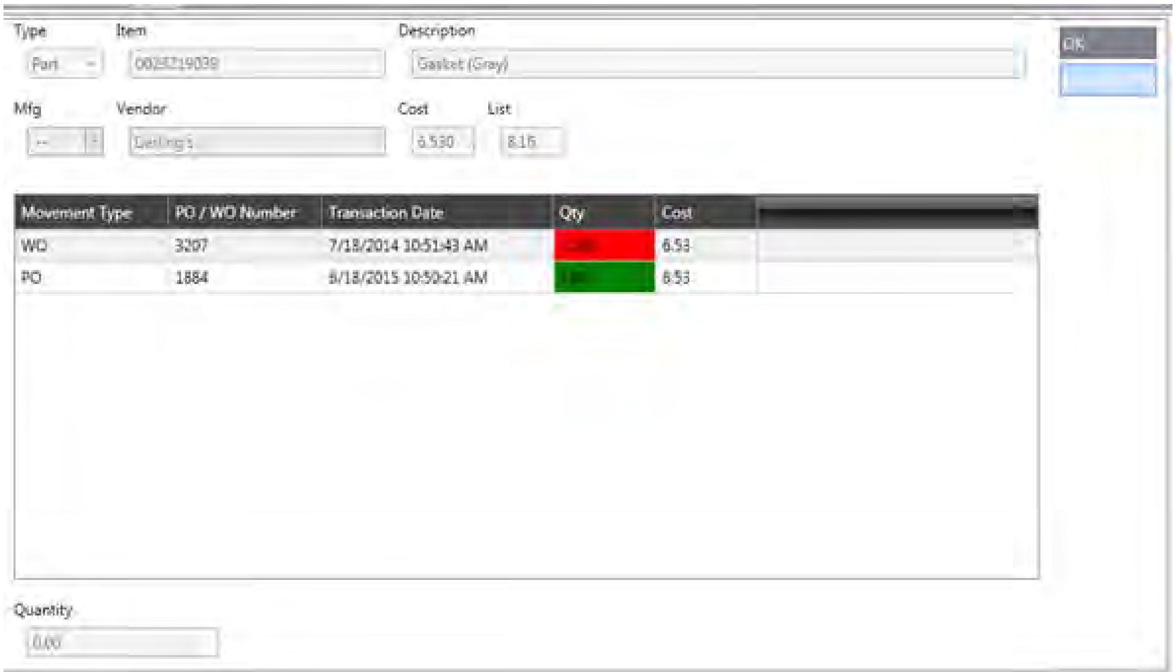


2. Select search criteria and click the **Find Items** button Find Items to display a list of all items. The **Items List** screen appears.

You can sort, filter, or group the list of results using the techniques reviewed in the [Common List Functions]() topic.



3. Select an item and click the **Item Movement** button Item Movem. The screen displays the work orders and purchase orders associated with the selected item.



3. Click the **OK** button to close the window.

   -or -

4. Click the **Open WO/PO** button. The system displays the highlighted work order or purchase order.

   - or -
   Double-click on a movement type to view all details.

5. Click the **Cancel** button to close the Work Order or Purchase Order window.

Working with Search Criteria

You can create and save frequently used or complex search criteria for future use. This feature enables you to quickly re-run the same search criteria as often as needed. This topic explains how to:

- Create and save criteria

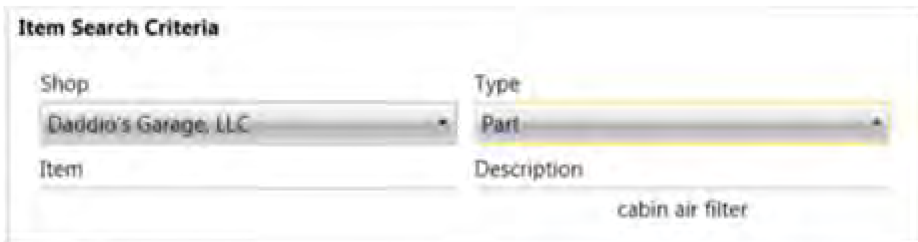
- Run saved criteria
- Delete saved criteria

Creating and Saving Search Criteria

To create and save search criteria:

1. On the **Search Items** tab or **Tire & Wheel** tab, select or enter information in the fields.

   In the example below, the type is **Part** and the description is **Cabin Air Filter**. The search results return only parts with the words **cabin air filter** in the **Description** field.



2. Click the **Save Search** button. The **Saved Search** window appears.

3. Enter a name for the search, and click the **OK** button to save the search criteria. The system saves the search criteria, displays the search name on the **Saved Searches** tab, and closes the **Saved Search** screen.
4. Click the top of the **Saved Searches** tab to display the saved search criteria.

Running a Saved Search

To run a saved search from the **Saved Searches** screen:

1. Click the **Saved Searches** tab.
2. Double-click a row to open the saved search criteria. The system fills in the applicable search criteria fields.

3. Click the **Find Items** button to display the filtered item list.


Labor Parts Tires Wheels Sublets Charges Notes All

Found 7 Item entries

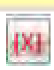
Type	Item	Description	Mfg	List	Category	Shop Name
Part	20958479	CABIN AIR FILTER	-	$43.96	HEATING/COOLING	Daddio's Garage, LLC
Part	3600727	CABIN AIR FILTER	-	$28.08		Daddio's Garage, LLC
Part	3600739	CABIN AIR FILTER	ATM	$15.16		Daddio's Garage, LLC
Part	3602450	CABIN AIR FILTER	ATM	$18.76		Daddio's Garage, LLC
Part	3602452	CABIN AIR FILTER	ATM	$16.88		Daddio's Garage, LLC
Part	3602937	CABIN AIR FILTER	ATM	$17.36		Daddio's Garage, LLC
Part	3603012	CABIN AIR FILTER	ATM	$33.20		Daddio's Garage, LLC

4. Click the **Done** button to close the **Items List** screen.
5. Click the **Done** button to close the **Search Criteria** screen.

Deleting Saved Criteria

To delete saved search criteria:

1. Click on the top of the **Saved Searches** tab.

2. Click the red X button  next to the search criteria to be deleted.

The system deletes the saved search criteria from the **Saved Searches** tab.

Chapter 7 Customer and Repair Orders

Overview

When a customer brings their vehicle into your shop for service, you will need to perform certain tasks to give them an estimate of the work to be done, and create a repair order to complete the work. Below are links to some of the basic tasks you will need to do in order to complete those tasks:

- **Create a new estimate** that will provide the customer with a statement of approximate charges for repair.
    - **Find or create a new customer** if you cannot locate an existing customer.
    - **Find or create a new vehicle record** if you cannot locate an existing vehicle.
    - **Create repair notes** for the technician by listening to the customer's description of the problem.
    - **Assign a technician** to diagnose the repair and assess next steps. You can assign a technician to individual items or all items on the work order.
- Add specific items to the estimate by selecting from a list, **entering a new item**, selecting from the NAPA PROLink Catalog or Mitchell's guide, or using a barcode scanner.
- **View the shop schedule** to see when you can schedule the repair.

- After customer approves work and schedule, **purchase parts** for the work order.

Searching Using Special Characters

Use special characters to create powerful searches in NAPA TRACS. Search for items, vehicles and customers individually or in any combination from any vehicle, customer or item window. Type the criterion for your search and click the **Find** button. The following table describes the special character and its related function.

<table>
<tr><th>Character</th><th>Function</th><th>Example</th><th>Result</th></tr>
<tr><td>></td><td>Greater Than</td><td>>0</td><td>Values will be 1 and higher</td></tr>
<tr><td><</td><td>Less Than</td><td><0</td><td>Values will be -1 and lower</td></tr>
<tr><td>=</td><td>Equal To</td><td>=1</td><td>Value will be 1</td></tr>
<tr><td>=></td><td>Equal To or Greater Than</td><td>=>1</td><td>Value will 1 or higher than 1</td></tr>
<tr><td>=<</td><td>Equal To or Less Than</td><td>=<1</td><td>Value will be 1 or lower than 1</td></tr>
<tr><td><></td><td>Not Equal To</td><td><>1</td><td>Value will be anything other than a 1</td></tr>
<tr><td>:</td><td>Within Range</td><td>01/01/2011:12/31/2011</td><td>Value will be anything between and including the beginning and ending numbers or letters</td></tr>
<tr><td>|</td><td>Or Statement</td><td>Bob|Robert</td><td>Value will include either name</td></tr>
<tr><td>*</td><td>Wildcard</td><td>*1*</td><td>Value will include anything with a 1; use the wildcard in front of the 1 to find anything that starts with a 1</td></tr>
<tr><td>?</td><td>Wildcard</td><td>c?mp</td><td>Value will include any single character between the c and mp.</td></tr>
</table>

Note: Searches can be case sensitive. Always use the caps lock key when typing customer names and part numbers.

Back to Finding a Vehicles | Back to Finding a Customer Record

Vehicle Searches

- Type your criterion and press the **Find** button. Vehicle searches are not case sensitive.
  - Example: “Honda” or “HONDA” will return all Honda makes.
  - Example: “>Honda” will return all makes that begin with Honda through Volvo. “Greater Than” looks farther down the alphabet toward “Z”, where “Less Than” looks up the alphabet toward “A”.
  - Example: “>01/01/2009” in a date field to locate all vehicles seen AFTER that date.
  - Example: “<01/02/2010” in a date field to locate all vehicles seen BEFORE that date.
  - Example: “?????????????????” will return only vehicles with a complete 17 VIN.

Customer Searches

- Type your criterion and press the **Find** button.
  - Example: “J*” in Last Name field will return all customers with a last name starting with “J”.
  - Example: “>499” in “Total Amount Invoiced” will return all customers who have spent more than $499 total with your shop.

Item Searches

- Type your criterion and press the **Find** button.
  - Use the **Description** field for the best possible results. Often, descriptions are abbreviated with “fil” for “filter” or “plg” for “plug”.
    - Example: “*FILTER*” will return all items that have the word “filter” anywhere in the description.
    - Example: “21???MP” will return only SFI line code oil filters that end in MP.

Searching the Work Order List

The **Search By** function enables you to generate a list of specific estimates, repair orders, invoices and so on.

The **Search By** options include:

- Customer Name
- Customer Phone

- Vehicle Name
- Key Tag
- Vin# Partial
- WO Number
- Notes
- Service Writer Name
- Tech Name
- Clear criteria (reset list)

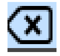
Search for all Items

1. Click the **Work Orders** icon  on the NAPA TRACS menu bar. The **Work Order List** screen appears.

2. Click the **Search By** down arrow to display a list of search options.

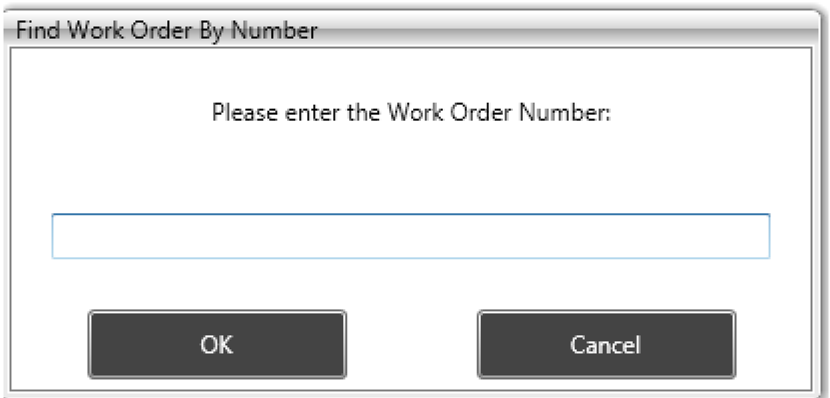
3. Select a search option.
4. Enter text in the search text field .
5. Press **Enter** or click the magnifying icon. The list displays the results.
6. Click the **Done** button to close the window.

Clear Search Text

Click the **Clear Search Text** button  on the search text field to clear the text.

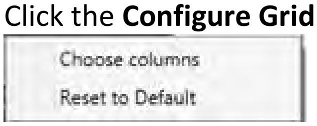
Find Work Order

Click the **Find** button on the TRACS Rail. The **Find Work Order By Number w**indow appears.



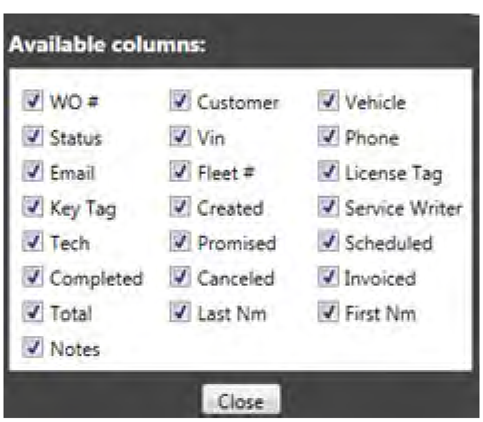
Type the work order number and click the **OK** button. The work order screen appears in a separate tab.

Configure Grid View

1. Click the **Configure Grid View button** . The options appear.


2. Select the **Choose columns** option.

3. Check available columns to include on the grid or clear columns to delete from the grid.



4. Click the **Close** button to close the **Available columns** window.
5. Click the **Done** button to close the **Work Order List** window.

Reset the Grid View

Click the **Reset to Default** option to reset the grid to the default view.

Working with Accounts Receivable

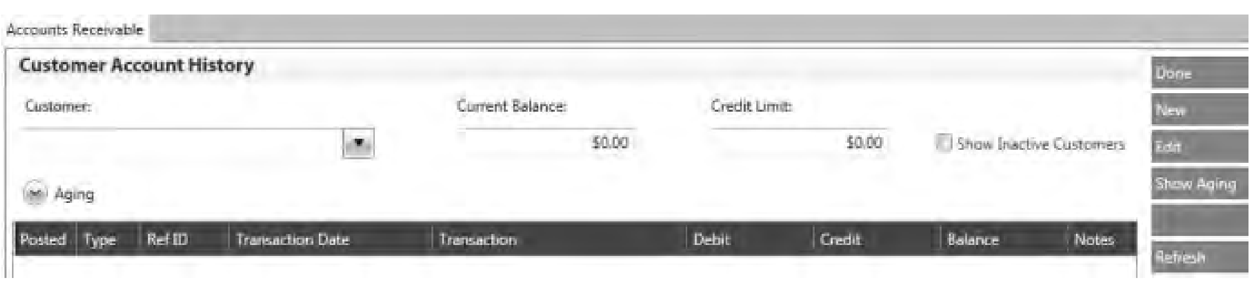
Use the Accounts Receivable function to:

- View current and aging customer accounts receivable information.
- Add new customer accounts receivable transactions.
- Edit existing customer accounts receivable transactions.
- Print accounts receivable statements.
- Voiding an invoice.

Accessing Accounts Receivable Information

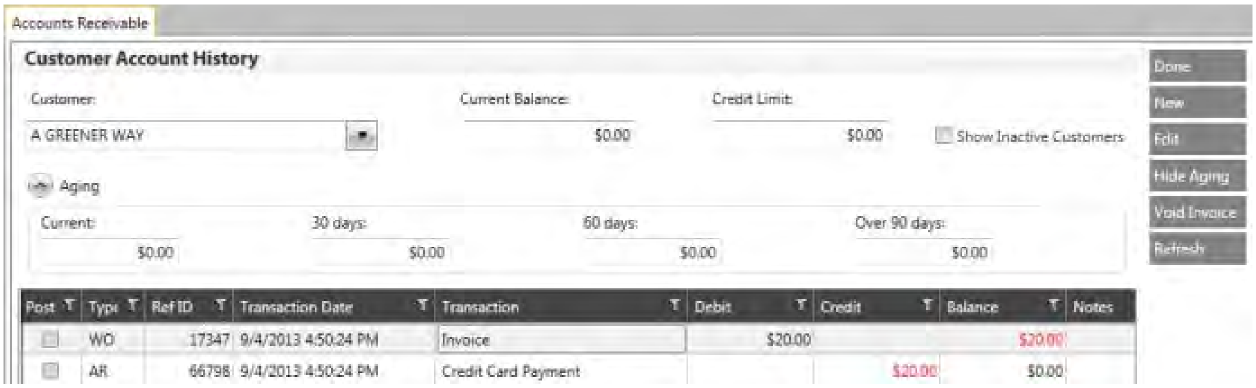
To access accounts receivable information, click the **Accounts Receivable** icon  on the NAPA TRACS menu bar.

The **Customer Account History** window appears.



Viewing Customer Accounts Receivable Information

To view customer accounts receivable information, click the **Customer** down arrow and select a name**.** The system retrieves accounts receivable information and displays the content in the transaction table. Credit and Balance amounts are color-coded in **red** when a customer owes money.



- **Current Balance -** displays the amount owed to your shop.
- **Credit Limit -** displays the maximum amount of credit for this customer.
- **Show Inactive Customers -** check the box to display inactive and active customers.
- **Current / 30 days / 60 days / Over 90 days -** provides information on the number of days a balance is overdue.

Click the **Aging** button located below the **Customer** field to show or hide aging customer balance. Intervals are **Current**, **30 days**, **60 days** and **Over 90 days**.

Note: You can also click the **Show Aging** button located on the TRACS Rail on the right side of the screen.

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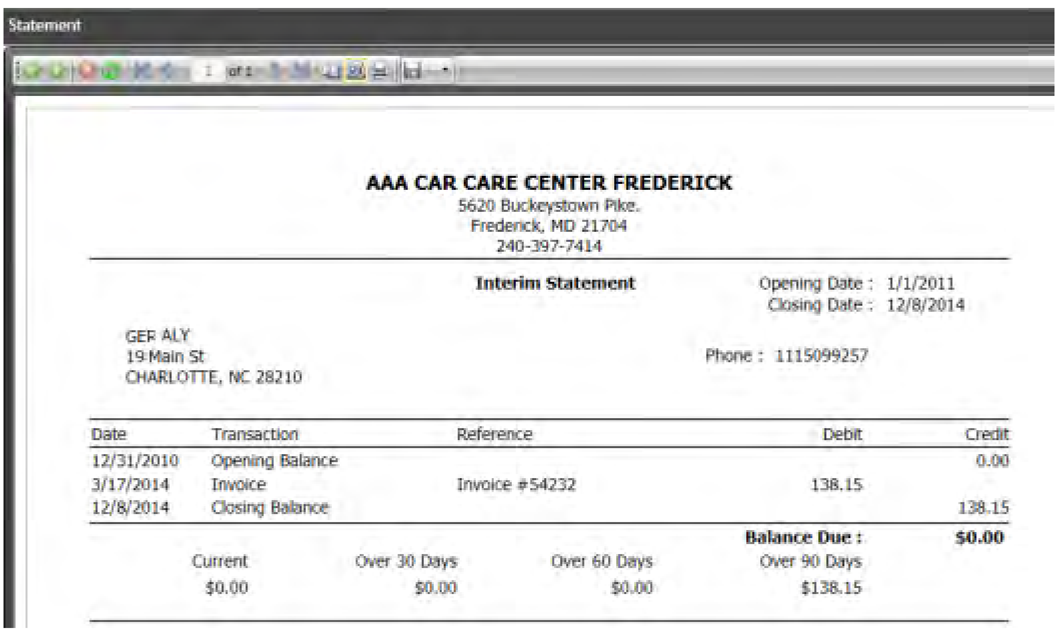
Printing Accounts Receivable Statements

To print statements:

1. View a customer account.
2. Click the **Statement** button located on the TRACS Rail on the right side of the screen. The **Report Settings** screen appears.

2. The **Interim Statement** option is selected as default. Accept the default or select the **Last Statement** option.
3. Click the calendar icon on the **Opening Date** field and select a date.
4. Accept or change the closing date field.
5. Click the **Run Report** button located on the TRACS Rail on the right side of the screen. The system displays the statement.



6. Use the icons bar to print, save, or export the report.
7. Click the **Done** button on the TRACS Rail on the right side of the screen to close the Statements Report screen.

[- back to top -]

Adding New Accounts Receivable Transactions

To add new accounts receivable transactions, click the **New** button on the **Customer Account History** window.

1. The **Accounts Receivable Transaction Entry** window appears for the selected customer.

2. Click the **Transaction Type** down arrow and select an item from the list.
3. Click the **Credit Card** down arrow if a credit card is used for payment and select an item from the list.
4. Type the check number in the **Check Number** field if a check is used for payment.
5. Type the transaction amount in the **Amount** field.
6. Click the **Save** or **Cancel** button to save or discard the entry.

Adding Multiple Payment Types for a Transaction

To add multiple payment types:

1. From the **Accounts Receivable Transaction Entry** window, click the **Transaction Type** down arrow and select an item from the list.
2. Enter a check number or select a credit card if applicable.
3. Type the transaction amount in the **Amount** field.
4. Click the **Additional** button to add more payments.
5. Repeat steps 2 -4 to add additional payments.

6. When you are finished entering payments, click the **Cancel** button to close the window.

Voiding an Invoice

To void an invoice:

1. From the **Customer Accounts History** screen, select an invoice from the transactions table.
2. Click the **Void Invoice** button. The **Void Invoice** window appears.

3. Enter your password and click the **OK** button.

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Editing Existing Accounts Receivable Information

To edit existing accounts receivable transactions:

1. From the **Customer Account History** window, click on a row in the table and click the **Edit** button. The **Accounts Receivable Transaction Entry** window appears for the selected customer.

2. Click the **Transaction Type** down arrow and select an item from the list.
3. Make edits to the information where necessary.
4. Click the **Save** or **Cancel** button to save or discard the entry.

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Estimates

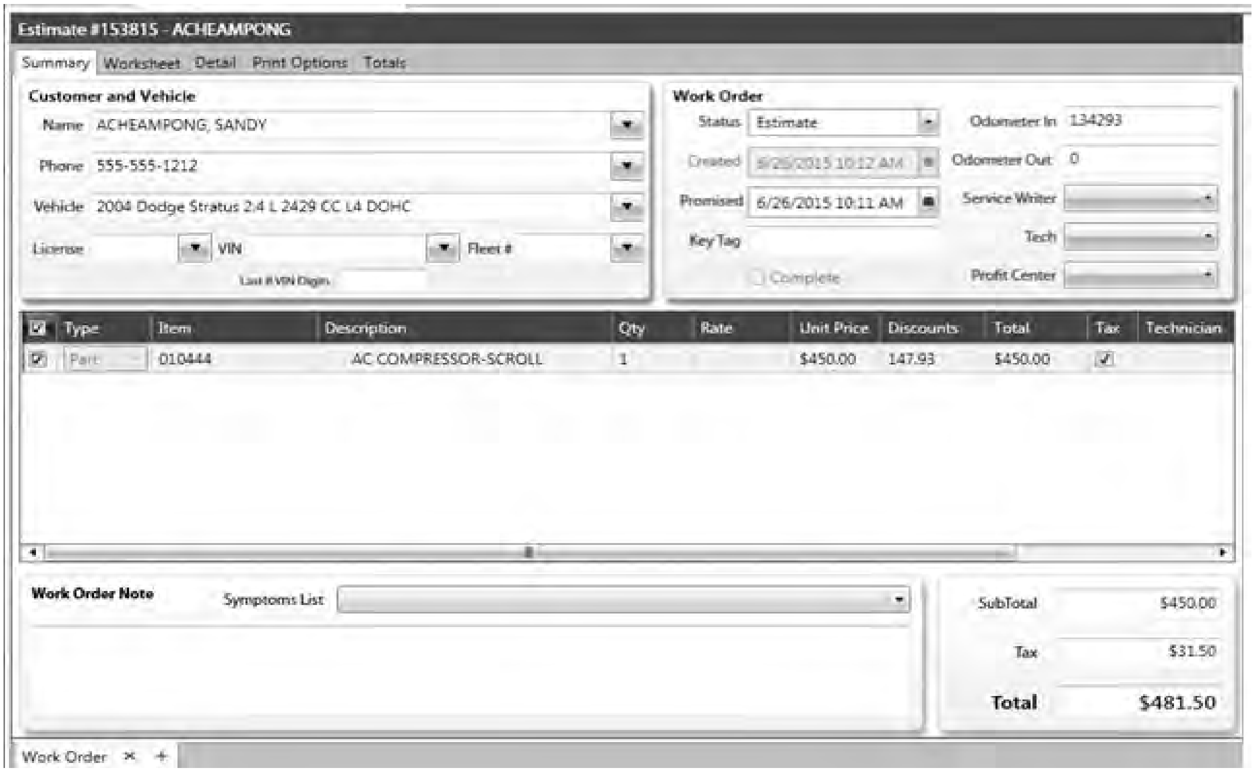
About the Estimate Screen

There are four main tabs on the estimate screen - **Summary**, **Worksheet**, **Detail** and **Totals**. The **Worksheet** and **Details** tabs have additional tabs that appear when selected.

To access the **Estimate** screen, click the **New Estimate** icon  on the menu bar.

Estimate Summary Tab

Complete information on the **Summary** tab for customers that visit your shop. Record their name and vehicle information along with the reason for their visit. You will also use this screen to add items from the PROLink catalog or your inventory, add labor estimates using the FlatRate Estimating Guide, and generate purchase orders for any items not at your location.



Use the **Customer and Vehicle** section of the **Summary** tab to search for an existing customer record.

Use the **Work Order** section of the **Summary** tab to identify the status of the vehicle being serviced, as well as when the estimate was created and when the repair is promised to be completed. There are additional fields where you can identify information about the vehicle, who is responsible for the service and the profit center that should be associated with this order.

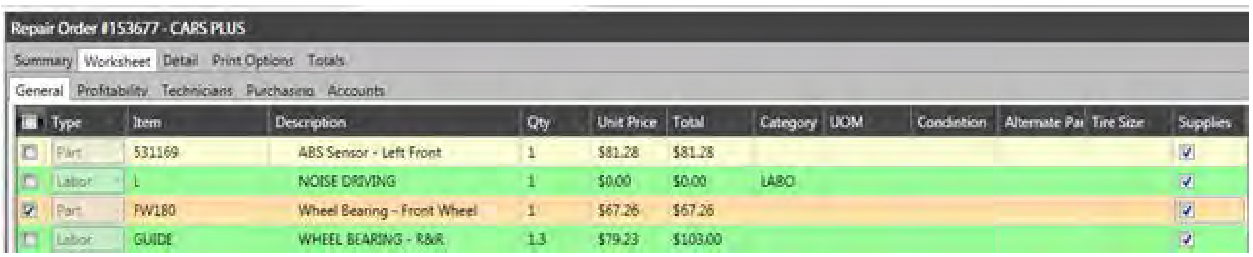
The **New Line Item** section of the estimate screen is where you add items to the estimate that will become part of the customer's work order.

At the bottom of the New Estimate Summary tab you can enter information provided by the customer into the **Work Order Note** field. The information could be as simple as "Needs yearly inspection" or something more complex about a weird noise they are hearing from the vehicle. Capturing the customer's version of the details can be critical to helping the technician diagnose the issue faster. You can also create a pre-populated list of symptoms in the List Settings section of TRACS. Click here to see how you can create a list of symptoms in List Settings section of TRACS. This is also where the order's SubTotal, Tax, and Totals will be displayed as items are added to the estimate.

Worksheet General Sub Tab

Use the **Worksheet** tab to view information on the following sub tabs:

- General
- Profitability
- Technicians
- Purchasing
- Accounts



	Type	Item	Description	Qty	Unit Price	Total	Category	UOM	Condition	Alternate Par	Tire Size	Supplies
☐	Part	531169	ABS Sensor - Left Front	1	$81.28	$81.28						☑
☐	Labor	L	NOISE DRIVING	1	$0.00	$0.00	LABO					☑
☑	Part	FW180	Wheel Bearing - Front Wheel	1	$67.26	$67.26						☑
☐	Labor	GUIDE	WHEEL BEARING - R&R	1.3	$79.23	$103.00						☑

To enter data into the **General** table:

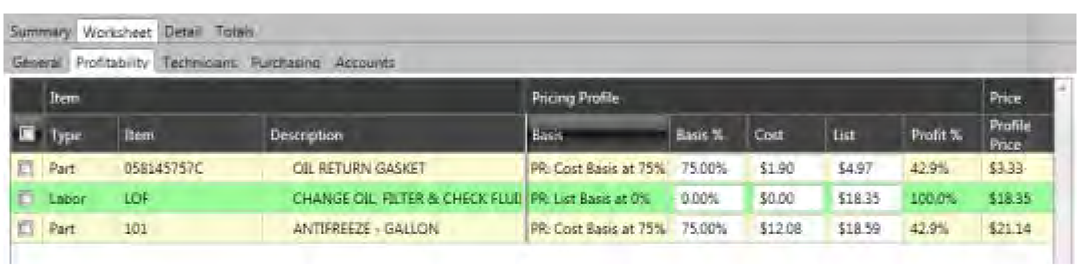
1. Click the **Item** field to display the down arrow.
2. Click the down arrow to select an item from the list, and item information displays allowing you to modify or add if necessary.

Notes:

- The **Supplies** flag follows the item when copied to the work order.
- Clear the **Supplies** check box to prevent charging shop supplies for that item.
- The system sets the Core Credit item to not charge shop supplies.

Worksheet Profitability Sub Tab

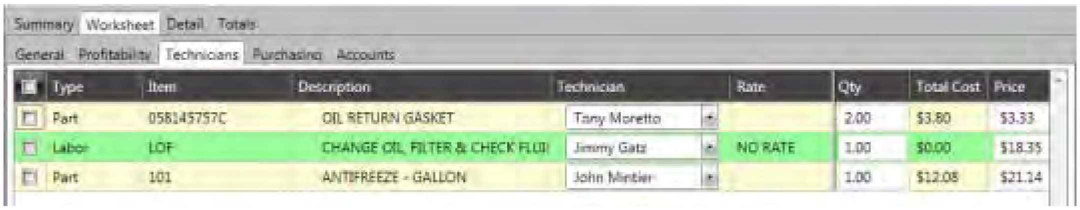
Use the **Profitability** sub tab to view data in the profitability table, work with profit graphs, and verify profitability. Items in red do not meet your selected minimum gross profit percentage.



Item				Pricing Profile					Price
	Type	Item	Description	Basis	Basis %	Cost	List	Profit %	Profile Price
☐	Part	058145757C	OIL RETURN GASKET	PR: Cost Basis at 75%	75.00%	$1.90	$4.97	42.9%	$3.33
☐	Labor	LOF	CHANGE OIL, FILTER & CHECK FLUI	PR: List Basis at 0%	0.00%	$0.00	$18.35	100.0%	$18.35
☐	Part	101	ANTIFREEZE - GALLON	PR: Cost Basis at 75%	75.00%	$12.08	$18.59	42.9%	$21.14

Worksheet Technicians Sub Tab

Use the **Technicians** sub tab to assign a technician, rate, and time spent on a task.



Worksheet Purchasing Sub Tab

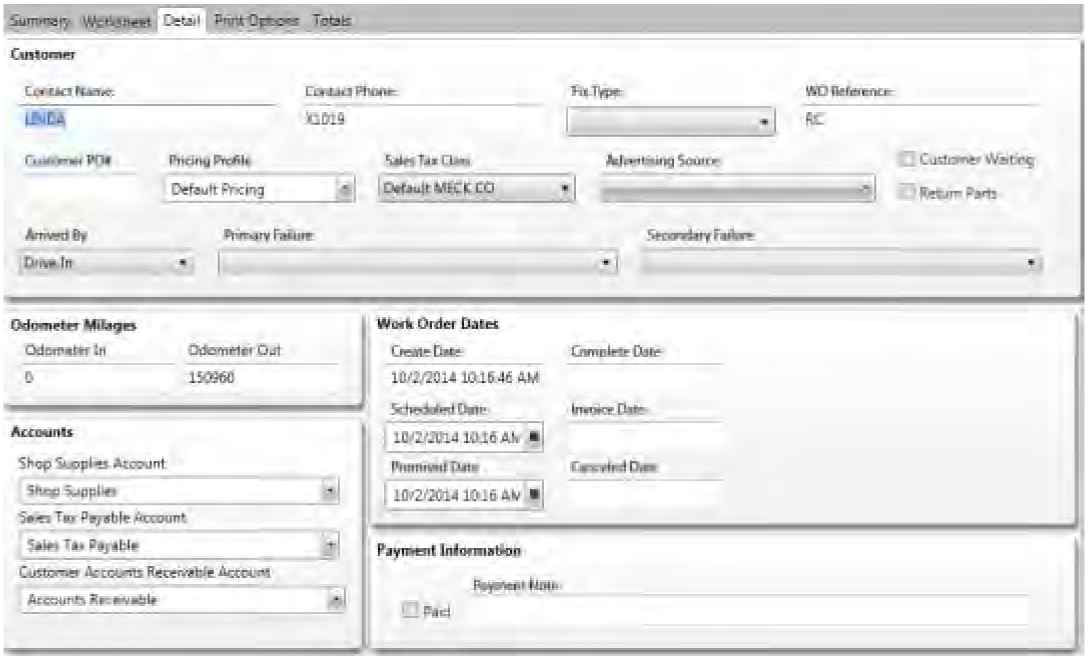
Use the **Purchasing** sub tab you to view item information such as manufacturer, vendor, and cost.

Worksheet Accounts Sub Tab

Use the **Accounts** sub tab to view account information for the work order. You can also change accounts from the Chart of Accounts.

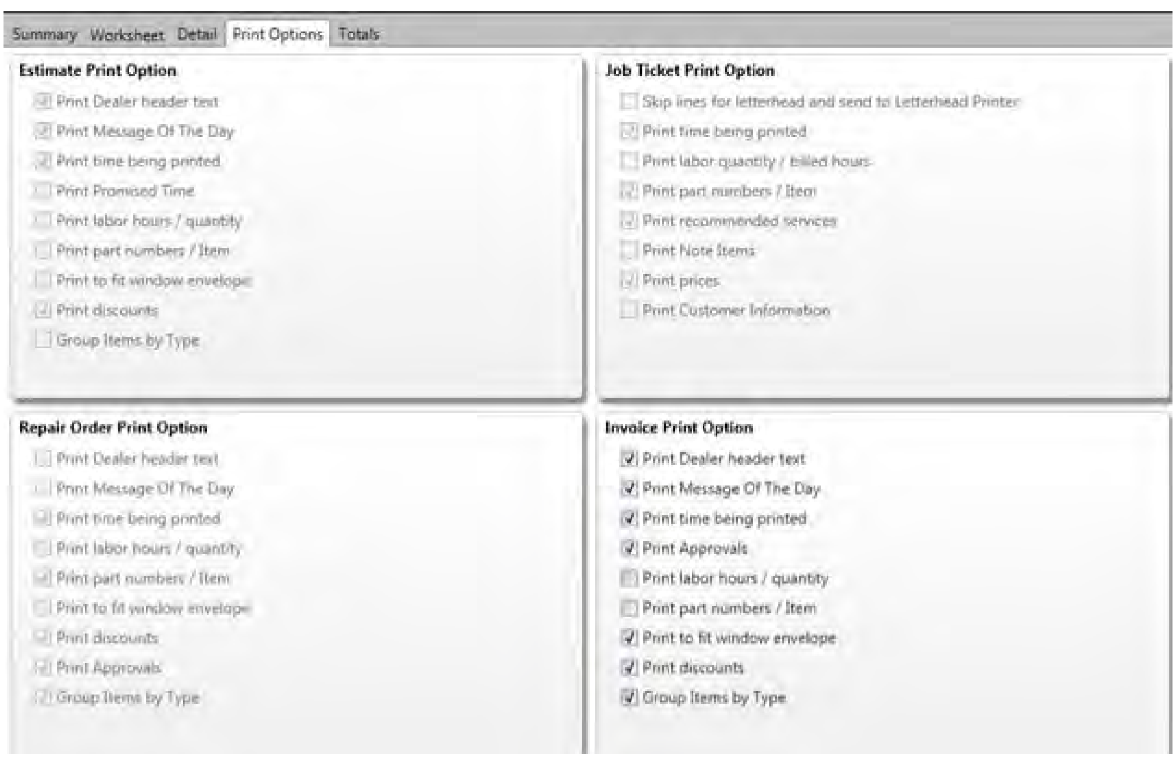
Detail Tab

Use the **Detail** tab to view customer information, account information, work order times, and document odometer readings.



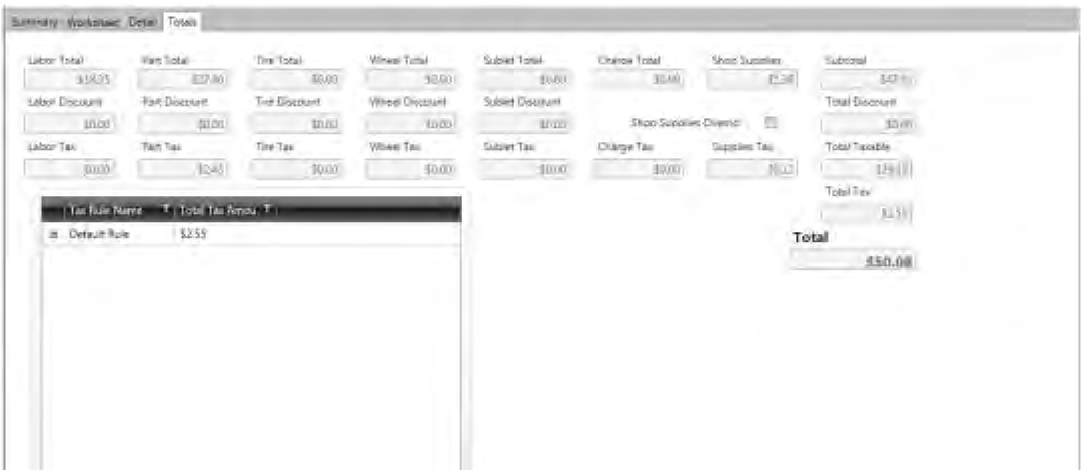
Print Options Tab

Use the **Print Options** tab to turn on or off options such as printing the message of the day and more for estimates, job tickets, repair orders, and invoices. Check a check box to turn on an option and clear a check box to turn an option off.



Review Estimate Totals Tab

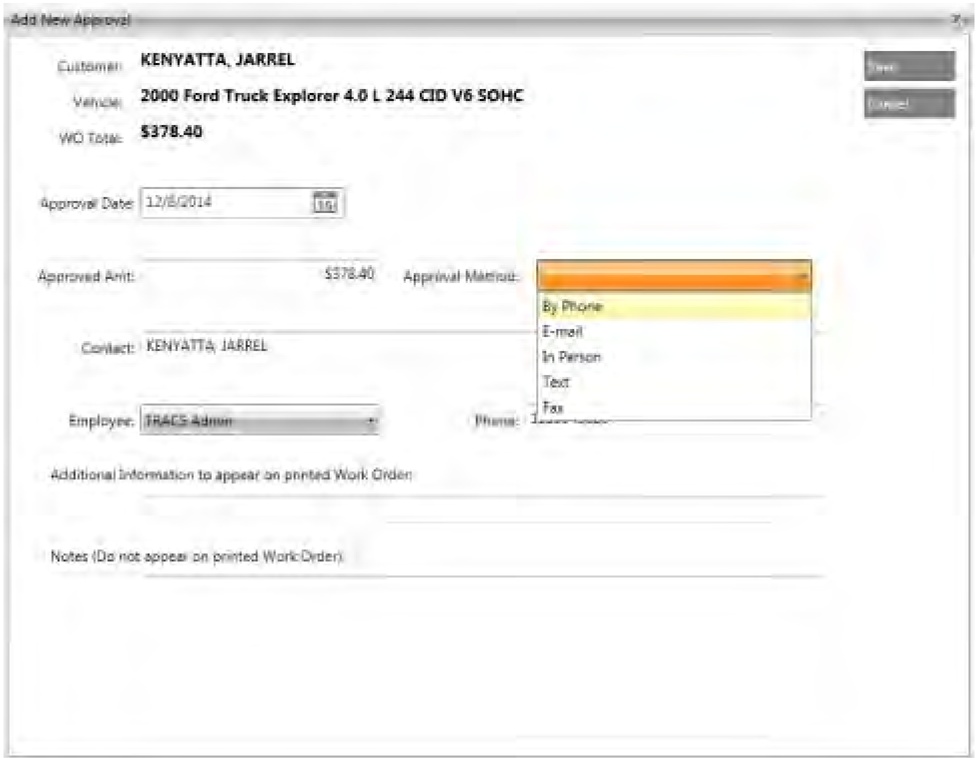
Use the **Totals** tab to view a breakdown of total estimate by labor, parts, sublets, and shop supplies. This window also displays any discounts given or taxes incurred. A pie chart feature shows the percentage of the work order total for items such as parts and labor.



Approving Estimates

You use the **Approvals** button on the TRACS Rail to approve an estimate or work order.

1. Open an estimate or work order.
2. Click the **Approvals** button on the TRACS Rail. The **Work Order Approvals** screen appears.
3. Click the **New** button on the TRACS Rail. The **Add New Approval** window appears.



4. Click the **Approval Method** down arrow and select an option.
5. Click the **Employee** down arrow and select an option.
6. Optionally, add text that will appear on the printed work order.
7. Optionally, add text in the Notes box. The text will not appear on the printed work order.
8. Click the **Save** button to save and close the **Add New Approval** window.
9. Click the **Done** button to close the approvals screen.

About Sub Estimates

Use the sub estimate feature to include additional vehicle repairs. Sub estimates are added from an existing estimate or repair order.

When a customer brings a vehicle for repair work, an estimate is generated. Additional repairs the diagnosing technician finds are included on the repair estimate. If the price of the repair, urgency of the repair, or time required to complete a portion of the repair does not meet the customer's needs, the work can be moved to a sub estimate. Sub estimate repairs can be scheduled for a later date.

Adding a New Sub Estimate
Moving a Work Order Item to a Sub Estimate

Deleting a Sub Estimate

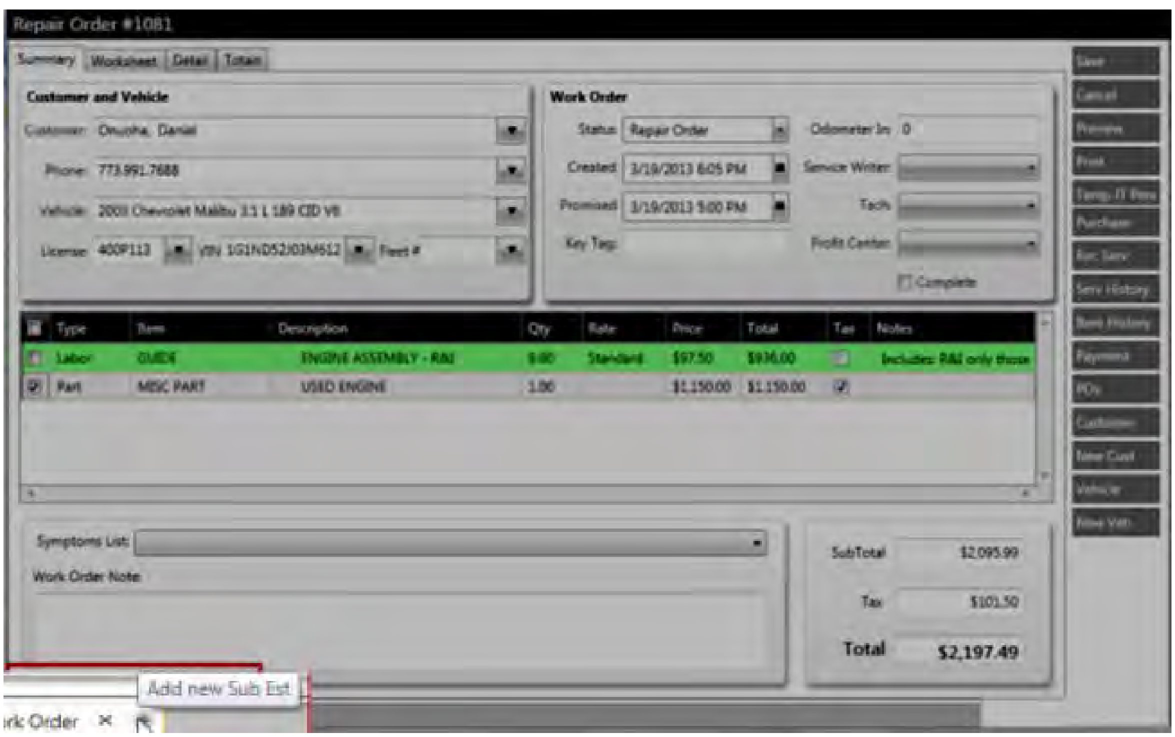
Adding a New (Empty) Sub Estimate

Sub estimates are added from an existing estimate or repair order, and can be scheduled for a later date.

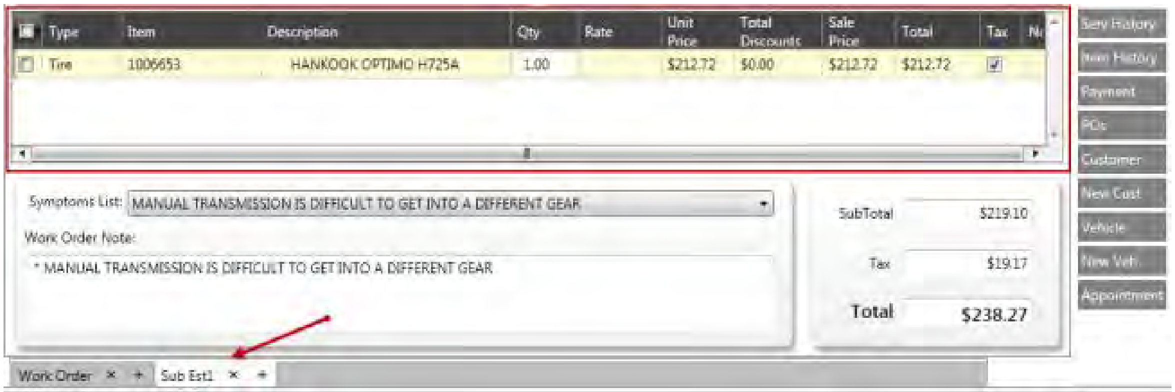
Note: You must have a repair estimate or work order open that already contains a sub estimate.

To add a new (empty) sub estimate:

1. Click the **Add New Sub Est** plus sign (+) on the work order tab at the bottom of the **Repair Order** screen-click on line item in the repair items section of the estimate or work order screen.



A new (empty) sub estimate view is created with an area to include parts, labor, charges, items, or notes.



2. Click the **Work Order** tab to return to the repair order view.

If the customer defers part of the work order or repairs on the estimate, you can copy that item to the sub estimate.

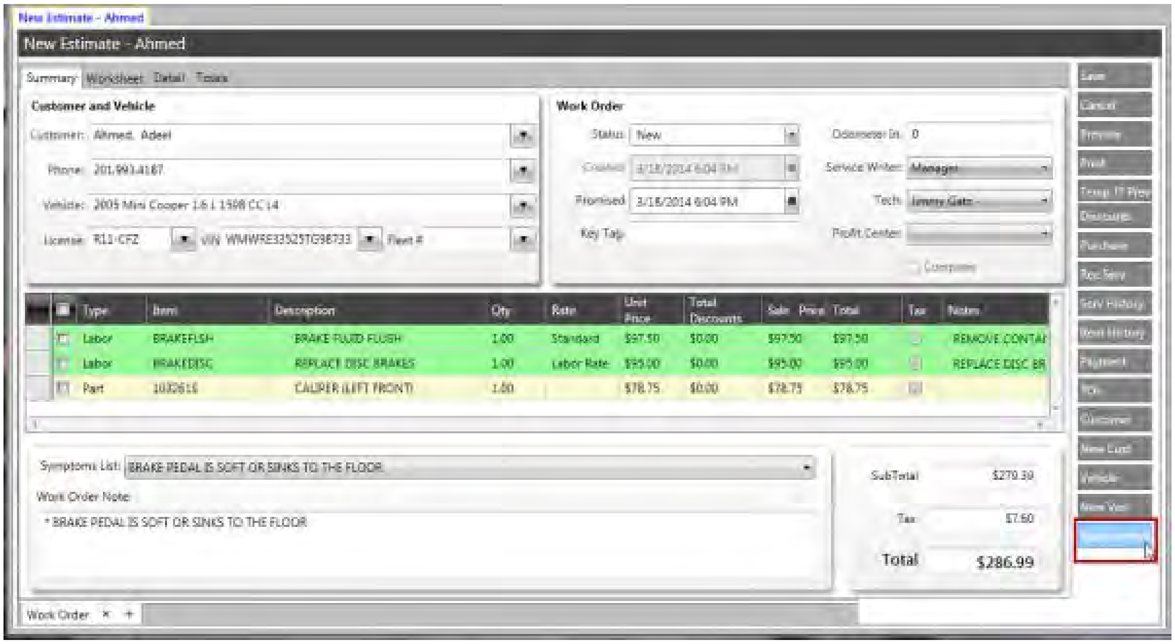
Create Additional Sub Estimates

To create additional sub estimates, click the **Add New Sub Est** plus sign (+) on the sub est tab. You can create an unlimited amount of sub estimates to a work order.

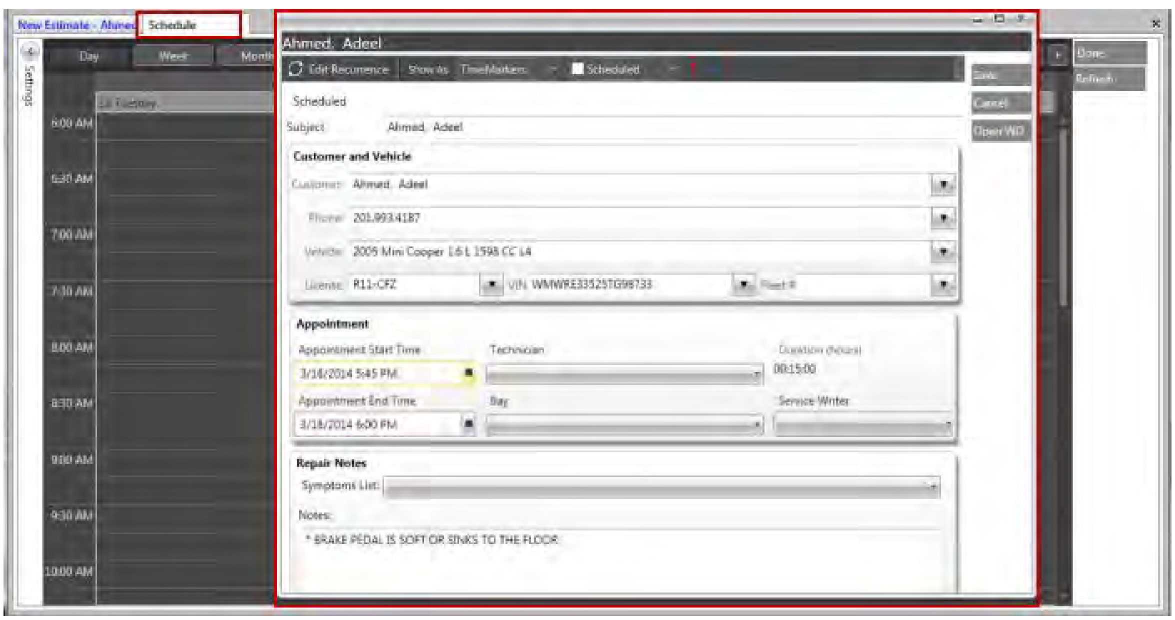
Creating an Appointment

Use the appointment schedule window to create and schedule a repair appointment from any estimate, work order, or repair order screen. To create an repair appointment:

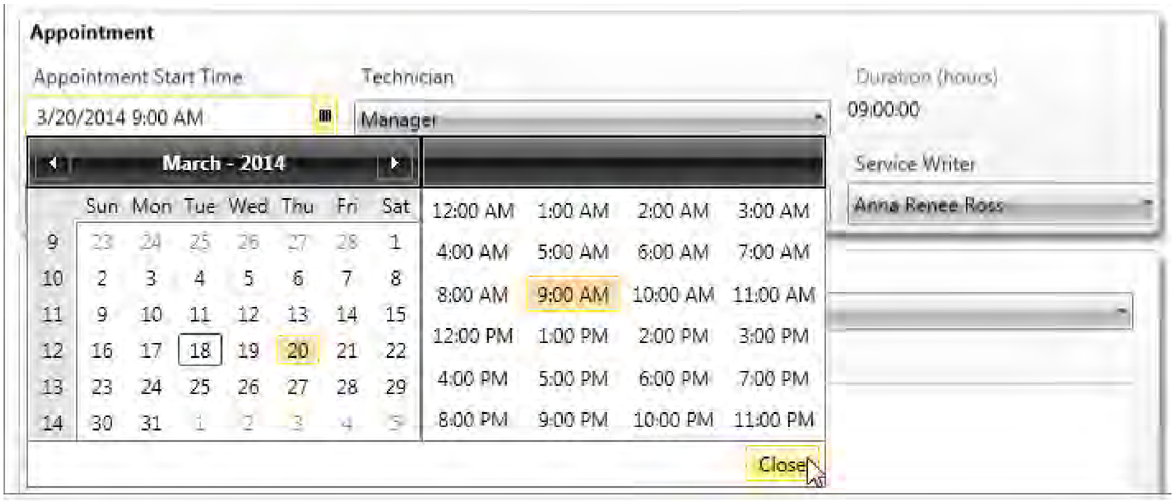
1. Click the **Appointment** button on the TRACS Rail on any estimate, work order or repair order window.



The appointment schedule window appears over the Schedule screen.

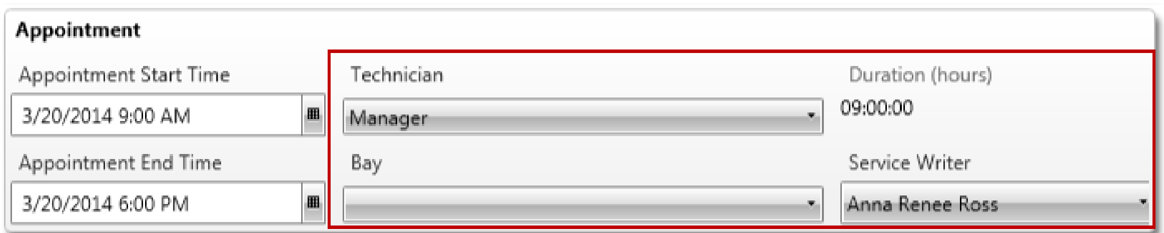


2. Select an appointment date and start and end time in the **Appointment** section of window, and then click the **Close** button.

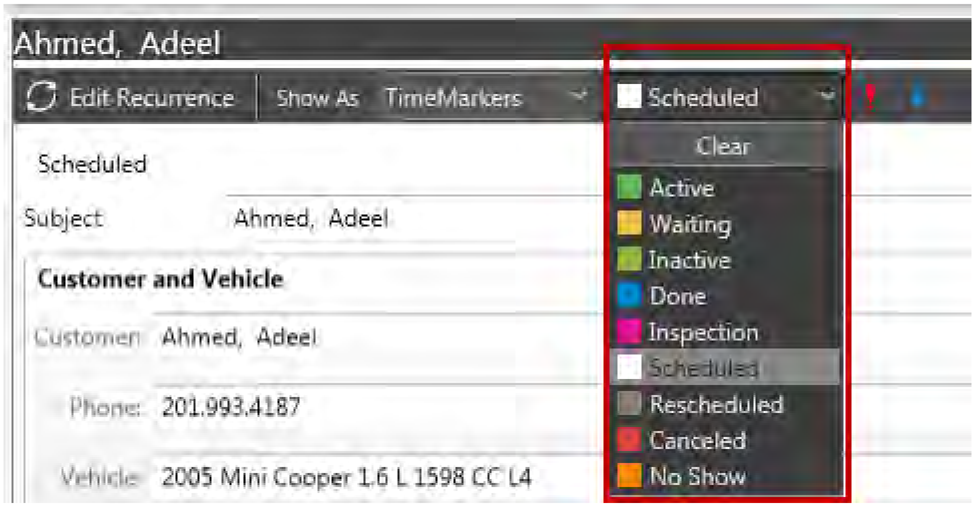


3. Select a technician, service writer and repair bay.

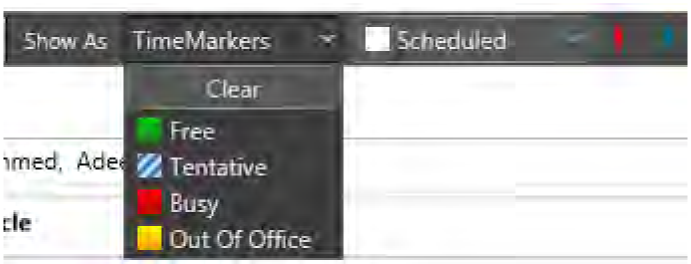
   Note: Selecting a repair bay may not apply to your shop.



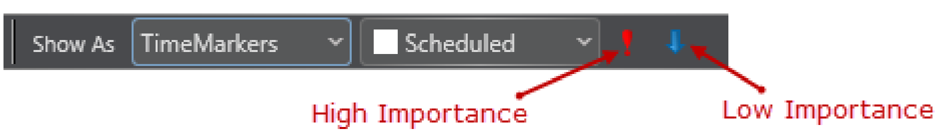
4. Select a status for the appointment. Options are:
   - Active
   - Waiting
   - Inactive
   - Done
   - Inspection
   - Rescheduled
   - Cancelled
   - No Show



5. Select a time marker for the appointment that will show on the schedule calendar. Options are:
   - Free
   - Tentative
   - Busy
   - Out of Office (not commonly used)



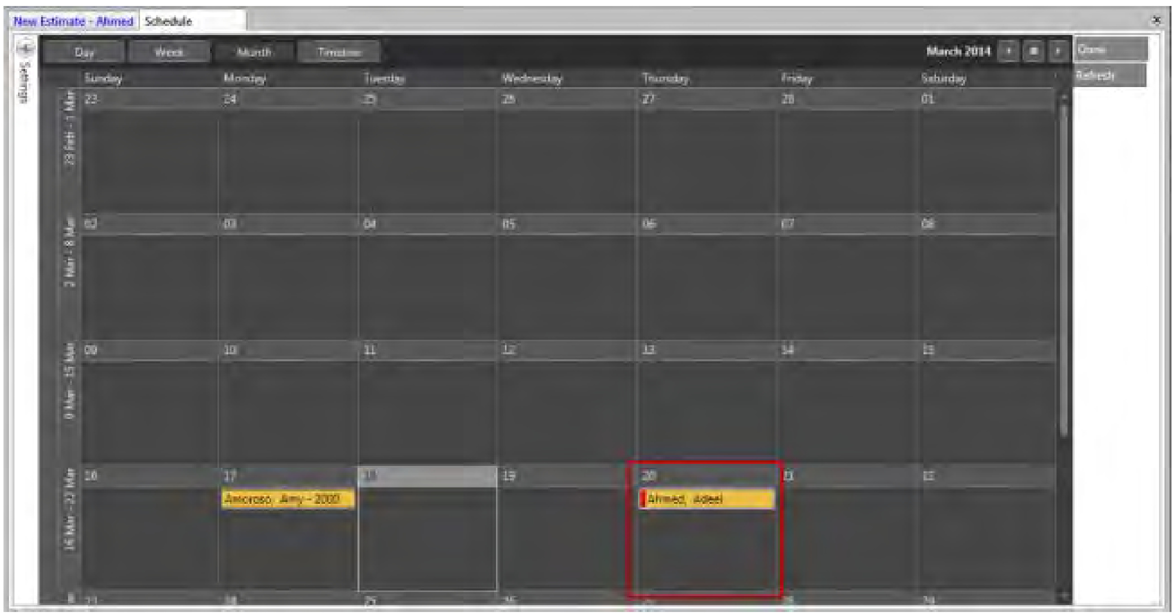
6. Select a priority for the appointment. Options are high importance or low importance.



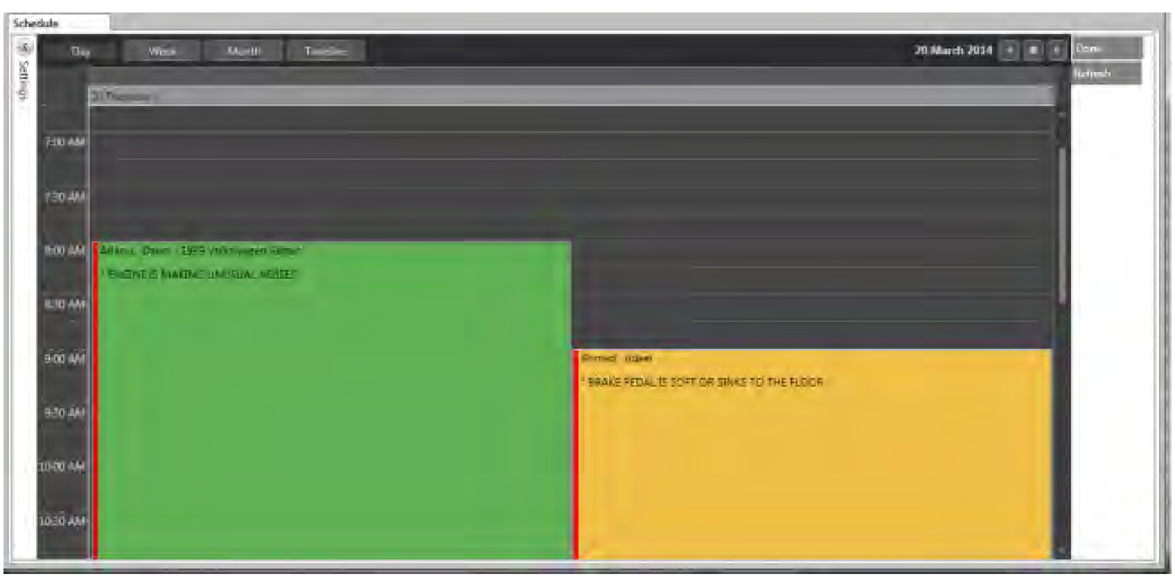
The following example shows a repair appointment where the customer is waiting, the repair is of high importance and the schedule will indicate the time as **Busy** for the assigned technician.

Schedule Example

7. Click the **Save** button to return to the Scheduler page. The appointment appears for the date and time selected.



Schedule in Month View



Schedule in Month View

Creating a Repair Estimate

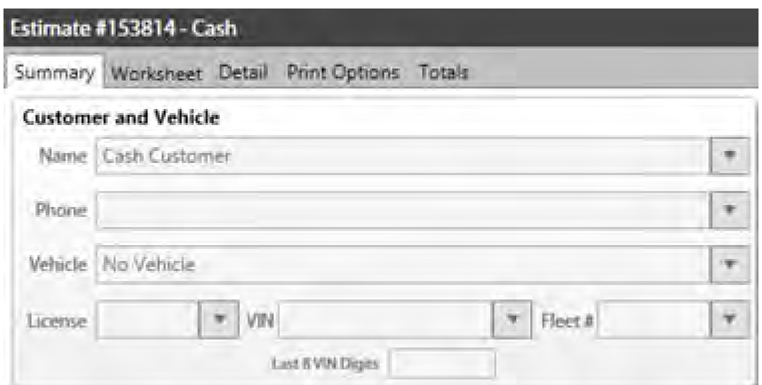
Use a repair estimate to determine labor and parts needed to repair a customer vehicle. Repair estimates can be for new customers or existing customers.

Creating a Repair Estimate for an Existing Customer

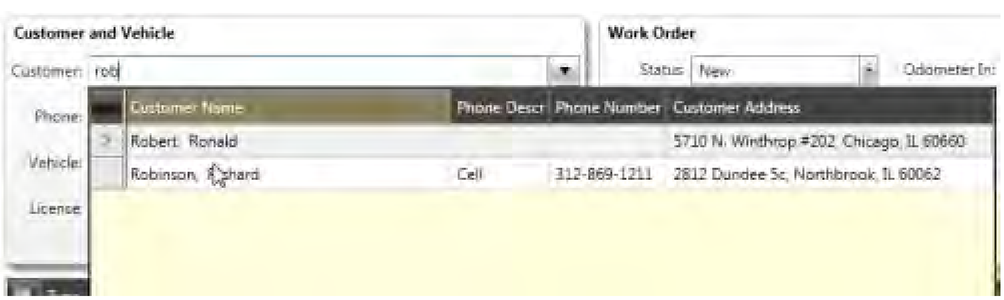
To create a repair estimate for an existing customer:

1. Click the **New Estimate** icon  on the NAPA TRACS menu bar.

   The **New Estimate** screen appears showing **Cash Customer** in the **Customer** field



2. Begin typing the customer's last name in the **Customer** field. Matching customer names appear as you type.
3. Select the customer name from the list.



Vehicle and customer information from the database populates the fields on the **Summary** tab.

Note: Do not create a duplicate customer record. Always pick the customer from the list.

If the customer is not in your database a confirmation dialog box appears where you can add the new customer.

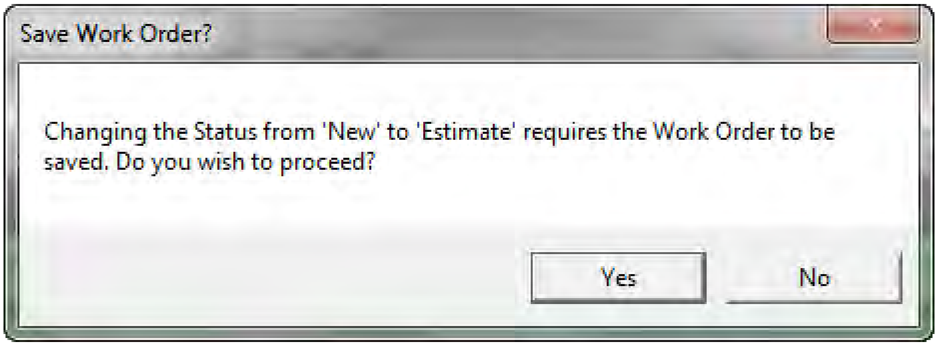
See Creating a Repair Estimate for a New Customer.

4. Discuss the repair needs with the customer. Go out to the vehicle if necessary for a thorough assessment.
5. Click the **Symptoms List** down arrow and select an item that matches what is wrong with the vehicle. Include additional symptoms one at a time.

Symptoms are automatically added to the **Work Order Note** field. Work order notes only print on the job ticket.

6. Click the **Work Order Note** field and type information provided by the customer to help the technician diagnose the repair accurately.
7. Click the **Service Writer** and **Tech** down arrows to indicate who is entering the order in the system and which technician will diagnose the repair.
8. Click the **Status** down arrow and change the status from **New** to **Estimate**.

The **Save and Close Work Order** dialog box appears.



9. Click **Yes** to save the estimate.

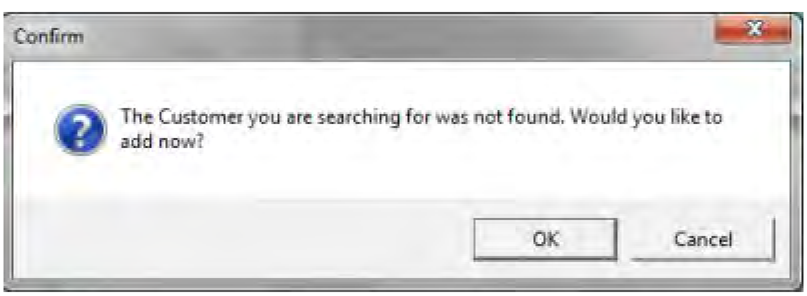
   At this point in the estimating process, the technician moves the vehicle to the repair bay to diagnose repair needs. The service writer, using information from the technician, prepares a written estimate for the customer.

Creating a Repair Estimate for a New Customer

To create a repair estimate for a new customer:

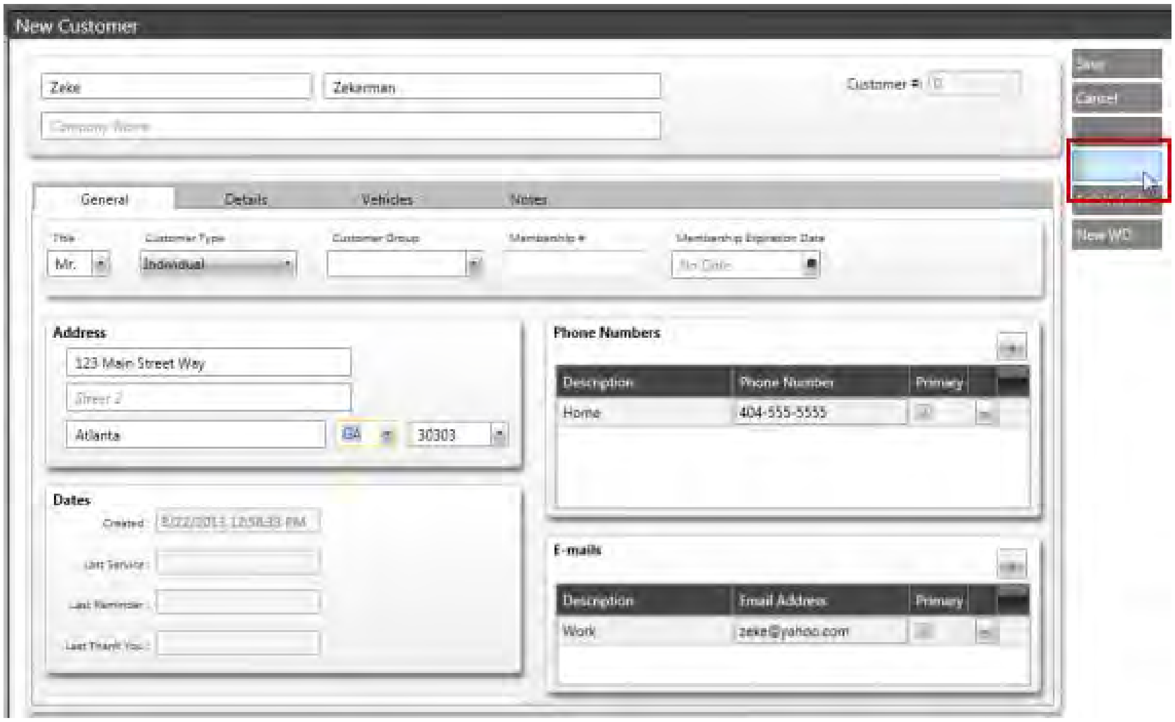
1. Click the **New Estimate** icon  on the NAPA TRACS menu bar.
2. Verify that the customer is not already in the database by typing the customer last name in the **Customer** field.

   If the customer is not in your database a confirmation dialog box appears where you can add the new customer.



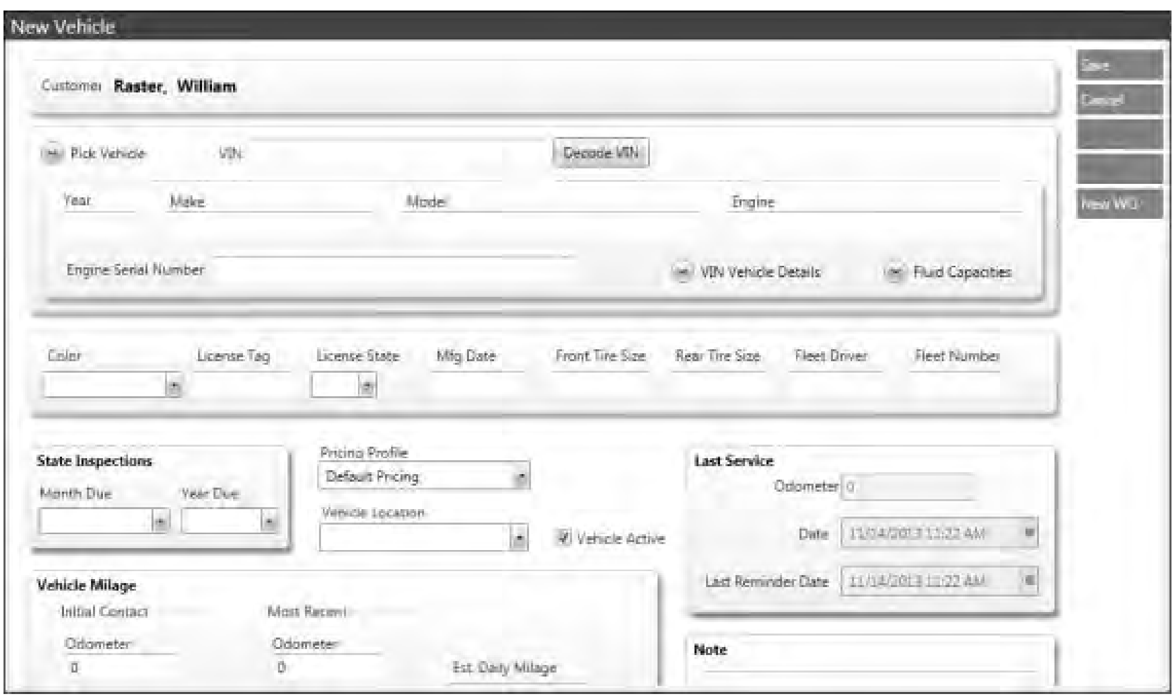
3. Click **OK**.

   The **New Customer** window appears.



4. Complete the fields in the **Address**, **Phone Numbers**, and **E-mails** sections and click the **New Vehicle** button.

The **New Vehicle** window appears.

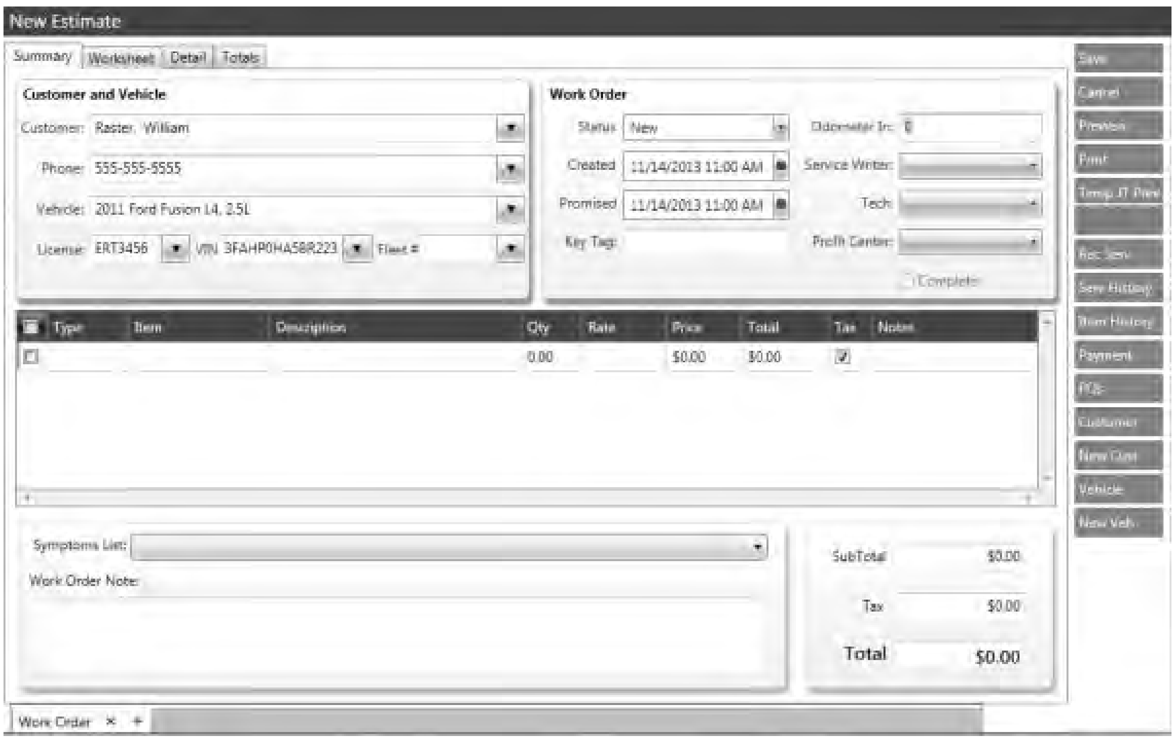


5. Type the VIN number and decode it to populate the vehicle information

- or -
use the **Pick Vehicle** drop down arrow to select vehicle details. See the Picking Vehicle Details topic for instructions on picking vehicle details.

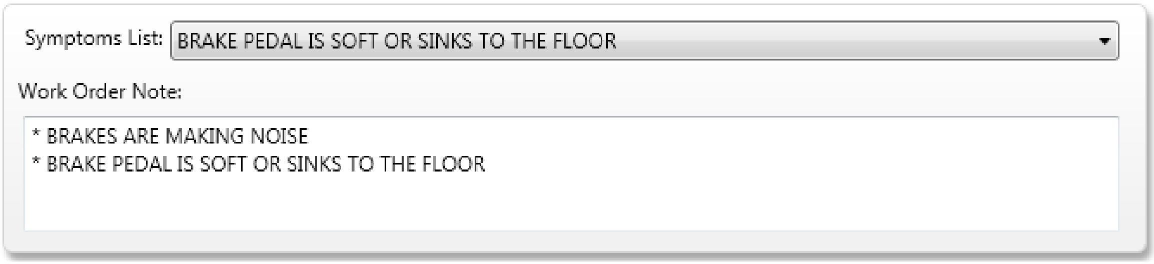
6. Complete information as applicable in the other sections of the screen.
7. Click **Save** to close the **New Vehicle** window.
8. Click **Save** to close the **New Customer** window.

The **Summary** tab of the **New Estimate** window with the new customer information completed appears.



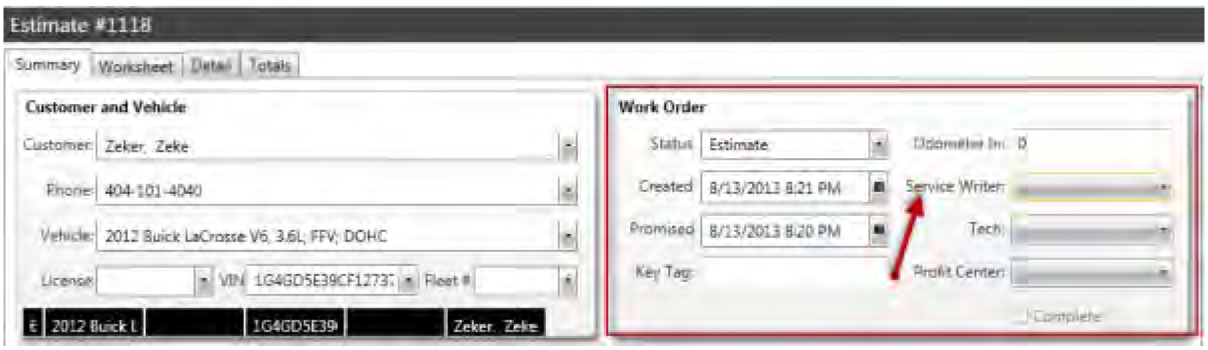
Create Repair/Symptom Notes

1. Click on the **Symptoms List** down arrow to select from a pre-populated list of things that the customer reports as being wrong with the vehicle. You can select more than one from the list. As you click to select the symptom will be added to the **Work Order Notes** field.
2. Click in the **Work Order Notes** field to enter specific information that the customer provides about the vehicle that could help the technician diagnose the issue more accurately. These notes will only print on the job ticket.

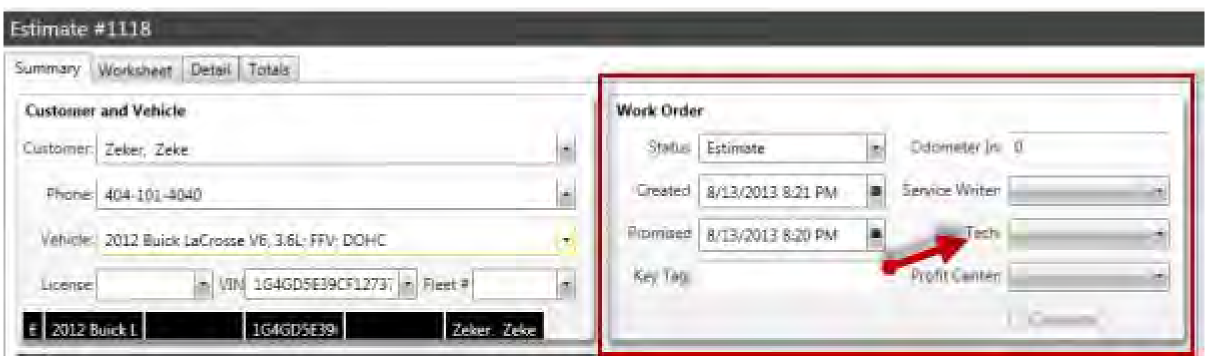


Assign a Technician/Service Writer

Use the **Work Order** section of the **New Estimate** screen to identify the service writer and assign a technician.



Identify Service Writer



Assign Technician

Note: Optionally assign a profit center and key tag for your shop for the estimate in the **Profit Center** and **Key Tag** fields.

Assess Repair Needs

At this point, the technician takes the customer keys and moves the vehicle into a bay to diagnose the repair needs. The technician and service writer discuss the repair specifics, parts needed, and the length of time for the repair

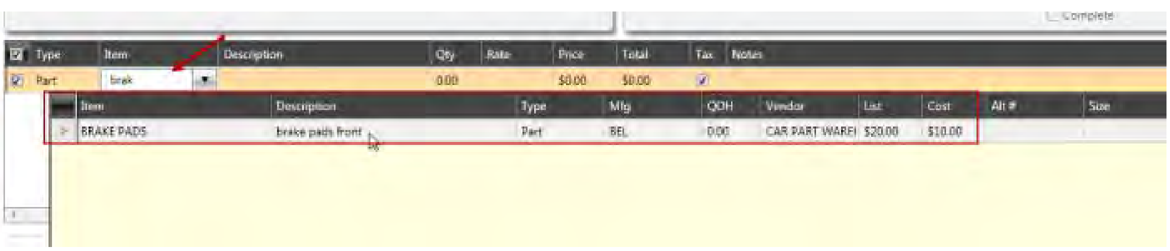
Prepare the Estimate

The steps in this example show bleeding brakes as the labor component; brakes pads as the parts; and new tires are included.

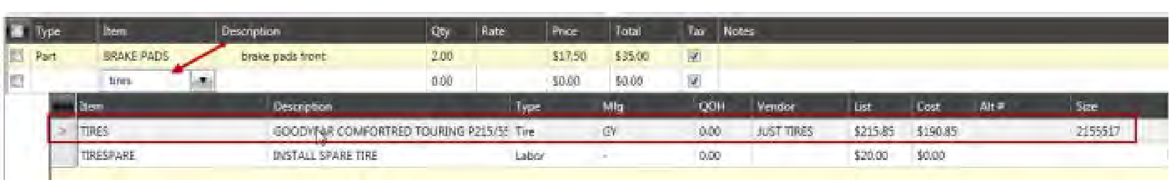
1. Click the down arrow on the **Type** field and make a selection. Options are:

    - Part
    - Labor
    - Charge
    - Tire
    - Wheel
    - Sublet
    - Note

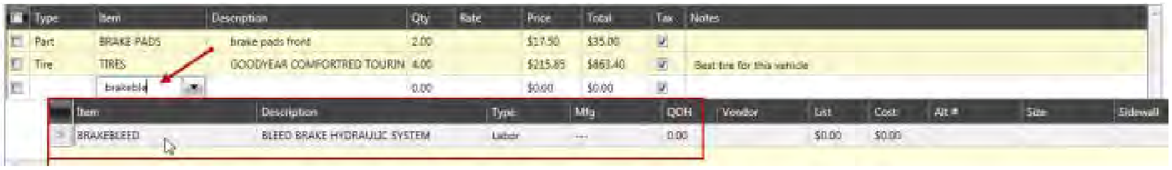
2. Push the down arrow on your keyboard to create a new line, if necessary.
3. Begin typing **brakes** in the **Item** field and select it from the list that appears.



4. Push the down arrow on your keyboard to create a new line.
5. Type **tires** in the **Item** field and make a selection from the list that appears.



6. Push the down arrow on your keyboard to create a new line.
7. Type **Labor** in the **Type** field.
8. Type **brakebleed** in the **Item** field and make a selection from the list that appears.



9. (Optional) Add notes to any row in the **Notes** field.

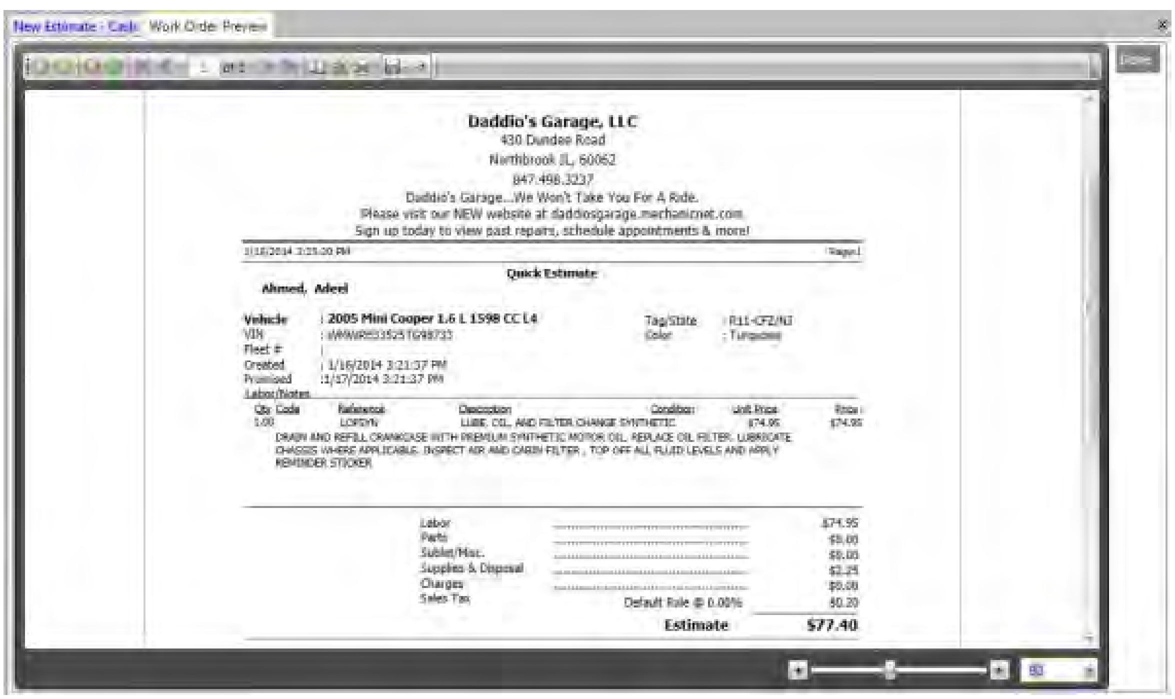
Note: You can also use NAPA PROLink to add parts and labor for the vehicle repair. See [NAPA PROLink Catalog](#) to add parts and labor to a repair estimate.

Preview the Estimate

Use the preview feature to view and print out the repair estimate for the customer. To preview the estimate:

1. Click **Preview** from the right menu.

The estimate appears containing the parts, labor, and price for the repair.



2. Use the print preview tool bar near the top of the report to perform actions on the work order preview. Hover over each icon on the tool bar to see the actions you can perform.

Note: Typically, the service manager prints the estimate to show to the customer before performing any repair

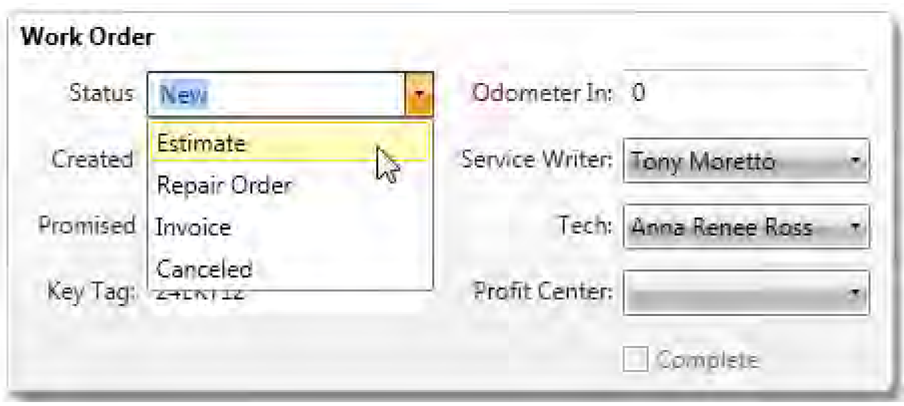
Print Preview Tool Bar

3. Click **Done** to close the work order preview.

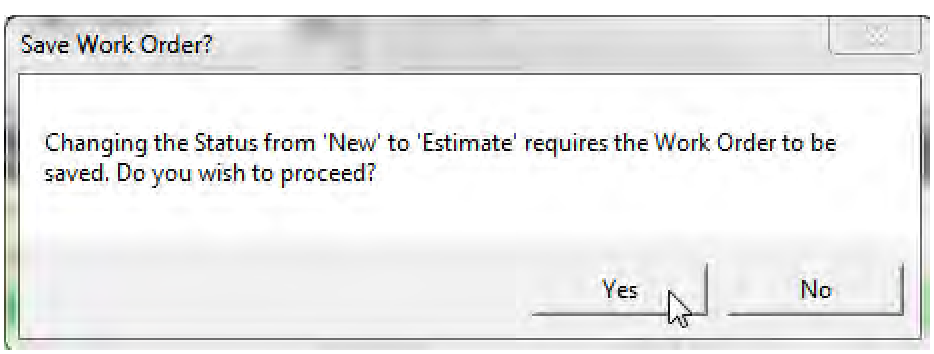
Once the customer approves the repairs, change the estimate to a repair order.

Change Status to Estimate

1. Select **Estimate** from the **Status** field in the **Work Order** section of the **New Estimate** screen.



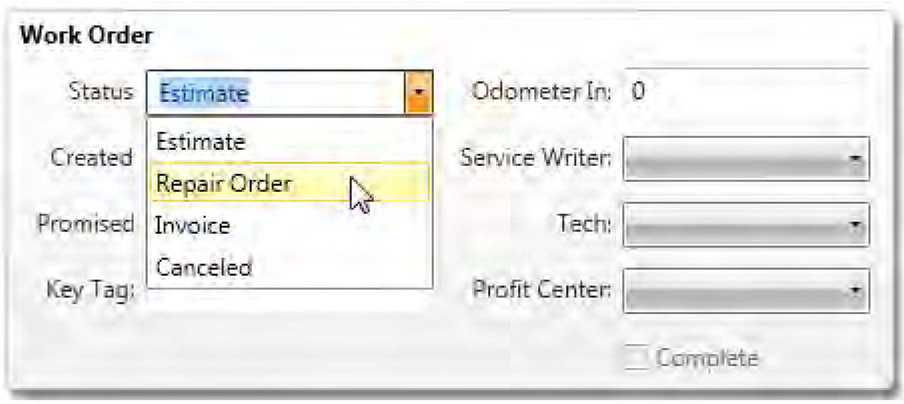
The **Save Work Order** dialog box appears.



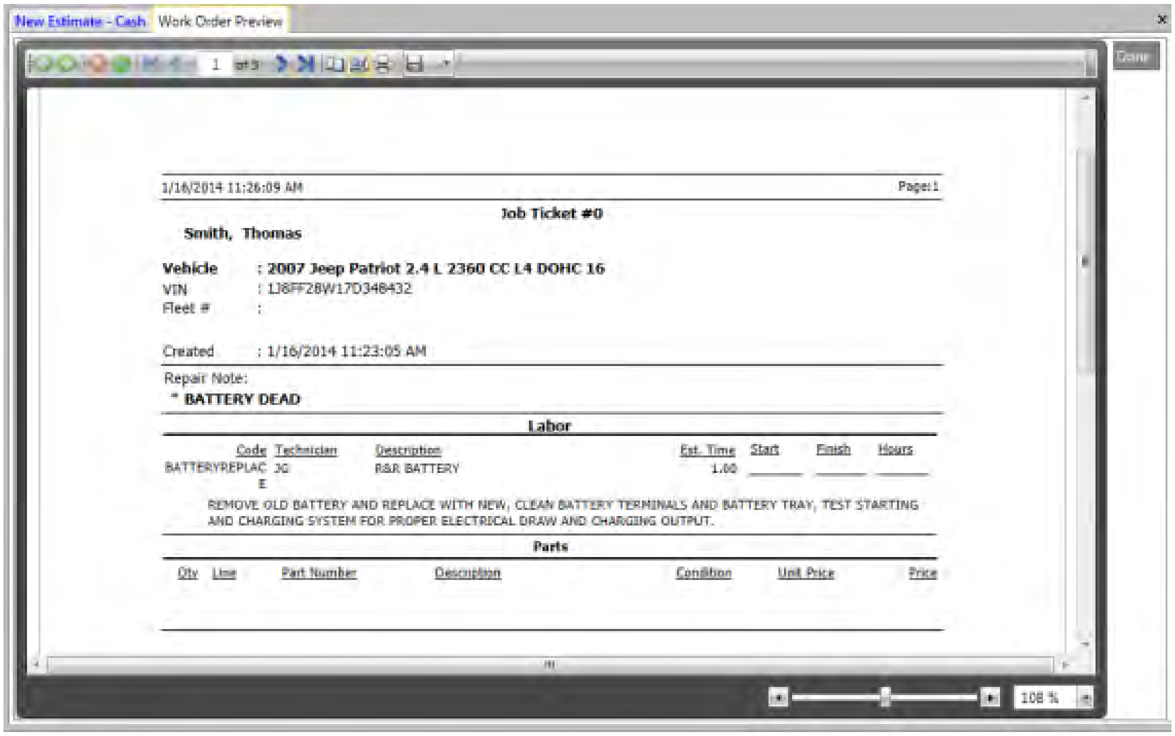
2. Click **Yes** to save the work order.

Change Estimate Status to Repair Order and Save

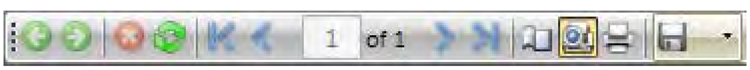
1. Select **Repair Order** from the **Status** field in the **Work Order** section of the **New Estimate** screen.



2. Click the **Temp JT Prev** button to preview the job ticket used by the service writer and technician.



3. Use the print preview tool bar near the top of the job ticket to perform actions on the job ticket preview. Hover over each icon on the tool bar to see the actions you can perform.



Print Preview Tool Bar

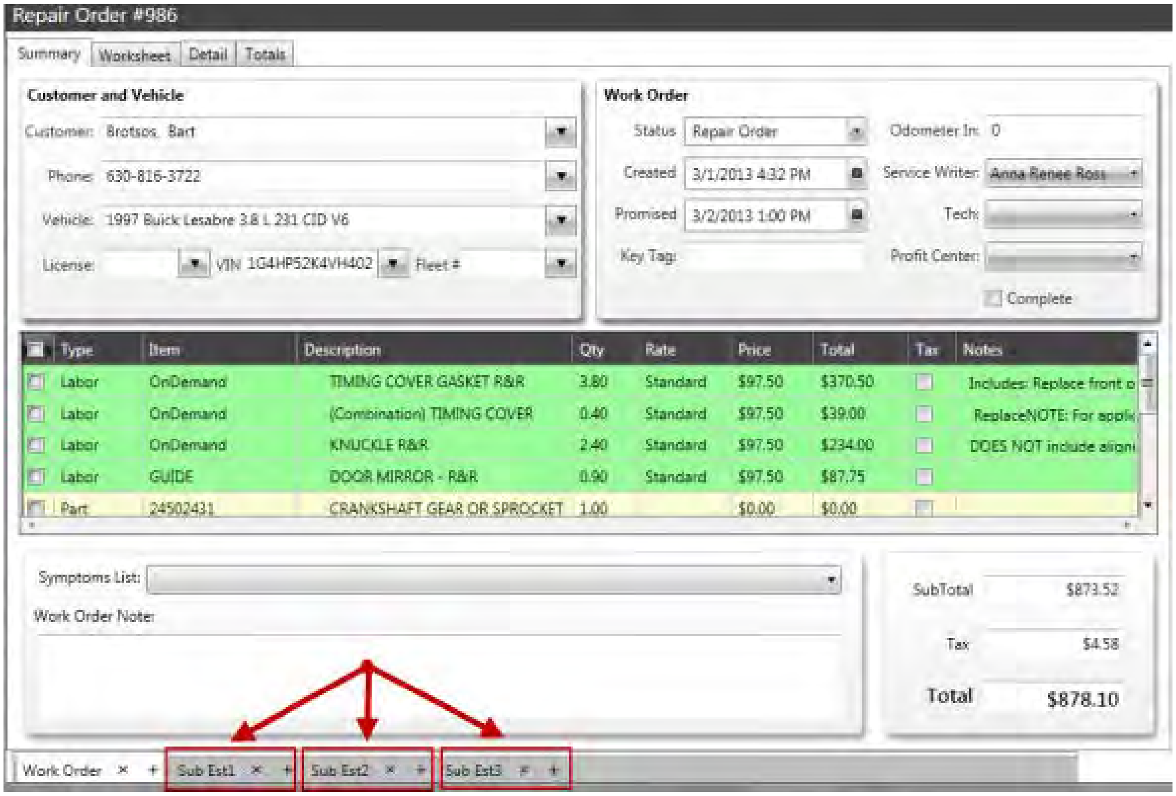
Note: Typically, the service writer prints the job ticket and uses it in conjunction with the technician during the repair process.

4. Click **Save** to save the repair order.

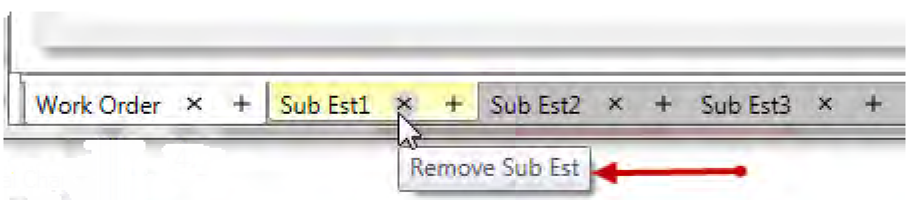
Deleting a Sub Estimate

To delete a sub estimate:

1. Open the customer work order containing sub estimates.



2. Click the Remove Sub Est **x** mark icon on the sub estimate tab to remove the sub estimate.



The sub estimate is removed from the work order.

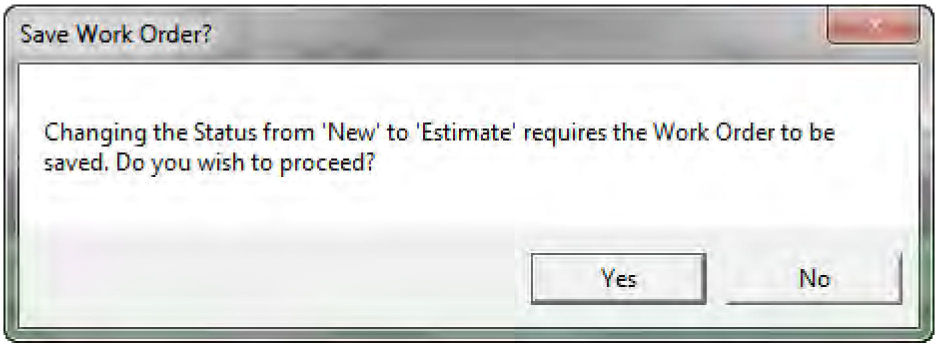
3. Click the **Save** button to update the work order information.

Saving a New Estimate

To save a new estimate for a vehicle repair:

1. Complete the tasks listed in Creating a Repair Estimate.
2. Click the **Status** down arrow and change the status from **New** to **Estimate**.

The **Save Work Order** dialog box appears.



3. Click **Yes** to save the estimate.

Using the ProDemand Estimating, Maintenance and Fluid Capacities Guide

The ProDemand Estimating Guide function enables you to look up parts and determine standard labor rates needed to complete a vehicle repair. The ProDemand Estimating Guide is the industry standard guideline for establishing flat rate time for labor.

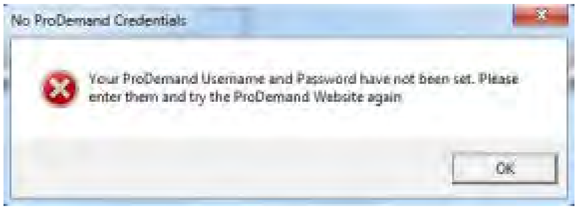
Parts and labor information from the Guide are added to the customer repair estimate or work order when you click the **Transfer** button.

Signing in to ProDemand

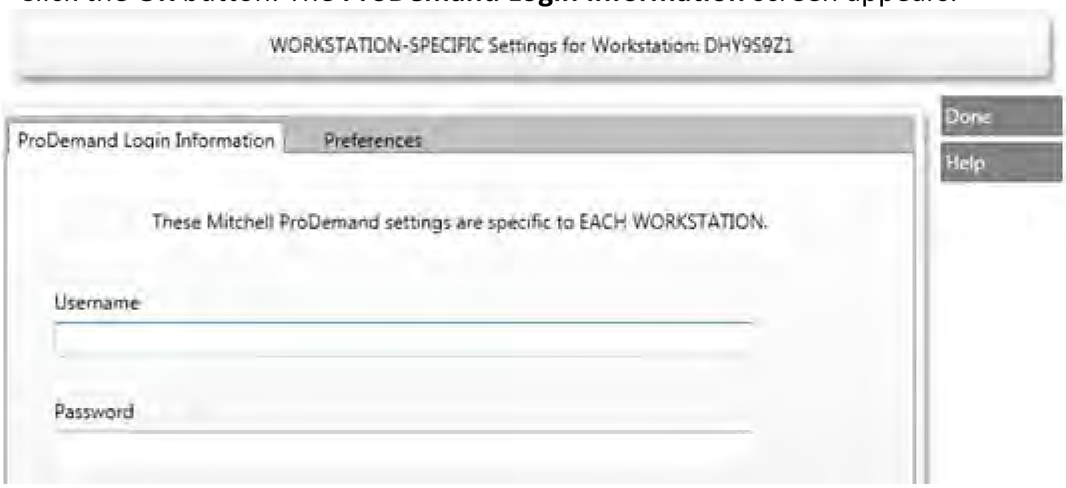
You must provide a user name and password to use the ProDemand system.

Note: Obtain your user name and password from your NAPA TRACS customer service representative.

1. If this is the first time you launch ProDemand and a user name and password has not been set, the **ProDemand Credentials** screen appears.



2. Click the **OK** button. The **ProDemand Login Information** screen appears.

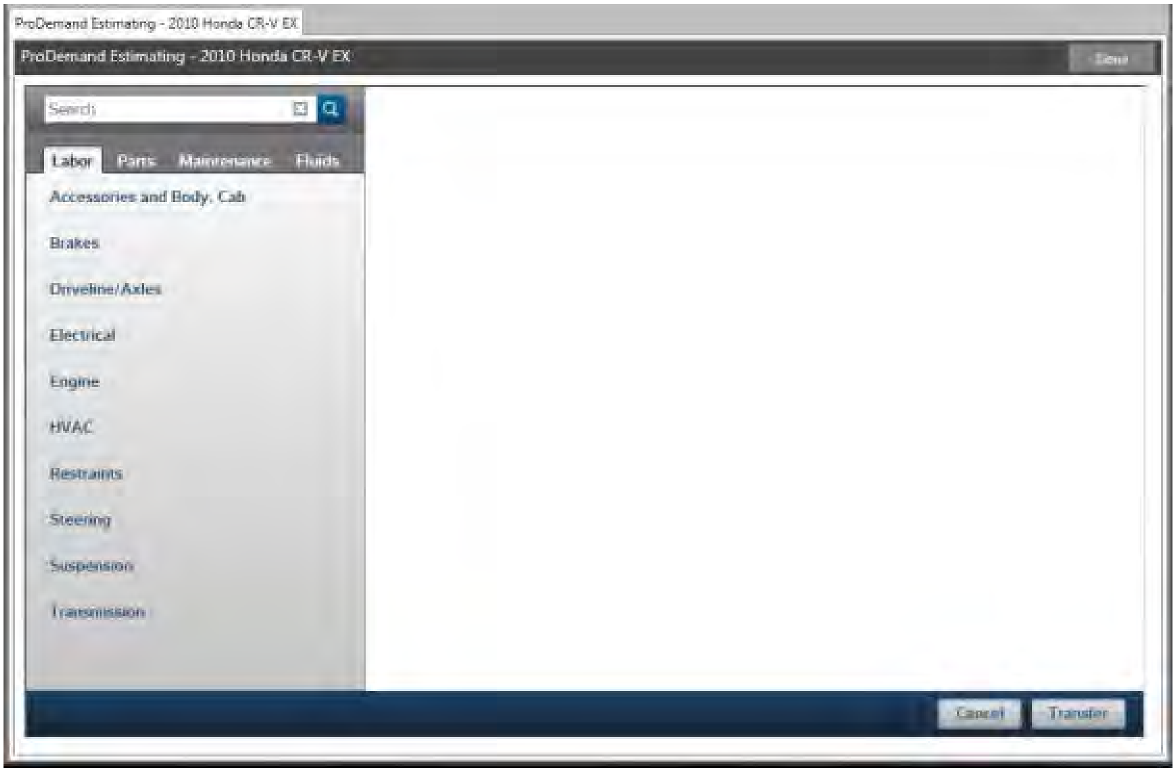


3. Enter the user name and password.
4. Click the **Done** button.

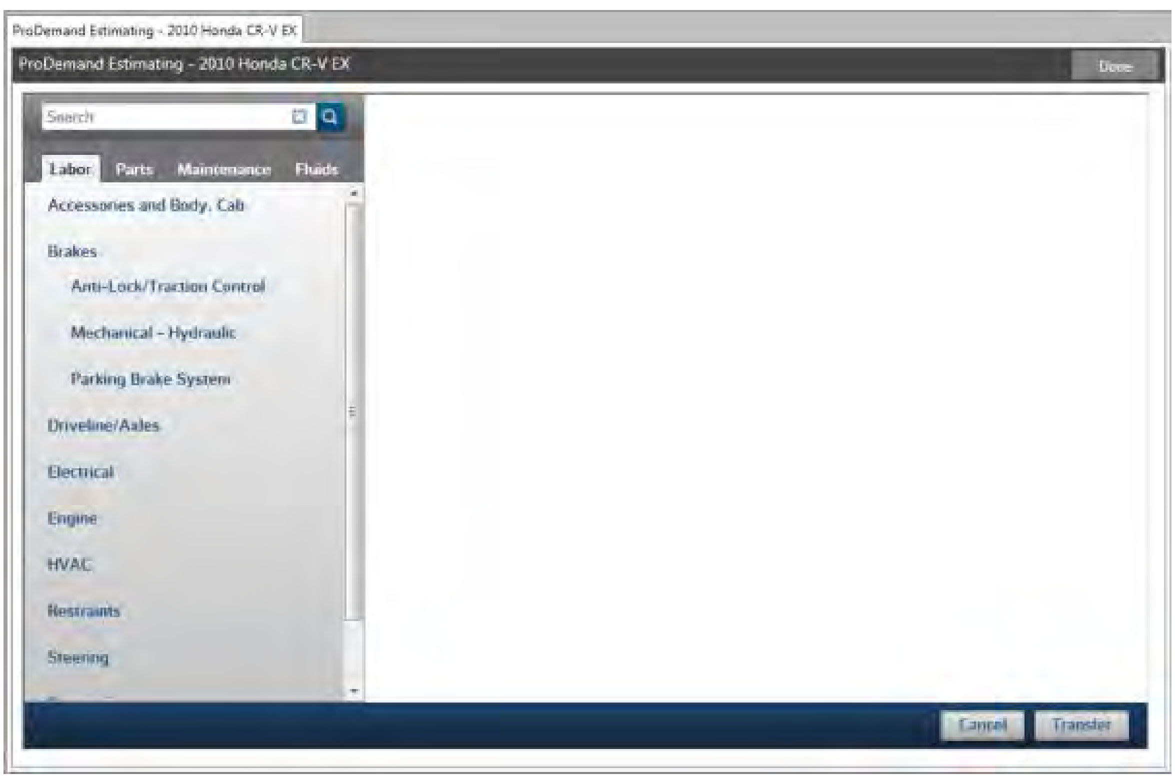
To access and use the NAPA TRACS Labor Worksheet to determine labor rates:

1. From the Work Order screen, click the **ProDemand Estimating, Maintenance and Fluid Capacities** icon  on the NAPA TRACS menu bar.

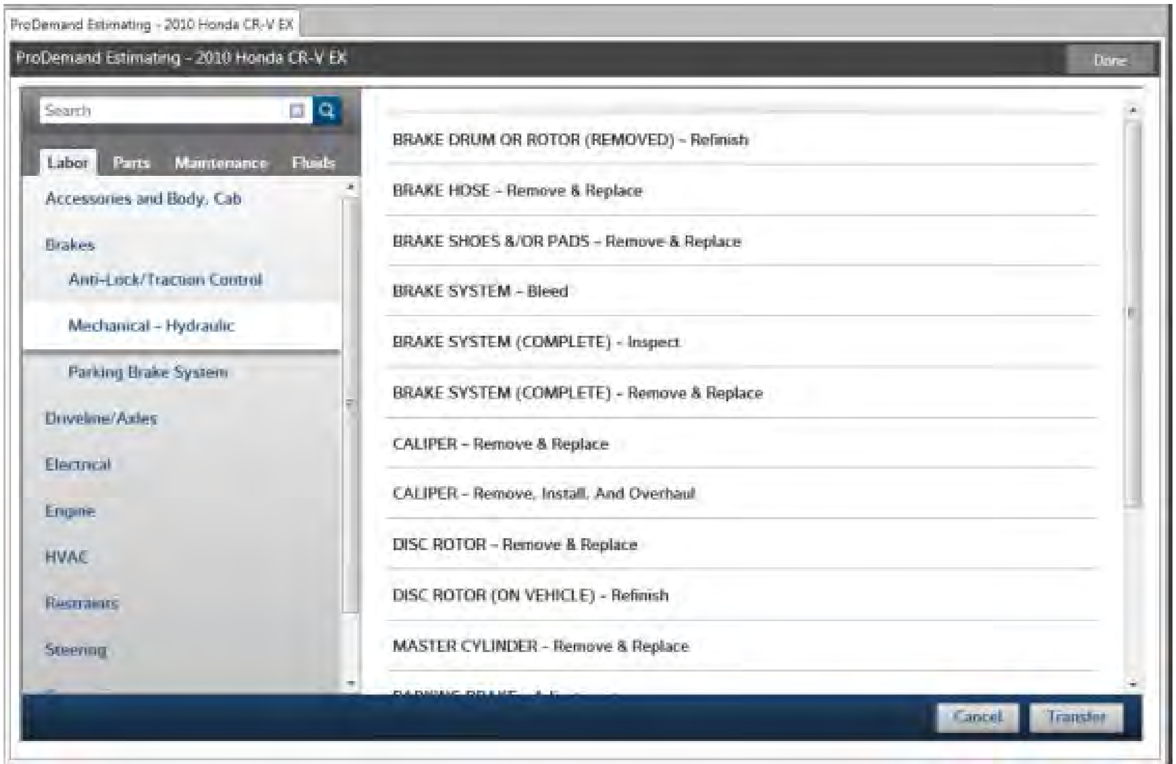
Note: The ProDemand Estimating Guide icon accesses the Mitchell1© OnDemand5™ estimator tool.



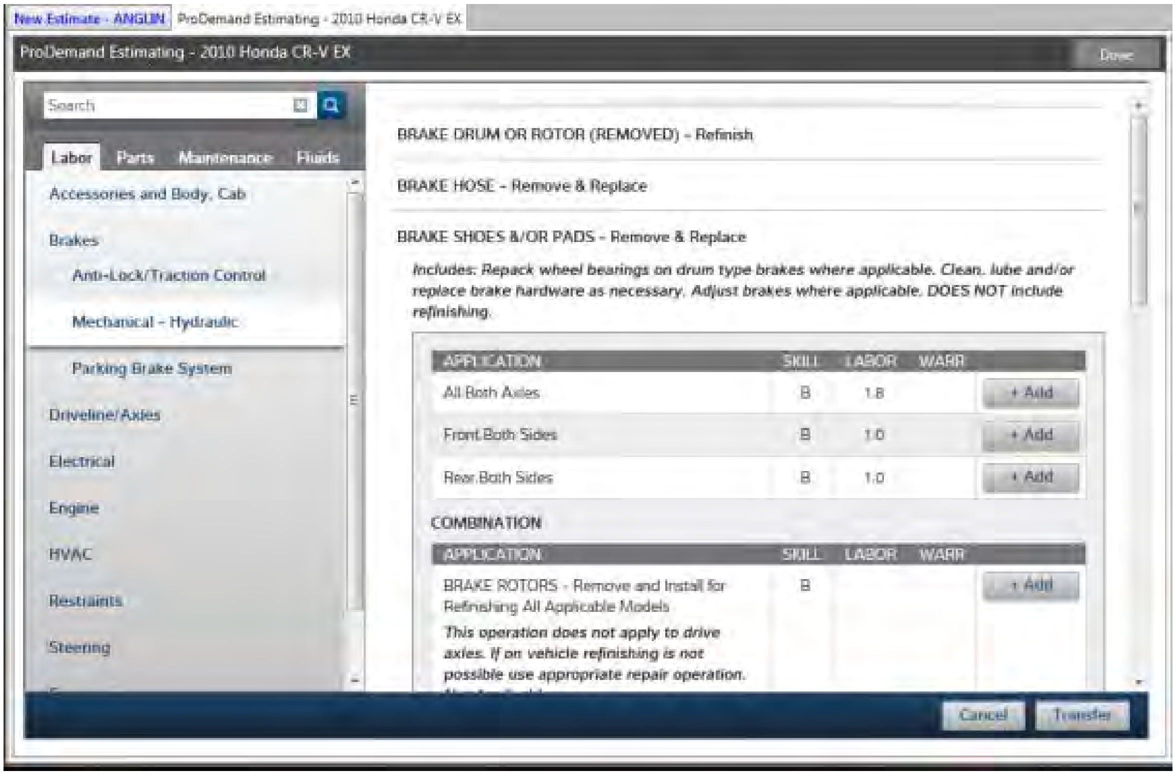
2. Select a category such as **Brakes**.



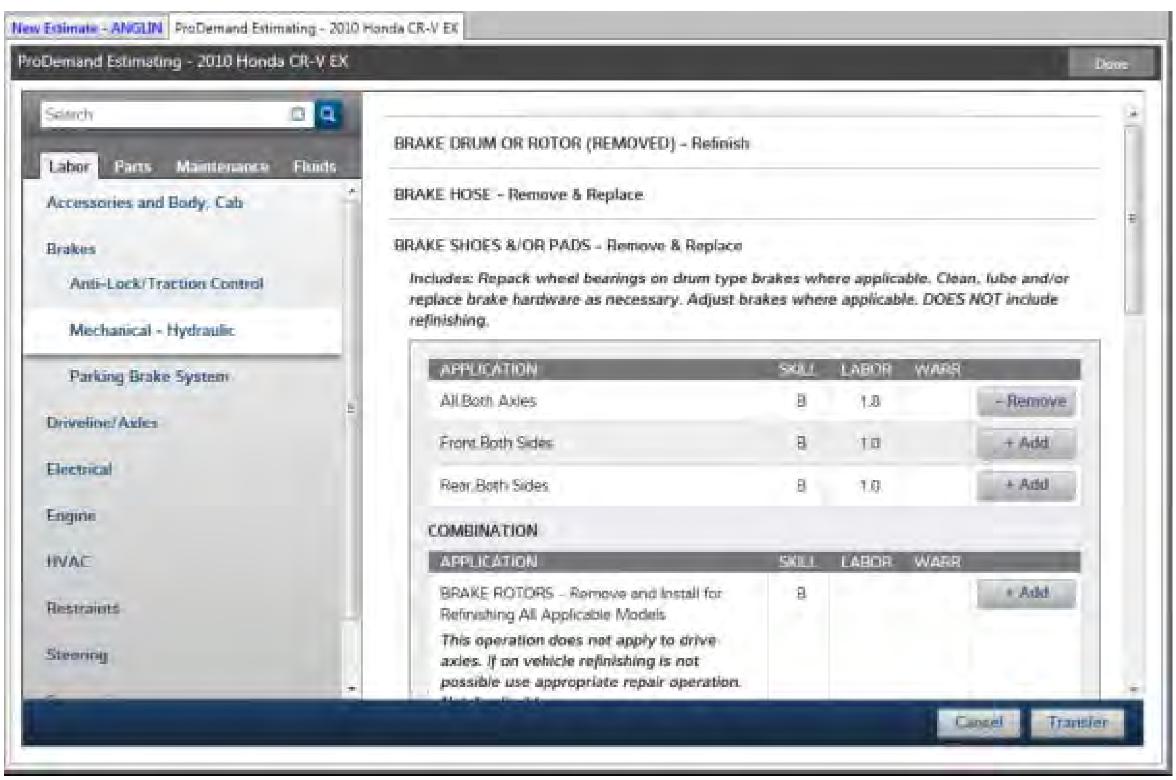
3. Select a sub category such as **Mechanical - Hydraulic.**



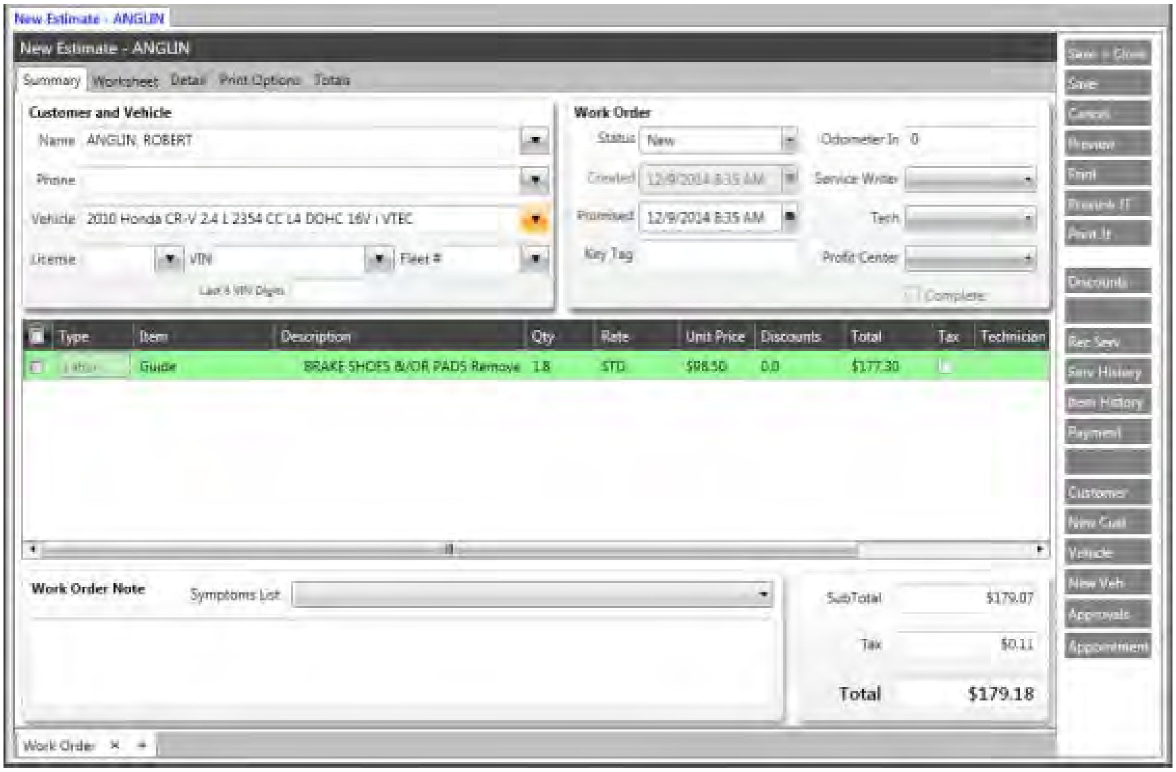
4. Select a labor type such as **BRAKE SHOES &/OR PADS - Remove & Replace**.



5. Select a labor operation such as **All Both Axles** by clicking the **+Add** button. The **+Add** button label changes to **+Remove**.



6. Click the **Transfer** button when after all labor items are added. The labor items are added to the work order.



7. Click the **Save** button to save the new items to the repair order.

Using the ProDemand Automotive Repairs Web Site

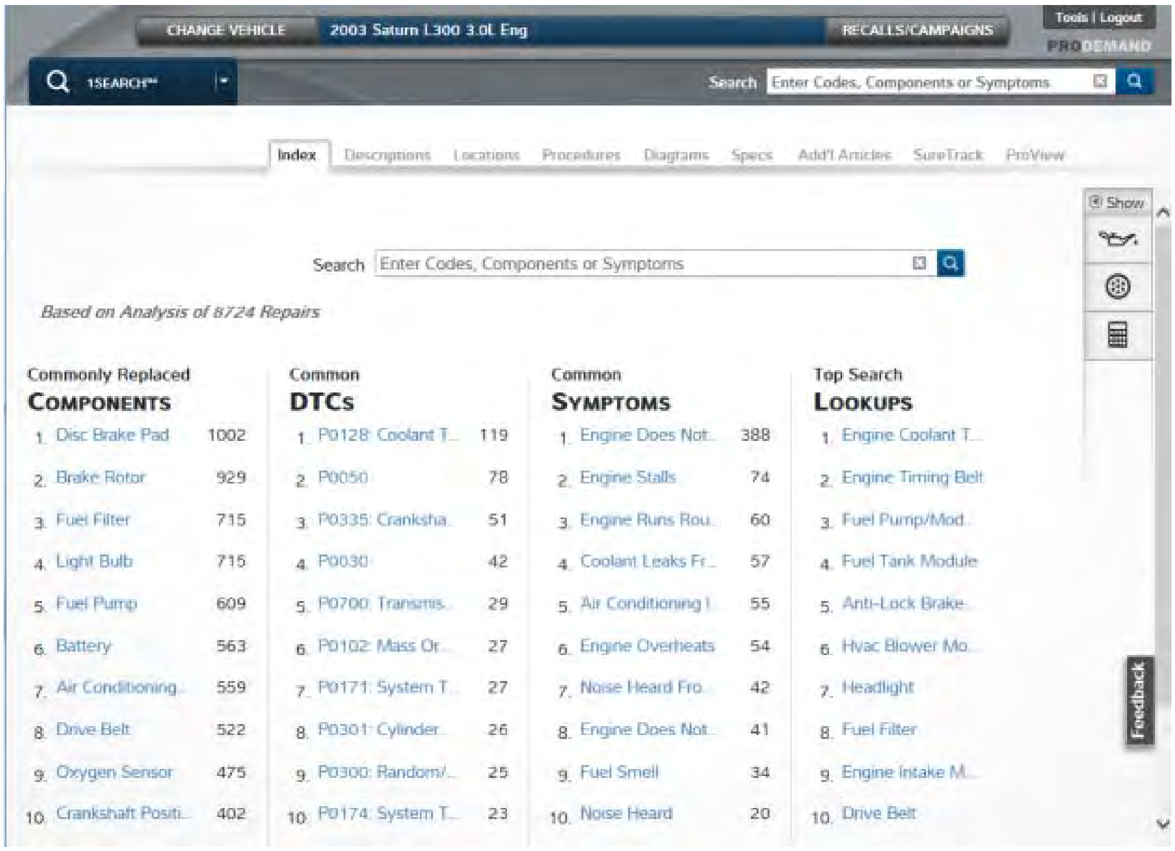
The ProDemand Automotive Repairs web site enables you to look up the top ten common repairs for the selected vehicle. You can drill down information such as commonly replaced components, symptoms, DTCs and more.

To access and use the ProDemand Automotive Repairs Web Site:

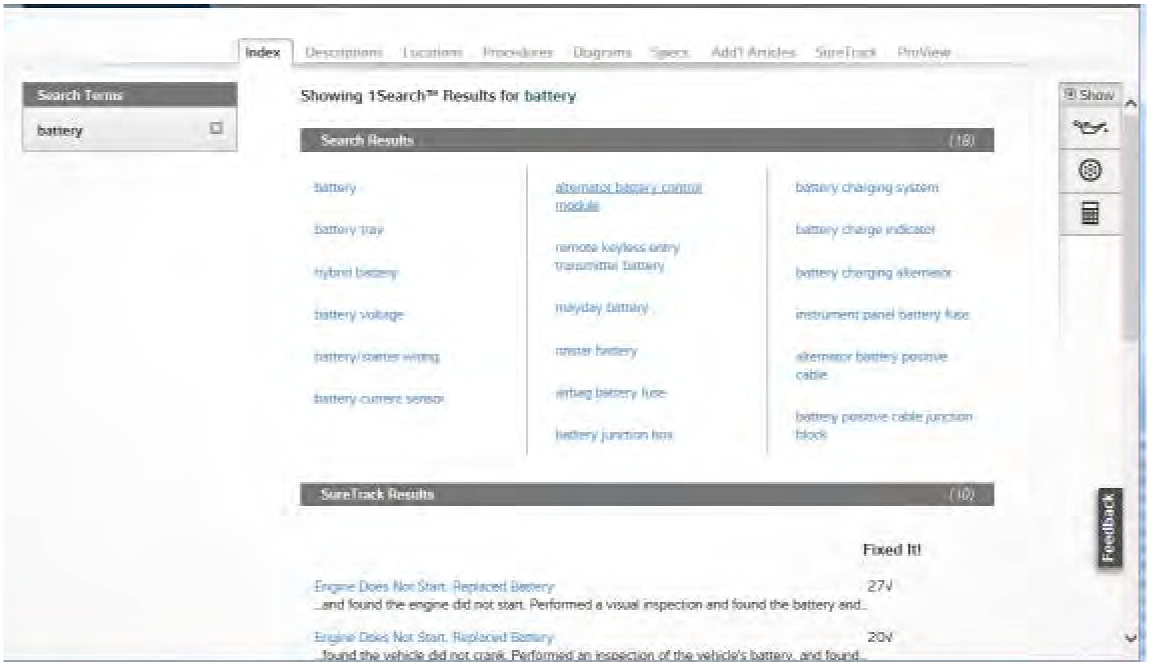
1. From the Work Order screen, click the **ProDemand** icon PRO on the NAPA TRACS menu bar.

The **ProDemand Automotive Repair Information** page appears.

2. Click on a component, DTC, symptom, or lookup to display detailed information. For example, click the **Battery** link under the **Components** column.



The Results page appears.



2. Optionally, you can enter a code, component, or symptom in the **Search** field.
3. Click the browser window when done.

Work Orders

About Work Orders

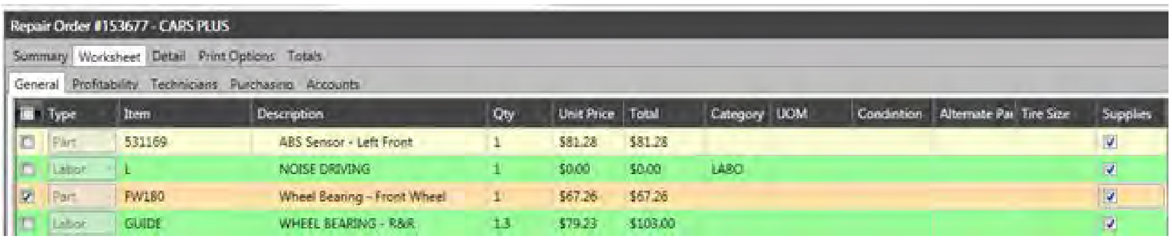
The work order is the central core of the NAPA TRACS system. It is a collection of information that documents the repair work performed on a customer vehicle. A work order begins on the **New Estimate** screen that is divided into folders:

Summary - provides a summary of the repair estimate information. Use this view to select customer and vehicle information, modify the status of a work order, and enter any additional repair notes. Parts or items for the repair may also be entered.

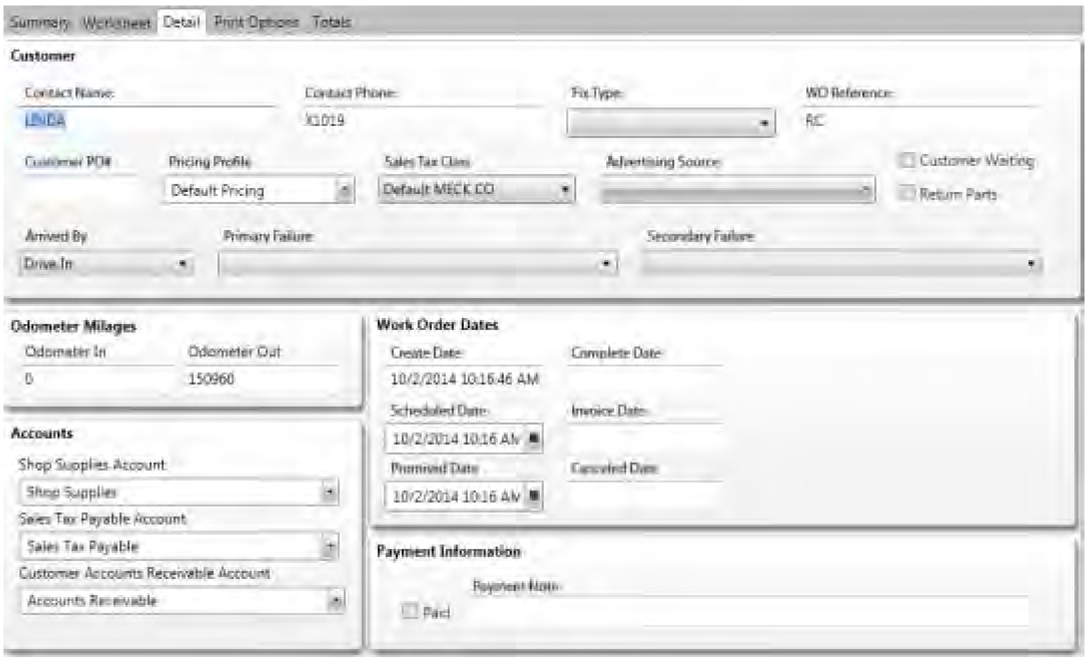
Worksheet - enables working with general information, profitability, technicians, purchasing, and accounts. Information provided appears in the summary view. The Worksheet folder contains the following sub-folders:

- General
- Profitability
- Technicians
- Purchasing

- Accounts

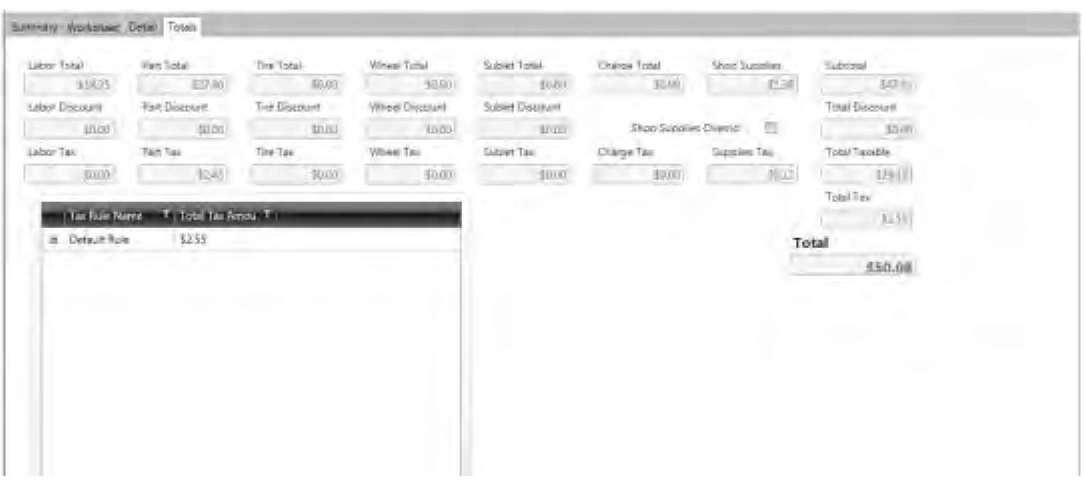


Detail - Enables you to enter additional customer information.



Print Options - provides several options that you can turn on or off such as printing the message of the day and more for estimates, job tickets, repair orders, and invoices. Check a check box to turn on an option and clear a check box to turn an option off.

Totals - displays a breakdown of an estimate by labor, parts, sublets, shop supplies and any discounts or taxes incurred.



Work Order Status Field

The **Work Order Status** field is located in the upper right area of the **New Estimate** screen. Work order statuses are:

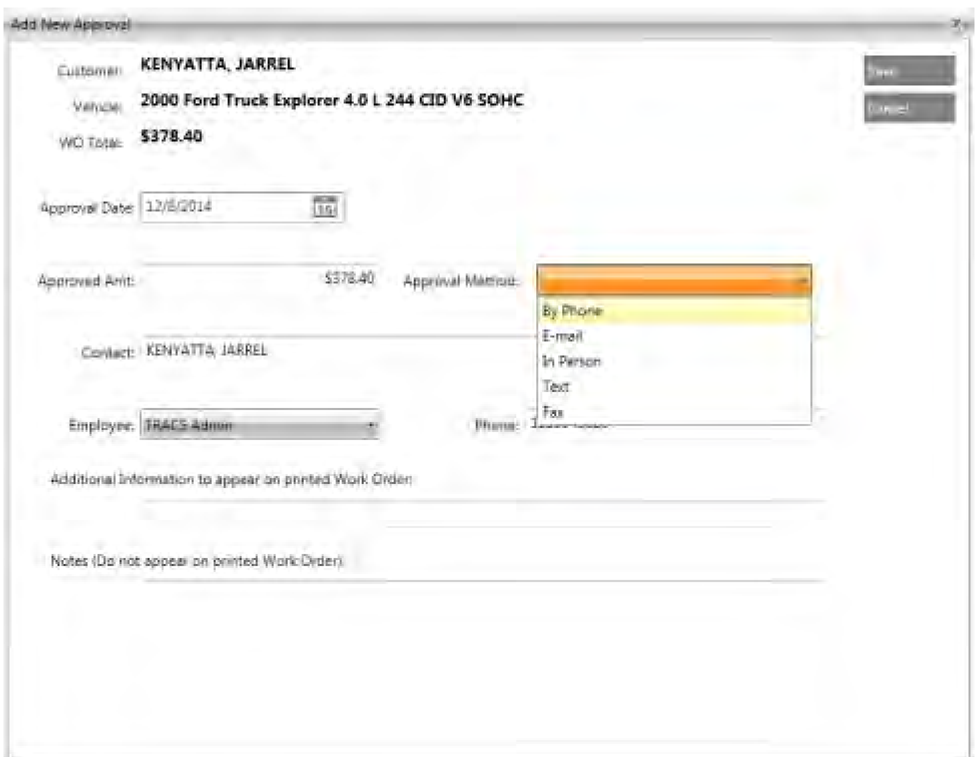
- **New** - status before work order is saved for the first time.

- **Estimate** - status automatically given to a work order the first time it is saved.
- **Repair Order** - status a final version of the work order. Used for customer review and repair verification.
- **Invoice** - status when repair is complete and the work order can be closed.
- **Canceled** - status when work order is no longer valid.

Approving Work Orders

You use the **Approvals** button on the TRACS Rail to approve an estimate or work order.

1. Open an estimate or work order.
2. Click the **Approvals** button on the TRACS Rail. The **Work Order Approvals** screen appears.
3. Click the **New** button on the TRACS Rail. The **Add New Approval** window appears.



4. Click the **Approval Method** down arrow and select an option.
5. Click the **Employee** down arrow and select an option.
6. Optionally, add text that will appear on the printed work order.
7. Optionally, add text in the **Notes** box. The text will not appear on the printed work order.
8. Click the **Save** button to save and close the **Add New Approval** window.

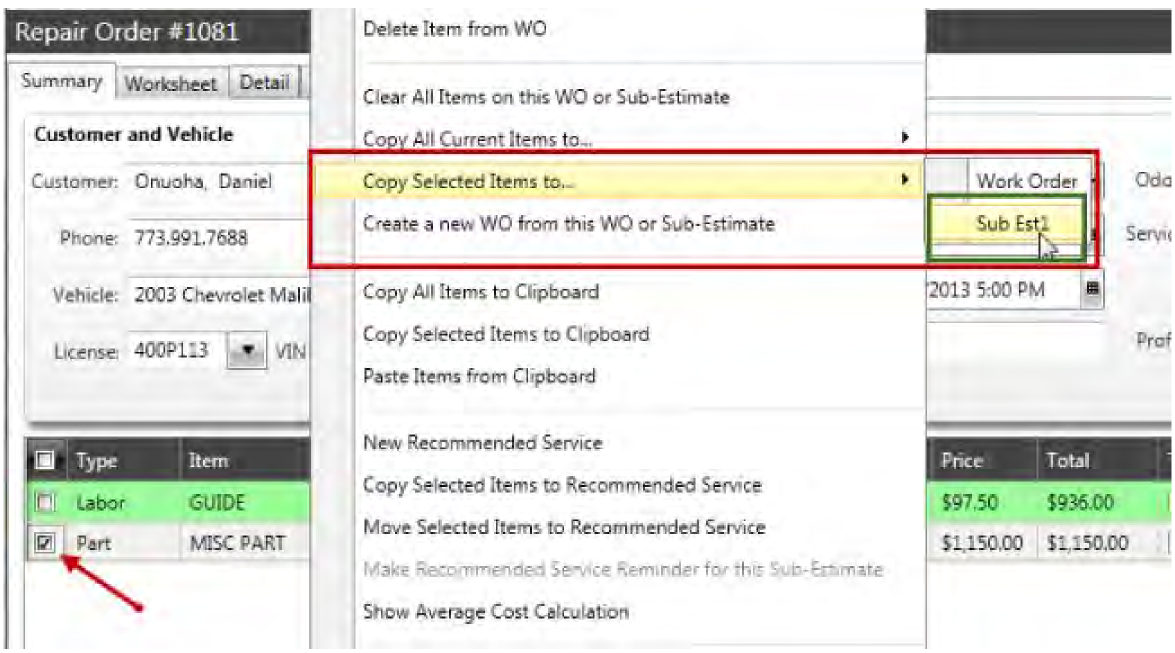
9. Click the **Done** button to close the approvals screen.

Moving (Copying) Repair Order Items to a Sub Estimate

Note: You must have a repair estimate or work order open that already contains a sub estimate.

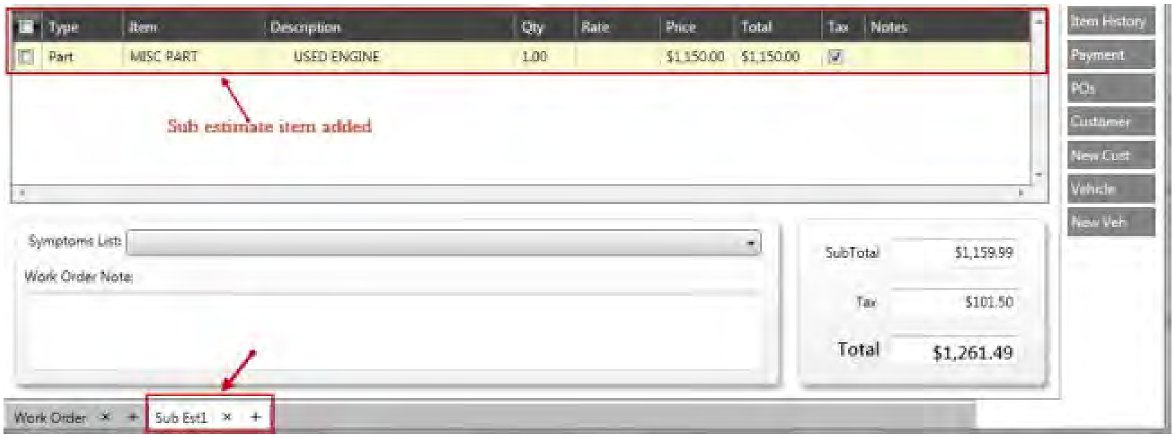
To move (copy) repair order items to a sub estimate:

1. Right-click on a line item in the repair items section of the estimate or work order screen.
2. Select **Copy Selected Items to...** from the pop-up menu, then select the sub estimate number from the list.

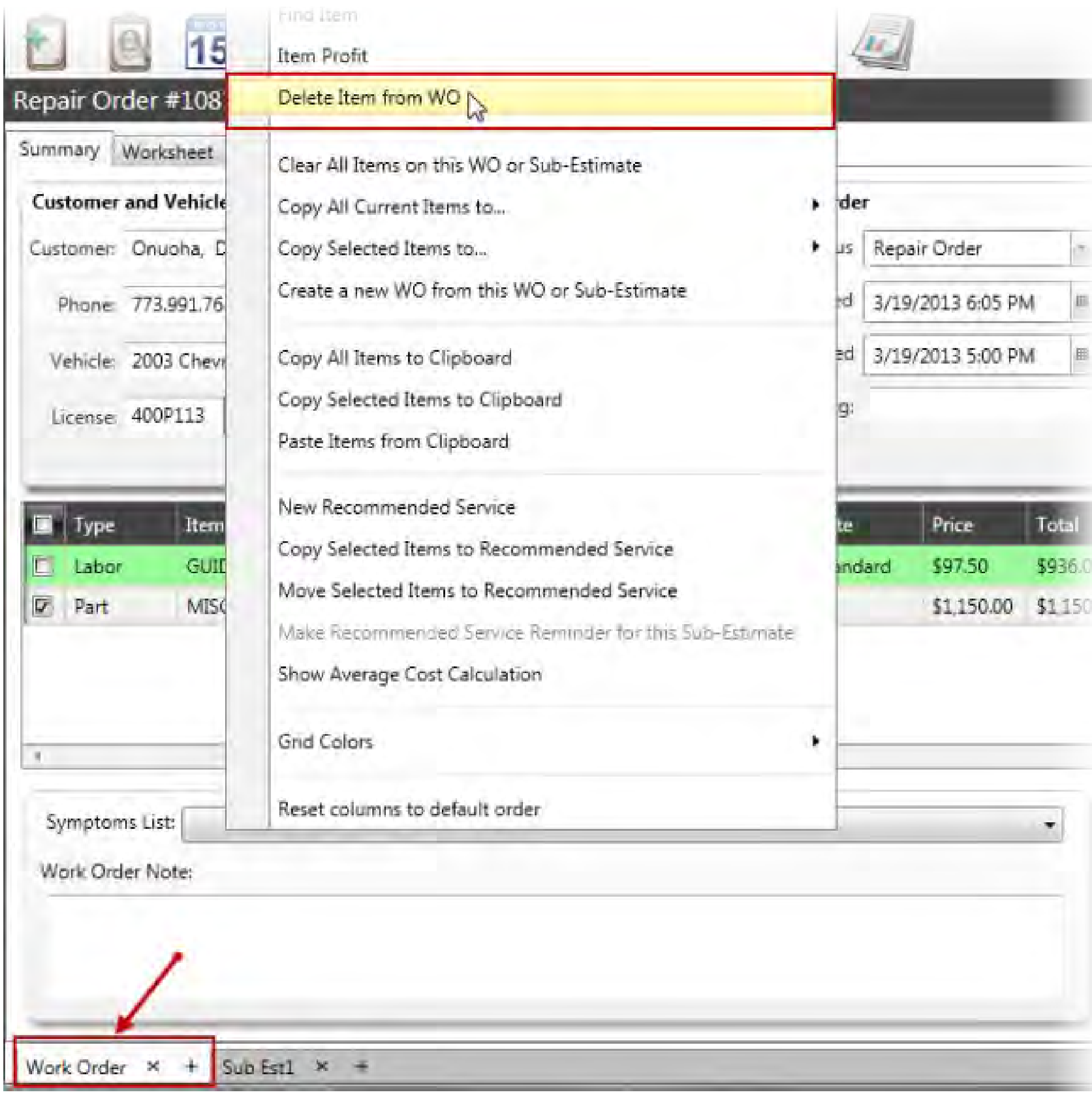


Note: The number of sub estimates that appear on the list directly correlate to the number of sub estimate associated with the work order.

The copied item is moved (copied) to the selected sub estimate and the sub estimate view appears.



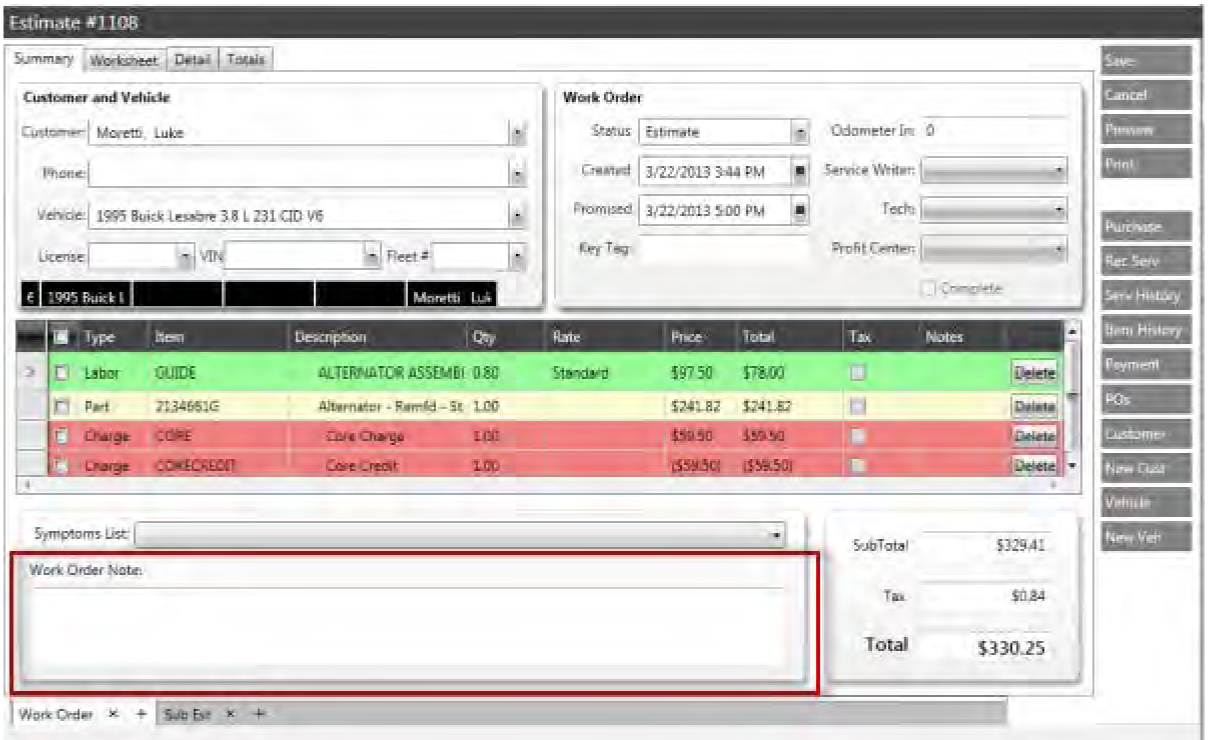
3. Click the **Work Order** tab.



4. Right click the item on the work order and select **Delete Item from WO** from the pop-up menu to delete the item you copied to the sub estimate.
5. Print the print the revised work order for the customer.

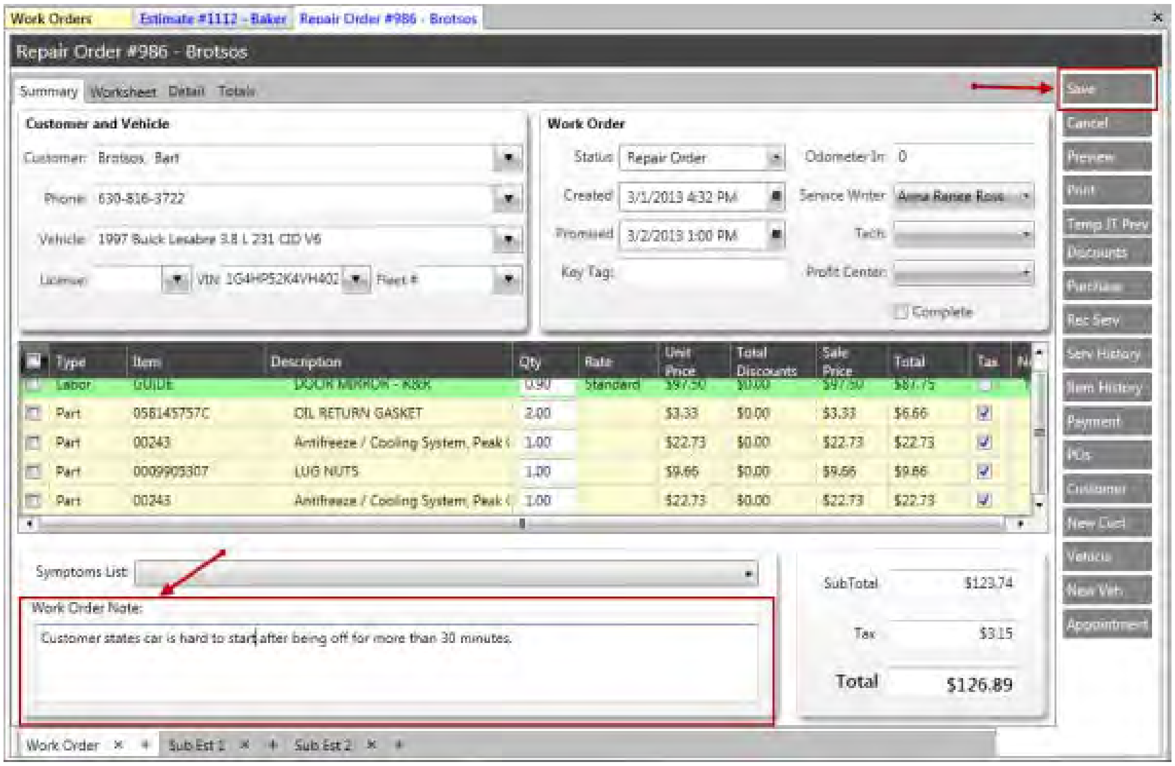
Adding Work Order Notes

Use work order notes to include an internal memo that displays on the job ticket for the technician to review. Add work order notes from any **Estimate** or **Repair Order** screen.



To add work order notes from an **Estimate** or **Repair Order** screen:

1. Type the note information in the **Work Order** field.

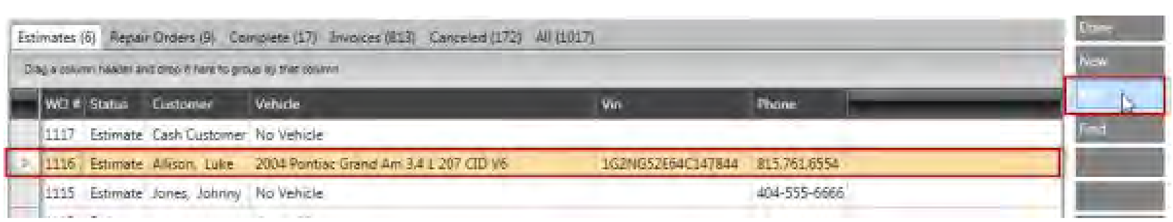


2. Click the **Save** button to add the note and return to the previous screen.

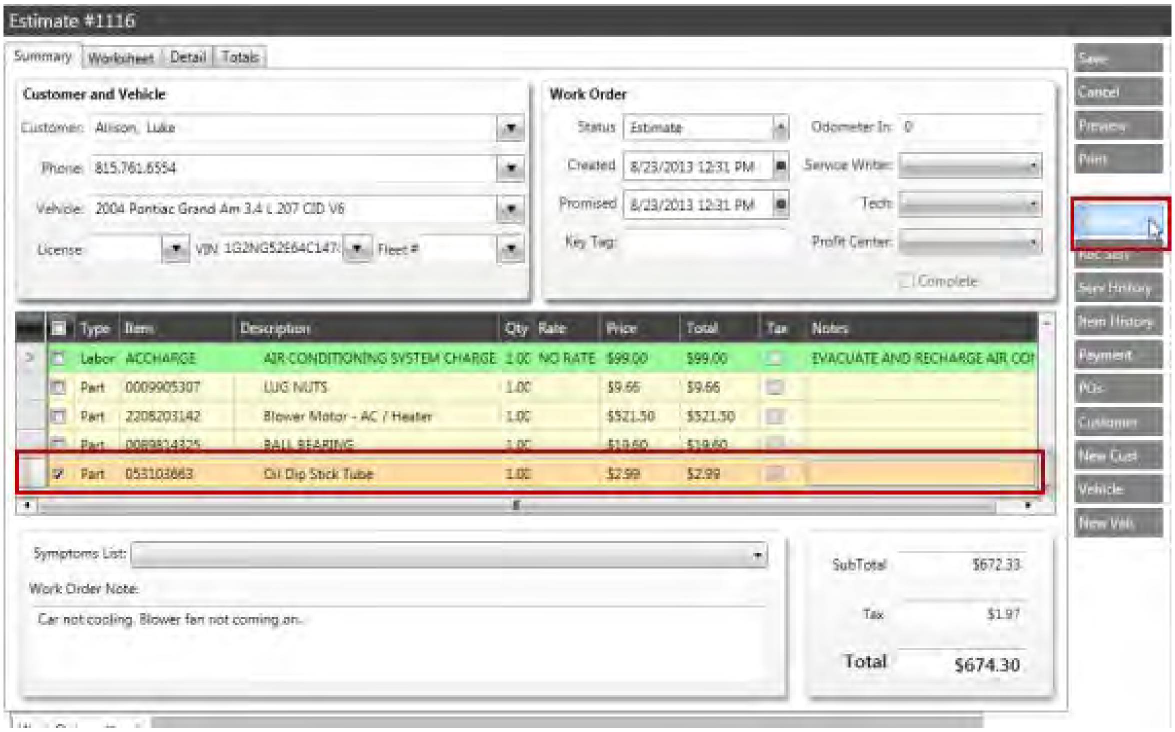
Purchasing Items for a Work Order

To purchase items for a work order:

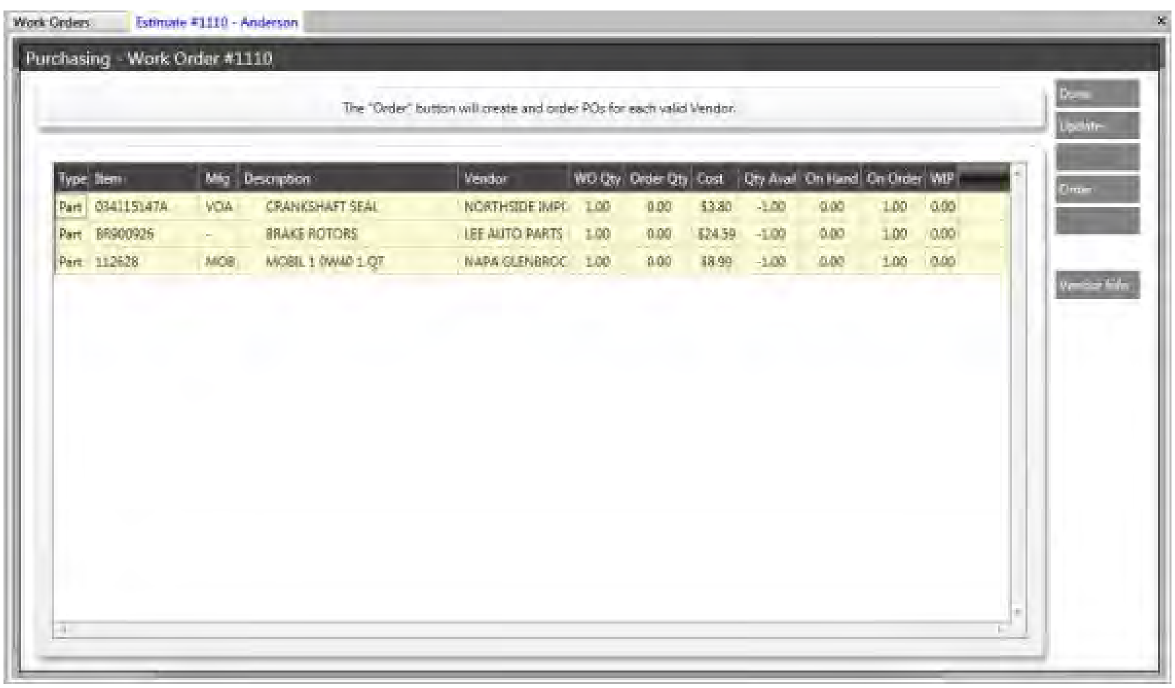
1. Click the **Work Orders** icon  on the NAPA TRACS menu bar.
2. Highlight a row from the list in the **Estimates** folder and click the **Edit** button.



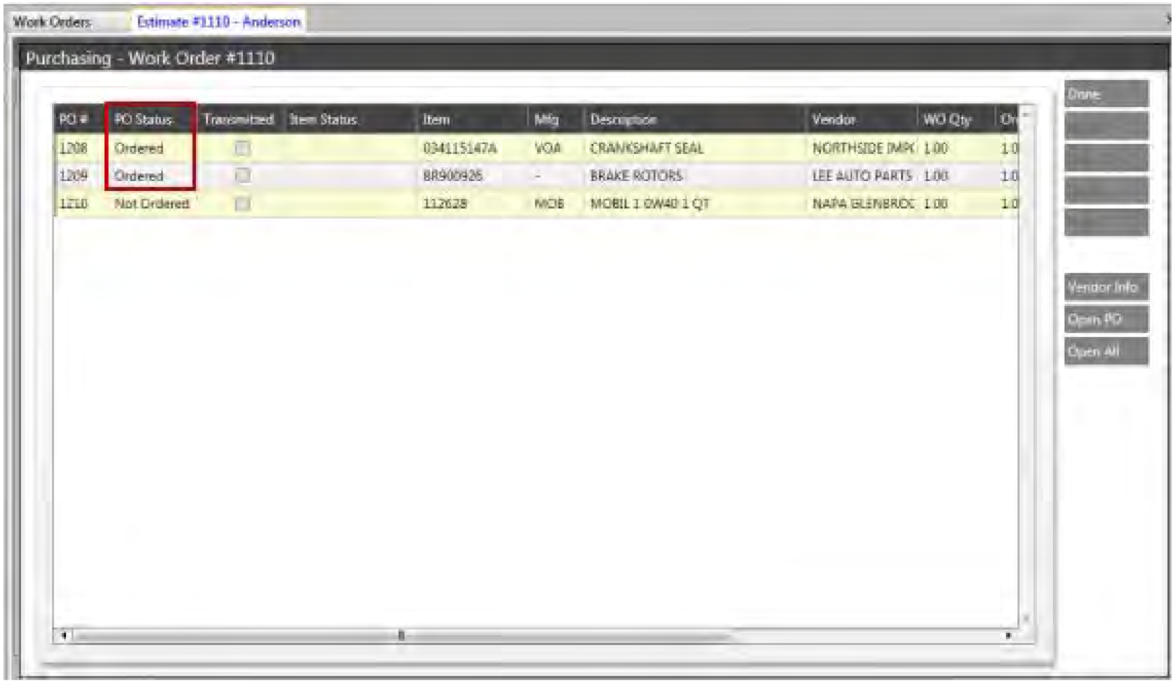
The work order appears with the **Summary** folder active.



3. Click the **Purchase** button. The **Purchasing** window appears with all purchase orders associated with the repair order.



4. Click the **Order** button. The **Purchasing Work Order** window appears and displays the item to be ordered.

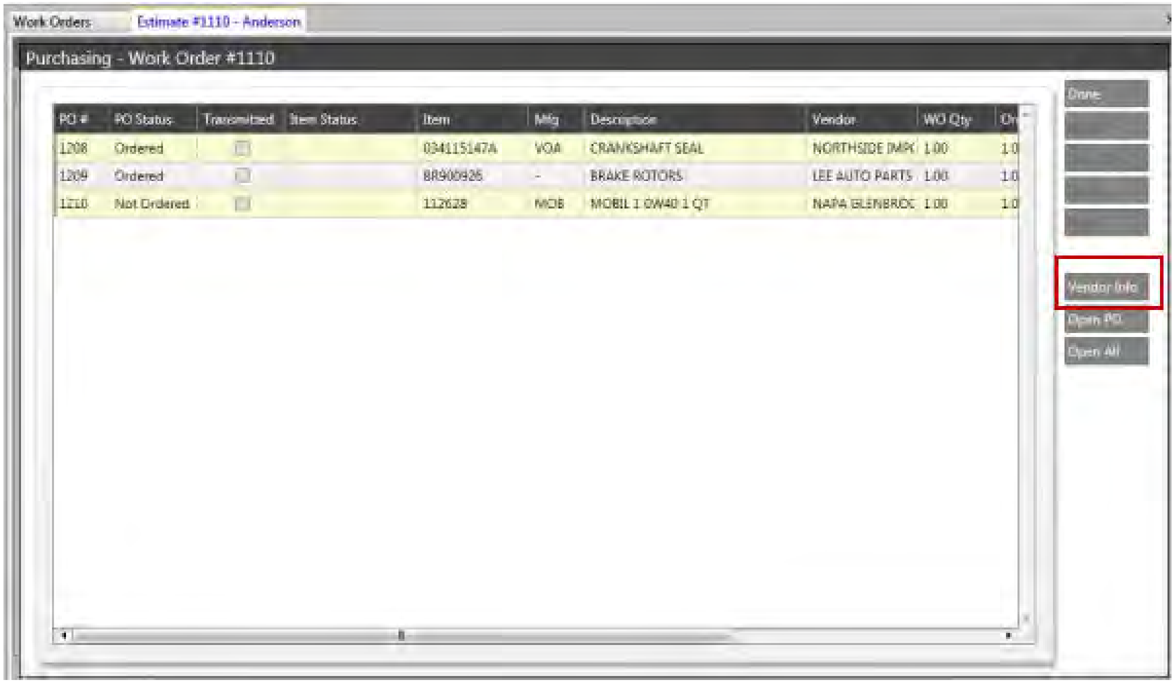


6. (Optional) Scroll to the right to see the rest of information for each item.
7. Press the **Done** button to save and transmit later or click the **Transmit** button to save and transmit the order.

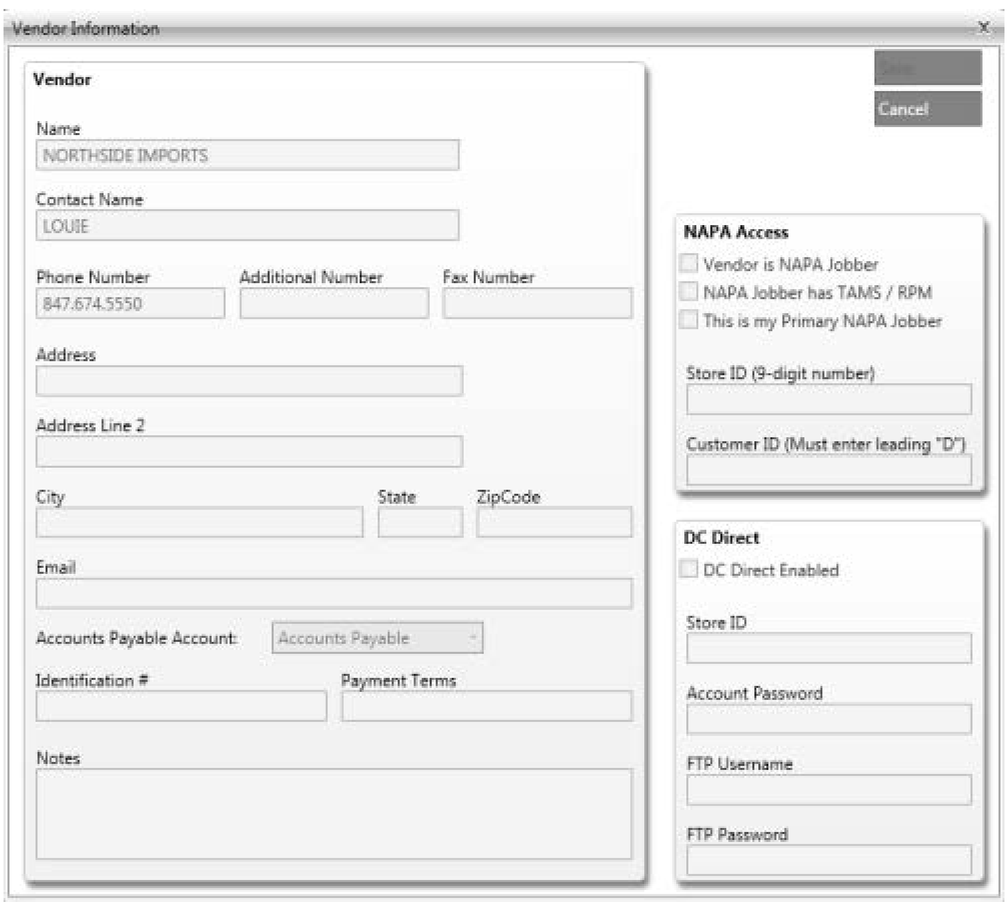
Viewing Vendor Information

To view vendor information:

1. Highlight a row on the **Purchase** window and click **Vendor Info** on the right to view vendor information.



The **Vendor Information** window appears.



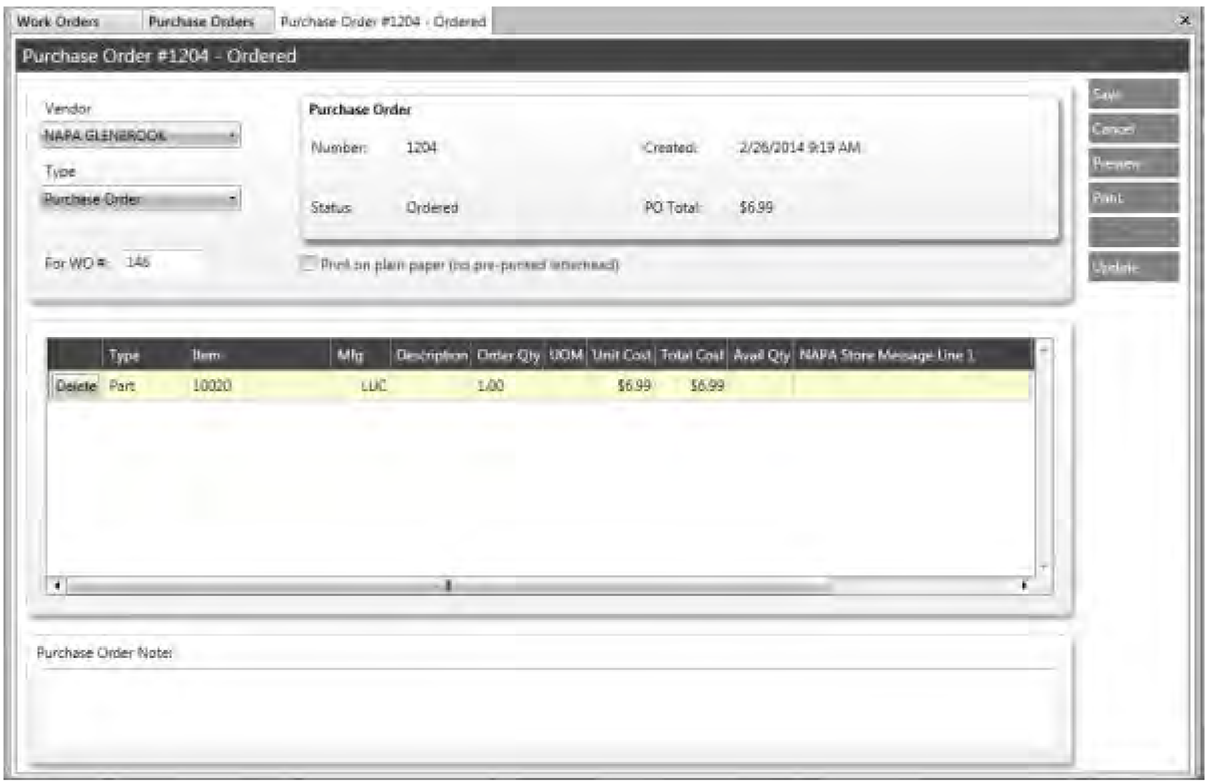
2. Click **Cancel** to close the **Vendor Information** window.

Viewing or Updating a Purchase Order

You can view or update the purchase orders displayed on the **Purchase** window.

To view or update a purchase order from the **Purchase** window, highlight the row and click **Open PO** from the right side of the window.

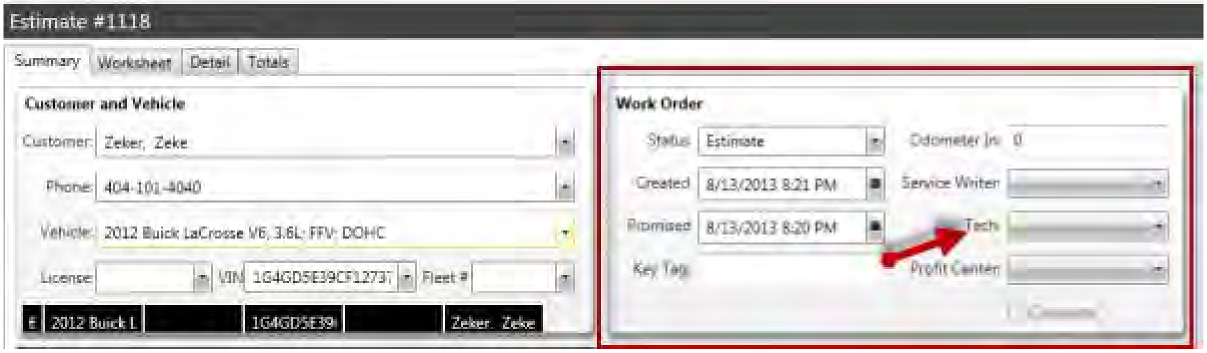
The **Purchase Order** screen appears for the selected item.



Use this screen to change vendors, add additional parts, or preview or print the purchase order.

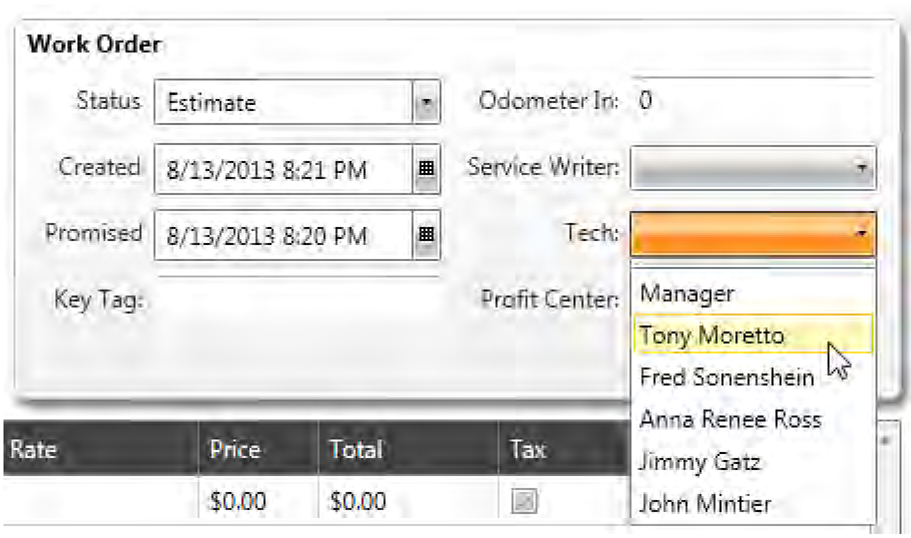
Assigning a Technician

Use the **Work Order** section of the **Estimate** or **Repair Order** windows to assign a technician to a vehicle repair.



To assign a technician to a vehicle repair:

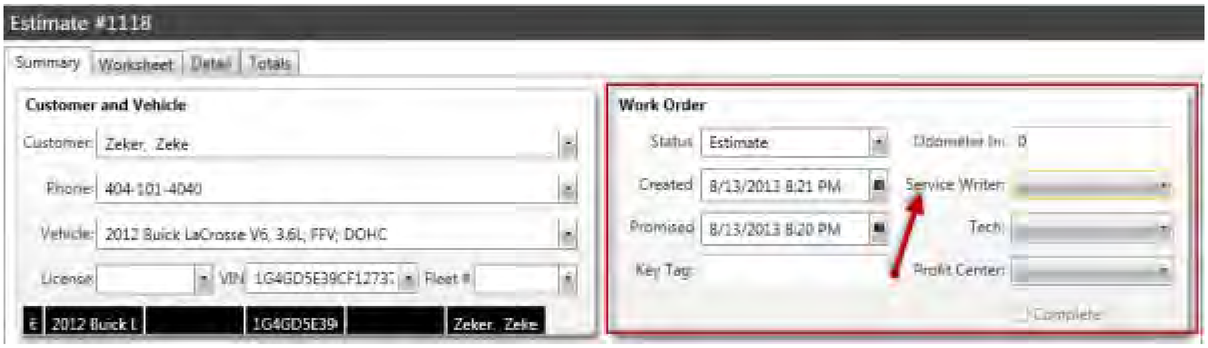
1. Click the **Tech** down arrow and select a technician.



2. Click the **Save** button.

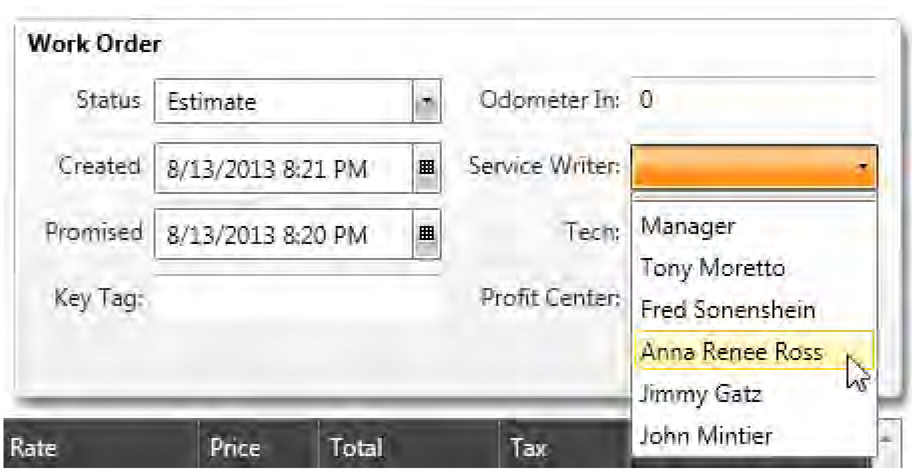
Assigning a Service Writer

Use the **Work Order** section of the **Estimate** or **Repair Order** windows to assign a service writer to a vehicle repair.



To assign a service writer to a vehicle repair:

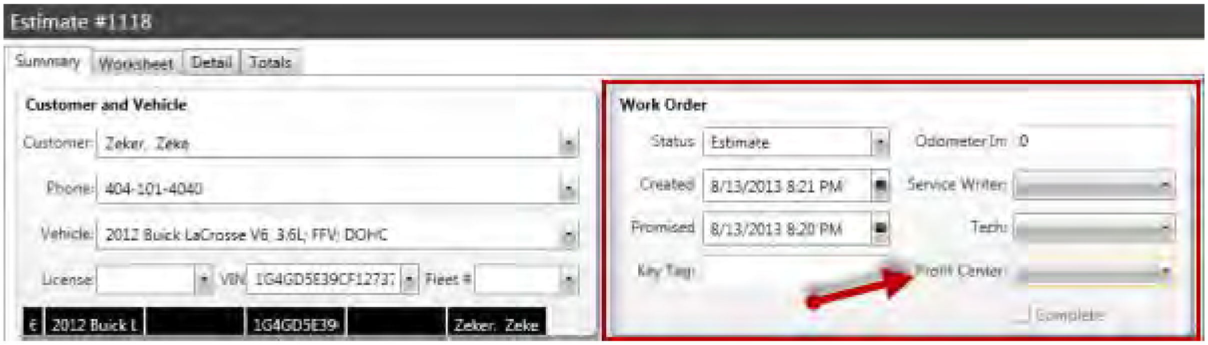
1. Click the **Service Writer** down arrow and select a service writer.



2. Click the **Save** button.

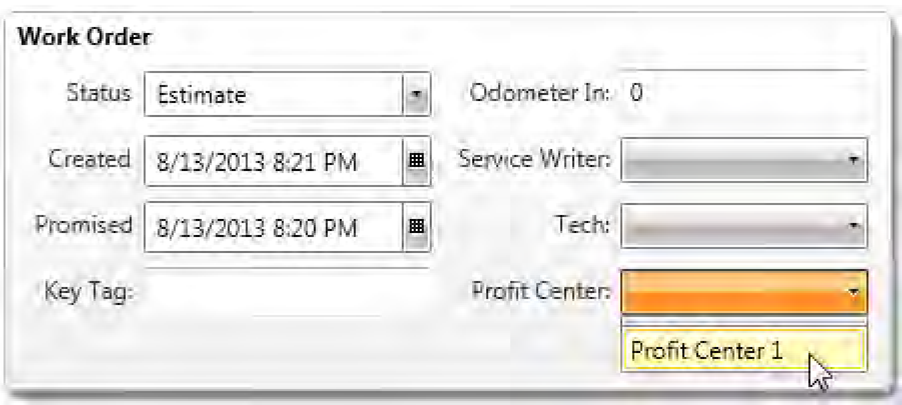
Assigning a Profit Center

Use the **Work Order** section of the **Estimate** or **Repair Order** windows to assign a profit center to a vehicle repair.



To assign a technician to a vehicle repair:

1. Click the **Profit Center** down arrow and select a profit center.

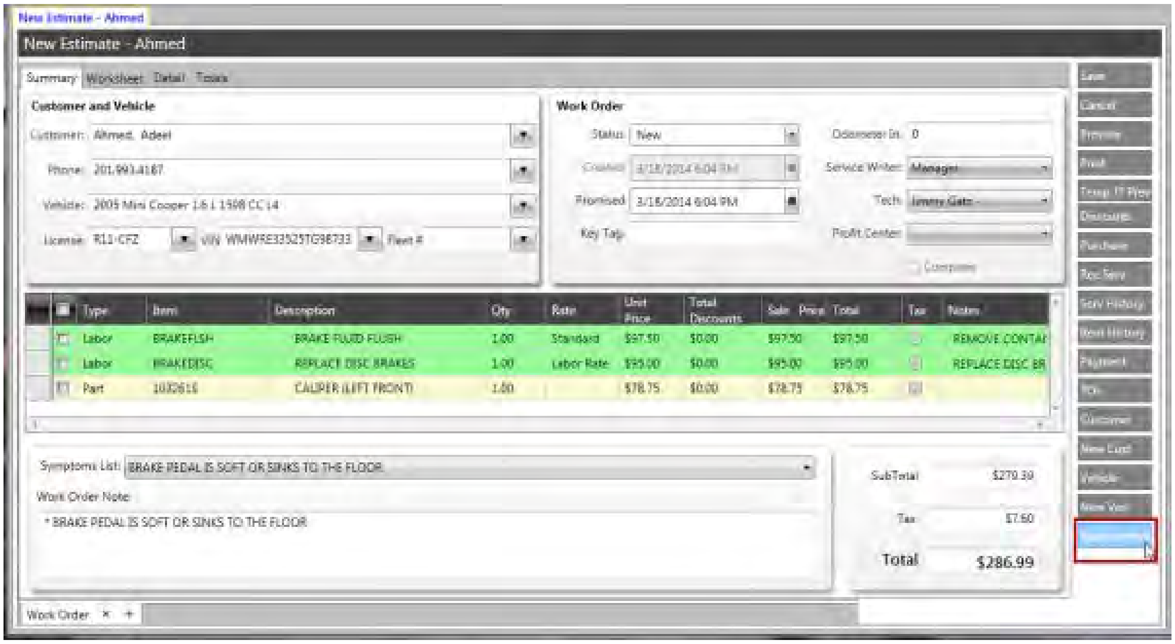


2. Click the **Save** button.

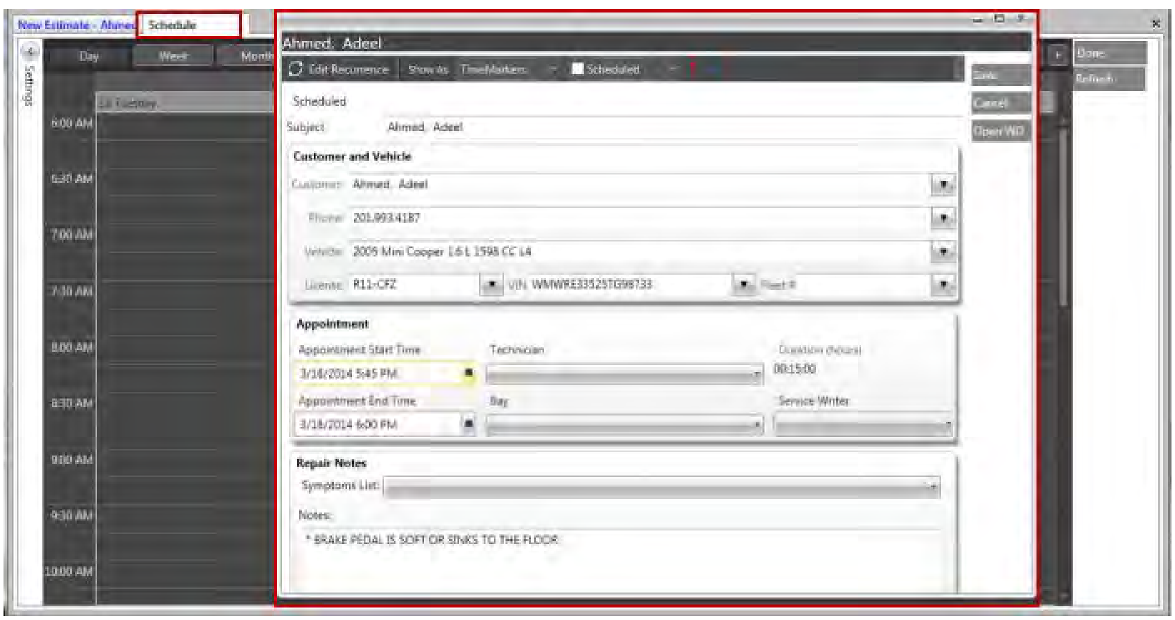
Creating an Appointment

Use the appointment schedule window to create and schedule a repair appointment from any estimate, work order, or repair order screen. To create an repair appointment:

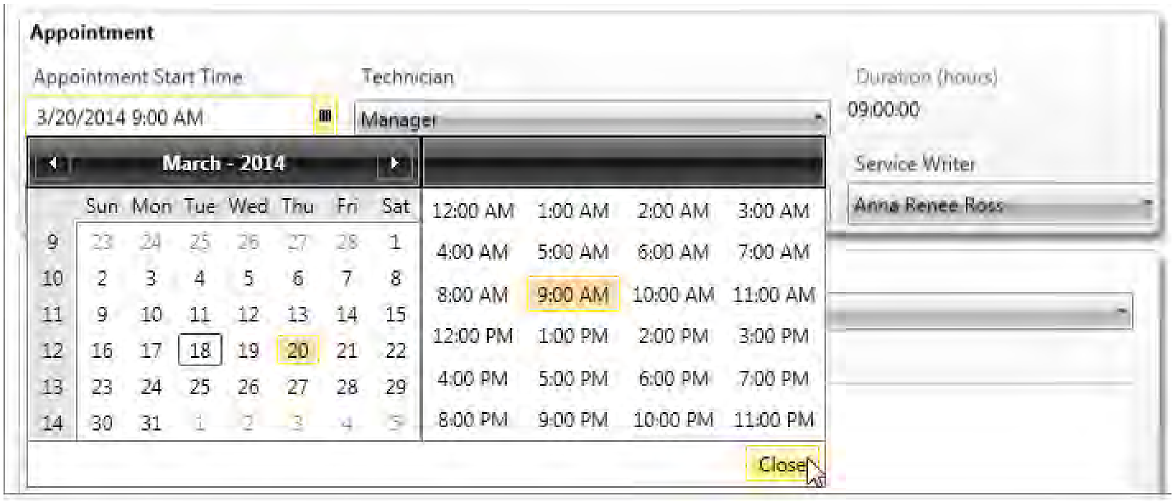
1. Click the **Appointment** button on the TRACS Rail on any estimate, work order or repair order window.



The appointment schedule window appears over the Schedule screen.

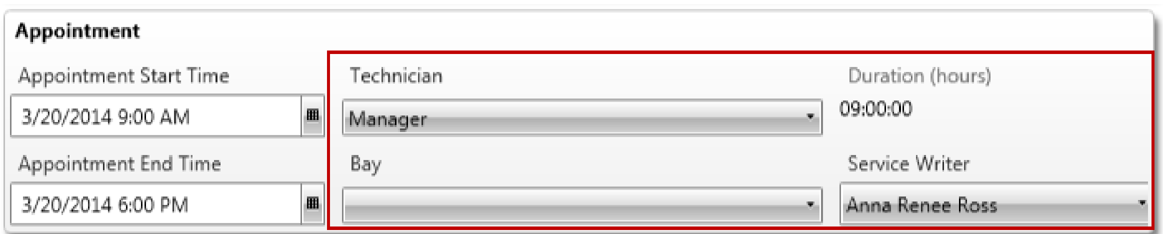


2. Select an appointment date and start and end time in the **Appointment** section of window, and then click the **Close** button.

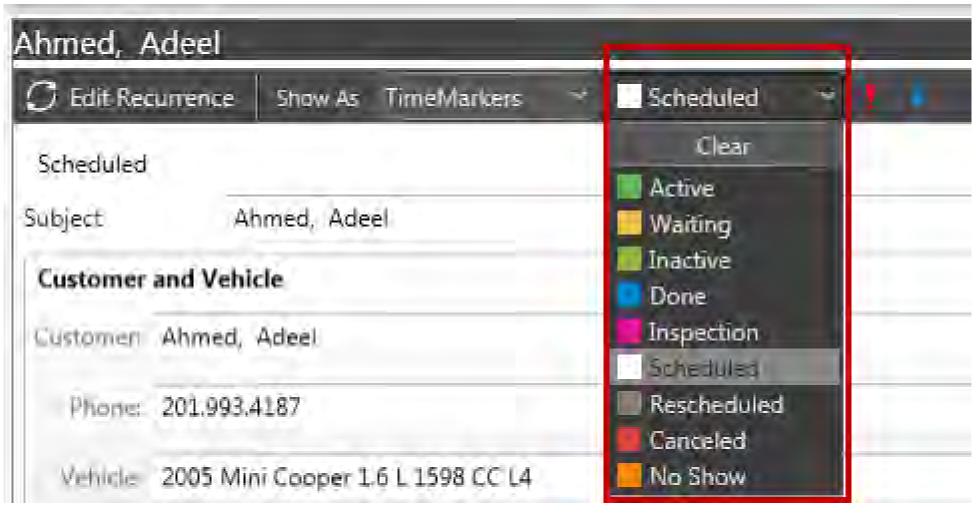


3. Select a technician, service writer and repair bay.

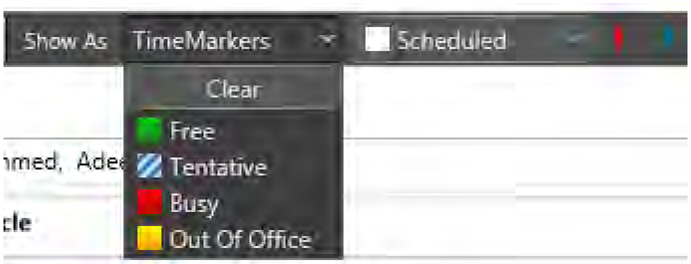
Note: Selecting a repair bay may not apply to your shop.



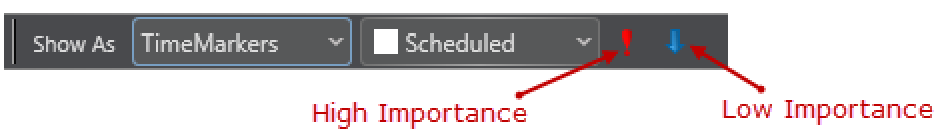
4. Select a status for the appointment. Options are:
   - Active
   - Waiting
   - Inactive
   - Done
   - Inspection
   - Rescheduled
   - Cancelled
   - No Show



5. Select a time marker for the appointment that will show on the schedule calendar. Options are:
   - Free
   - Tentative
   - Busy
   - Out of Office (not commonly used)



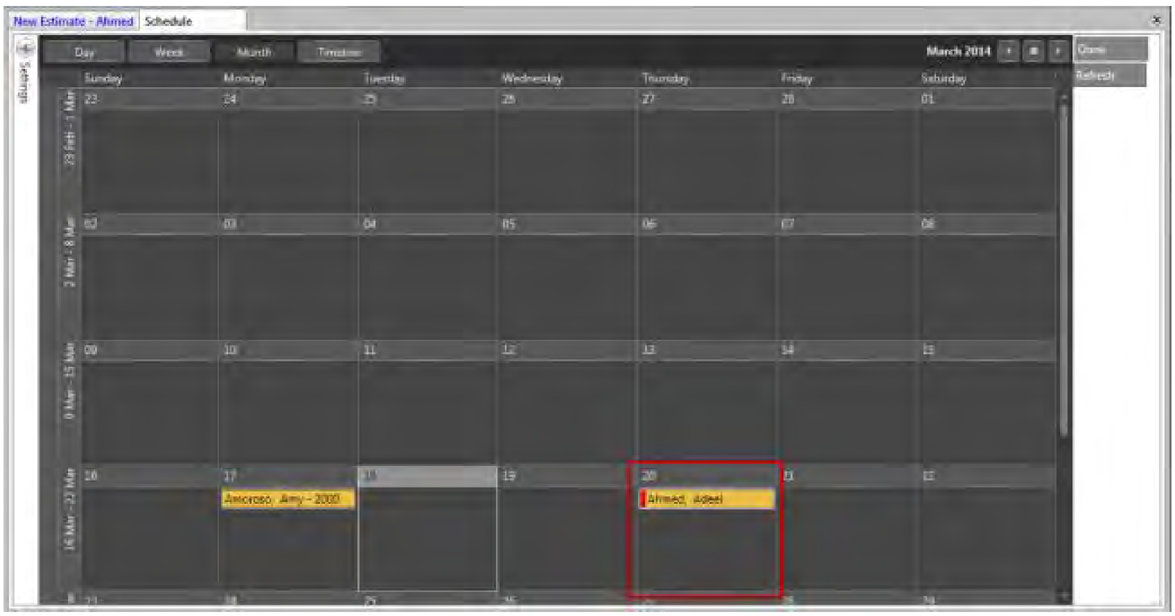
6. Select a priority for the appointment. Options are high importance or low importance.



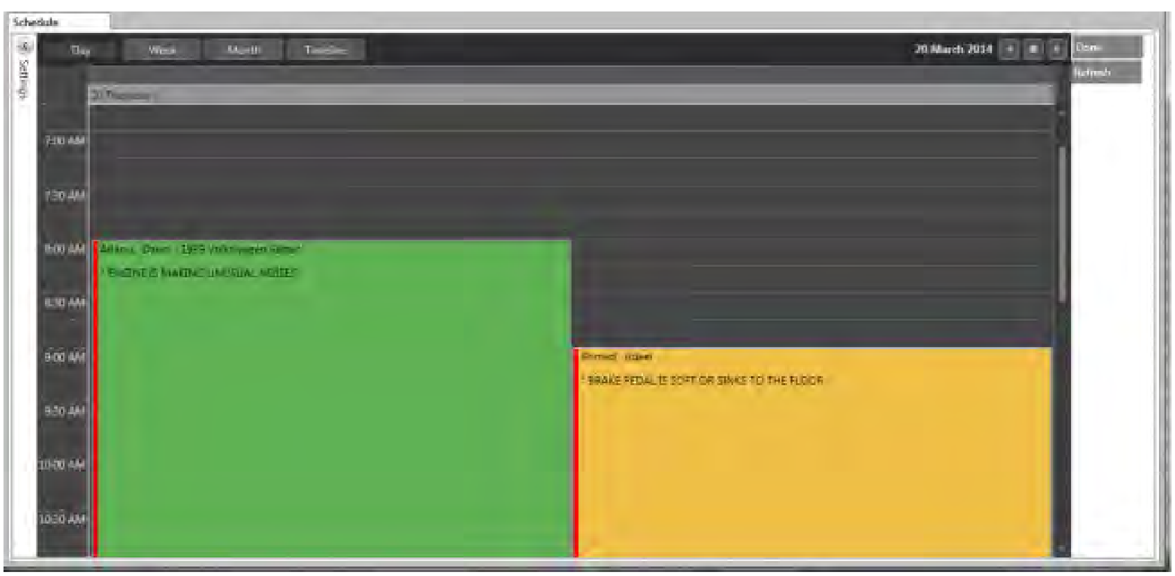
The following example shows a repair appointment where the customer is waiting, the repair is of high importance and the schedule will indicate the time as **Busy** for the assigned technician.

Schedule Example

7. Click the **Save** button to return to the Scheduler page. The appointment appears for the date and time selected.



Schedule in Month View

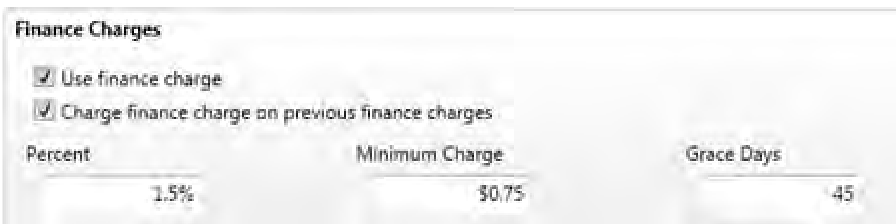


Schedule in Month View

Customers and Vehicles

Applying and Unapplying Finance Charges

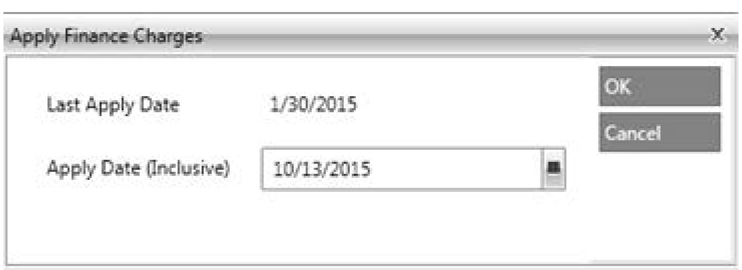
The apply finance charge feature enables you to apply finance charges to those customers who have been flagged as **Subject To Finance Charge** on the **Customer Edit - Details** screen. Likewise, the unapply finance charge feature enables you to unapply finance charges in the event a customer should not have been subject to finance charges.



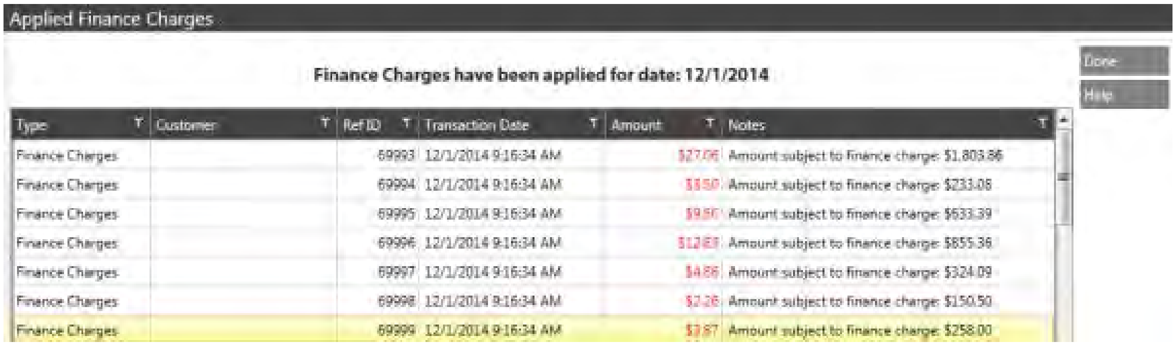
To apply finance charges:

1. From the **Activities** menu, select **Apply Finance Charges**.

2. The **Apply Finance Charges** window appears.



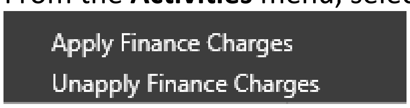
3. If you are not ready to apply finance charges, click the **Cancel** button.
4. To apply finance charges, accept the default date or click the **Apply Date (Inclusive)** calendar icon.
5. Click the **OK** button to apply finance charges.
6. The **Applied Finance Charges** screen appears with a listing of all finance charges that were applied.



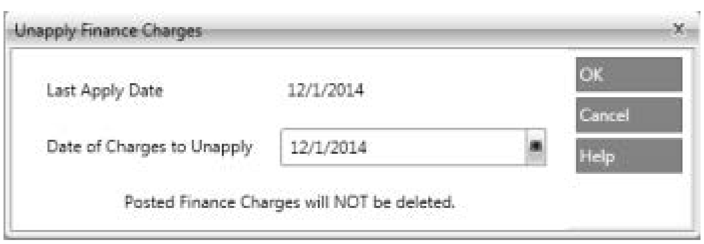
7. Click the **Done** button to close the screen.

To unapply finance charges:

1. From the **Activities** menu, select **Unapply Finance Charges**.



2. The **Unapply Finance Charges** window appears.



3. If you are not ready to unapply finance charges, click the **Cancel** button.
4. To unapply finance charges, accept the default date or click the **Date of Charges to Unapply** calendar icon and select a date.
5. Click the **OK** button to unapply finance charges. The system displays the number of finance charges that were unapplied.

6. Click **OK** to close the window.

Scheduling a Customer

Use the NAPA TRACS scheduling feature to view existing scheduled repair work and to schedule future repair appointments for a balanced workflow.

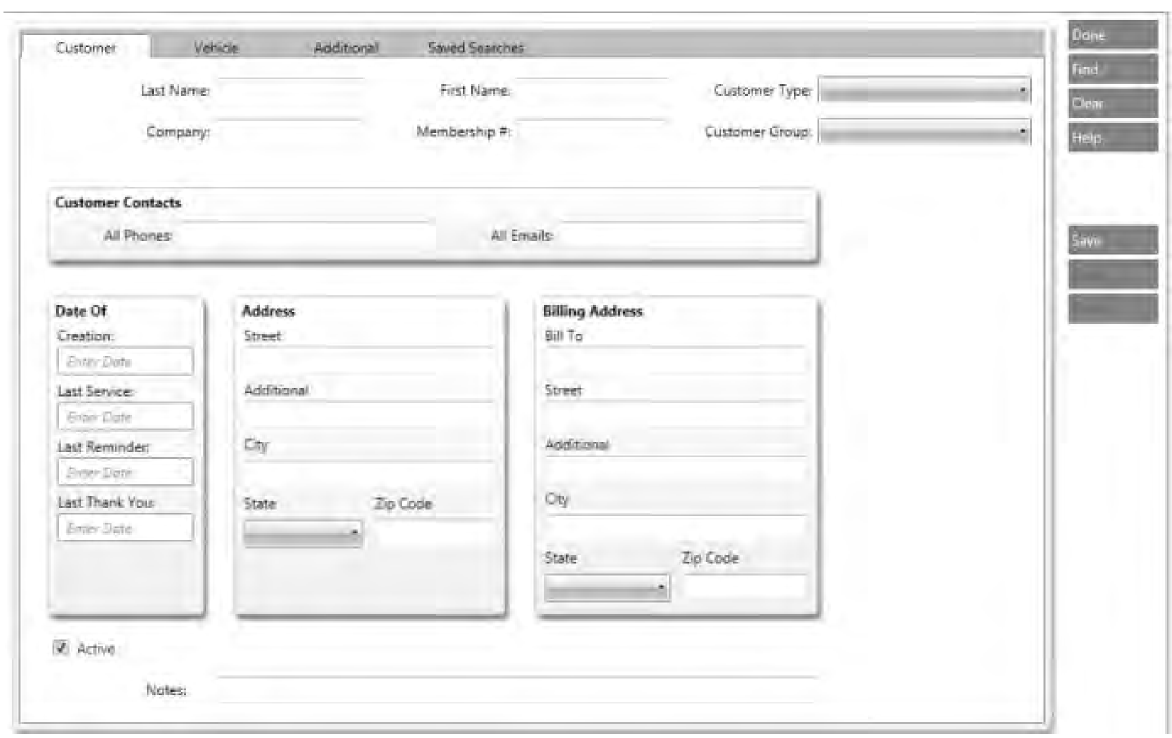
Note: Functionality for this feature will be available in a future release of NAPA TRACS.

Finding a Customer Record

It is critical to know if a customer already exists in your database so duplicate customer records are not created. Most times you will find a customer directly from the **New Estimate** screen. However, use the customer screen to locate customer information when you need to work directly with customers - separate from an estimate or repair order.

To determine if a customer record already exists or to locate customer information:

1. Click the **Customers** icon  on the NAPA TRACS menu bar. The **Customer** tab appears.



2. Type your search criteria in the **Customer** tab. Click here to learn more about using special characters in your search results.

   Tip: Use the first one or two letters in a last name and the asterisk (*) in the **Last Name** field to narrow your search.

   Note: Leave all fields blank to display all vehicles in the system.

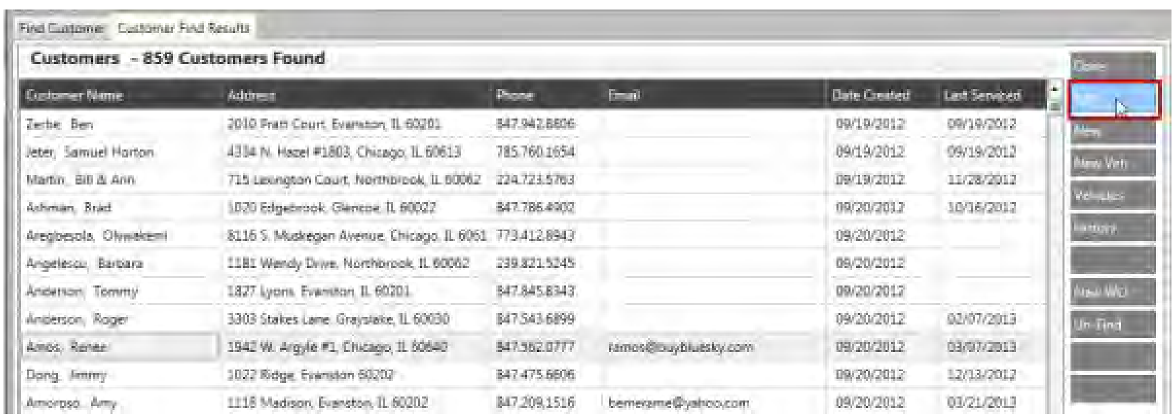
3. Click the **Find** button on the rail on the right side of the page to display customers matching the search criteria.

   If no names appear, you are not duplicating an existing customer record and can add a new customer.

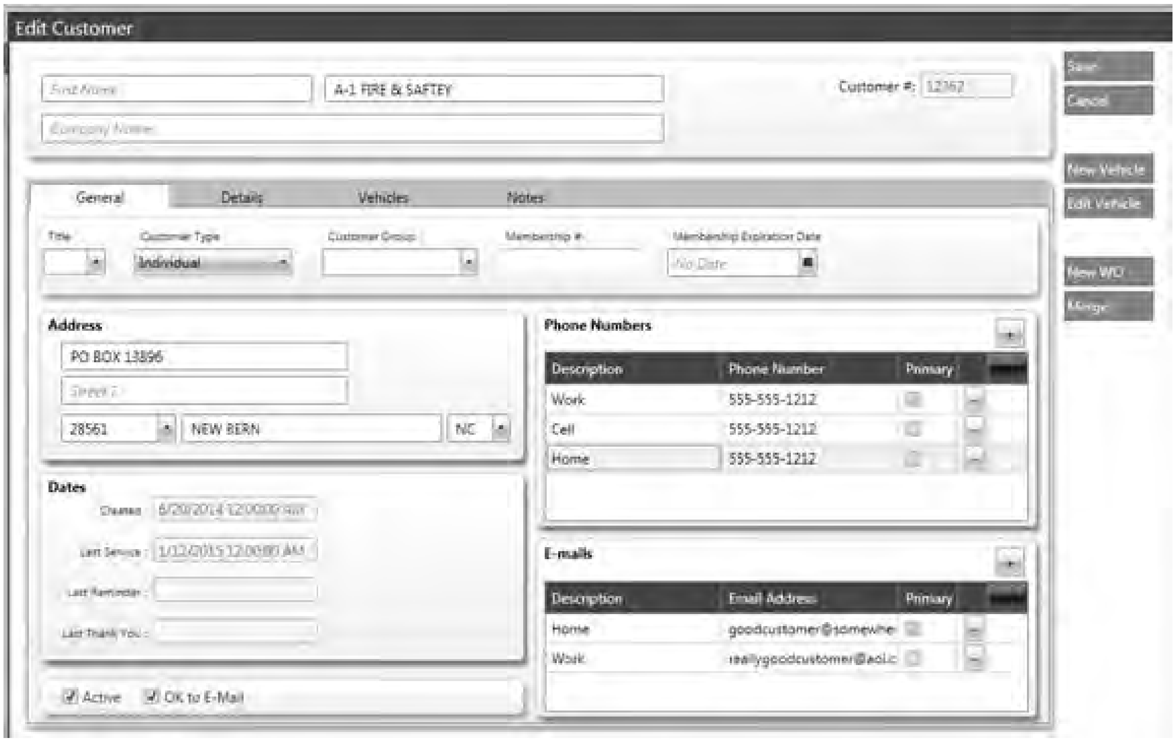
Viewing Existing Customer Information

To view existing customer information:

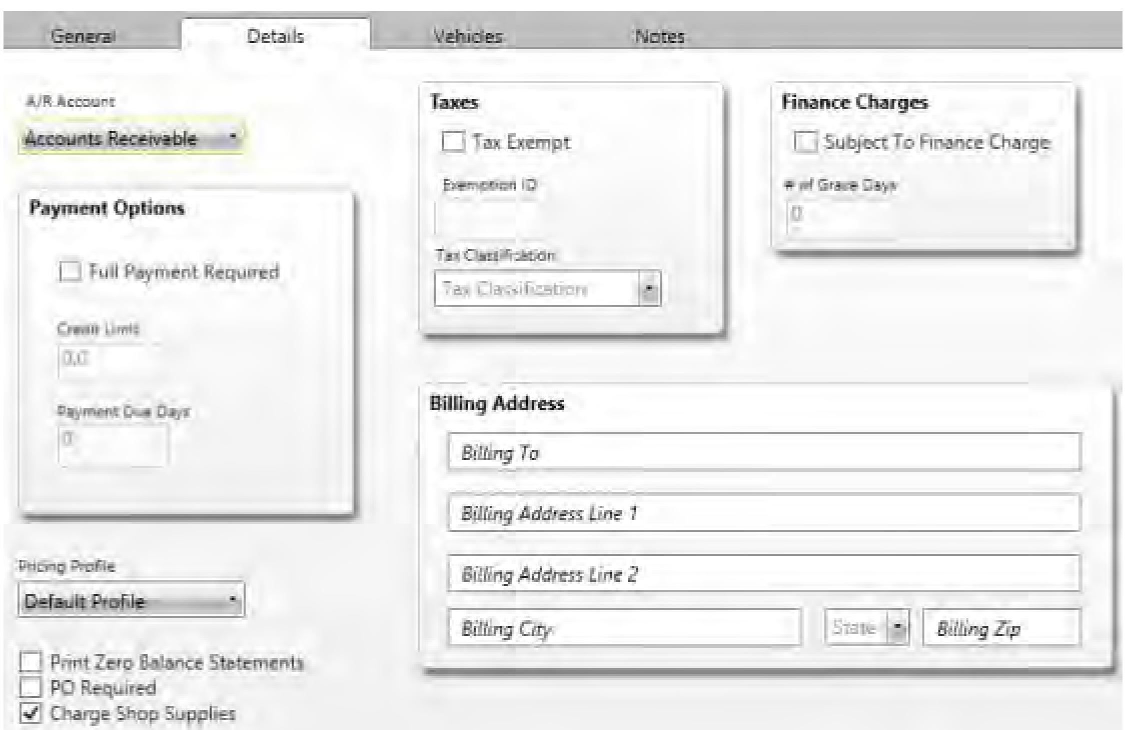
1. Click a row to highlight the customer name, then click the **Edit** button to view customer information.



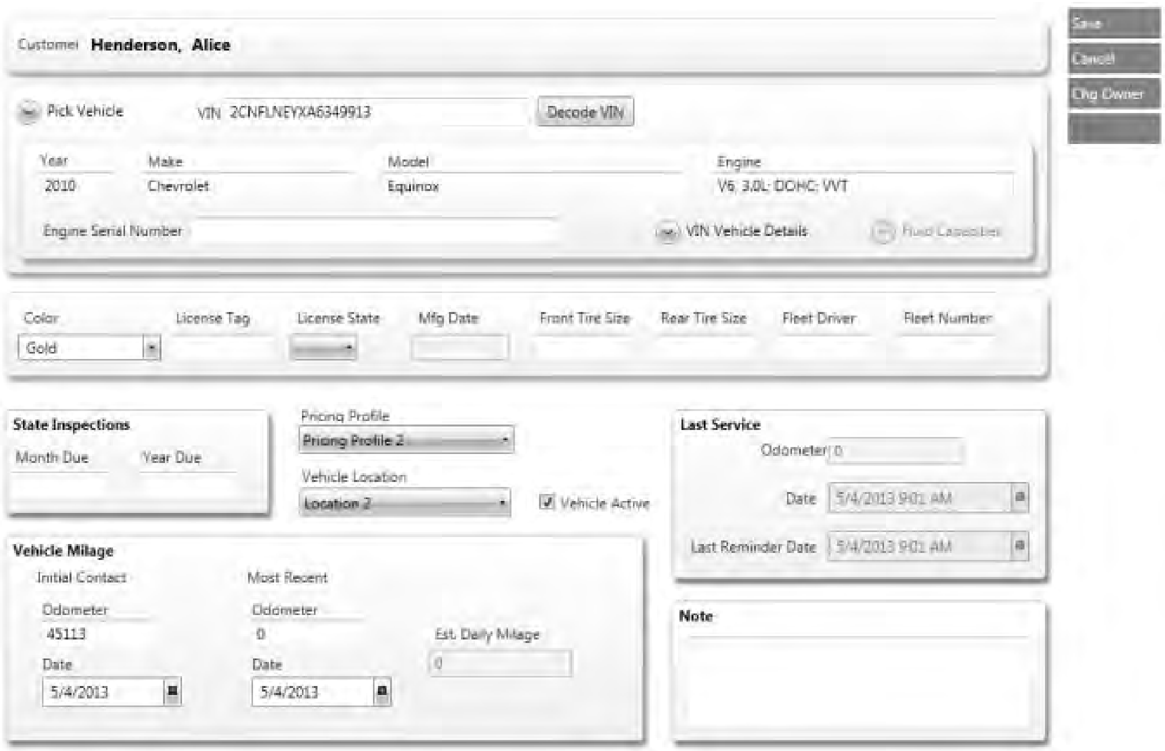
The **General** tab of the **Edit Customer** window appears.



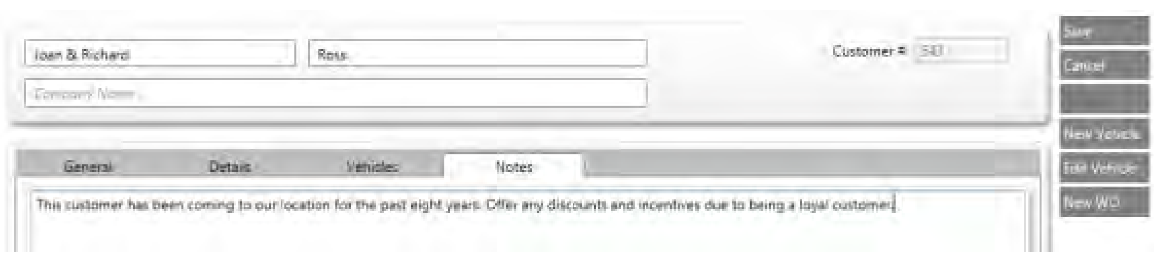
2. Update the information on the **General** tab.
3. Click the **Details** tab.



4. Update the information on the **Details** tab.
5. Click the **Vehicles** tab.
6. Click the row of the vehicle and click the **Edit** button to view the information.



7. Update the vehicle information and click the **Save** button.
8. Click the **Notes** tab.



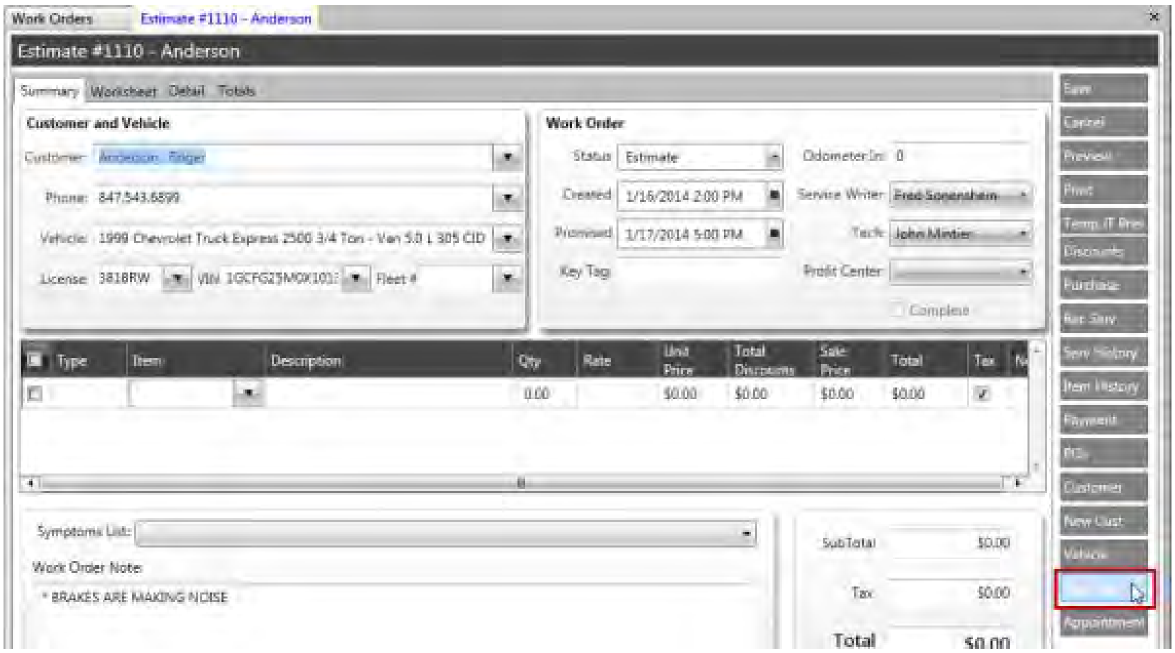
9. Type the text of the note.
10. Click the **Save** button to return to the list of customers.

Decoding a VIN

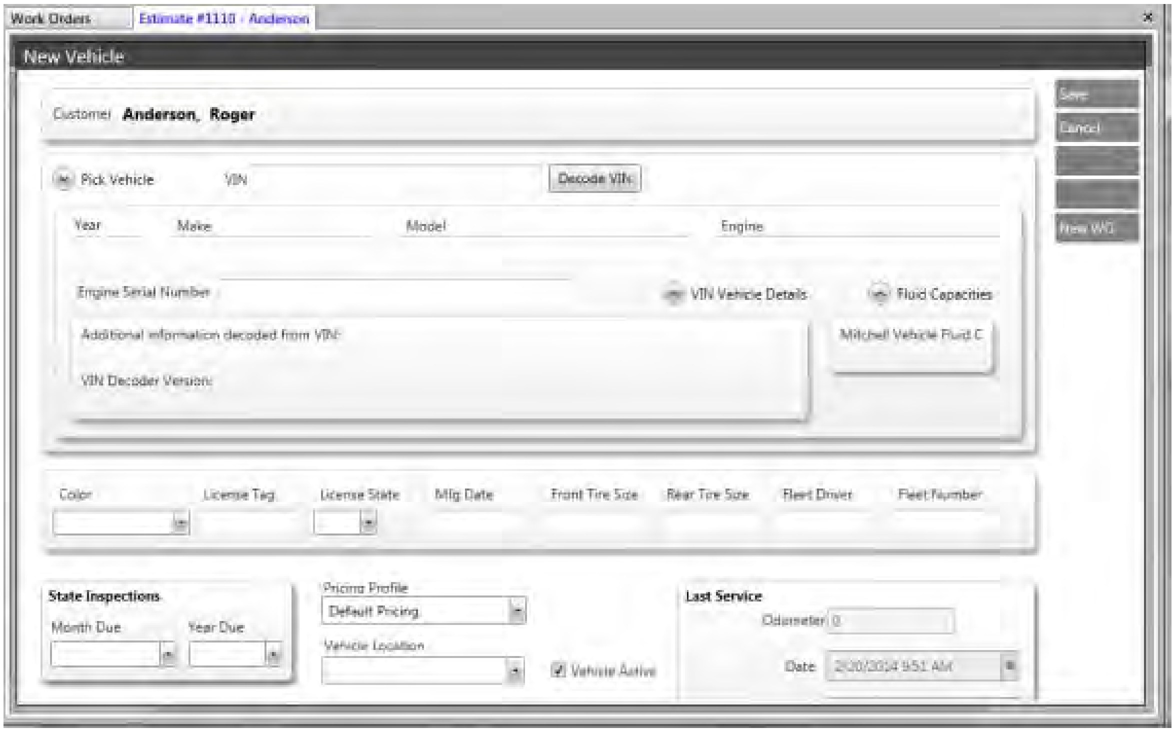
Use the **Decode VIN** feature to select vehicle details using the Vehicle Information Number (VIN).

To decode a VIN:

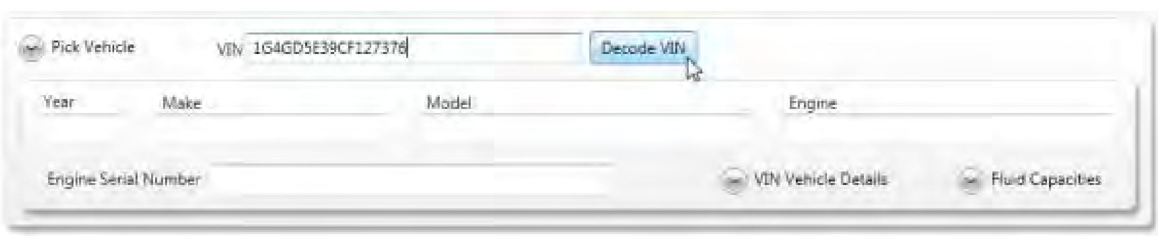
1. Click the **New Veh** button from any new estimate or work order window.



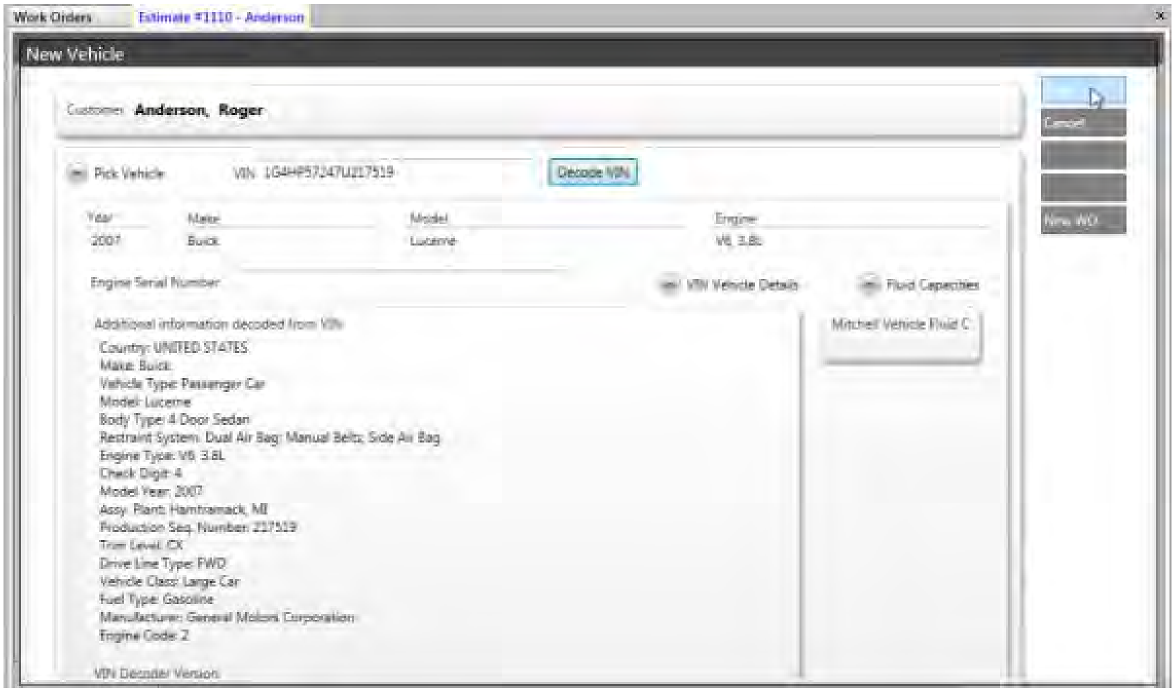
The **New Vehicle** window appears.



2. Type the VIN number in the **VIN** field, and press the **Decode VIN** button.



The information for the vehicle appears.



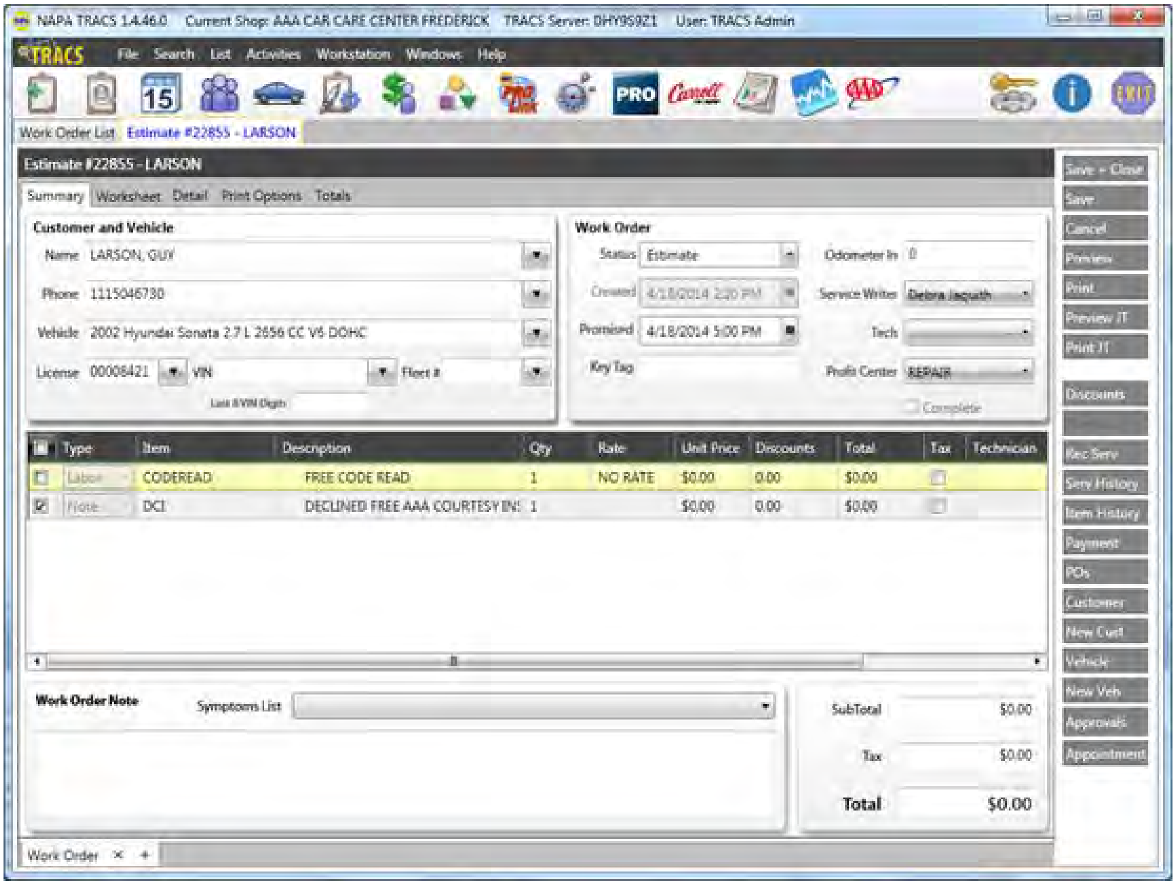
3. Click the **VIN Vehicle Details** arrow button.
4. (Optional) Add additional information in the remaining fields.
5. Click the **Save** button.

Mobile VIN Scans

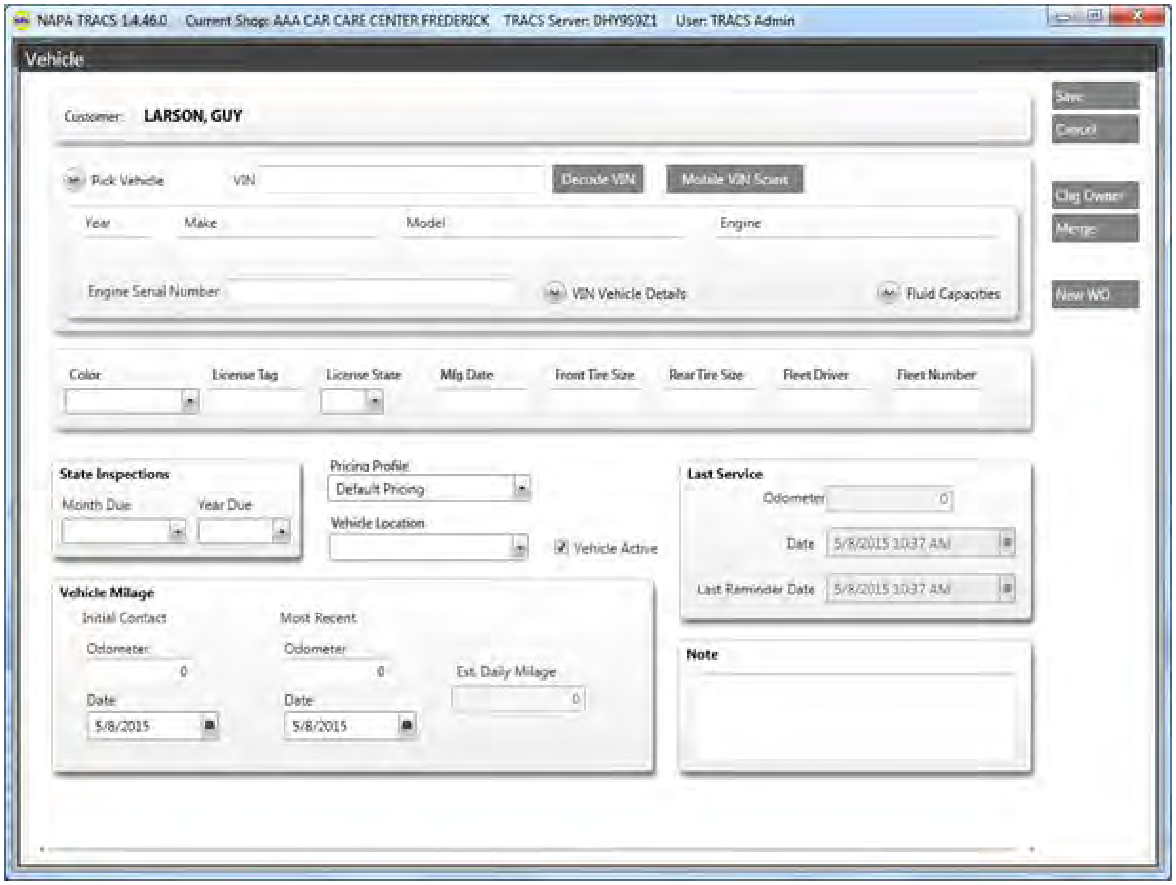
Use the **Mobile VIN Scans** feature to select vehicle details using the Vehicle Information Number (VIN).

To decode a VIN:

1. Click the **New Veh** button from any new estimate or work order window.

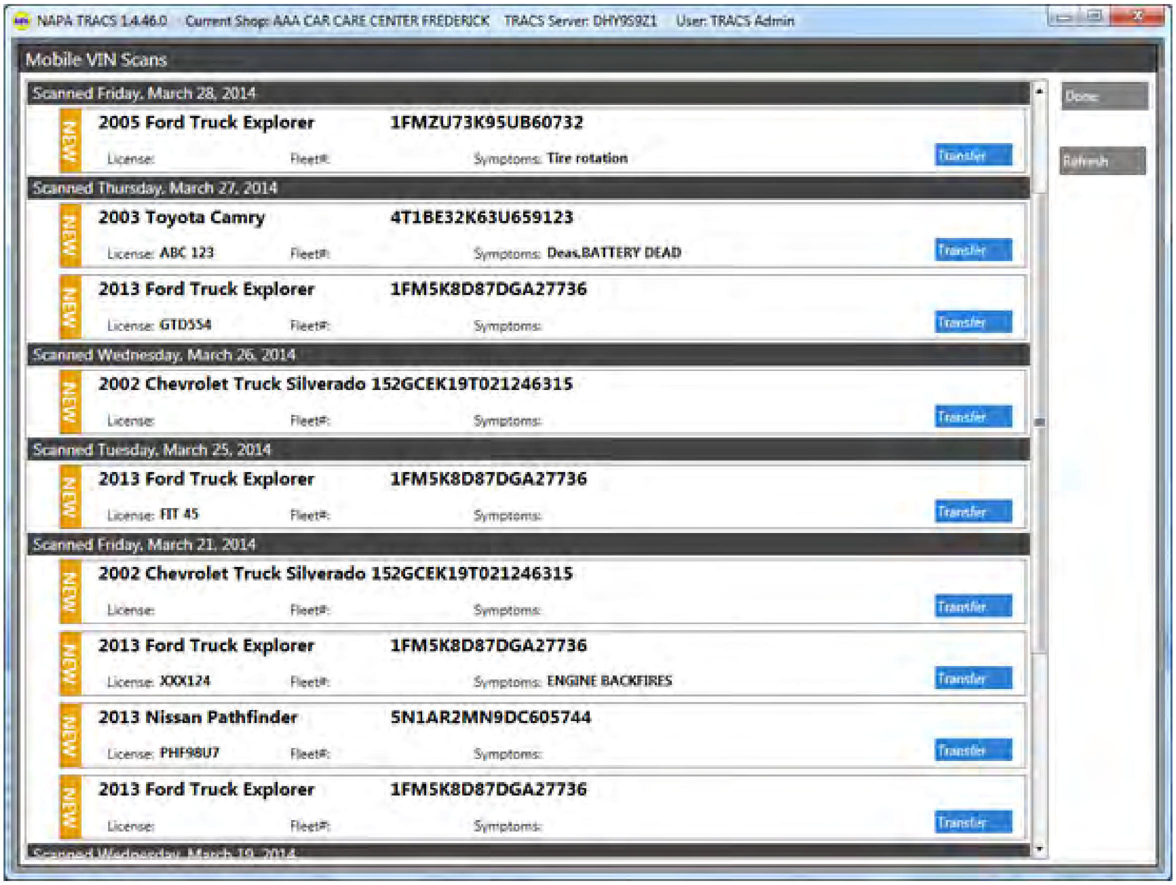


The **New Vehicle** window appears.

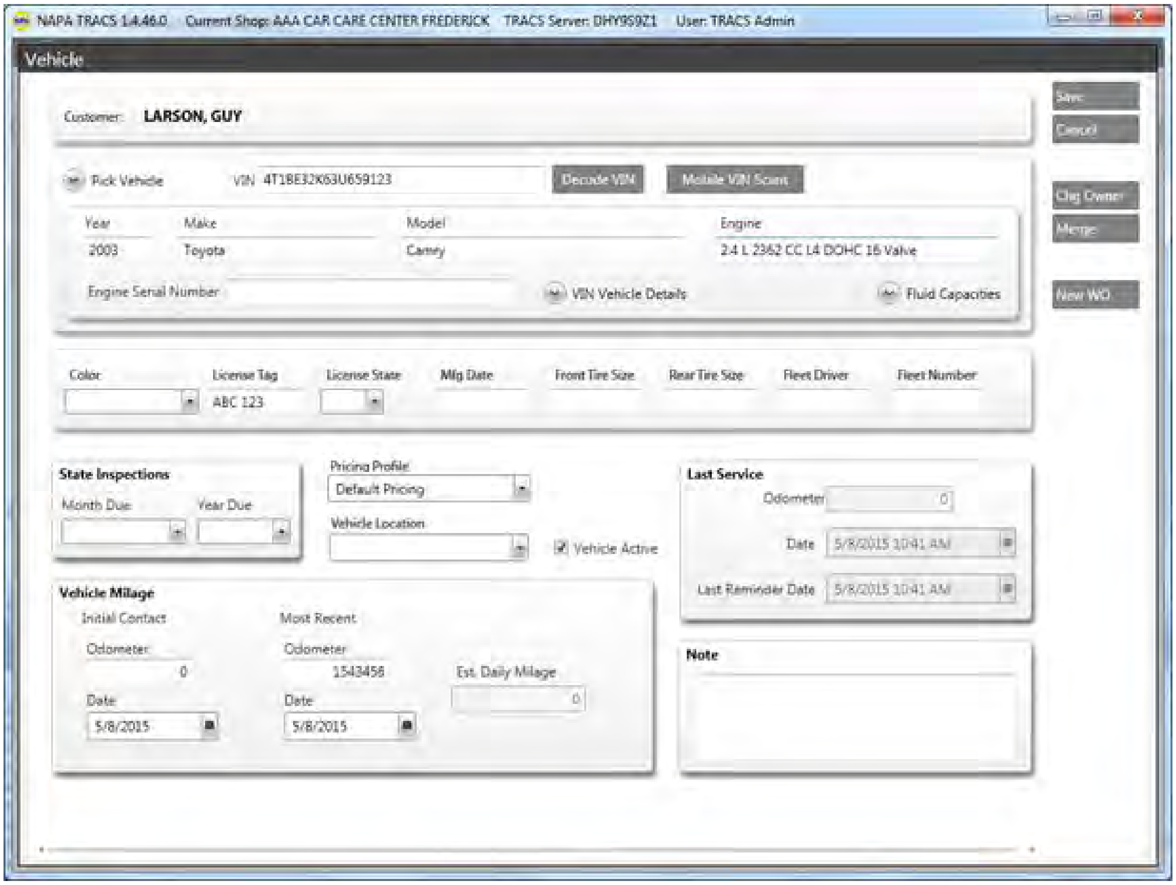


2. Click the **Mobile VIN Scans** button and wait while the system displays the results.

A list of PROLink mobile captured VINs appears.



3. Click the blue **Transfer** button. They system fills in the vehicle information.



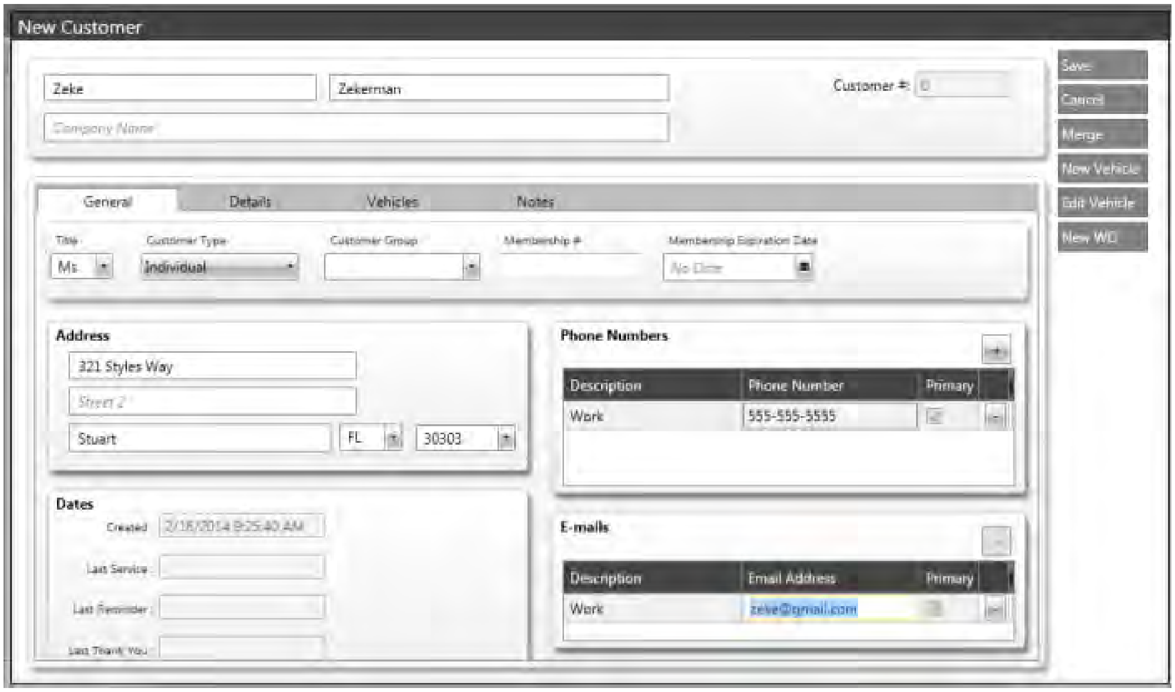
4. (Optional) Add additional information in the remaining fields.
5. Click the **Save** button.

Adding a New Customer

Use the **Add New Customer** window to add a new customer record to your database.

To add a new customer record to your customer database:

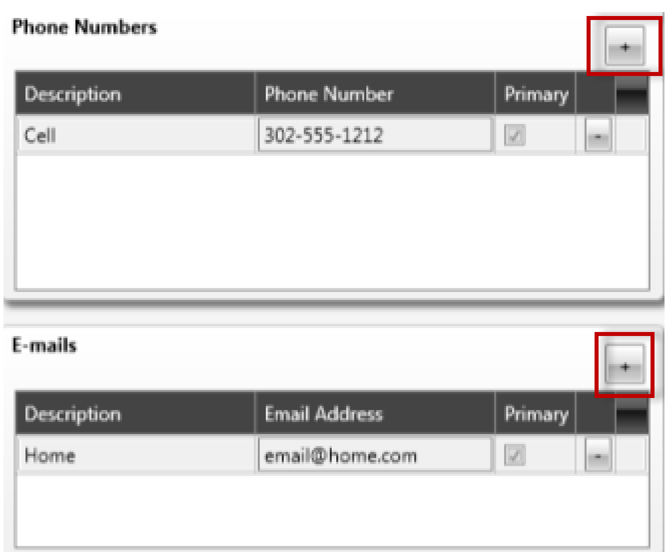
1. Select **Create New Customer** from the **Activities** menu or click the **New Cust** from any Estimate or Repair Order screen. The **New Customer** screen appears.



2. Enter customer information in the fields as needed.
3. Click the **Save** button to save the information and close the **New Customer** window.

Adding Phone and E-mail Information

Use the **Phone Numbers** and **E-mails** section of the **Add New Customer** window to include phone and e-mail information.



1. Click the Plus **(+)** button to add a new line to the **Phone Numbers** table. The **Description** field defaults to **Cell**. Options are:

- Cell
- Home
- Work

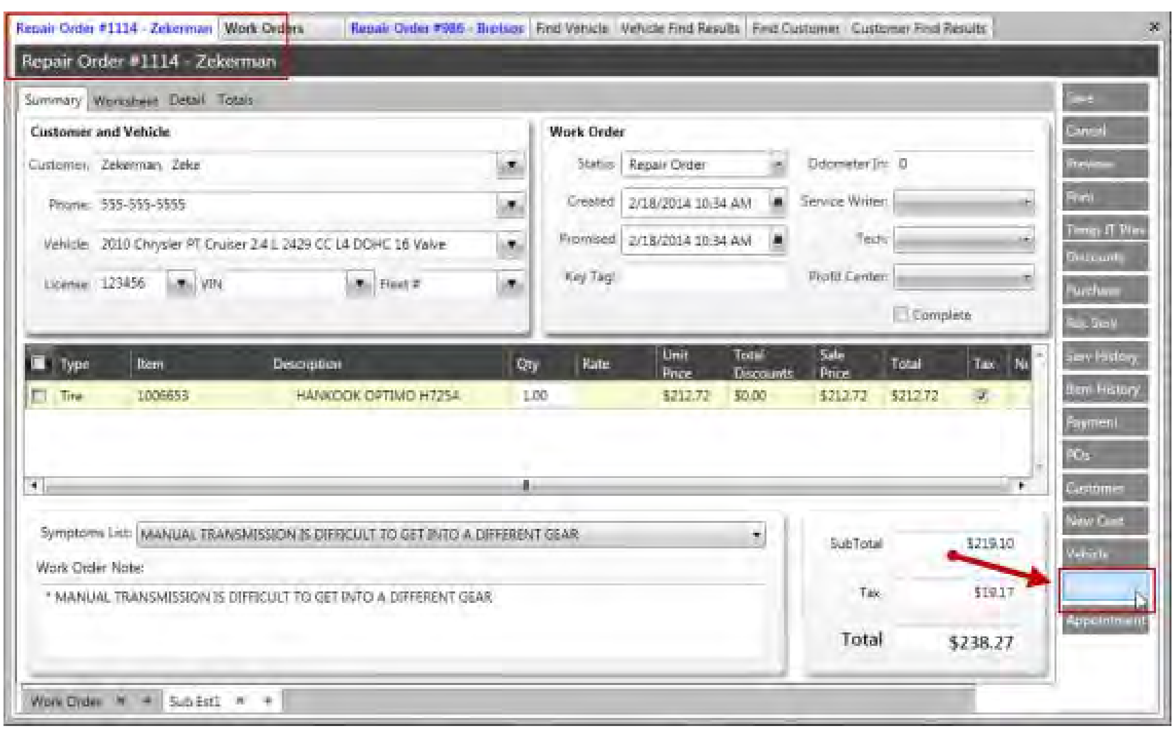
2. Type the information in the fields and place a check in the **Primary** check box.
3. Click the Plus **(+)** button to add a new line to the **E-mails** table.
4. Click the down arrow in the **Description** field to indicate the e-mail type and place a check in the **Primary** check box.
5. Click the Plus **(+)** button to include additional phone or e-mail entries.

Adding a New Vehicle

Use the **New Vehicle** window to add a new vehicle record **for a new customer** or **for an existing customer**. There are several ways to view the **New Vehicle** window depending the task you are performing in NAPA TRACS. This topic shows the most common way to add a new vehicle.

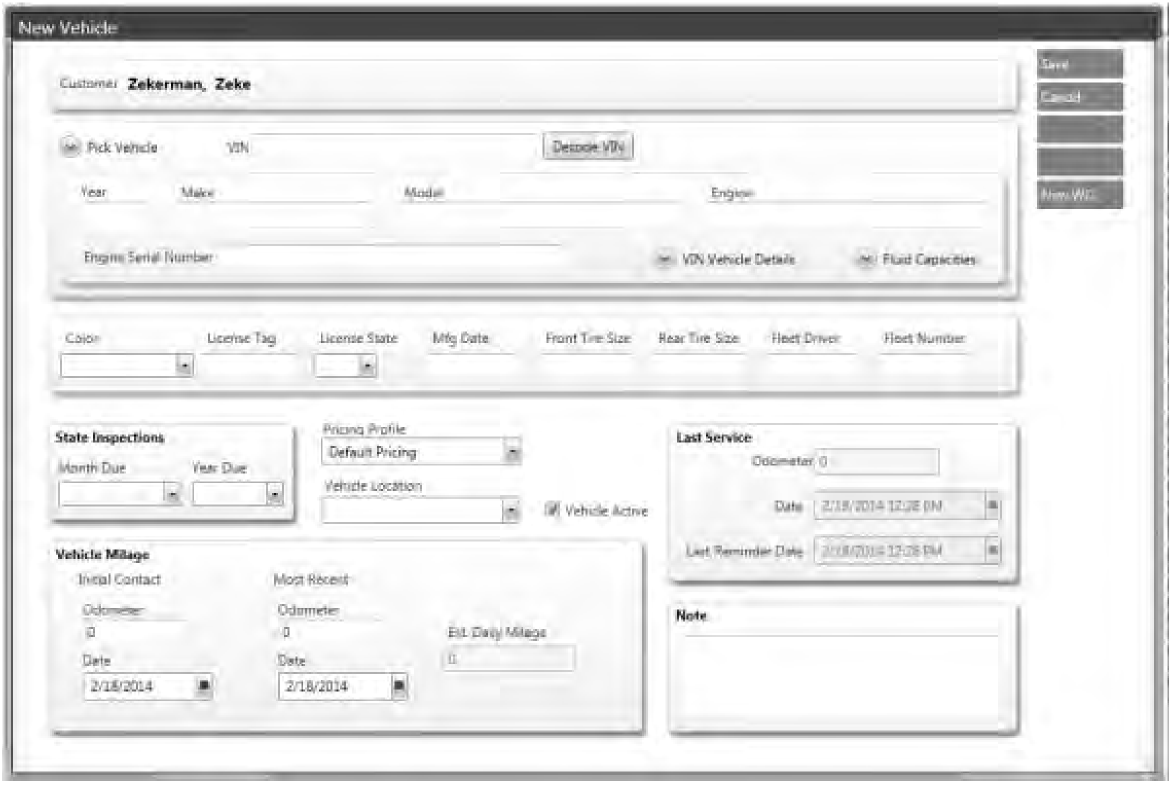
To add a new vehicle record for an existing customer:

1. Open an existing estimate or repair order for an existing customer.
2. Click the **New Veh** button from the TRACS rail on the right.



The **New Vehicle** window appears for the selected customer.

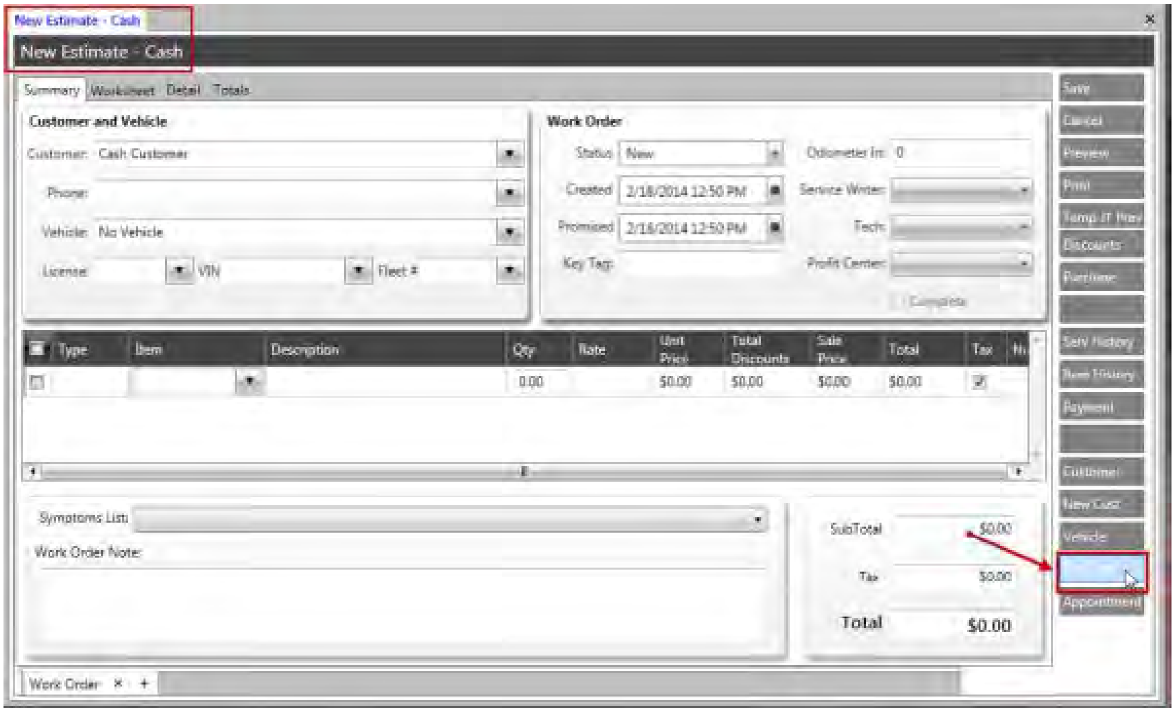
Note: You may need to float and resize the window to view all the fields.



3. Provide vehicle information manually in the fields as needed, or use the Pick Vehicle feature or the Decode VIN feature.
4. Use the **State Inspections** section to select the month and year a state inspection is due.
5. Click the **Pricing Profile** down arrow to select a pricing profile.
6. Use the **Vehicle Location** down arrow to select a vehicle location
7. Use the **Vehicle Mileage** section to provide odometer mileages and dates mileages were recorded.
8. Use the section to include any notes associated with the vehicle.
9. Click the **Save** button to save the information and close the **New Vehicle** window.

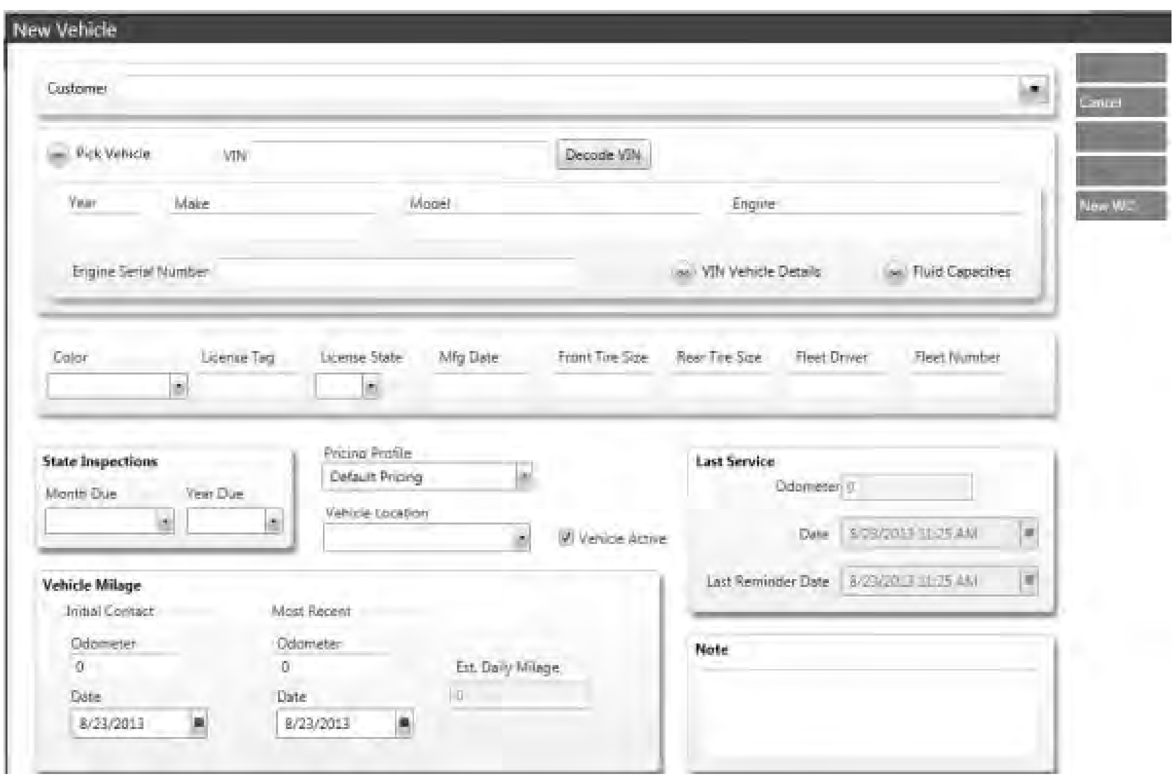
To add a new vehicle record for when creating an estimate for a new customer:

1. Open an new estimate  for a new customer.
2. Click the **New Veh** button from the TRACS rail on the right.



The **New Vehicle** window appears.

Note: You may need to float and resize the window to view all the fields.

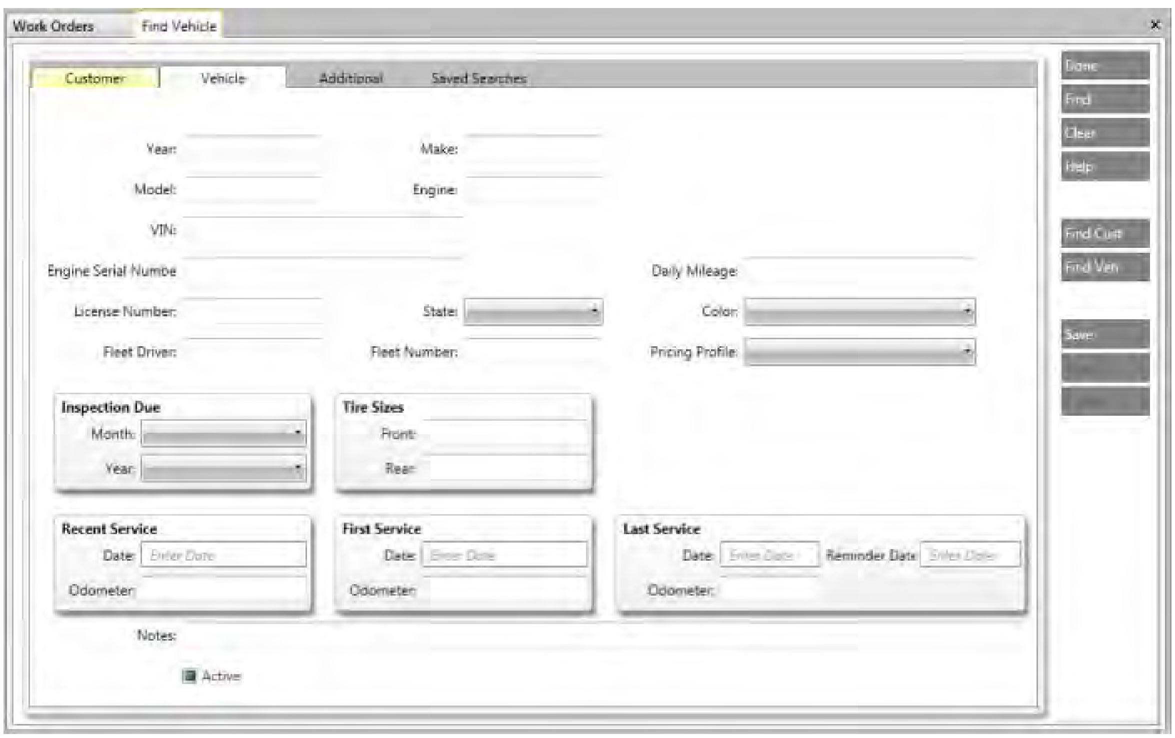


3. Follow Steps 3-9 as described above.

Finding a Vehicle Record

Use the find vehicles feature to locate all vehicles associated with a customer. To find a vehicle record:

1. Click the **Vehicles** icon  from the NAPA TRACS menu bar. The **Find Vehicle** tab appears.

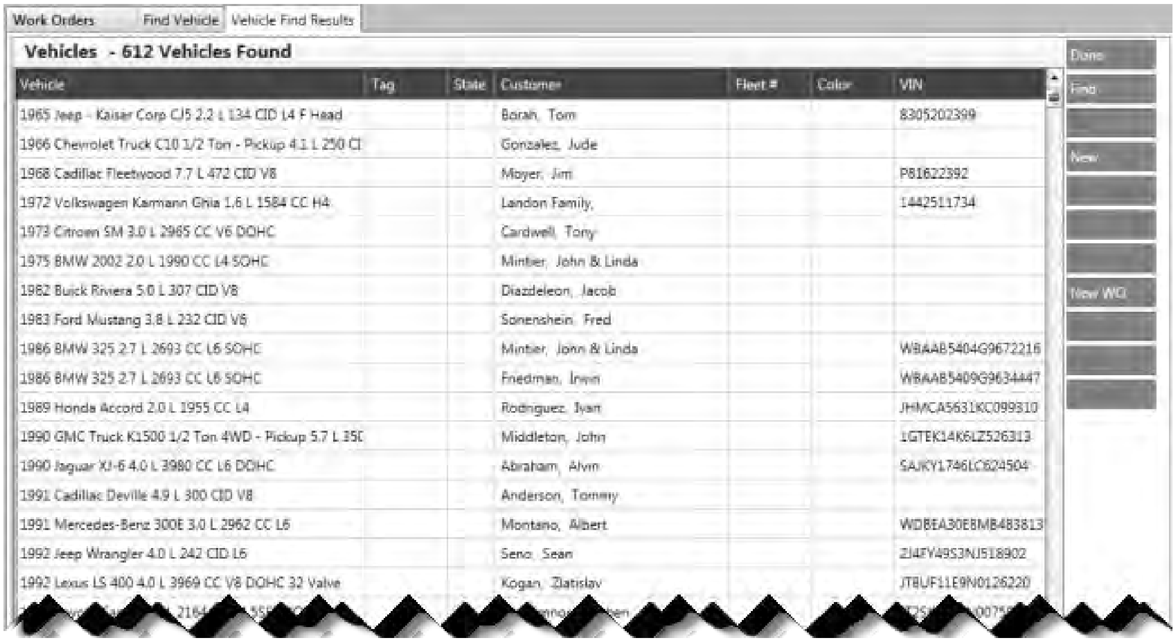


2. Type your search criteria in the **Vehicles** tab. Click here to learn more about using special characters in your search.

   Tip: Use the first digit in the **Year** field **and** the first one or two letters of the make in the **Make** field to narrow your search results.

   Note: Leave all fields blank to display all vehicles in the system.

3. Click the **Find** button on the rail on the right side of the page to display vehicles matching the search criteria.



4. Click a row to highlight the customer name, then click the **Edit** button to view vehicle information.

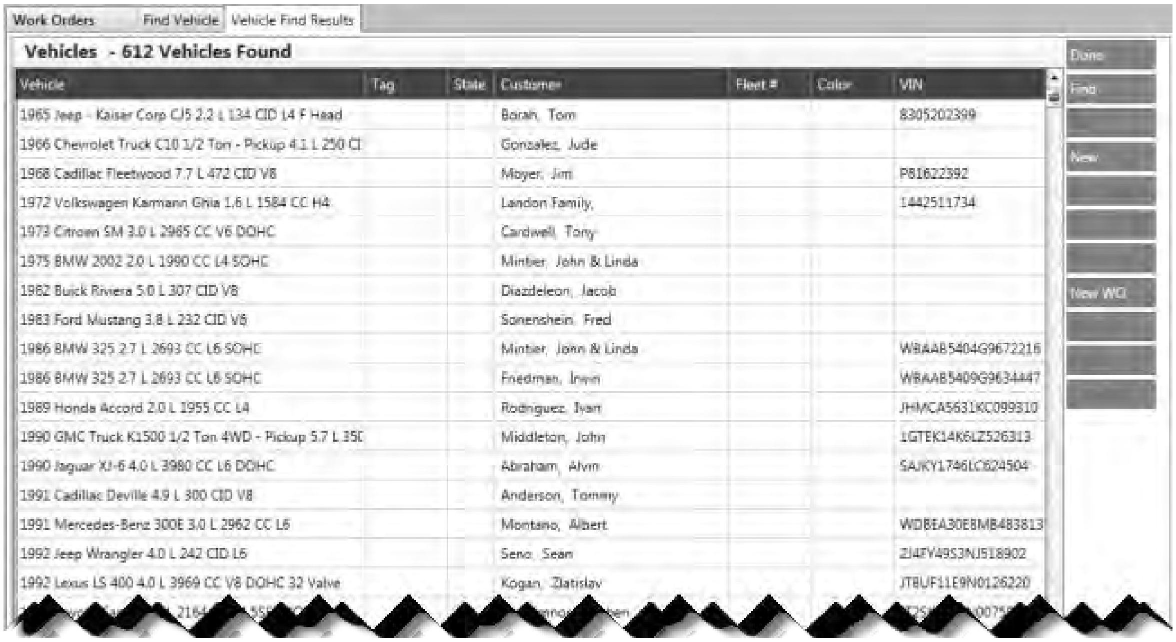
If you do not see the vehicle listed click the **New** button to add a new vehicle.

Maintaining Vehicle Information

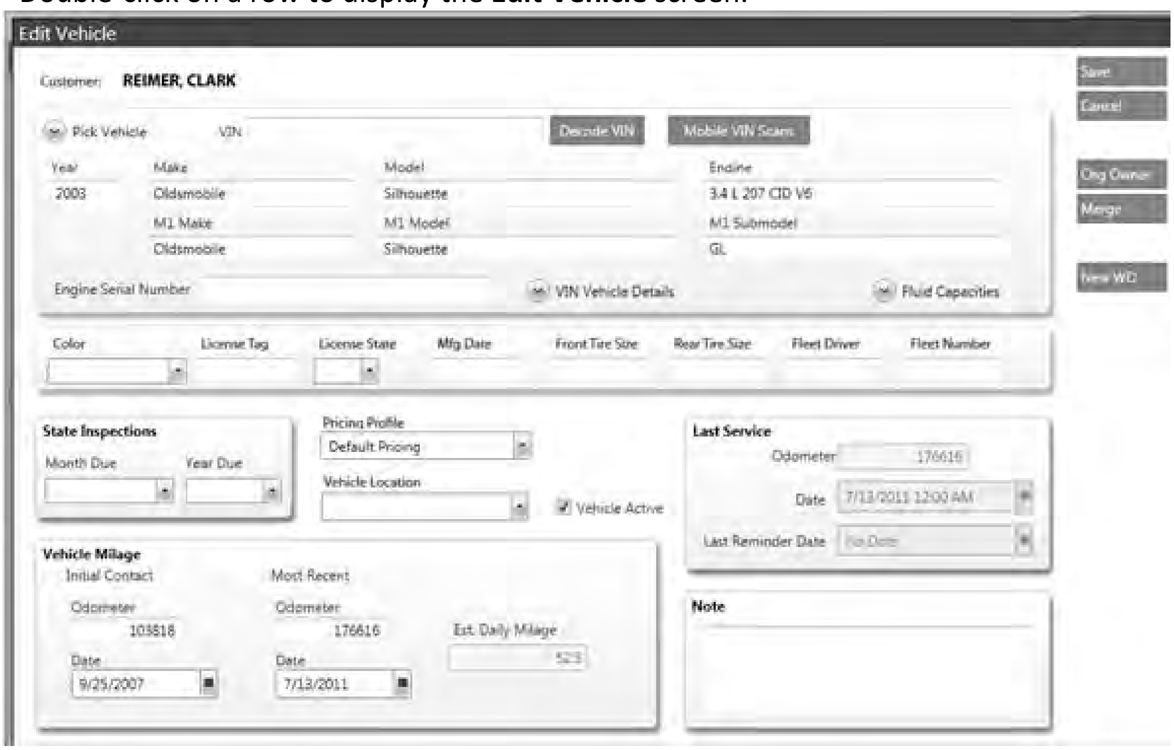
Use the **Vehicle Merge** screen to change the vehicle owner or merge vehicle information.

To change the vehicle owner:

1. Click the **Vehicle** icon  to display the **Vehicle** screen.
2. Enter search criteria and click the **Find** button. The **Vehicle Find Results** screen appears.



3. Double-click on a row to display the **Edit Vehicle** screen.



4. Click the **ChgOwner** button . The **Vehicle Merge** screen appears.

5. Start typing the new owner's name in the **Name Search** drop down or enter the customer number in the **Customer #** field.
6. Click the **ChgOwner** button 

. The **Vehicle Merge** screen closes.

To merge vehicle information:

1. Click the **Vehicle** icon  to display the **Vehicle** screen.
2. Enter search criteria and click the **Find** button. The **Vehicle Find Results** screen appears.
3. Double-click on a row to display the **Edit Vehicle** screen.
4. Click the **Merge** button 

. The **Vehicle Merge** screen appears.

5. Start typing in the **Vehicle To Keep** - **Vehicle Search** drop down or enter the vehicle number in the **Vehicle#** field.
6. Click the **Merge** button 

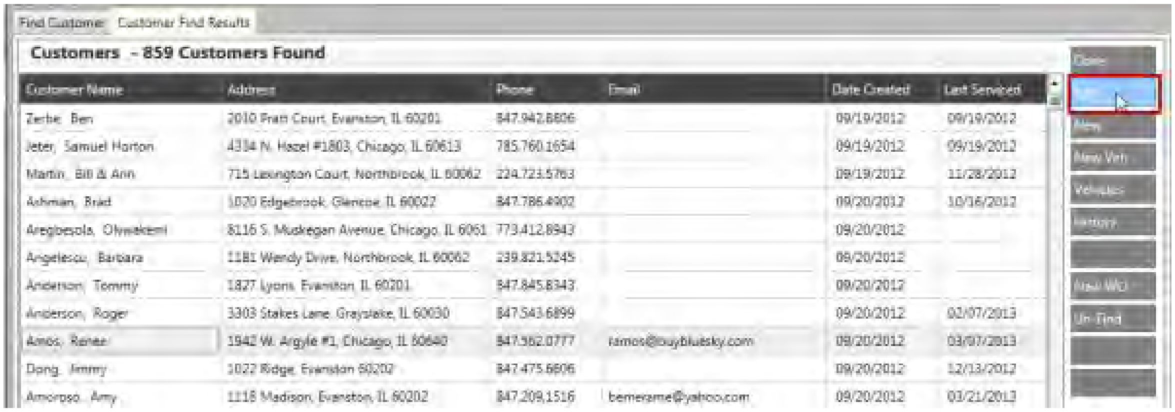
. The **Vehicle Merge** screen closes.

Maintaining Customer Information

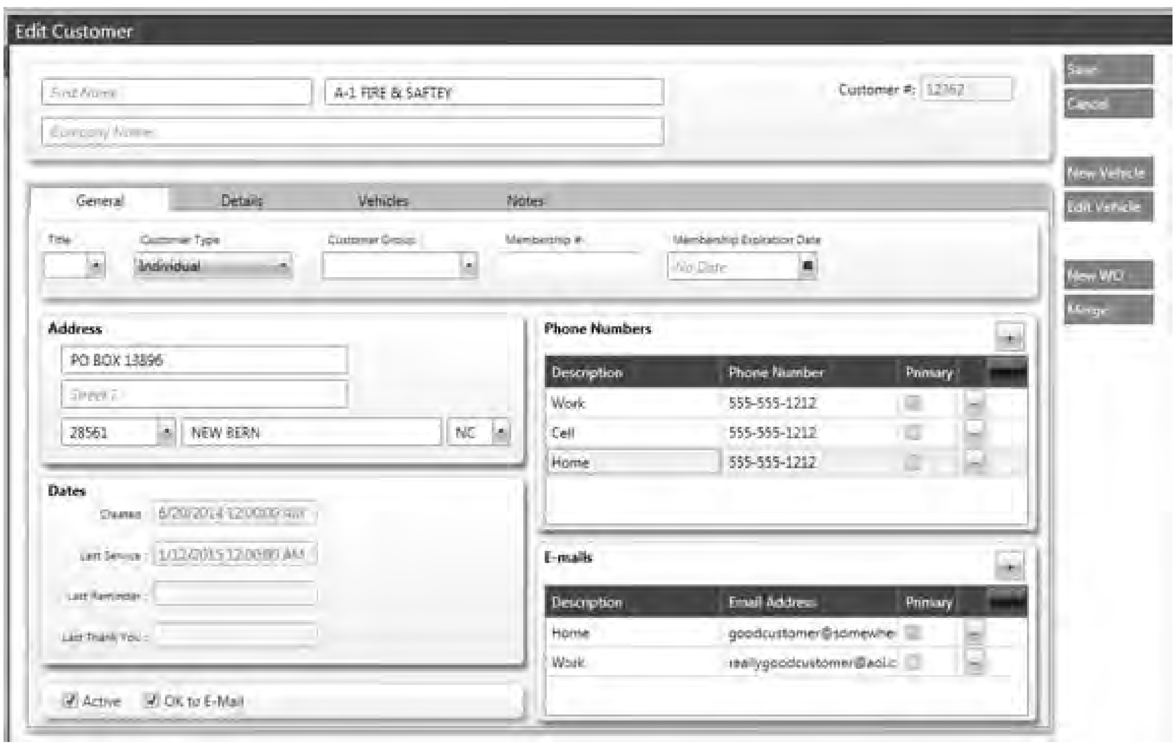
Use the **Customer Merge** screen to merge customer information.

To merge customer information:

1. Click the **Customers** icon  on the NAPA TRACS menu bar. The **Customer** tab appears.
2. Enter search criteria and click the **Find** button. The **Customer Find Results** screen appears.

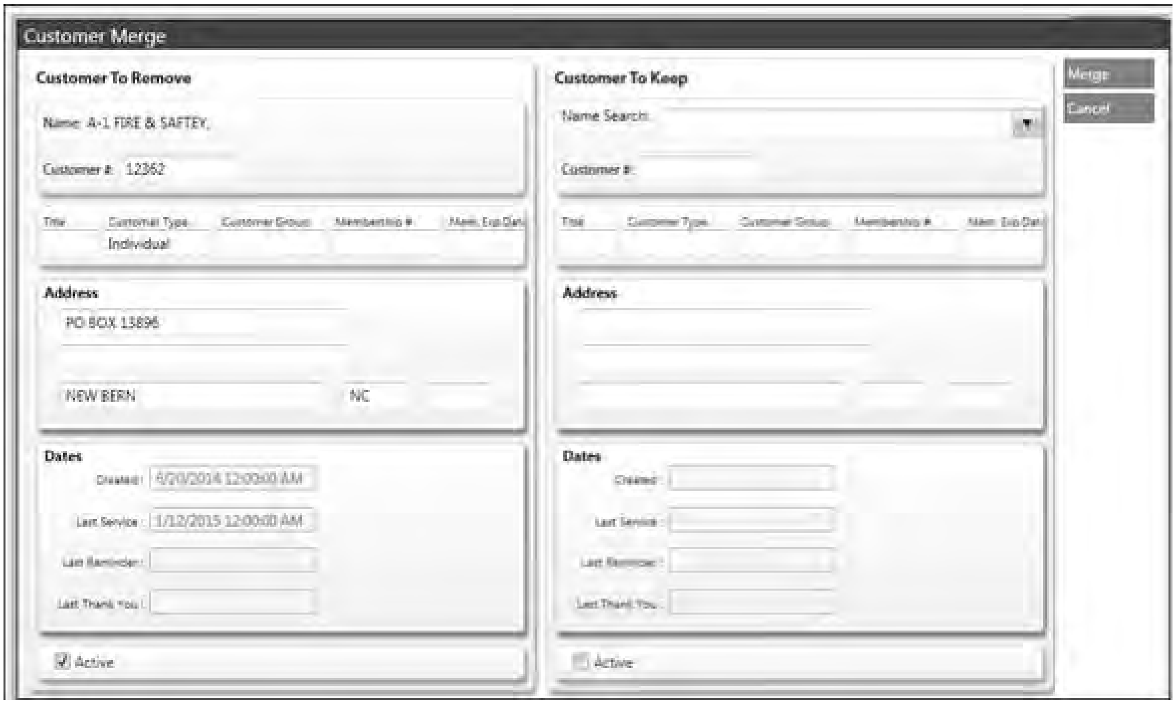


3. Click a row to highlight the customer name, then click the **Edit** button to view customer information. The **Edit Customer** screen appears.



4. Click the **Merge** button 

. The **Customer Merge** screen appears.
5. Start typing in the **Name Search** drop down or enter the customer number in the **Customer #** field to locate the customer to keep.



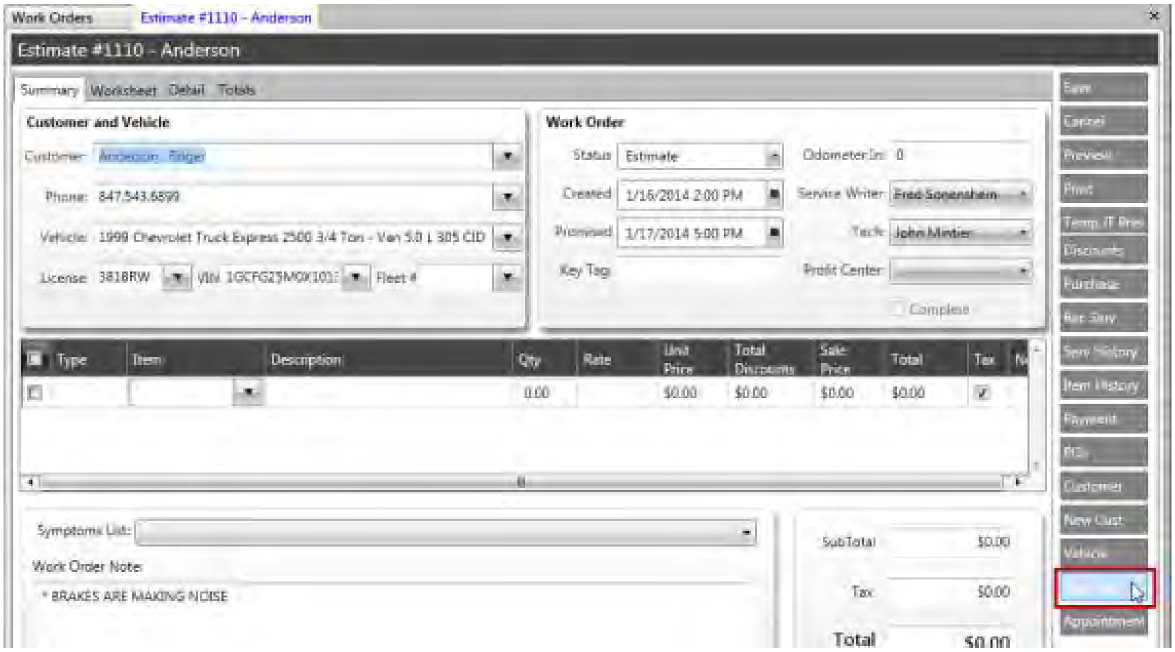
6. Click the **Merge** button 

. The **Customer Merge** screen appears.

Picking Vehicle Details

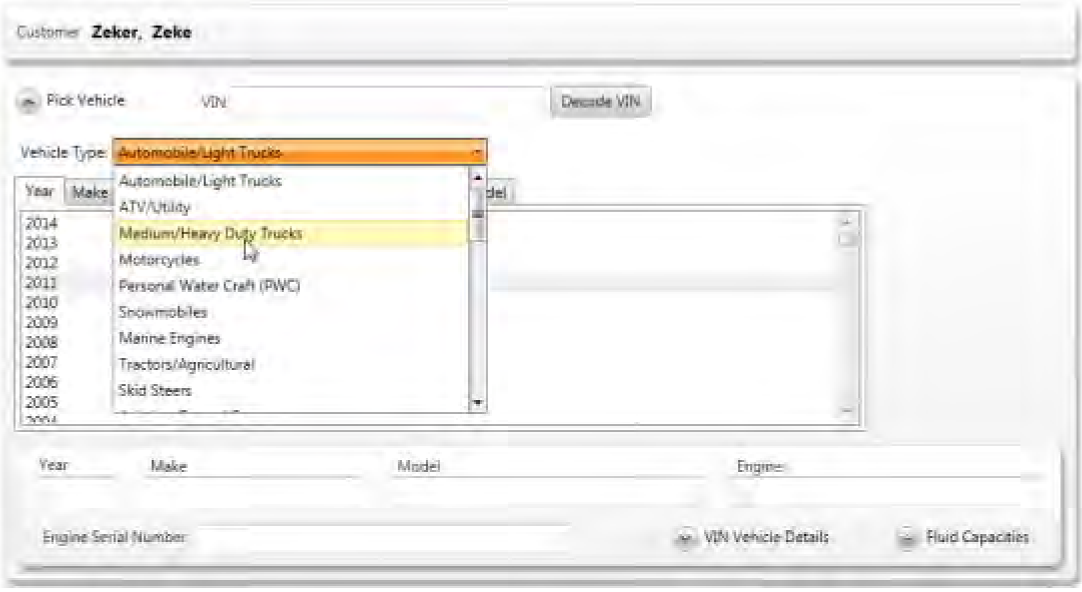
Use the **Pick Vehicle** feature to select the details of a customer vehicle. Using **Pick Vehicle** saves time because it links to existing information in the NAPA electronic catalogs. To pick vehicle information:

1. Click the **New Veh** button from any new estimate or work order window, and the **Vehicle** screen appears.

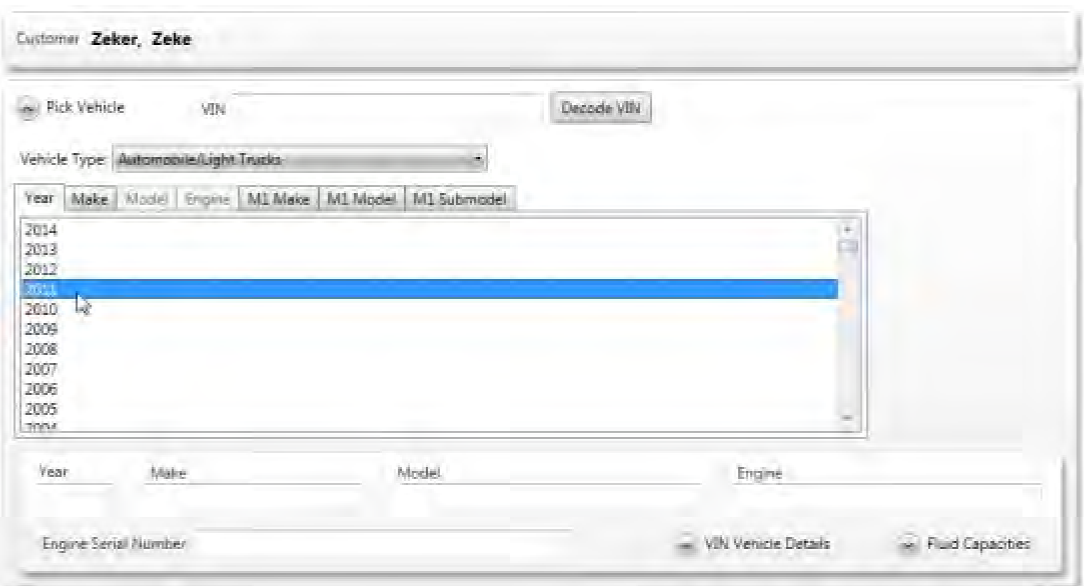


2. Click the **Pick Vehicle** button.

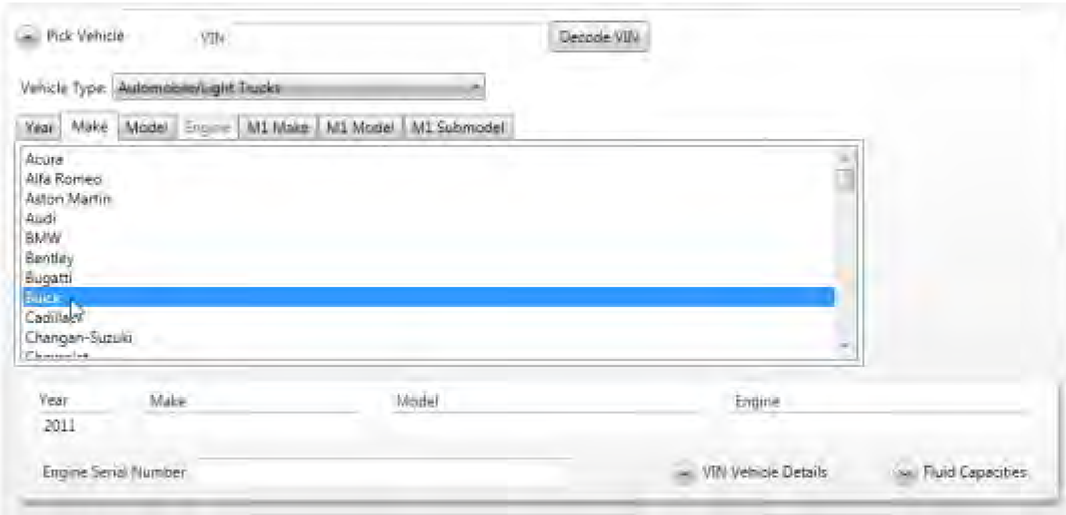
3. Select the vehicle type.



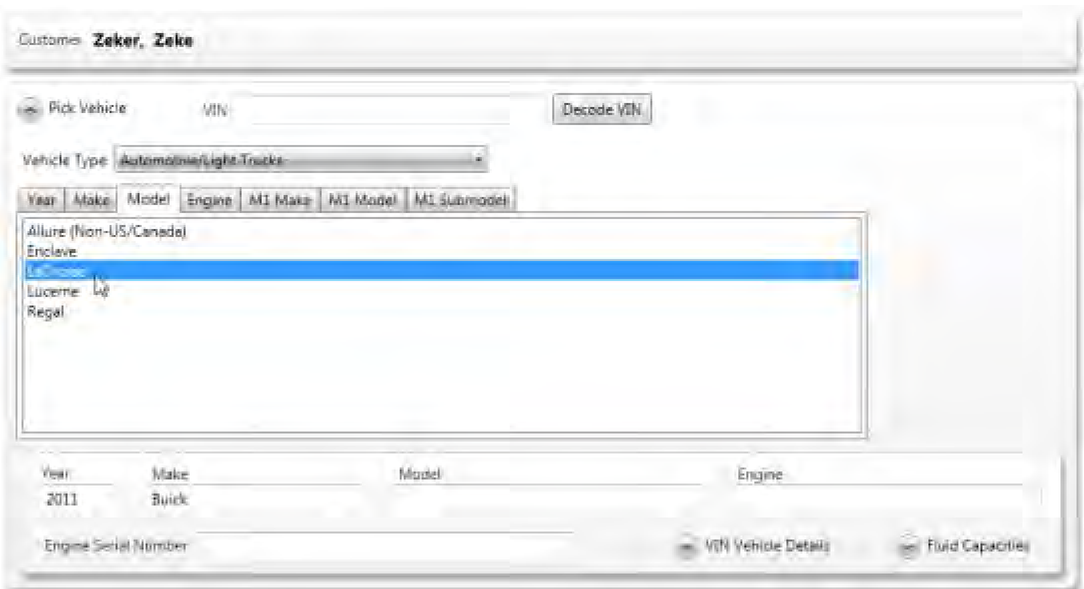
4. Select the vehicle year.



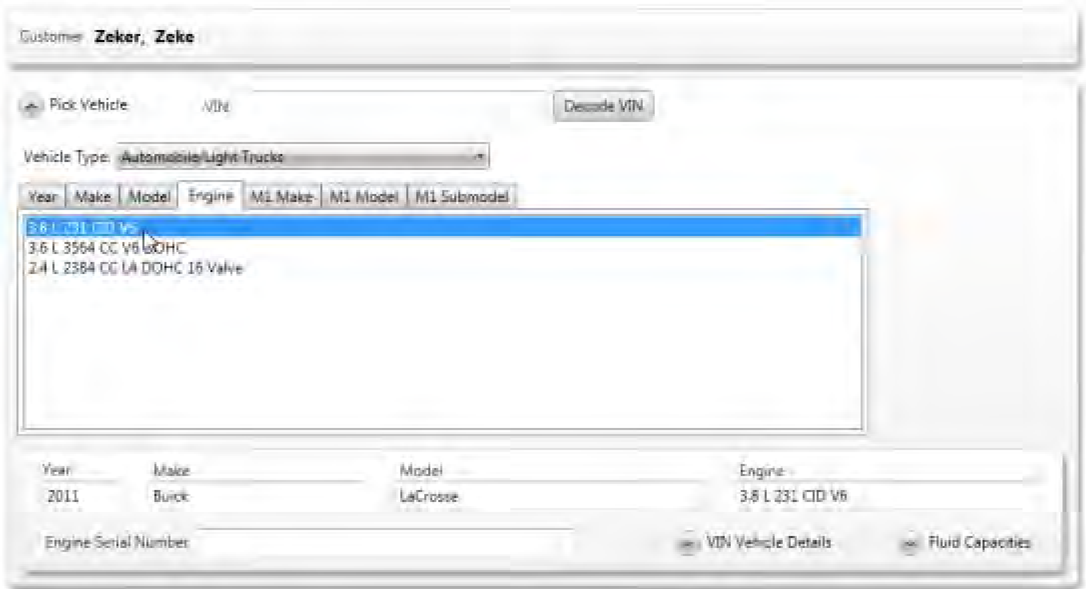
5. Select the vehicle make.



6. Select the vehicle model.



7. Select the engine type.



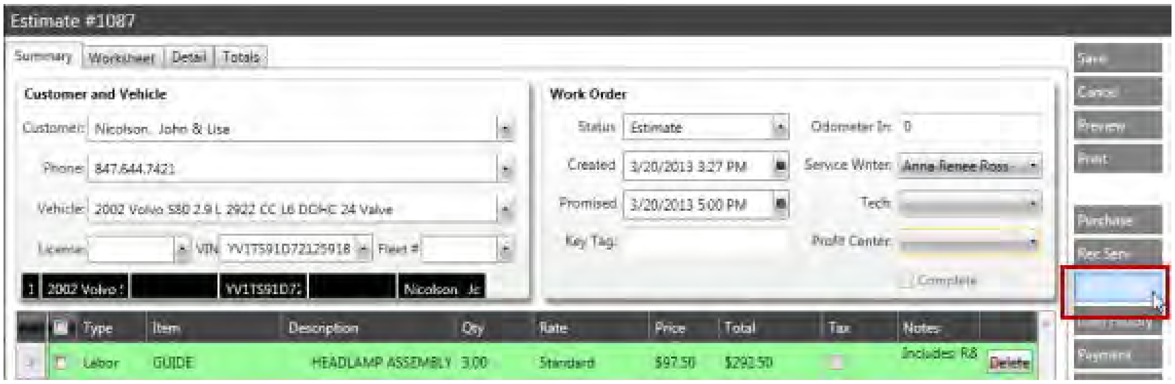
8. (Optional) Select the M1 Make, M1 Model and M1 Submodel and the information selected appears.
9. (Optional) Add additional information in the remaining fields.
10. Click the **Save** button.

Viewing Vehicle Service History

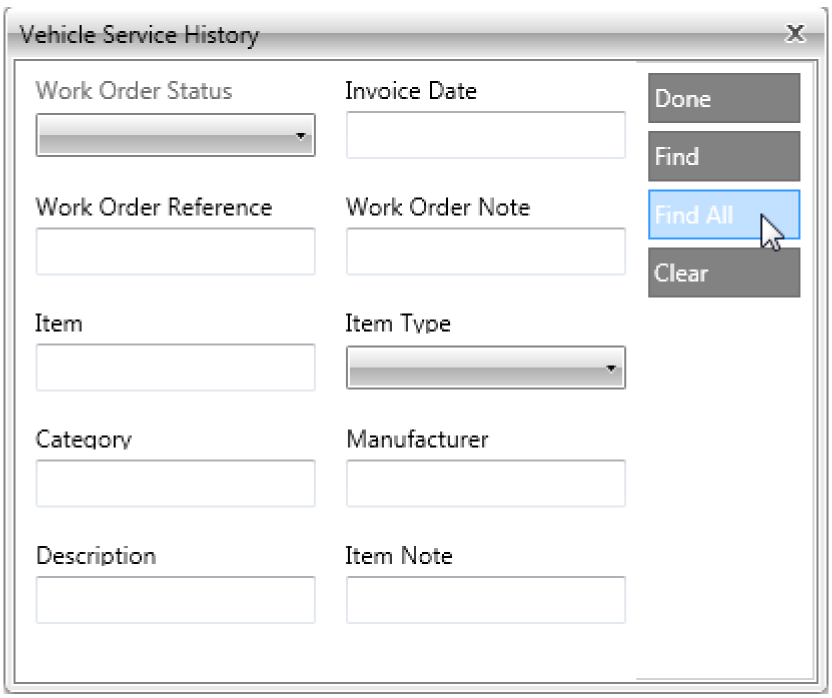
Use the **Service History** feature to view or print information on services performed on a certain vehicle. The **Serv History** button is available from an open repair order and when viewing data on a specific vehicle.

To view the service history for a particular vehicle from an open repair order screen or when viewing data on a specific vehicle:

1. Click the **Serv History** (Service History) button.



The **Vehicle Search History** window appears.



2. Leave all fields blank and click the **Find All** button.

The complete service history appears for the vehicle.

3. Click the **Done** button to return to the previous screen.

Viewing Service History Entries for a Particular Vehicle by Specific Criteria

To view the service history for a particular vehicle by specific criteria:

1. Perform Step 1 above.
2. Provide information in any or all of the areas (for example, type the word "brakes" in the **Category** field).
3. Click the **Find All** button.

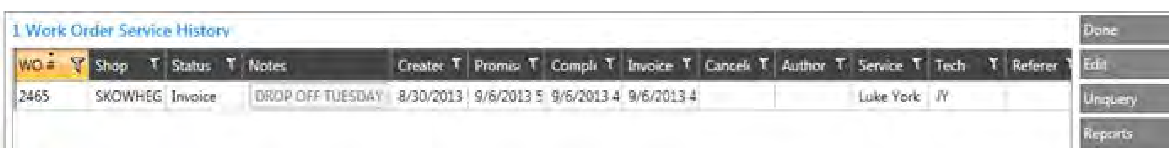
   The complete service history appears for the vehicle based on the criteria provided.

4. Click the **Done** button to return to the previous screen.

Printing Service History Reports

To print a service history report:

1. Search vehicle history.



2. Click the **Reports** button. The **Report Settings** screen appears.

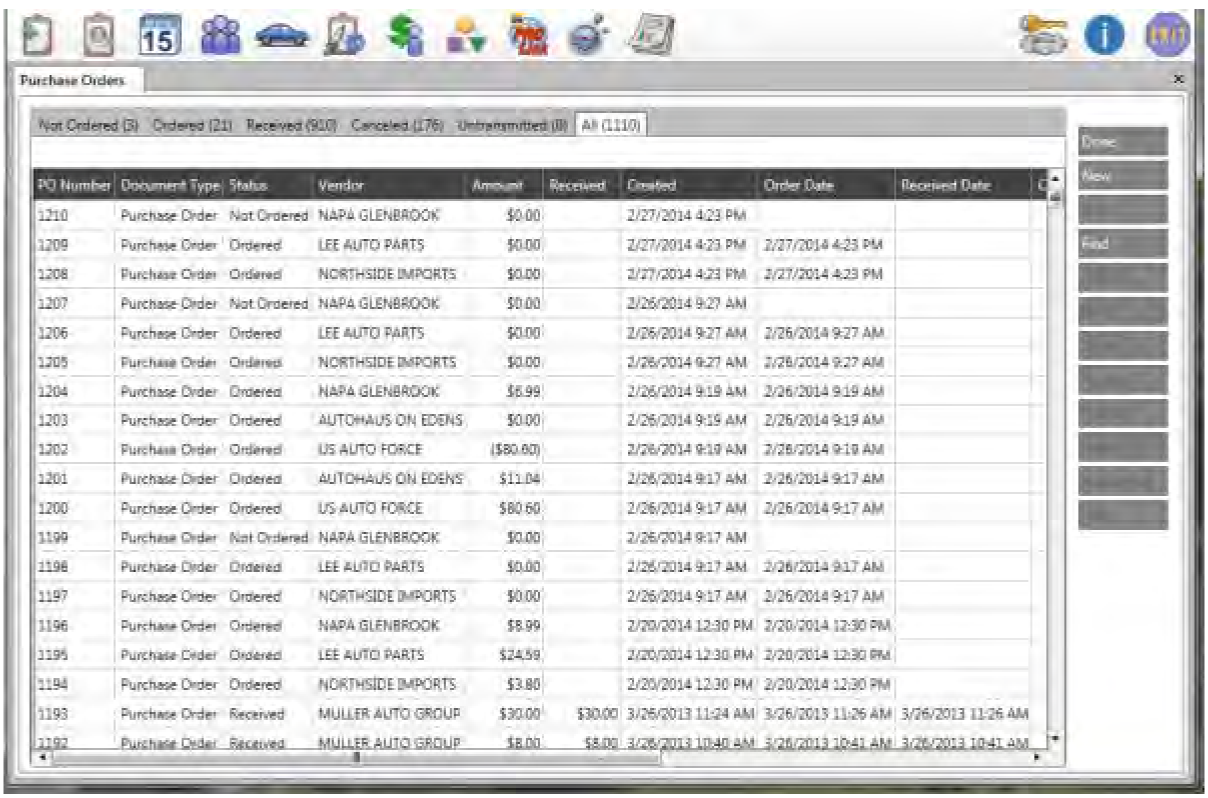
3. Click on a vehicle report type and click the **Run Report** button.
4. Click the **Done** button to close the report window.

5. Click the **Done** button on the Work Order Service History Rail to close the Services History tab.

Purchase Orders

About the Purchase Order Screen

Parts for vehicle repairs may or may not be in stock at your location. Items not in stock need to be purchased. Order parts in NAPA TRACS using purchase orders (PO's).
The **Purchase Order** screen lists purchase orders in tabs. Click the **Purchase Order** button  on the NAPA TRACS menu bar to view the **Purchase Order** screen.



Purchase Order Screen

Purchase Order Screen Review

Purchase order categories are:

- **Not Ordered** - PO's of parts that have not been ordered.
- **Ordered** - PO's of parts that have been ordered.
- **Received** - Ordered PO's that have been received.
- **Canceled** - PO's that are canceled.
- **Untransmitted** - PO's that are not electronically transmitted for processing
- **All** - Lists all categories of PO's.

Categories of Purchase Orders

When you first create a purchase order, it is "pending" and identified as open which means that you have ordered your parts from your vendor, but your order has not yet been transmitted. These open PO's fall into the following two categories:

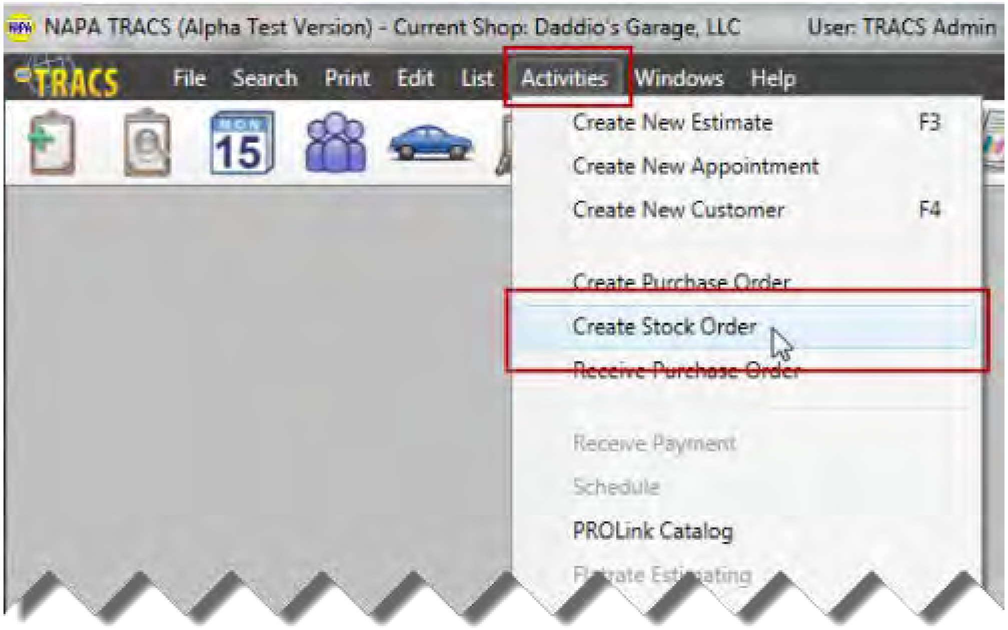
- PO's using the TAMS system through your local NAPA Auto Parts Store
- PO's through another vendor

Creating a Stock Order for In-House Stock

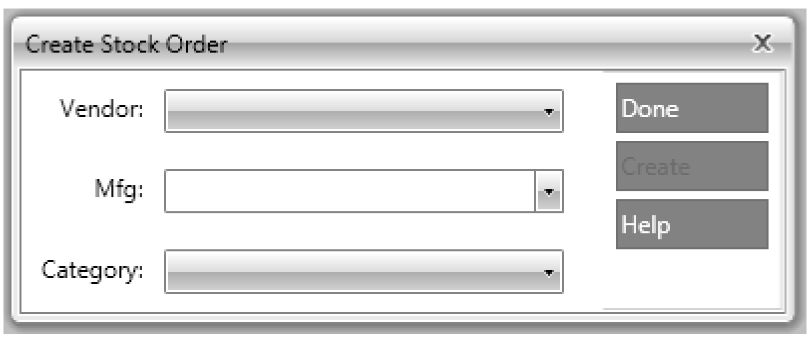
Parts for vehicle repairs may or may not be in stock at your location. Items not in stock need to be purchased. Stock orders allow you to replenish stock as needed. You are able to order the difference between the minimum and maximum stock levels and consider quantity on hand and work in progress.

To create a stock order for in-house stock:

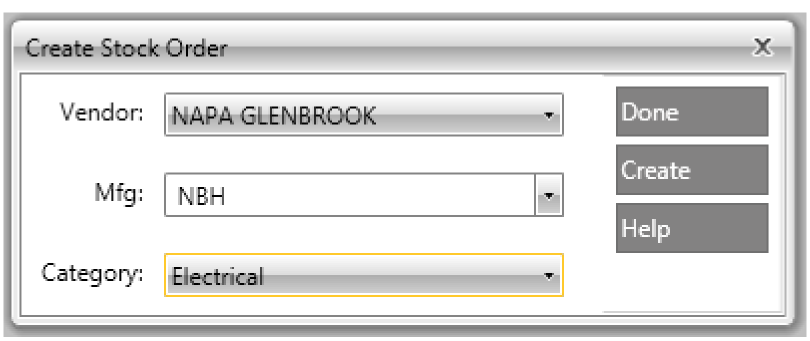
1. Select **Create Stock Order** from the **Activities** menu.



2. The **Create Stock Order** dialog box appears.



3. Select a vendor, manufacturer and category from the corresponding **Vendor**, **Mfg**, and **Category** drop-down fields.



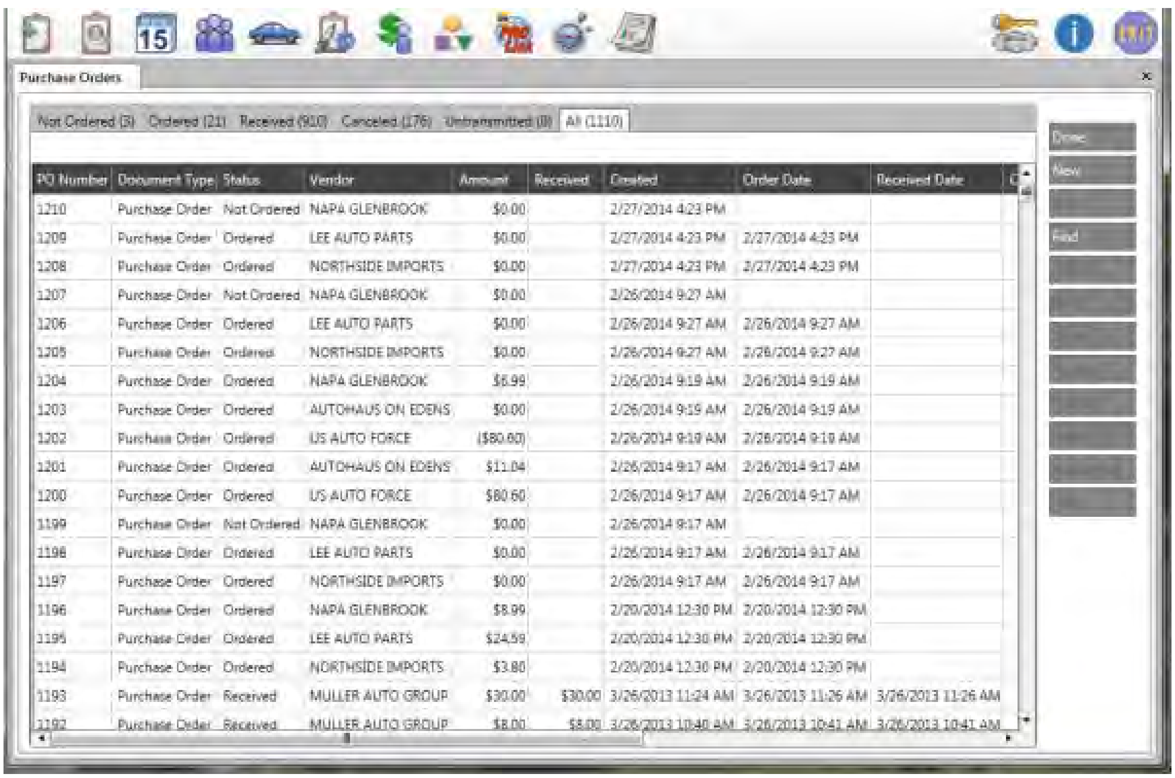
4. Click the **Create** button.
5. Click the **Done** button when the order is complete.

The stock order will be listed on the purchase order screen.

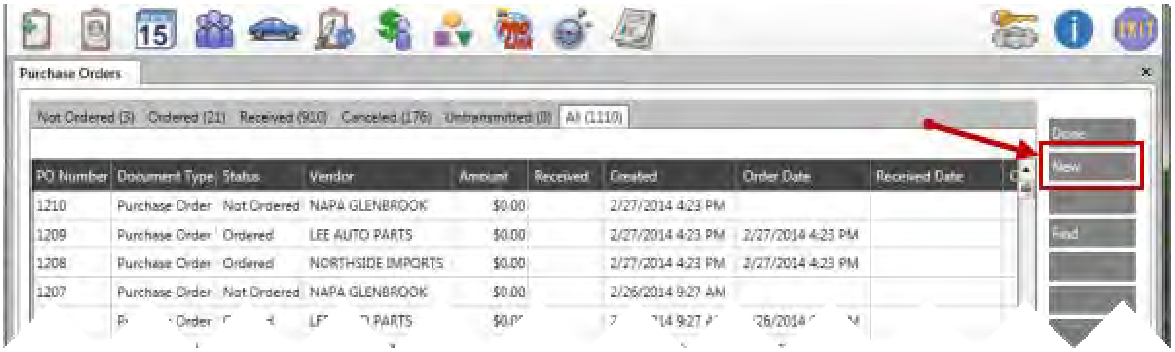
Creating a Purchase Order

Purchase orders are mainly created when [preparing an estimate]() for a vehicle repair or to order inventory for in-house stock. To create a PO from the **Purchase Order** screen:

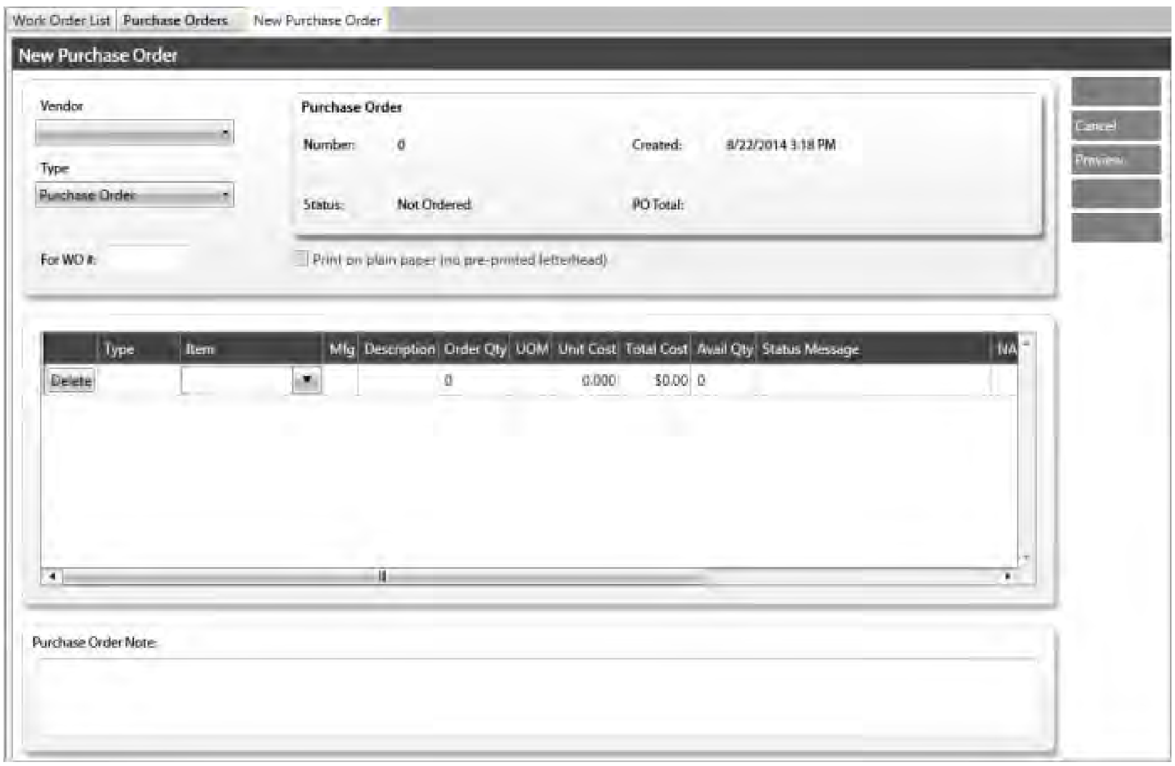
1. Click the **Purchase Order** button  on the NAPA TRACS menu bar to view the **Purchase Order** screen.



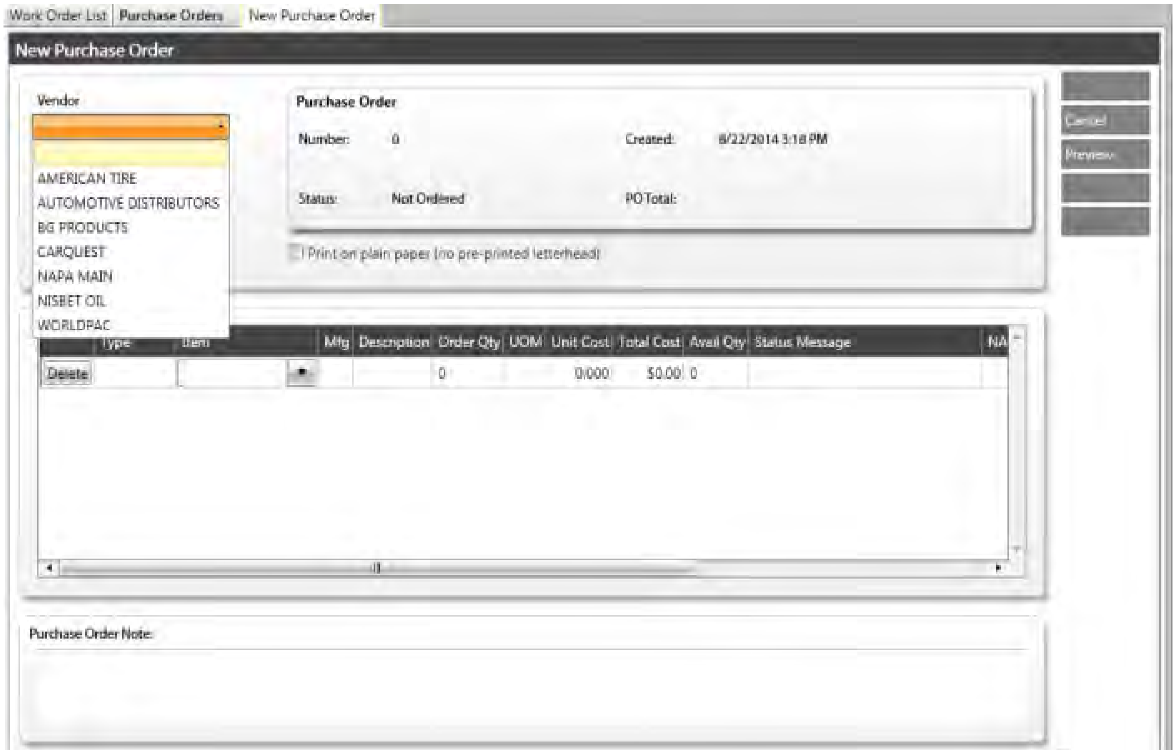
2. Click the **New** button from the TRACS rail on the right side of the screen.



The **New Purchase Order** screen appears.



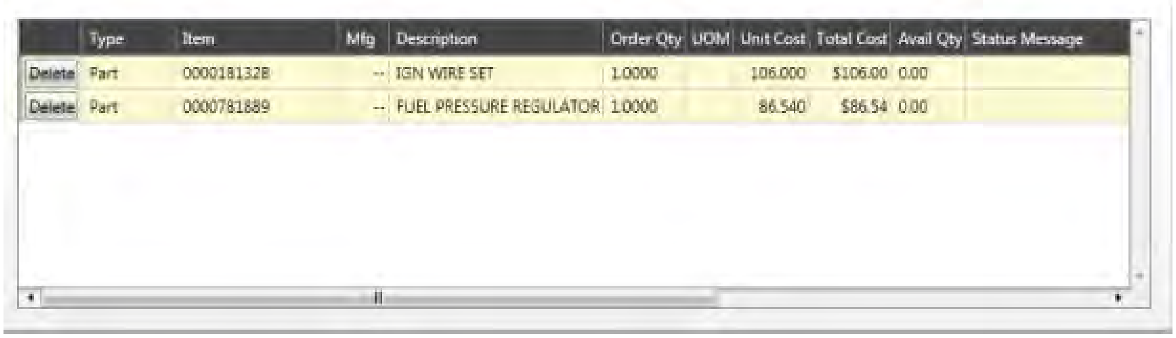
3. Click the down arrow of the **Vendor** field and select the part vendor.



4. Click the down arrow of the **Type** field and select the type of transaction to perform. Available options are:
   - Adjustment
   - Purchase Order (default)
   - Returned Goods
   - Advanced Shipping
   - Transfer
   - Stock Order

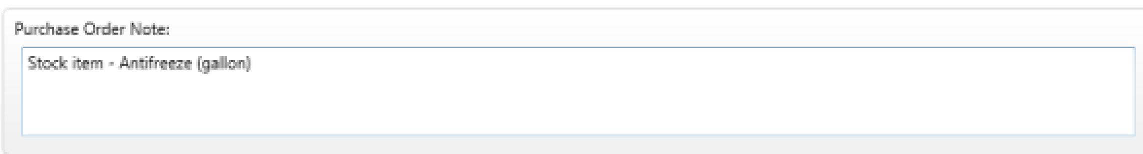
   This field should remain as **Purchase Order**.

5. Type the number of the work order in the **For WO#** field.
6. (Optional) Check the **Print on plain paper** check box to indicate your printing preference.
7. Place your cursor in the last row of items, and press the **down arrow** key on your keyboard to add a new line to the PO.



	Type	Item	Mfg	Description	Order Qty	UOM	Unit Cost	Total Cost	Avail Qty	Status Message
Delete	Part	0000181328	--	IGN WIRE SET	1.0000		106.000	$106.00	0.00	
Delete	Part	0000781889	--	FUEL PRESSURE REGULATOR	1.0000		86.540	$86.54	0.00	

8. Select an option from the **Type** field.
9. Type the item number in the **Item** field or click the down arrow to select an item from the list.
10. Type additional information about the PO in the **Purchase Order Note** field. The note will be visible to the vendor.



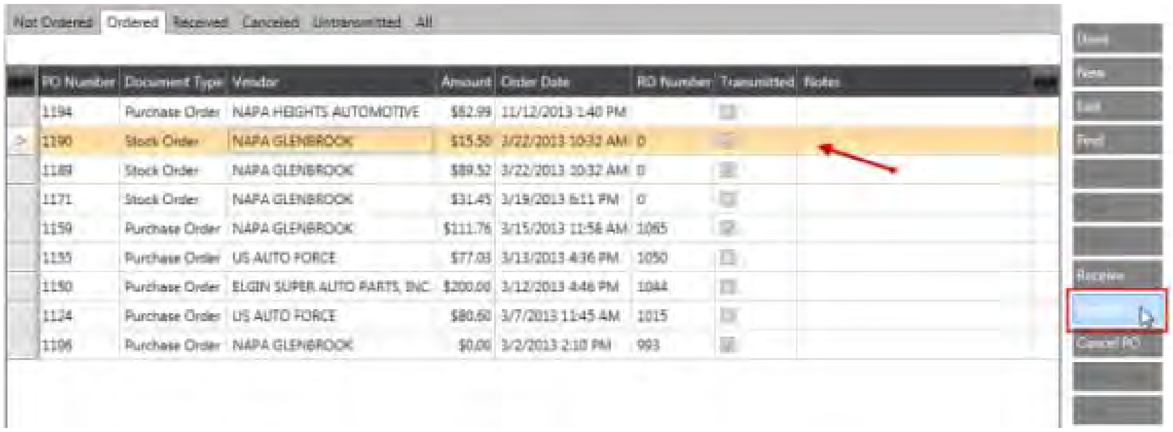
10. (Optional) Click **Preview** to review the PO on your screen, or click **Print** to print the PO to review a hard copy.
11. Click the **Save** button.
12. Click the **Order** button to complete the PO or click the **Order & Xmit** button to save and transmit the order.

Updating a Purchase Order

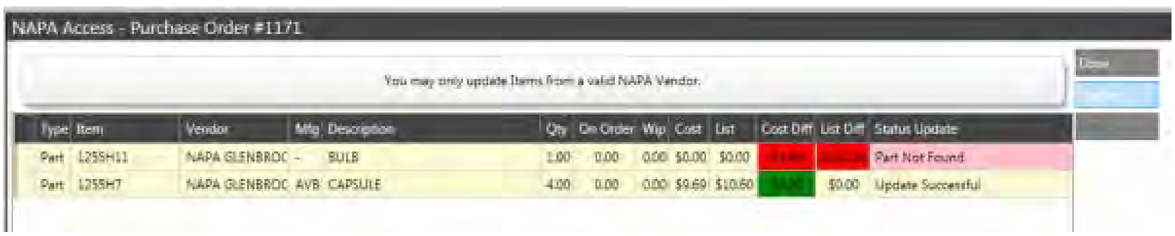
Updating a purchase order or stock order allows you to update order information that comprise a purchase order or stock order. You can only update purchase orders listed under the **Not Ordered** and **Ordered** tabs, and that have already been transmitted.

To update a purchase order or stock order:

1. Click a purchase order or stock order row and click the **Update** button on the right side of the screen.



The items that comprise the order appear, and then click the **Update** button.



2. Click the **Update** button.

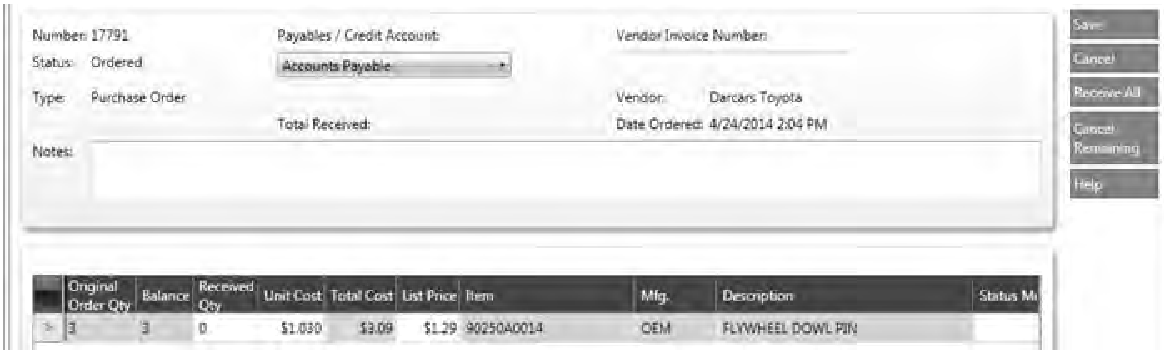
   Update Successful appears in the **Status Update** column next to the items that get updated. **Part Not Found** appears if the item was not updated. Unsuccessful updates require your specific investigation.

3. Click the **Done** button to return to the **Purchase Order** screen.

Receiving a Purchase Order

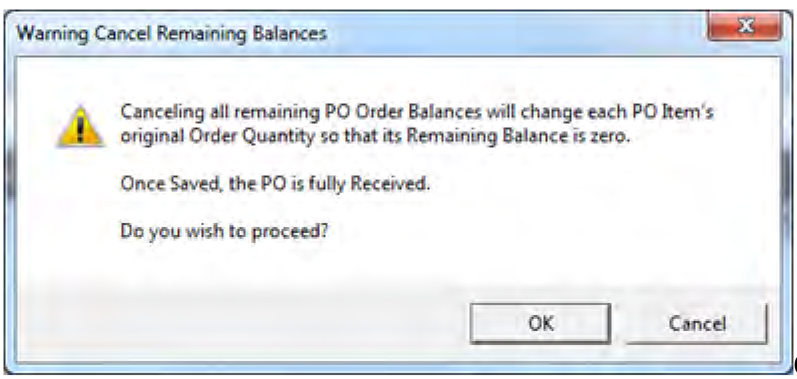
To receive a purchase order:

1. Click the **Purchase Order** button  on the NAPA TRACS menu bar to view the **Purchase Order** screen.
2. Click on a purchase order row to select it.
3. Click the **Receive** button to display the purchase order screen.



4. Type the number of items you received in the **Received Qty** field if you received a partial order.

   - or -
   Click the **Receive All** button if you received all of the items you ordered. The system will move the quantity in the **Balance** column to the **Received Qty** column.
   - or -
   Click the **Cancel Remaining** button to set the remaining ordered quantities to zero and receive the PO.



Click **OK** to continue or click **Cancel** to ignore.

Note: The item cost associated with the repair order is updated.

5. Click the **Save** button to save and close the purchase order.
6. The system displays the work order and the NAPA order was transmitted to a local NAPA Auto Parts store.

Canceling and Deleting Purchase Orders

Follow these instructions to cancel or delete a Purchase Order:

Canceling a Purchase Order

To cancel a purchase order, select **Ordered** tab on the Purchase Order screen and click the **Cancel PO** button.

Deleting a Purchase Order

To delete a purchase order:

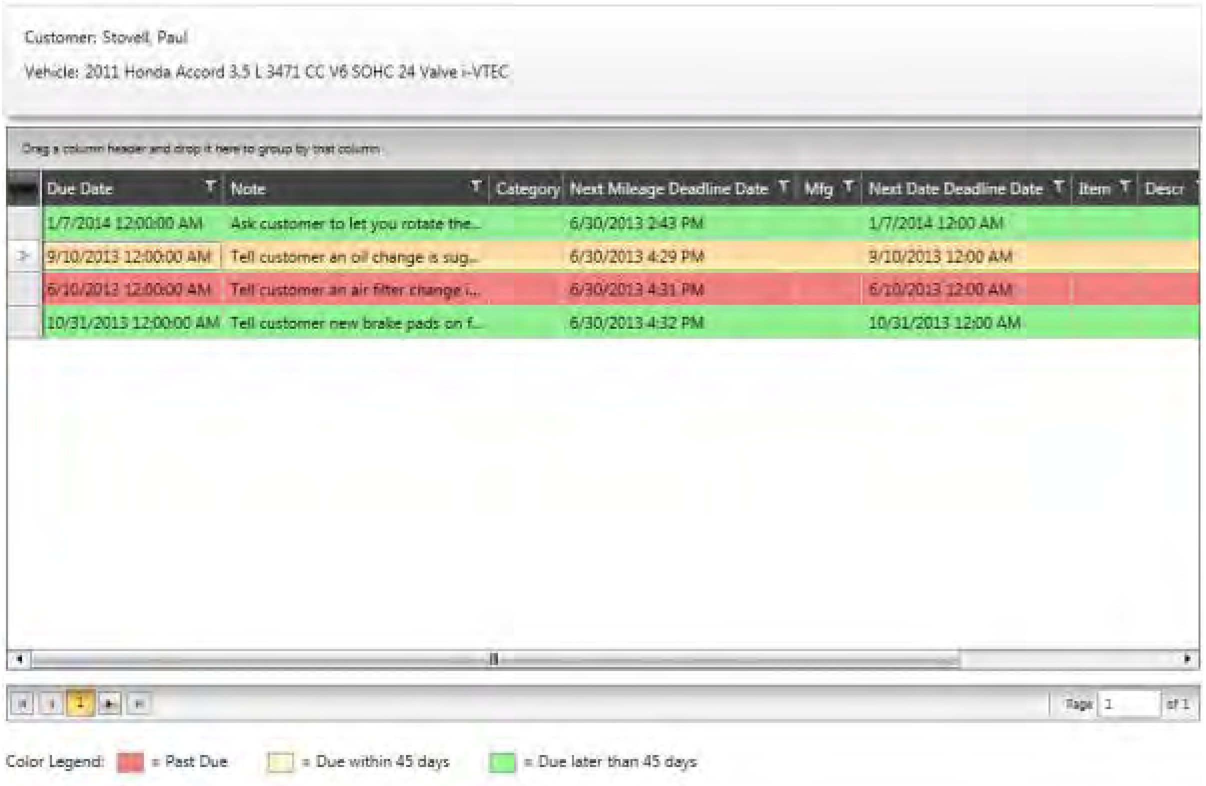
1. Click the appropriate purchase order from the **Purchase Order** screen.
2. Click the **Delete** button.

Recommended Services

About Recommended Services

The **Recommended Services** feature allows you to identify specific services, such as a tune-up or an oil change, that should be performed on a vehicle by a certain date or mileage milestone. When a customer comes in to have a recommended service performed on a vehicle, you can copy that item directly to the current work order from the recommended services list.

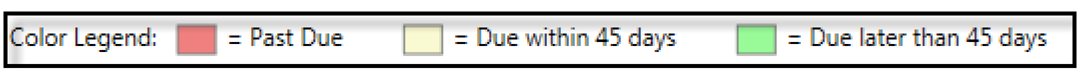
Recommended services are managed from the recommended services screen, and can also be used to generate mailings or create new business.



Recommended Services Screen

Color Coding and Color Legend

Color coding on this screen helps you to quickly see due dates for each item. The **color legend** at the bottom of the screen identifies the meaning of each color.

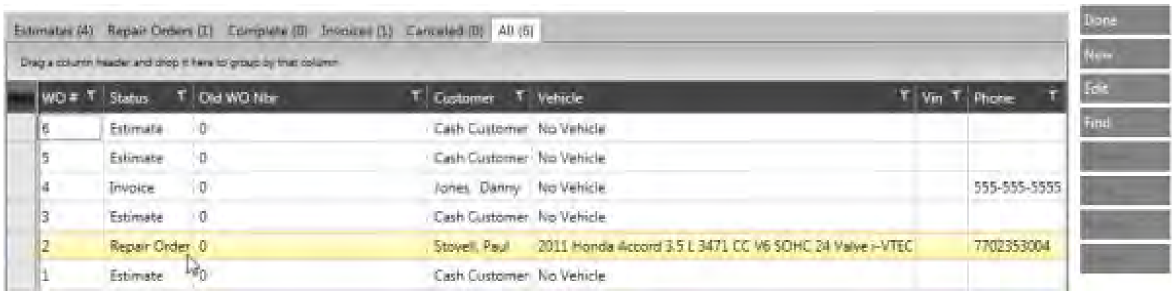


Color Legend

Accessing the Vehicle Recommended Services Form

To access the Vehicle Recommended Services Form:

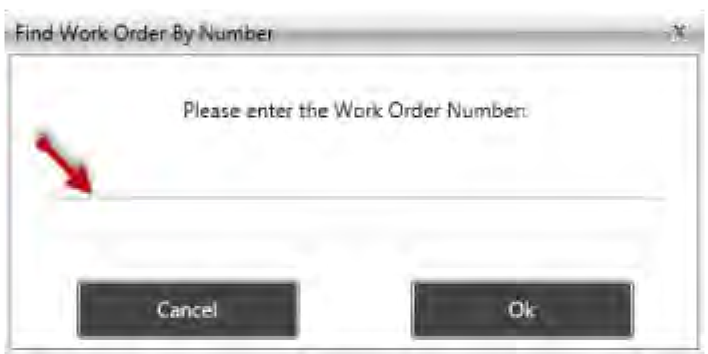
1. Click the **Work Orders** icon  from the NAPA TRACS main menu to display the work order list screen.



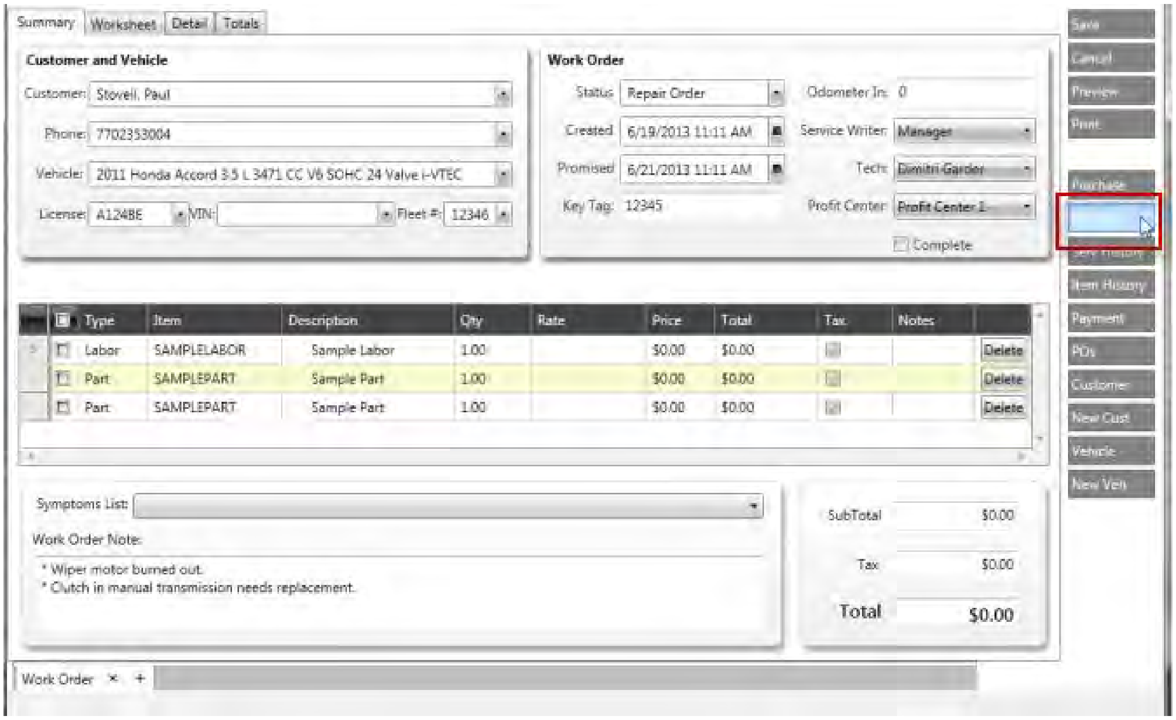
2. Click the **Repair Orders** tab to filter the display work orders only.

Note: A repair order is the same thing as a work order.

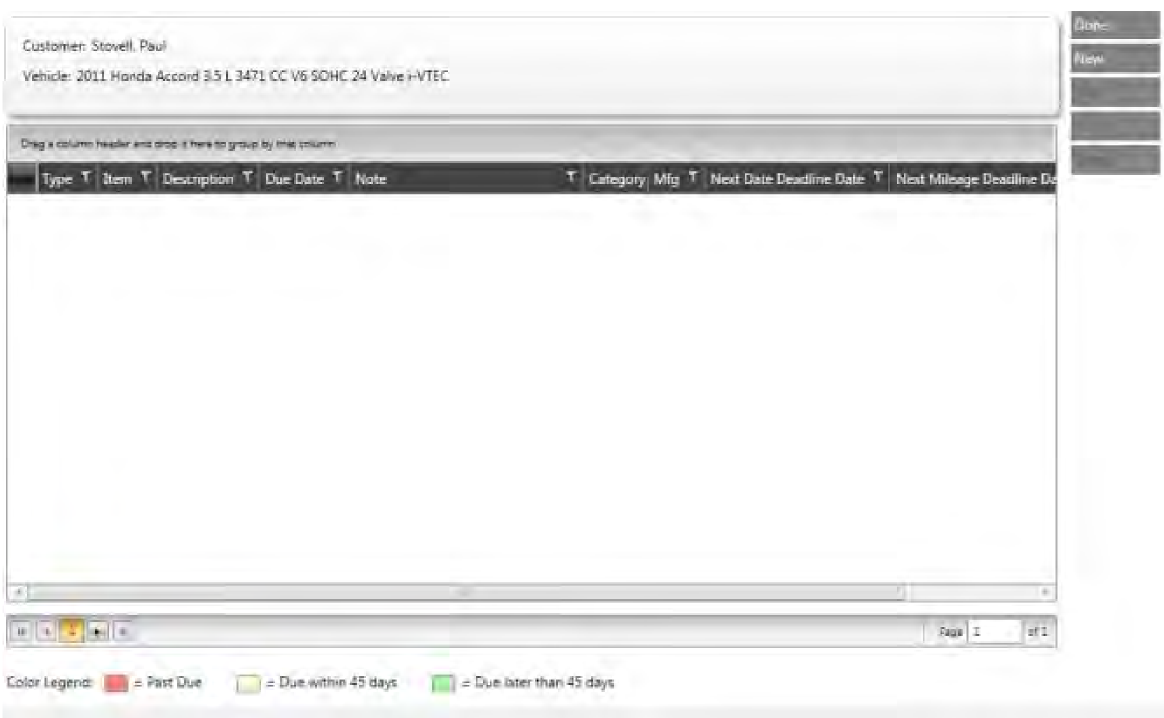
User Tip:
If your repair order list is lengthy **and** you have the work order number, select a work order and click the **Find** button on the right side of the screen to display the **Find Work Order by Number** dialog box. Type the work order number in the field provided and click **OK**.



3. Double-click on a work order to display the work order.
4. Click the **Rec Serv** button to add, edit, copy, or delete the recommended service.



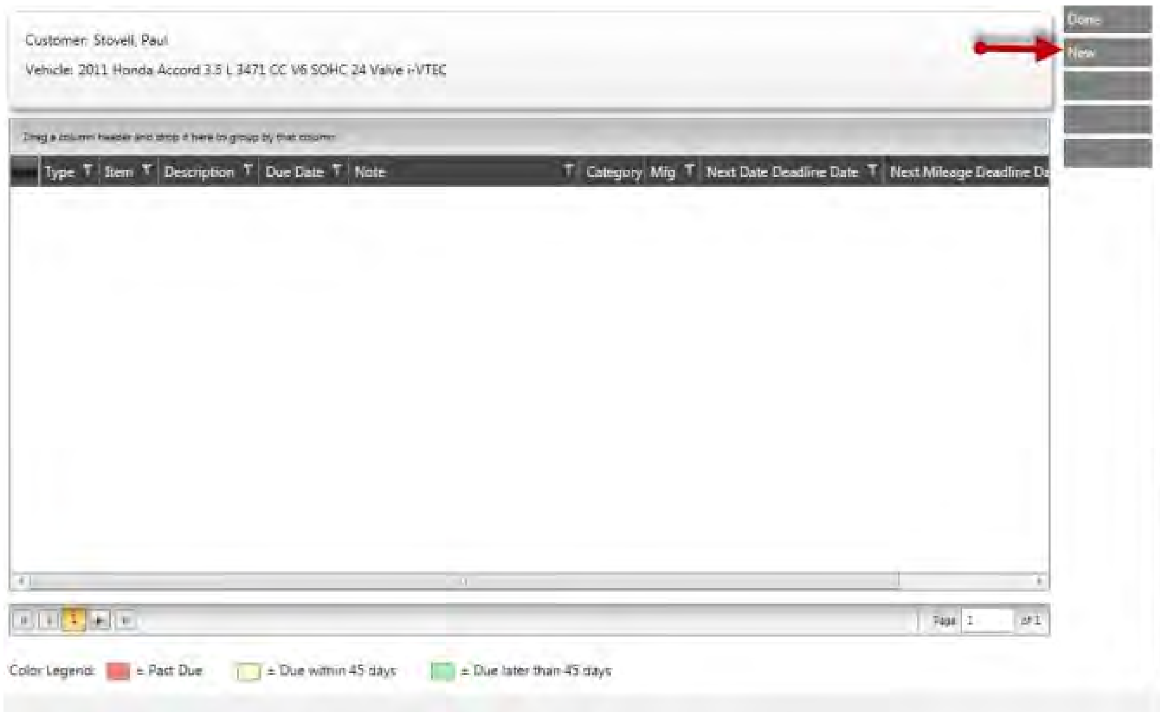
The system displays the Recommended Services screen. Use this screen to recommend a specific service to be performed on the vehicle.



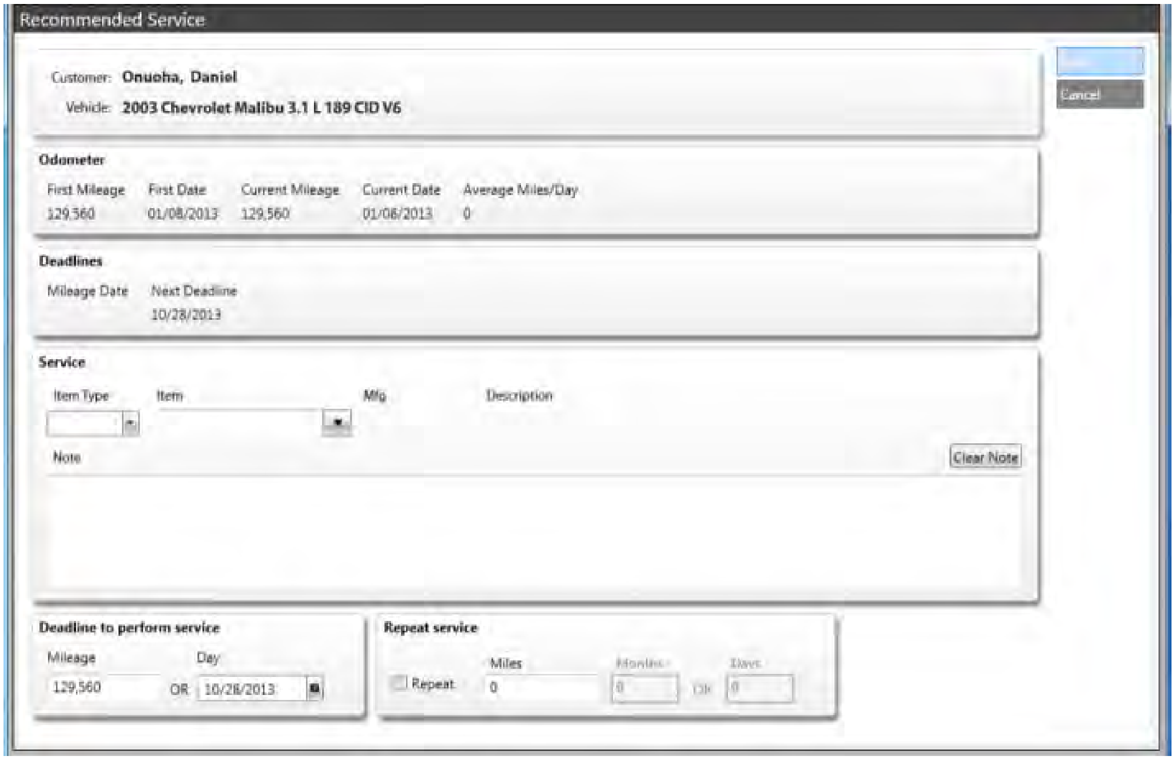
Adding a New Recommended Service to a Vehicle

To add a recommended service:

1. Click the **New** button from the Recommended Services screen.



The **Recommended Service** window appears.



2. Click the down arrow in the **Item Type** field to select from the list of available items.
3. Click the down arrow in the **Item** field to select from the list of items.

Note: Items must exist in your item file to be placed on your recommended services list.

4. Type the description of the recommended service in the **Note** field (optional).
5. Type a number in the **Mileage** field to recommend a service based on a pre-determined mileage.

 - or -
Click the down arrow in the **Date** field and click on a date to recommend a service occur before a specified date.

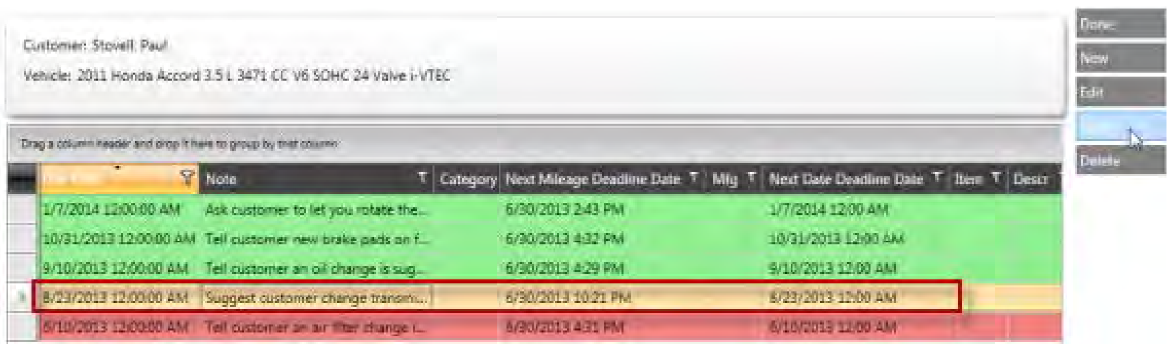
6. Place a check mark in the **Repeat** check box to recommend service to recur automatically in the system.
7. Enter the mileage, months, or days when the recommended service should recur.
8. Click the **Save** button to return to the recommended services screen.

Copying a Recommended Service

Use the copy feature to copy a recommended service to the current work order.

To copy a recommended service:

1. Open a work order where the system will add the copied recommended service.
2. Open a work order to copy a recommended service.
3. Highlight the item to be copied from the **Recommended Services** screen and click the **Copy** button.

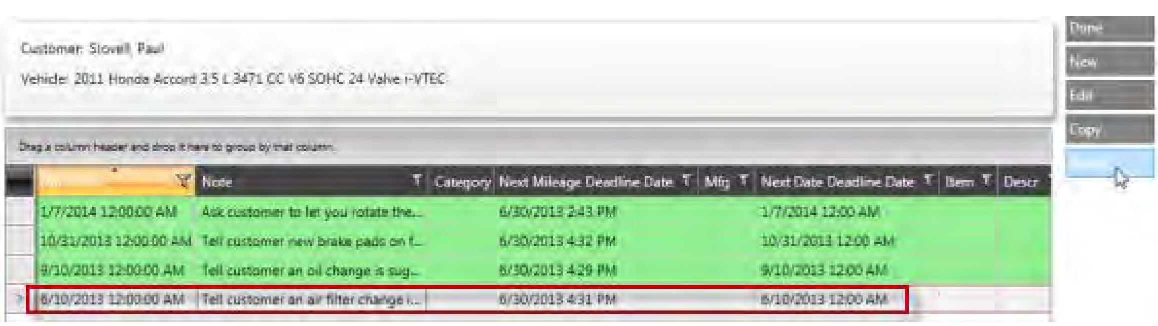


4. Click the **Done** button. The system displays the recommended service on the current work order.

Deleting a Recommended Service

To delete an existing recommended service:

1. Click the recommended service to be deleted from the **Recommended Service** screen.

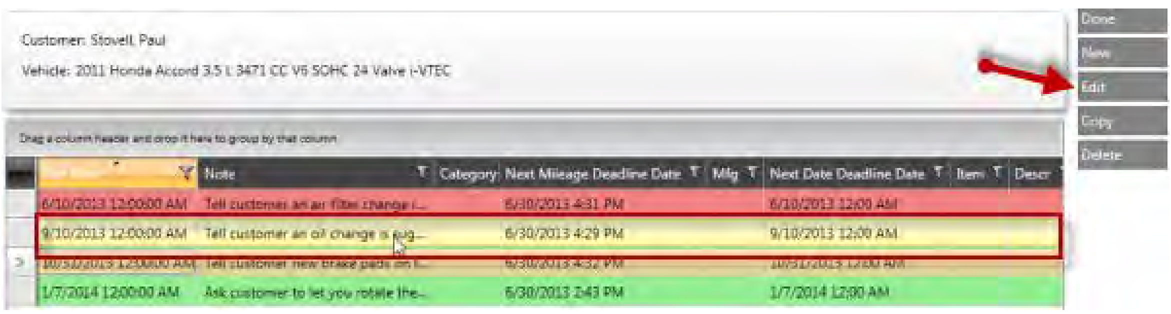


2. Click the **Delete** button to remove the recommended service item.
3. Click the **Done** button to close the window.

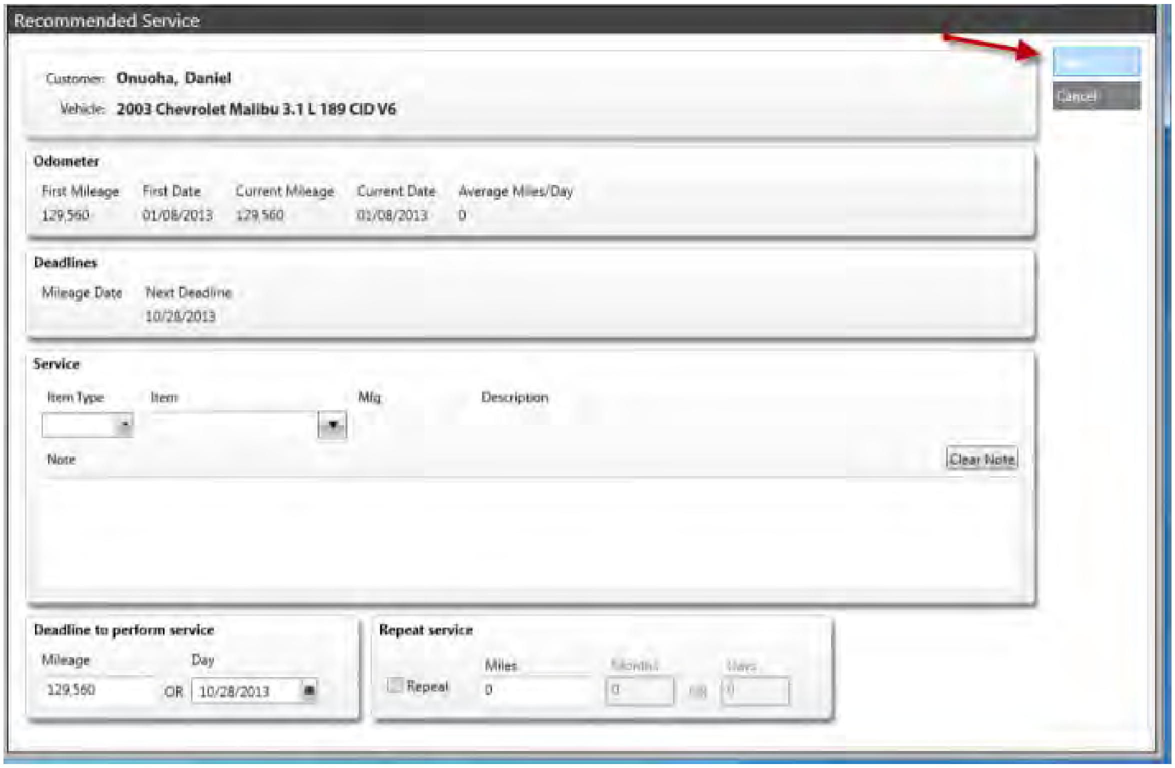
Editing an Existing Recommended Service

To edit existing recommended services:

1. Highlight the item to be edited from the Recommended Services screen and press the **Edit** button.



The **Recommended Service** window appears.



2. Make changes to the fields as required, and then click the **Save** button to return to the Recommended Services screen.

Chapter 8 Integrating TRACS and QuickBooks

Configuring the TRACS Export Dictionary

Note: Functionality for this feature will be available in a future release of NAPA TRACS.

Chapter 9 Reports

TRACS Reports List

This topic shows a list of available TRACS reports. Click on a report name to display information for that report in a separate window.

Accounts Receivable Reports

- Transaction Detail Report
- Transaction Summary Report

Item and Inventory Reports

- Item Movement Report
- Item Sales Report
- Item On Hand Report
- Item Valuation Report

Productivity Reports

- Technician Productivity Report
- Service Writer Productivity Report

Purchasing Reports

- Vendor Received PO List

Sales Reports

- Sales Analysis Summary Report
- Sales Analysis Details Report
- Sales By Tax Class Report
- Sales Register Summary Report
- Sales Register Detail Report
- Sales By Category Report
- Sales By Service Writer Report

Creating Reports

NAPA TRACS provides several reports that can be used for administrative purposes that enable you to analyze your day-to-day business activities. The reports are grouped by category such as Accounts Receivable, Sales, and so on. Some NAPA TRACS reports will display a **Report Settings** screen that includes selection criteria such as a date range, which enable you to narrow the data to a specific time frame. The criteria will vary for each report.

Accessing and Generating Reports

Use the **TRACS Reporting** feature to access and run reports.

Follow the steps below to access a report and generate a report that has **no** selection criteria:

1. Click the **TRACS Reporting** icon .
2. The **Report Selection** screen appears in the **Reports** tab.

3. Click on a report category bar such as **Sales Reports** to display a list of available reports pertaining to sales information.

4. Click on a report such as the **Sales Analysis Detail Report** to generate and display the report on the screen.

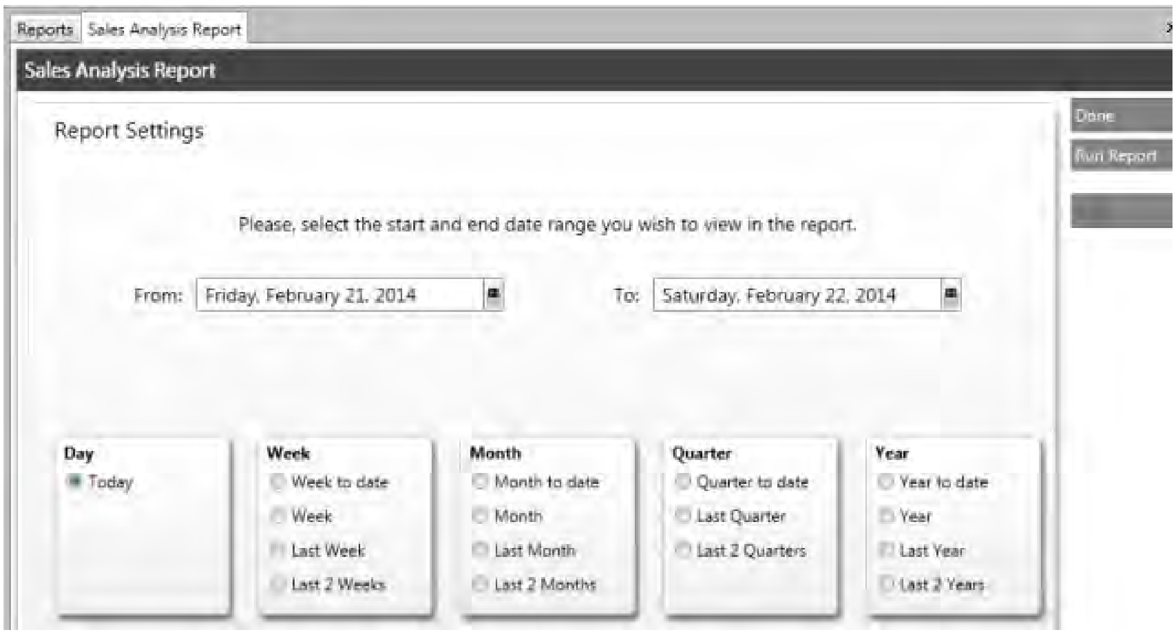
Follow the steps below to access a report and generate a report that **has** selection criteria:

1. Click the **TRACS Reporting** icon .

2. The **Report Selection** screen appears in the **Reports** tab.

3. Click on a report category bar such as **Sales Reports** to display a list of available reports pertaining to sales information.

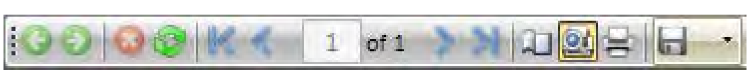
4. Click on a report such as the **Sales Analysis Detail Report**. The **Report Settings** screen appears.



5. Select options, and then click the **Run Report** button. The system generates and displays the report on the screen.
6. Slide the **Zoom** level at the bottom right corner of the screen to the right or left to increase or decrease the preview layout of the report. You can also select a percentage.

Report Toolbar

When the system displays a report on the screen, a toolbar with icons appears above the report. You use the **Report Toolbar** to navigate, preview, print, and export reports.



Note: Some functionality may be available in a future version of NAPA TRACS.

The following table describes the icon functions:

Icon	Description	Icon	Description

	Page backward in history		Display next page
	Page forward in history		Display last page
	Stop		Page setup options
	Refresh the data displayed		Switch between print preview and interactive view
	Display first page		Print report
	Display previous page		Export page to the following file formats: (PDF, CSV, Excel 97-2003, Rich Text, TIFF, Web Archive)
1	Current number of the page displayed on the screen		

See Printing and Exporting Reports

Printing and Exporting Reports

This topic explains how to set up page settings, print reports, and export reports to different file formats.

Changing Page Settings

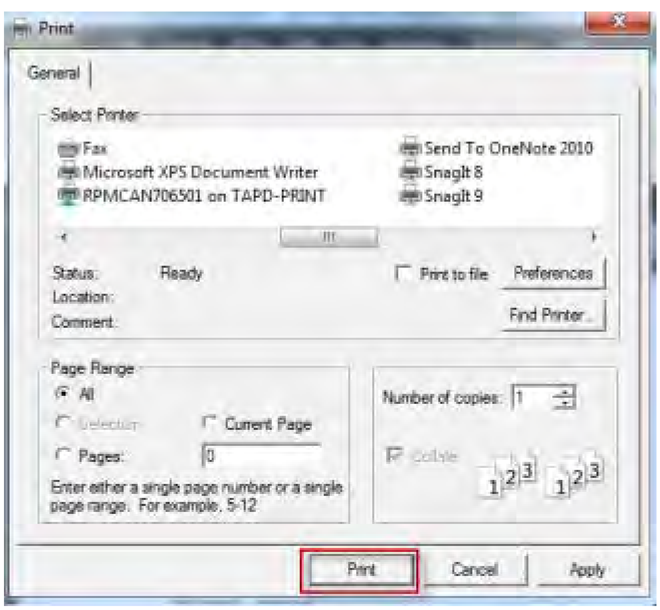
If you need to change the margins, orientation, or paper size of reports. Follow the steps below to change page settings:

1. Click the **Page Setup** icon . The **Page Setup** window appears.

2. Select a **Size**.
3. Click on the **Portrait** or **Landscape** radio button.
4. Edit the margins, if applicable.
5. Click the **OK** button to save changes or click the **Cancel** button to ignore.

Printing Reports

1. Click the **Print report** button . The **Print** window appears.



2. Select a printer, and then click the **Print** button.

3. Click the **Done** button, or click the **x** button located in the upper right-hand corner of the screen under the **EXIT** icon.

Exporting Report Data

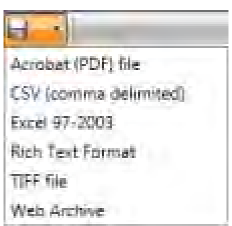
Export report data from any report into the following file formats:

- Adobe PDF
- CSV (comma-limited)
- Excel 97-2003
- Rich Text
- TIFF
- Web Archive

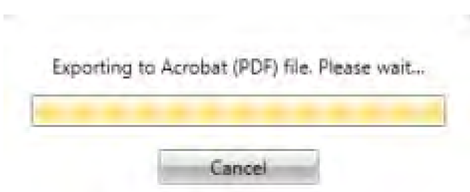
Follow the steps below to export a report to another file type:

1. Display a report on the screen.
2. Click the **Export** icon.

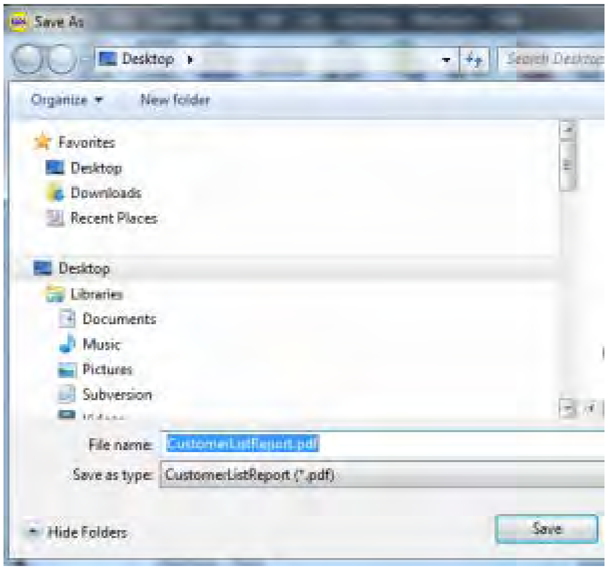
3. Select a file format such as Acrobat PDF.



A system progress window appears.



4. When the process completes, Windows Explorer opens with the **File name** populated with the report name and proper file extension as default.



5. Save the file in the default location or a location of your choice.

See [Creating Reports]

Accounts Receivable

Aged Accounts Report

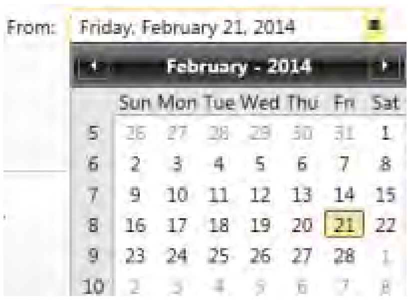
The **Aged Accounts Report** is a lists all customers that have an accounts receivable balance. The report displays the following information:

- Customer Name
- Balance
- Current 30, 60, and over 90 period balances
- Totals

To view and print a Transaction Detail Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Accounts Receivable** bar to view a list of A/R reports.

3. Click the **Aged Accounts Report.** The **Report Settings** screen appears with **the Report Date** set to today's date as the default time period.
4. Click on the calendar button in the **Report Date** box.



5. Click the **Run Report** button. The system displays the report in a separate tab.
6. Click the **Print report** button  and the **Print** window appears.
7. Select a printer, and then click the **Print** button.
8. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

Statements Report

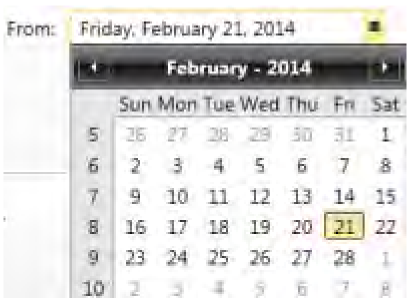
The **Statements Report** is a listing of all customers' statements (Interim or Last) that meet the configured criteria.

- Date
- Transaction
- Reference (invoice and check number)
- Customer
- Debit and Credit amounts

To view and print a Statements Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Accounts Receivable** bar to view a list of sales reports.
3. Click the **Statements Report.** The **Report Settings** screen appears with the **Statement Type** selected as **Interim Statement** as the default Statement and default Dates.

4. Click on the **Last Statement** radio button to generate a Last Statement time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.
   - and -
   Click the **Opening Date** and **Closing Date** range calendar icons, and select dates.



5. Click the **Run Report** button. The system displays the report in a separate tab.
6. Click the **Print report** button  and the **Print** window appears.
7. Select a printer, and then click the **Print** button.
8. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

Transaction Detail Report

The **Transaction Detail Report** is a listing of all transactions including invoices and receipts within the specified date range sorted by date. The report displays the following information grouped by vendor:

- Date
- Type
- Number
- Customer
- Amount
- Description

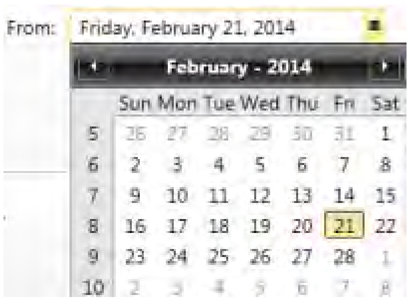
To view and print a Transaction Detail Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Accounts Receivable** bar to view a list of sales reports.

3. Click the **Transaction Detail Report.** The **Report Settings** screen appears with **Today** selected as the default time period.
4. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.

   - or-

   Click the **From** and **To** date range calendar icons, and select dates.



5. Click the **Run Report** button. The system displays the report in a separate tab.
6. Click the **Print report** button  and the **Print** window appears.
7. Select a printer, and then click the **Print** button.
8. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

Transaction Summary Report

The **Transaction Summary Report** is a listing of transaction types, amount and number of transactions. The report also displays all payments received broken down into cash, check, and credit card payments

To view and print a Transaction Summary Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Accounts Receivable** bar to view a list of sales reports.
3. Click the **Transaction Summary Report.** The **Report Settings** screen appears with **Today** selected as the default time period.
4. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.

   - or-

   Click the **From** and **To** date range calendar icons, and select dates.

5. Click the **Run Report** button. The system displays the report in a separate tab.
6. Click the **Print report** button  and the **Print** window appears.
7. Select a printer, and then click the **Print** button.
8. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

Item and Inventory

Item Movement Report

The **Item Movement Report** is a listing of queried items that were received and sold within a specified date range. The report displays the following information:

- Mfg
- Item Code
- Description
- Stocked
- Start Quantity
- Received Quantity
- Sold Quantity
- Adjusted Quantity
- End Quantity

To view and print an Item Movement Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Item and Inventory Reports** bar to view a list of item and inventory reports.

3. Click the **Item Movement Report.** The **Search Items tab** appears.
4. Use the **Search Items** tab to select criteria, and then click the **Find Items** button.
5. The **Report Settings** screen appears with **Today** selected as the default time period.
4. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.

   - or-

   Click the **From** and **To** date range calendar icons, and select dates.

5. Click the **Run Report** button. The system displays the report in a separate tab.
6. Click the **Print report** button  and the **Print** window appears.
7. Select a printer, and then click the **Print** button.
8. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

Item Sales Report

The **Item Sales** report is a listing of queried items sold within a specified date range. The report displays the following information:

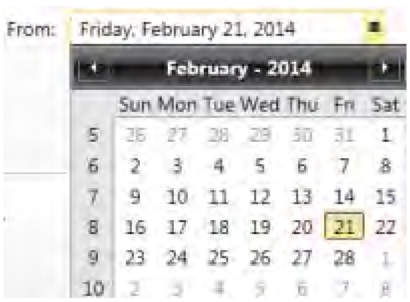
- Mfg
- Item Code
- Description
- Qty
- Net Sales
- Costs and Gross Profit Percent

To view and print an Item Sales Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Item and Inventory Reports** bar to view a list of item and inventory reports.
3. Click the **Item Sales Report.** The **Search Items tab** appears.
4. Use the **Search Items** tab to select criteria, and then click the **Find Items** button.
5. The **Report Settings** screen appears with **Today** selected as the default time period.
6. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.

   - or-

   Click the **From** and **To** date range calendar icons, and select dates.



7. Click the **Run Report** button. The system displays the report in a separate tab.
8. Click the **Print report** button  and the **Print** window appears.
9. Select a printer, and then click the **Print** button.
10. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

Item On Hand Report

The **Item On Hand** report is a listing of queried items on hand, cost, and list values within a specified date range. The report displays the following information:

- Mfg
- Item Code
- Description
- On Hand
- Cost
- List

To view and print an Item On Hand Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Item and Inventory Reports** bar to view a list of item and inventory reports.
3. Click the **Item On Hand Report.** The **Search Items tab** appears.
4. Use the **Search Items** tab to select criteria, and then click the **Find Items** button.
5. The **Report Settings** screen appears with **Today** selected as the default time period.
6. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.

   - or-

   Click the **From** and **To** date range calendar icons, and select dates.

7. Click the **Run Report** button. The system displays the report in a separate tab.
8. Click the **Print report** button  and the **Print** window appears.
9. Select a printer, and then click the **Print** button.
10. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

Item Valuation Report

The **Item Valuation** report is a listing of queried items on hand, cost, and dollar values within a specified date range. The report displays the following information:

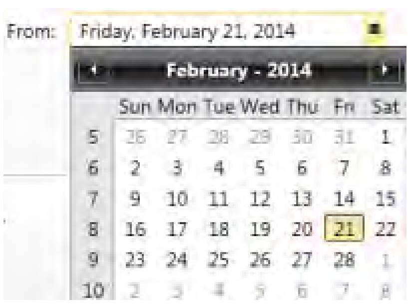
- Mfg
- Item Code
- Description
- On Hand Quantity
- On Hand Value
- Core Value

To view and print an Item Valuation Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Item and Inventory Reports** bar to view a list of item and inventory reports.
3. Click the **Item Valuation Report.** The **Search Items tab** appears.
4. Use the **Search Items** tab to select criteria, and then click the **Find Items** button.
5. The **Report Settings** screen appears with **Today** selected as the default time period.
6. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.

   - or-

   Click the **From** and **To** date range calendar icons, and select dates.



7. Click the **Run Report** button. The system displays the report in a separate tab.
8. Click the **Print report** button  and the **Print** window appears.
9. Select a printer, and then click the **Print** button.
10. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

Productivity

Service Writer Productivity Report

The **Service Writer Productivity Report** is a listing of all parts ad labor sales within the specified date range for each service writer. The report displays the following information:

- Invoice #
- Billed Amount
- Gross Profit

- Actual Hours
- Billed Hour
- Billed Amount
- Gross Profit
- Sublet
- Charges
- Supplies
- Discount
- Net Sales

To view and print a Service Writer Productivity Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Productivity Reports** bar to view a list of productivity reports.
3. Click the **Service Writer Productivity Report.** The **Report Settings** screen appears with **Today** selected as the default time period.
4. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.

   \- or-

   Click the **From** and **To** date range calendar icons, and select dates.

5. Click the **Run Report** button. The system displays the report in a separate tab.
6. Click the **Print report** button  and the **Print** window appears.
7. Select a printer, and then click the **Print** button.
8. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

Technician Productivity Report

The **Technician Productivity Report** is a listing of all parts and labor sales within the specified date range for each technician. The report displays the following information:

- Invoice #
- Billed Amount
- Gross Profit
- Actual Hours
- Billed Hour
- Billed Amount
- Gross Profit
- Sublet
- Charges
- Supplies
- Discount
- Net Sales

To view and print a Technician Productivity Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Productivity Reports** bar to view a list of sales reports.
3. Click the **Technician Productivity Report.** The **Report Settings** screen appears with **Today** selected as the default time period.
4. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.

   - or-

   Click the **From** and **To** date range calendar icons, and select dates.

5. Click the **Run Report** button. The system displays the report in a separate tab.
6. Click the **Print report** button  and the **Print** window appears.
7. Select a printer, and then click the **Print** button.

8. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

Technician Time Sheet Report

The **Technician Time Sheet Report** (**Invoiced**) is a listing of all parts and labor sales within the specified date range for each technician. The report displays the following information:

- Invoice #
- Billed Amount
- Gross Profit
- Actual Hours
- Billed Hour
- Billed Amount
- Gross Profit
- Sublet
- Charges
- Supplies
- Discount
- Net Sales

To view and print a Technician Time Sheet Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Productivity Reports** bar to view a list of productivity reports.
3. Click the **Technician Time Sheet Report.** The **Report Settings** screen appears with **January 1** selected as the default **From** time period and **Today** as the **To** time period.
4. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.
   - or-
   Click the **From** and **To** date range calendar icons, and select dates.

5. Click the **Run Report** button. The system displays the report in a separate tab.
6. Click the **Print report** button  and the **Print** window appears.
7. Select a printer, and then click the **Print** button.
8. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

Purchasing

Vendor Received PO List

The **Vendor Received PO List** is a listing of all received purchase orders by vendor within the specified date range. The report displays the following information grouped by vendor:

- PO #
- Ordered
- Received
- Author
- Vendor Invoice #
- WO#
- Total Cost
- Total Received

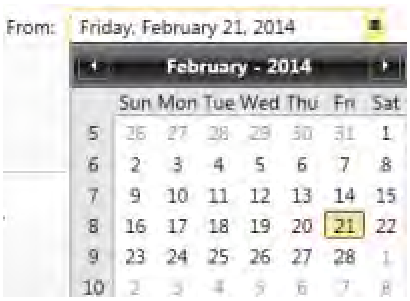
To view and print a Vendor Received PO List:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Purchasing Reports** bar to view a list of sales reports.

3. Click the **Vendor Received PO List.** The **Report Settings** screen appears with **Today** selected as the default time period.
4. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.

   - or-

   Click the **From** and **To** date range calendar icons, and select dates.



5. Click the **Run Report** button. The system displays the report in a separate tab.
6. Click the **Print report** button  and the **Print** window appears.
7. Select a printer, and then click the **Print** button.
8. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

Sales

Customer Sales Ranking by Customer Type Report

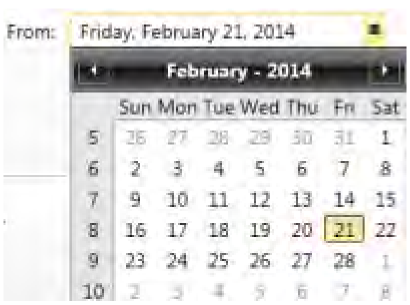
The **Customer Sales Racking by Customer Type Report** is a listing of customer sales ranked by highest sales amount to the lowest amount. The report is grouped by customer type. This report displays the following information:

- Customer Name
- Phone Number
- Part GP%
- Labor GP%
- Labor Profit
- Labor Sales
- Other GP%
- Total GP%
- Other Profit
- Other Sales

- Part Sales
- Total Profit
- Total Sales

To view and print a Customer Sales By Ranking by Customer Type Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Sales Reports** bar to view a list of sales reports.
3. Click the **Customer Sales By Customer Type report.** The **Report Settings** screen appears with **Today** selected as the default time period.
4. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.
   - or-
   Click the **From** and **To** date range calendar icons, and select dates.



5. Click the **Run Report** button. The system displays the report in a separate tab.
6. Click the **Print report** button  and the **Print** window appears.
7. Select a printer, and then click the **Print** button.
8. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

Sales Analysis Detail Report

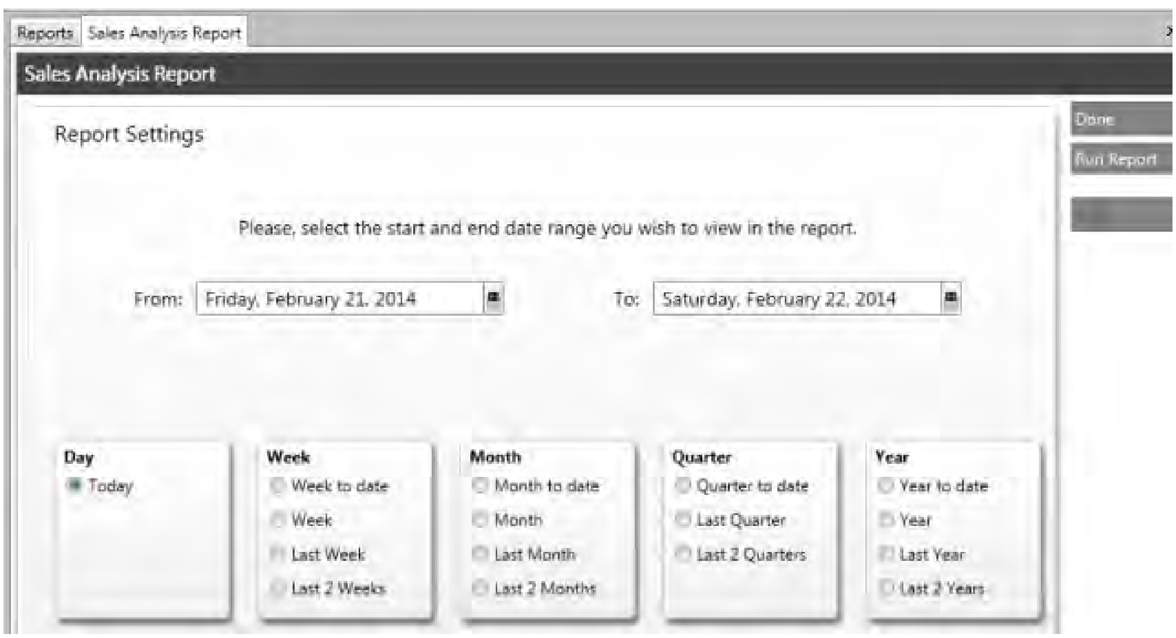
The **Sales Analysis Detail Report** is a listing of all parts, labor, and sublet sales with subtotals and totals. The report provides the following sales information:

- Invoice number
- Technician
- Item

- Description
- Cost
- Discount
- Price
- Profit
- % GP (Gross Profit)

To view and print a Sales Analysis Detail Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Sales Reports** bar to view a list of sales reports.
3. Click the **Sales Analysis Detail Report.** The **Report Settings** screen appears with **Today** selected as the default time period.



4. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.
   - or-
   Click the **From** and **To** date range calendar icons, and select dates.

5. Click the **Run Report** button. The system displays the report in a separate tab.
6. Click the **Print report** button and the **Print** window appears.
6. Select a printer, and then click the **Print** button.
7. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

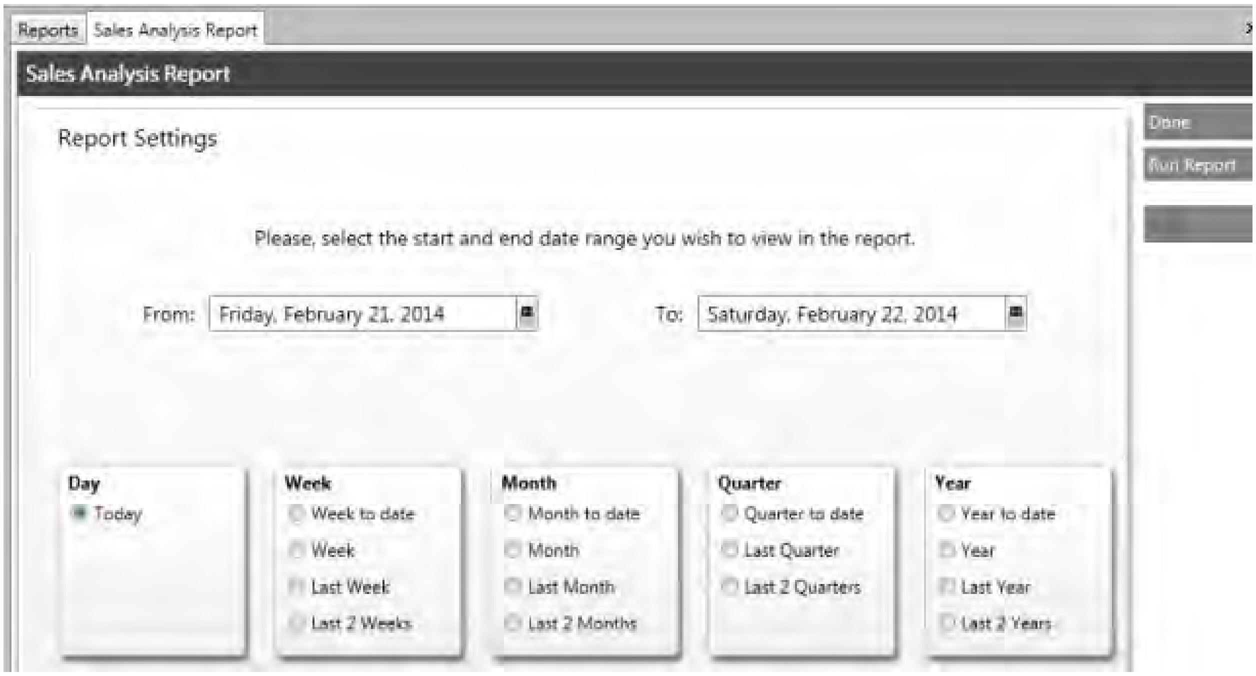
Sales Analysis Summary Report

The **Sales Analysis Summary Report** is a listing of grand totals for all parts, labor, and sublet sales within the specified date range. The report displays sales totals by item type such as parts, tires, and so on. Other information includes:

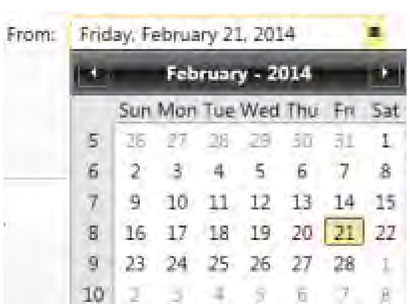
- Cost
- Discount
- Sales
- Profit Amount
- Gross Profit
- Gross Profit %

To view and print a Sales Analysis Summary Report:

1. Click the **TRACS Reporting** icon from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Sales Reports** bar to view a list of sales reports.
3. Click the **Sales Analysis Summary Report.** The **Report Settings** screen appears with **Today** selected as the default time period.



4. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.
   - or-
   Click the **From** and **To** date range calendar icons, and select dates.



5. Click the **Run Report** button. The system displays the report in a separate tab.
6. Click the **Print report** button  and the **Print** window appears.
7. Select a printer, and then click the **Print** button.
8. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

Sales Register Detail Report

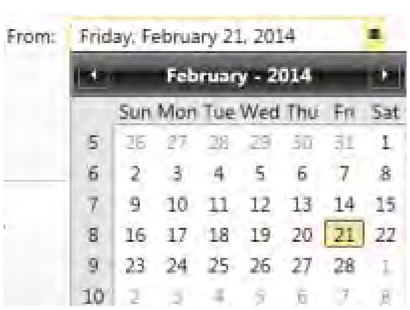
The **Sales Register Detail Report** is a listing of all invoices within the specified date range. The report displays the following information for parts, tires, wheel, labor, sublet, charges, and supplies:

- Sales
- Discount
- Net Sale
- Cost
- Gross Profit
- Gross Profit %
- % Total Sales

A sales register summary totals appears on the last page.

To view and print a Sales Register Detail Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Sales Reports** bar to view a list of sales reports.
3. Click the **Sales Register Detail Report.** The **Report Settings** screen appears with **Today** selected as the default time period.
4. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.
   - or-
   Click the **From** and **To** date range calendar icons, and select dates.



5. Click the **Run Report** button. The system displays the report in a separate tab.
6. Click the **Print report** button  and the **Print** window appears.
7. Select a printer, and then click the **Print** button.
8. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

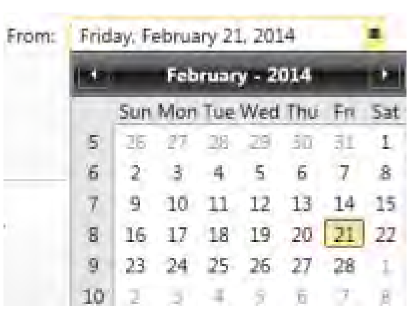
Sales Register Summary Report

The **Sales Register Summary Report** is a listing of summary information of all invoice sales within the specified date range. The report displays the following information for parts, tires, wheel, labor, sublet, and charge:

- Sales
- Discount
- Net Sales
- Cost
- Gross Profit
- Gross Profit %
- % Total Sales

To view and print a Sales Register Summary Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Sales Reports** bar to view a list of sales reports.
3. Click the **Sales Register Summary Report.** The **Report Settings** screen appears with **Today** selected as the default time period.
4. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.
   - or-
   Click the **From** and **To** date range calendar icons, and select dates.



5. Click the **Run Report** button. The system displays the report in a separate tab.
6. Click the **Print report** button  and the **Print** window appears.
7. Select a printer, and then click the **Print** button.
8. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

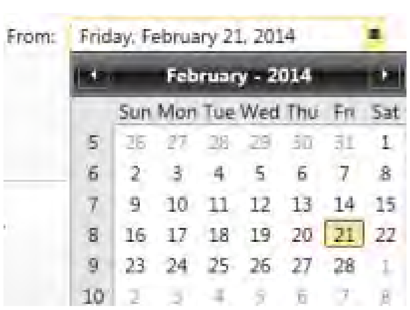
Sales By Category Report

The **Sales By Category Report** is a listing of sales summary information of all invoice sales within the specified date range by sales category such as alignment, batteries, and so on. The report displays the following information for parts, tires, wheel, labor, sublet, and charges:

- Sales
- Discount
- Net Sales
- Cost
- Gross Profit
- Gross Profit %
- % Total Sales

To view and print a Sales By Category Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Sales Reports** bar to view a list of sales reports.
3. Click the **Sales By Category Report.** The **Report Settings** screen appears with **Today** selected as the default time period.
4. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.
   - or-
   Click the **From** and **To** date range calendar icons, and select dates.



5. Click the **Run Report** button. The system displays the report in a separate tab.
6. Click the **Print report** button  and the **Print** window appears.
7. Select a printer, and then click the **Print** button.

8. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

Sales By Profit Center Report

The **Sales By Profit Center** report is a listing of sales summary information of all invoice sales within the specified date range by profit center such as alignment, batteries, and so on. The report displays the following information for parts, tires, wheel, labor, sublet, and charges:

- Sales
- Discount
- Net Sales
- Cost
- Gross Profit
- Gross Profit %
- % Total Sales

To view and print a Sales By Profit Center Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Sales Reports** bar to view a list of sales reports.
3. Click the **Sales By Profit Center Report.** The **Report Settings** screen appears with **Today** selected as the default time period.
4. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.

   - or-

   Click the **From** and **To** date range calendar icons, and select dates.

5. Click the **Run Report** button. The system displays the report in a separate tab.

6. Click the **Print report** button  and the **Print** window appears.
7. Select a printer, and then click the **Print** button.
8. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

Sales By Customer Group Report

The **Sales By Customer Group** report is a listing of sales summary information of all invoice sales within the specified date range by customer group such as alignment, batteries, and so on. The report displays the following information for parts, tires, wheel, labor, sublet, and charges:

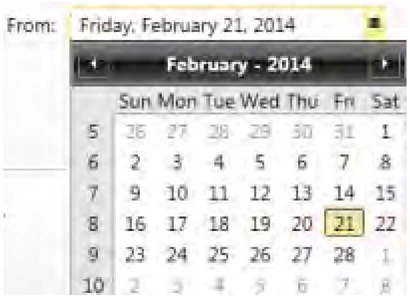
- Sales
- Discount
- Net Sales
- Cost
- Gross Profit
- Gross Profit %
- % Total Sales

To view and print a Sales By Customer Group Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Sales Reports** bar to view a list of sales reports.
3. Click the **Sales By Customer Group Report.** The **Report Settings** screen appears with **Today** selected as the default time period.
4. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.

   \- or-

   Click the **From** and **To** date range calendar icons, and select dates.



5. Click the **Run Report** button. The system displays the report in a separate tab.
6. Click the **Print report** button and the **Print** window appears.
7. Select a printer, and then click the **Print** button.
8. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

Sales By Service Writer Report

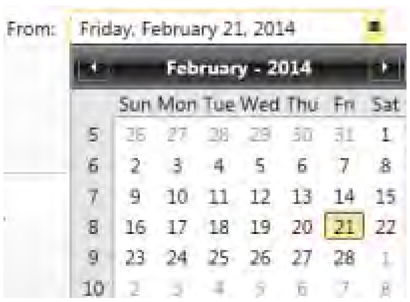
The **Sales By Service Writer** report is a listing of sales summary information of all invoice sales within the specified date range by sales service writer. The report displays the following information for parts, tires, wheel, labor, sublet, charges and supplies:

- Sales
- Discount
- Net Sales
- Cost
- Gross Profit
- Gross Profit %
- % Total Sales

To view and print a Sales By Service Writer Report:

1. Click the **TRACS Reporting** icon from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Sales Reports** bar to view a list of sales reports.
3. Click the **Sales By Service Writer Report.** The **Report Settings** screen appears with **Today** selected as the default time period.

4. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.
   - or-
   Click the **From** and **To** date range calendar icons, and select dates.



5. Click the **Run Report** button. The system displays the report in a separate tab.
6. Click the **Print report** button  and the **Print** window appears.
7. Select a printer, and then click the **Print** button.
8. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

Sales By Tax Class Report

The **Sales By Tax Class Report** is a listing of sales summary information of all invoice sales within the specified date range by tax class. The report displays the following information for parts, tires, wheel, labor, sublet, and charges:

- Sales
- Discount
- Net Sales
- Cost
- Gross Profit
- Gross Profit %
- % Total Sales

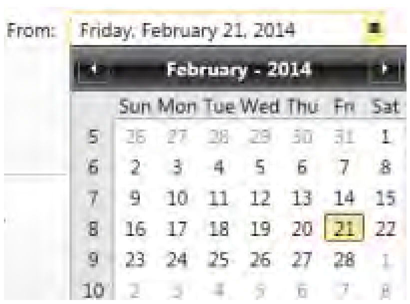
To view and print a Sales By Tax Class Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.

2. Click the **Sales Reports** bar to view a list of sales reports.
3. Click the **Sales By Tax Class Report.** The **Report Settings** screen appears with **Today** selected as the default time period.
4. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.

   \- or-

   Click the **From** and **To** date range calendar icons, and select dates.



5. Click the **Run Report** button. The system displays the report in a separate tab.
6. Click the **Print report** button  and the **Print** window appears.
7. Select a printer, and then click the **Print** button.
8. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

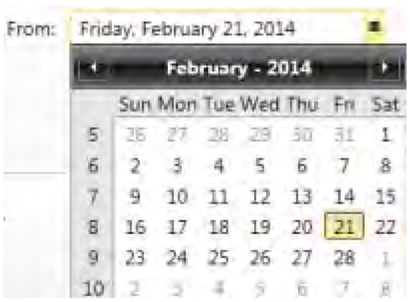
Sales By Vehicle Make Report

The **Sales By Vehicle Make Report** is a listing of sales summary information of all invoice sales within the specified date range by vehicle make. The report displays the following information for parts, tires, wheel, labor, sublet, charges, and supplies:

- Sales
- Discount
- Net Sales
- Cost
- Gross Profit
- Gross Profit %
- % Total Sales

To view and print a Sales By Vehicle Make Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Sales Reports** bar to view a list of sales reports.
3. Click the **Sales By Vehicle Make Report.** The **Report Settings** screen appears with **Today** selected as the default time period.
4. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.
   - or-
   Click the **From** and **To** date range calendar icons, and select dates.



5. Click the **Run Report** button. The system displays the report in a separate tab.
6. Click the **Print report** button  and the **Print** window appears.
7. Select a printer, and then click the **Print** button.
8. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

Sales By Vehicle Make, Model, Engine Report

The **Sales By Vehicle Make, Model, Engine Report** is a listing of sales summary information of all invoice sales within the specified date range by vehicle make, model, engine such as alignment, batteries, and so on. The report displays the following information for parts, tires, wheel, labor, sublet, and charges:

- Sales
- Discount
- Net Sales
- Cost
- Gross Profit
- Gross Profit %
- % Total Sales

To view and print a Sales By Vehicle Make, Model, Engine Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Sales Reports** bar to view a list of sales reports.
3. Click the **Sales By Vehicle Make, Model, Engine Report.** The **Report Settings** screen appears with **Today** selected as the default time period.
4. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.

   - or-

   Click the **From** and **To** date range calendar icons, and select dates.

5. Click the **Run Report** button. The system displays the report in a separate tab.
6. Click the **Print report** button  and the **Print** window appears.
7. Select a printer, and then click the **Print** button.
8. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

Sales By Vehicle Year, Make, Model, Engine Report

The **Sales By Vehicle Year, Make, Model, Engine Report** is a listing of sales summary information of all invoice sales within the specified date range by vehicle year, make, model, engine such as alignment, batteries, and so on. The report displays the following information for parts, tires, wheel, labor, sublet, and charges:

- Sales
- Discount
- Net Sales
- Cost

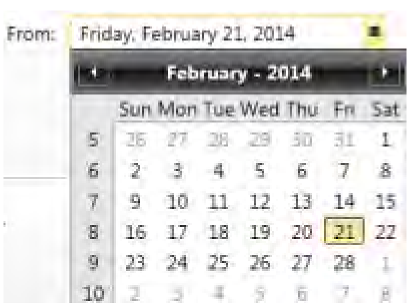
- Gross Profit
- Gross Profit %
- % Total Sales

To view and print a Sales By Vehicle Make, Model, Engine Report:

1. Click the **TRACS Reporting** icon  from the menu bar. The **Report Selection** screen appears in the **Reports** tab.
2. Click the **Sales Reports** bar to view a list of sales reports.
3. Click the **Sales By Vehicle Year, Make, Model, Engine Report.** The **Report Settings** screen appears with **Today** selected as the default time period.
4. Click on another predefined time period radio button in the **Day**, **Week**, **Month**, **Quarter**, or **Year** sections.

   - or-

   Click the **From** and **To** date range calendar icons, and select dates.



5. Click the **Run Report** button. The system displays the report in a separate tab.
6. Click the **Print report** button  and the **Print** window appears.
7. Select a printer, and then click the **Print** button.
8. Click the **Done** button or click the "**x**" button located in the upper right-hand corner of the screen under the **Exit** icon.

Chapter 10 NAPA PROLink Catalog

NAPA PROLink Catalog

The NAPA PROLink Catalog program is a powerful tool that enables you to search for parts in your inventory, plus the inventory of nearby NAPA stores and distribution centers. You typically use PROLink when creating an order and add a specific part to an order. However, PROLink includes standalone features such as parts catalogs, reference materials, and Mitchell OnDemand.

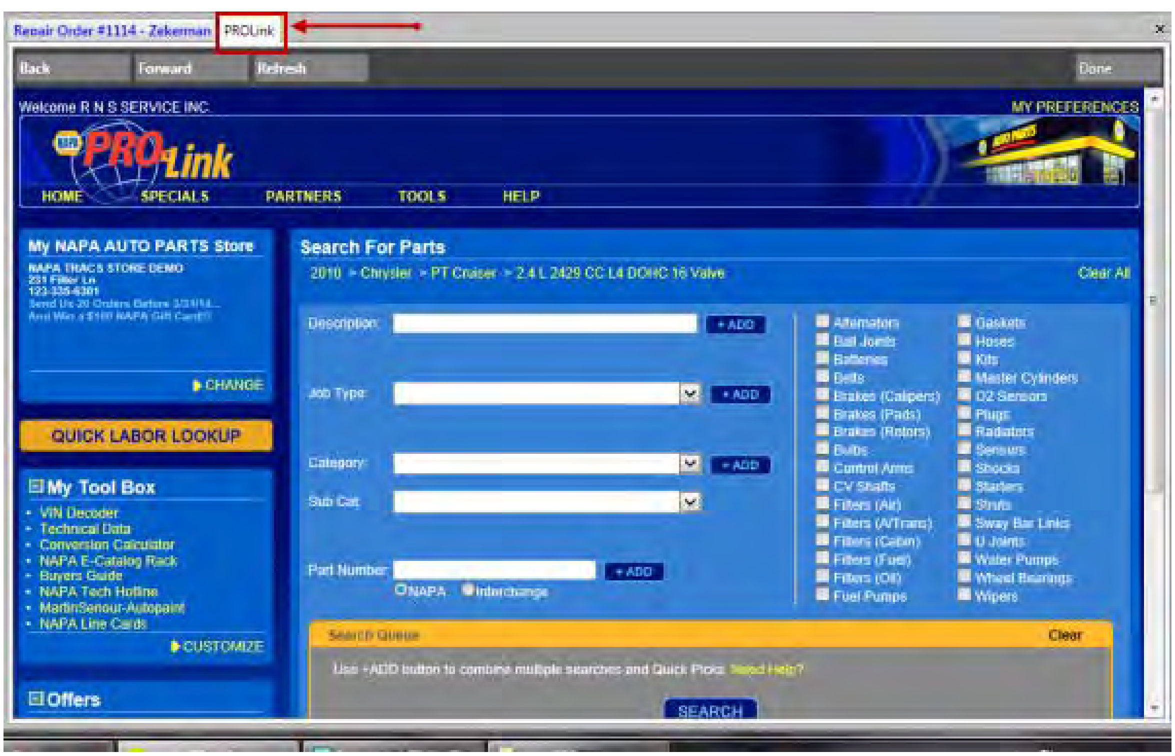
Note: The information provided in this topic is general in nature. Consult your NAPA TRACS customer support agent for additional questions on using The PROLink Catalog.

Accessing PROLink

To access PROLink:

1. Make sure you have a work order open on your screen.
2. Click on the **NAPA PROLink Catalog** icon on the NAPA TRACS menu bar.

The NAPA PROLink screen appears in a separate tabbed screen.

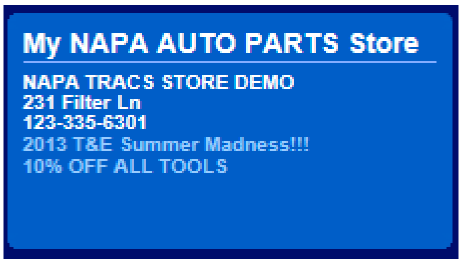


About Your NAPA PROLink Interface

This section describes the various parts of the NAPA PROLink.

Default Parts Store Location

The NAPA PROLink interface defaults to a predetermined NAPA store location used to find items not in your own inventory. The default store location is displayed on the PROLink home screen with the title **My NAPA AUTO PARTS Store**.



Contact your NAPA TRACS customer support agent for instructions on how to change your default store location.

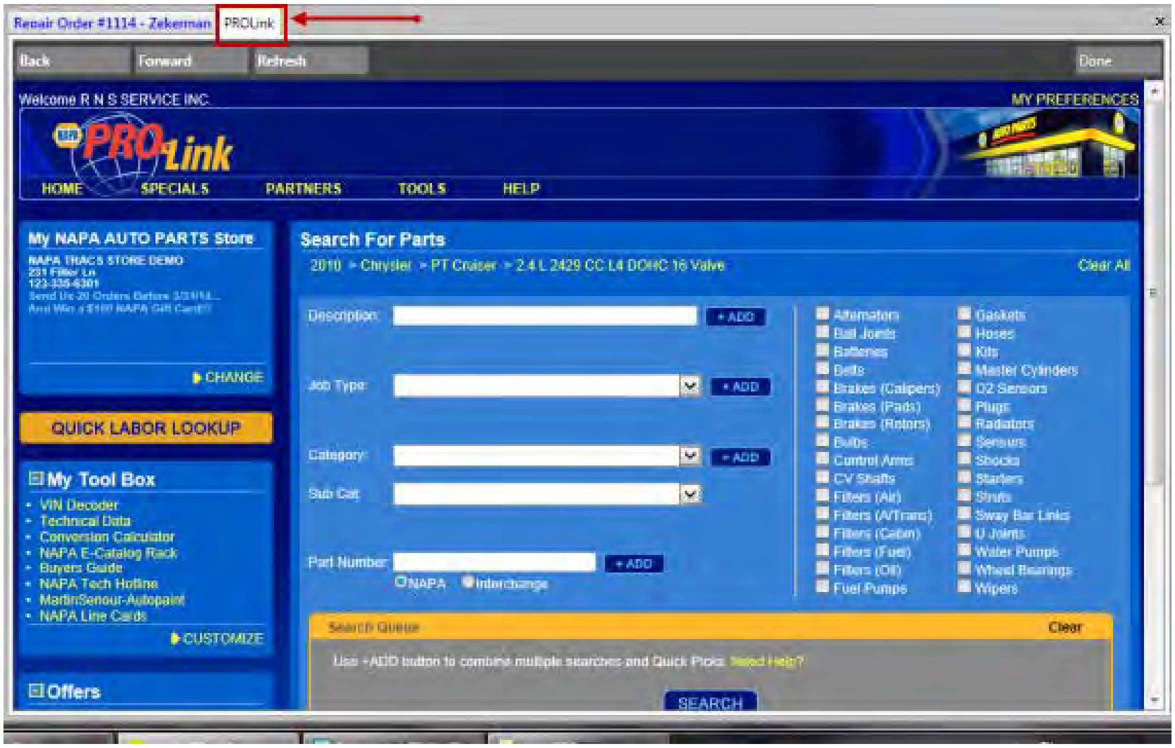
NAPA PROLink Quick Labor Lookup

Use the PROLink **Quick Labor Lookup**, integrated into the NAPA PROLink Catalog, to determine labor hours for a repair. The hours shown are strictly for reference purposes; you cannot use then to add labor hours to a NAPA TRACS repair order. Use the Mitchell Flat Rate Estimating Guide in NAPA TRACS to look up labor hours for a specific type of activity to add directly to a repair order.

To contact a Quick Labor lookup:

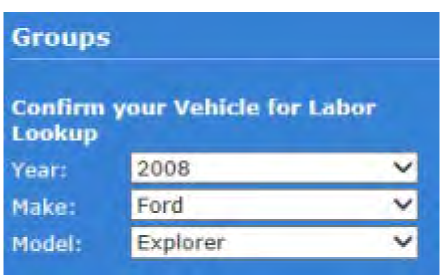
1. Make sure you have a work order open on your screen.
2. Click on the **NAPA PROLink Catalog** icon on the NAPA TRACS menu bar.

   The NAPA PROLink screen appears in a separate tabbed screen.



3. Click the **Quick Labor Lookup** button.

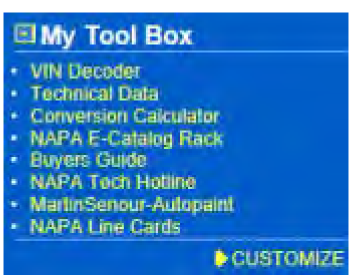
Confirm the vehicle information in the **Groups** section of the screen; it should be pre-populated with the vehicle information from the Work Order.



4. Select the type of service for the vehicle. Use the scroll bar to display more options.

My Tool Box

The **My Tool Box** contains information NAPA has made available as a quick resources to help you run your shop. Use the **Customize** text link to determine which items appear in the toolbox.



Parts Search

The PROLink parts search is pre-populated with the vehicle information displayed in an open NAPA TRACS repair order, so there is no need to search for a vehicle. The steps below show how to perform a search outside of a NAPA TRACS repair order.

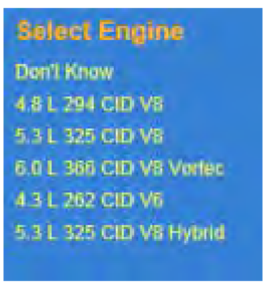
1. Select the year of the vehicle.

Note: Type the VIN code in the **Vin Code** field, if you have it, to quickly identify all vehicle information in Steps 1-4.

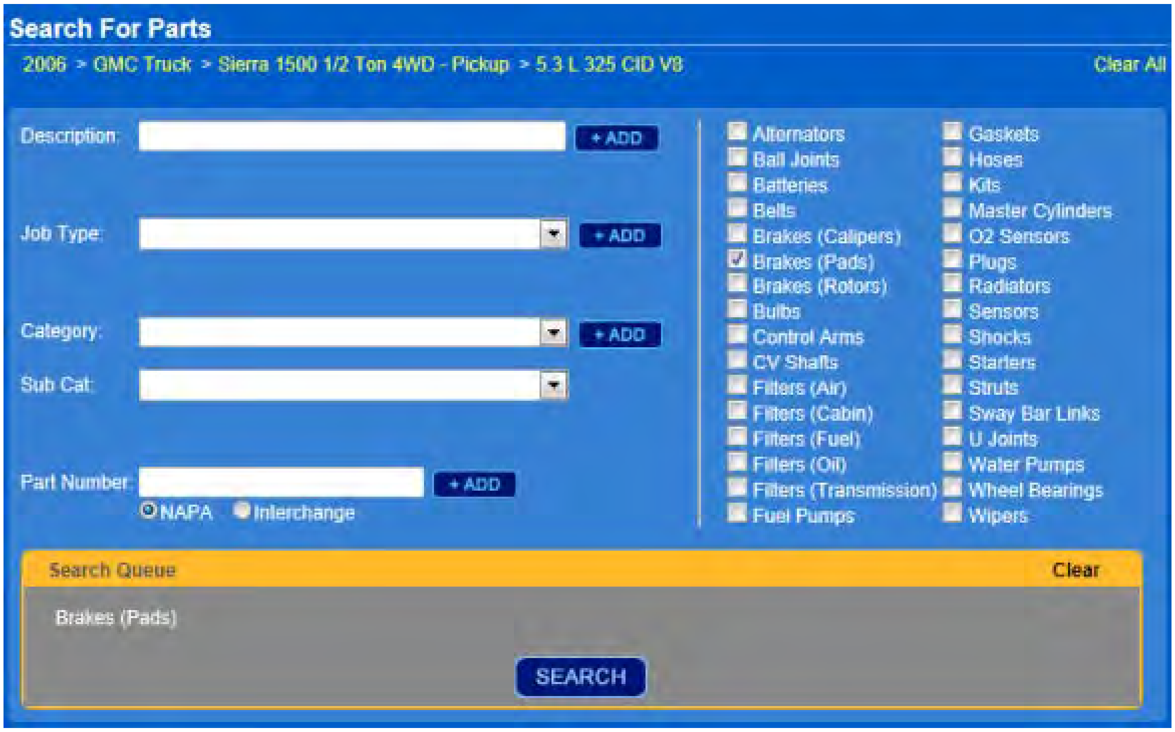
2. Select the make of the vehicle.

3. Select the vehicle model.

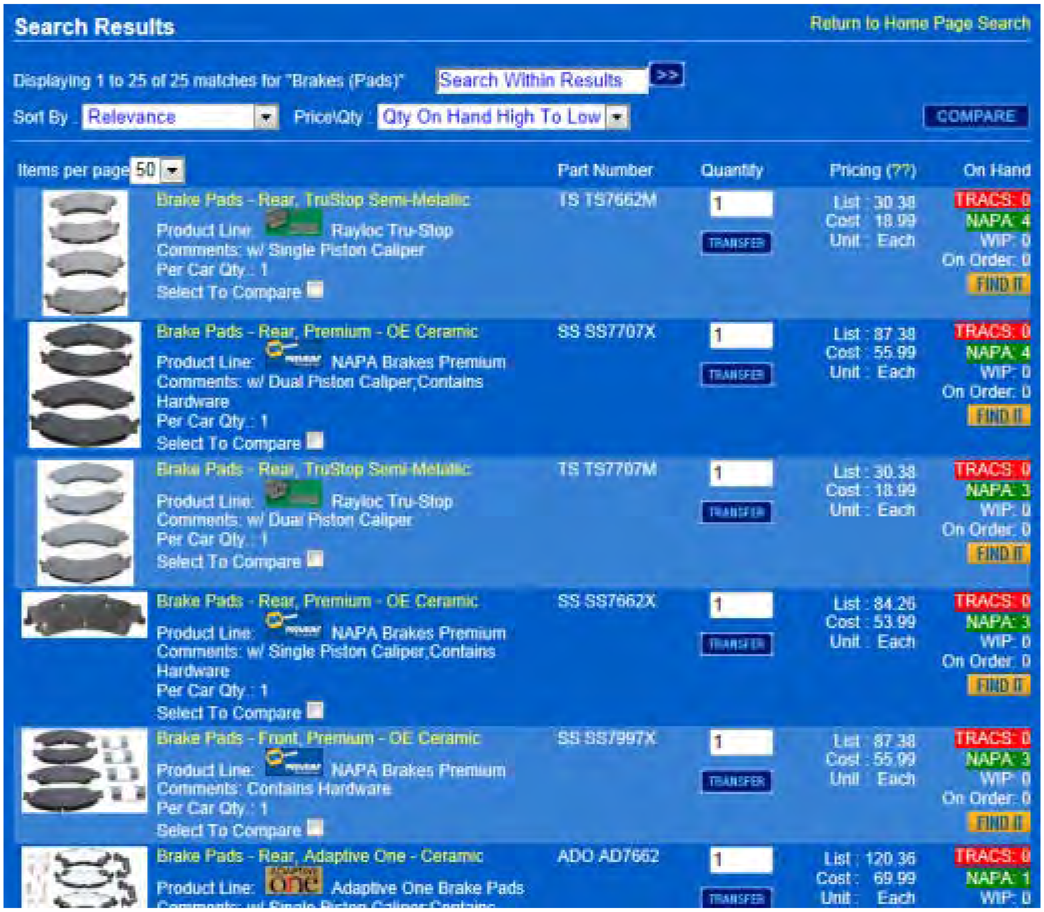
4. Select the vehicle engine size. Click **Don't Know** if you do not know the engine size.



5. Click the check box next to the part(s) needed.

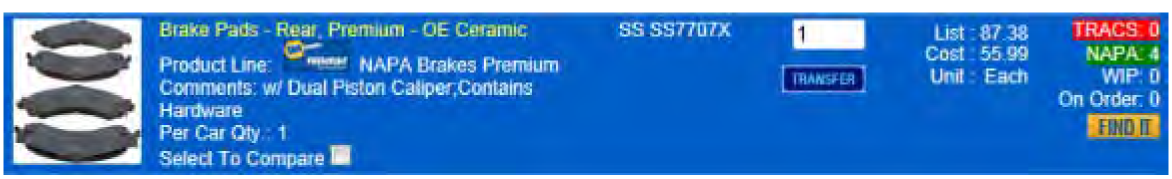


6. Click the **Search** button to display the parts inventory.



Parts Inventory

Once you complete your search for a part, the PROLink screen displays a listing of results. In addition to the part description, item number, list pricing, and cost pricing, the PROLink screen displays the following four inventory categories:



Category Name	Description
TRACS	Part quantity in your inventory.
NAPA	Part quantity in the inventory of NAPA stores near your area.
WIP (Work in	Part quantity from a work order that has **NOT**

Progress)	been invoiced. **Note:** Use this information to transfer a part from a non-urgent order to an urgent repair order.
On Order	Part quantity expected to arrive as part of an open purchase order.

- Use the **Find It** button to locate parts from other NAPA stores or distribution centers.
- Use the **Transfer** button to move a part to in-store inventory. Transfer aides with important administrative and accounting purposes.

Chapter 11 How To

Introduction

This chapter provides a quick reference to a number of tasks used in NAPA TRACS. Topics in this chapter are intended to be an alternative to making calls to your Technical Support representative.

NAPA TRACS is a robust, feature-rich, multifunctional shop management tool; and topics in this section are not intended to address every task you may need to accomplish as service writers or shop managers.

How to Use This Chapter

Use the **How To's** topic in this chapter to view a list of frequently used tasks in NAPA TRACS. Click the links to either go to the instructions provided in this Help system, or to information located in this section to get instructions or guidance.

Go to How To's

How To's

Click a link below to view instructions. Click your browser's **Back** button or use the **Table of Contents** on the left to navigate back to this page.

Appointments and Scheduling

- Create an appointment
- Create an estimate from the Scheduler
- Select a Scheduler view
- Edit a scheduled appointment

Customers and Vehicles

- Add a new vehicle to an existing customer's account
- Find a customer's vehicle
- Find an existing customer
- Decode a VIN
- Transfer Mobile VIN
- Apply and unapply finance charges

Estimates

- Create estimate for existing customer
- Create estimate for new customer
- Create an estimate from the Scheduler
- Look up parts using the Flatrate Estimating Guide
- Determine labor rates using the Flatrate Estimating Guide
- Look up the top ten common repairs for a selected vehicle

Items

- Adjust on hand quantities for items
- Copy items to the work order from the items list
- Create a new Item
- Discount Items
- Transfer an Item to a work order

Purchase Orders

- Create a purchase order
- Create a stock order
- Delete and cancel purchase order

Reports

- Run an aged accounts report
- Run a statements report
- Run a transaction detail report
- Run a transaction summary report
- Run an item movement report
- Run an item sales report
- Run an item on hand report
- Run an item valuation report
- Run a service writer productivity report
- Run a technician productivity report
- Run a technician time sheet report
- Run a sales analysis summary report
- Run a sales analysis detail report
- Run a sales register summary report
- Run a sales register detail report

Settings

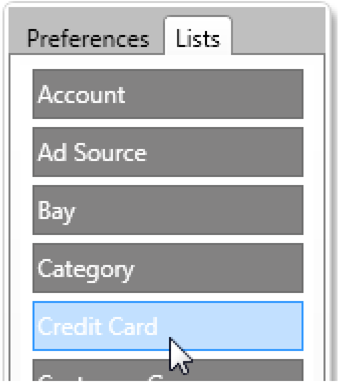
Work Orders

Accepting Fleet Payments

Some fleet companies do not use cash, check, or standard credit card payments for their vehicles. You need to set up a special credit card for these fleet companies.

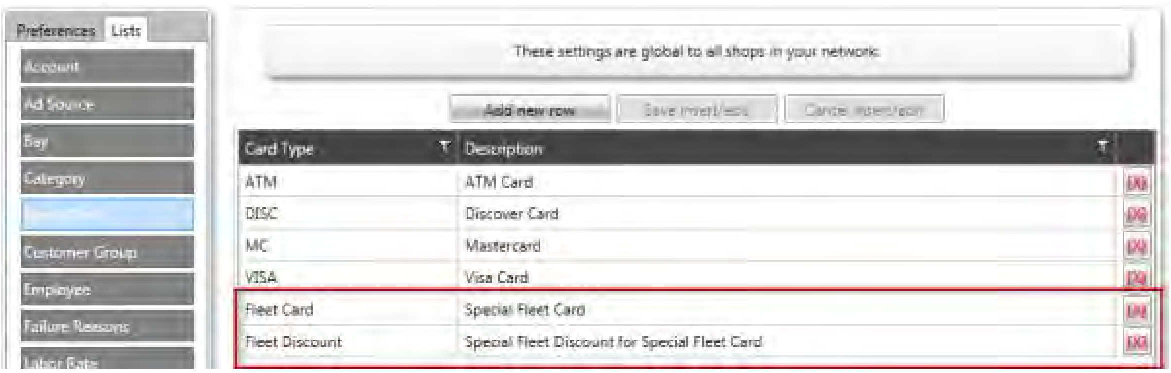
Follow these instructions to set up a special credit card:

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Lists** tab.
3. Click the **Credit Card** button.



4. Click the **Add** button on the right-portion of the screen and create a **Fleet Card** entry.

   Fleet payments often contain a discount from the original payment amount. If this is the case, add a second entry called **Fleet Discount**.

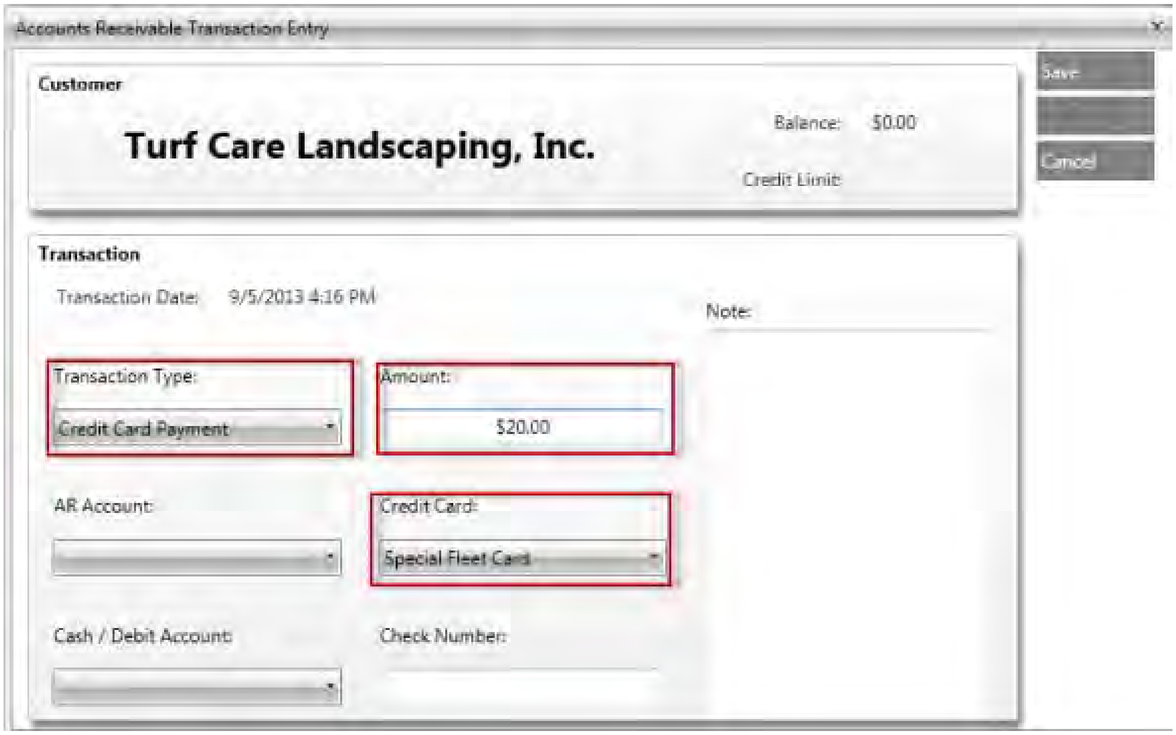


5. Click the **Done** button to save entries and close the window.

When a payment or credit is received from the Account:

1. Click the **Accounts Receivable** icon  from the NAPA TRACS menu bar.
2. Select the fleet customer account name from the **Customer** field or type the customer name in the **Customer** field.
3. Press the **New** button from the right menu.

4. Select **Credit Card Payment** from the **Transaction Type** field.
5. Type the actual amount of the payment received in the **Amount** field.



Note: If the payment is less than the invoice amount due because of a fleet discount, DO NOT include that amount here.

6. Select **Special Fleet Card** from the **Credit Card** field.
7. Press the **Save** button if the payment covers the entire invoice amount.

If the payment is less than the entire invoice amount (a fleet discount), follow the steps in **Entering Fleet Discounts**.

Entering Fleet Discounts

Note: Functionality for this feature will be available in a future release of NAPA TRACS.

If the payment for the fleet account includes a discount:

1. Click the **Additional** button from the right menu.

(Screen capture here)

2. Select **Credit Card Payment** from the **Transaction Type** field.
3. Type the amount of the discount withheld from the payment. This amount should balance invoice for the account.
4. Select **Fleet Discount** from the **Credit Card** field.

(Screen capture here)

5. Press the **Save** button to complete the task.

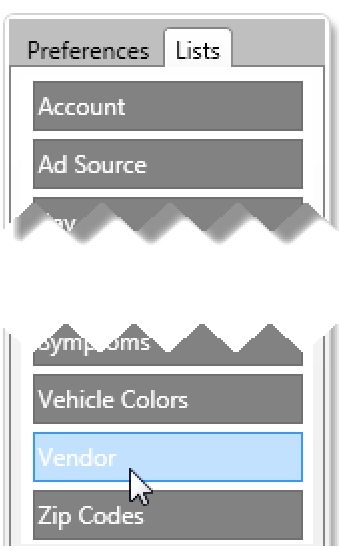
Documenting Technician Actuals

Type topic text here.

Setting Up NAPA Vendors for Parts Ordering

Use this task to add NAPA vendors for parts used on work orders and purchase orders. You will need to have the nine-digit store ID and TAMS ID handy to set up vendors.

1. Click the **Settings** (Gear and Key) icon.
2. Click the **Lists** tab.
3. Click the **Vendor** button.



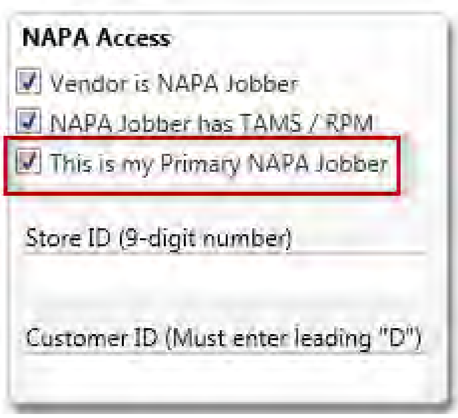
4. Click the **Add** button.
5. Add new NAPA vendors to your vendor list

Tip: Name NAPA vendors with a suffix to better control the alphabetical listing as follows:

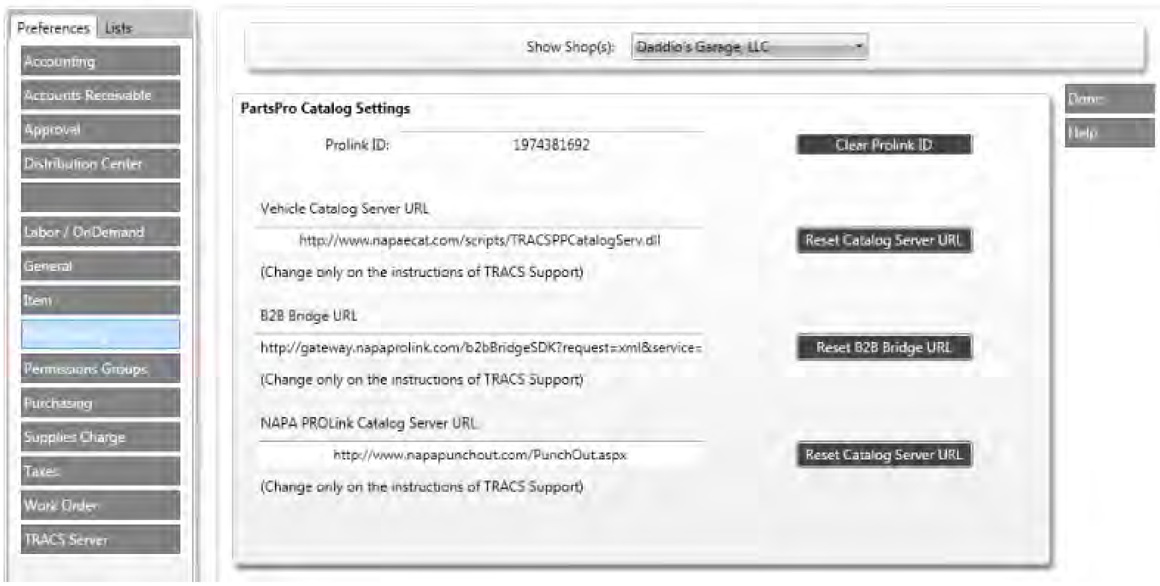
- NAPA – MAIN
- NAPA – SHOP SUPPLIES
- NAPA – SOUTH

6. Mark only one of these vendors at the of these as the Primary NAPA Jobber in the **NAPA Access** section.

Note: The **Primary NAPA Jobber** becomes the default vendor for NAPA Parts. If no primary jobber is selected, NAPA TRACS will automatically assign one as a pseudo-primary jobber.



7. Click the **Settings** (Gear and Key) icon.
8. Click the **Parts Catalog** button on the **Preferences** tab. The **PartsPRO Catalog Settings** window appears.



Note: The "Prolink ID" is automatically loaded and is associated with the first NAPA location correctly setup with a "Store ID" & "Customer ID". This NAPA location is most often correct since we usually load the Primary NAPA location first and connect with PROLink. When there are multiple NAPA vendors, or when there are changes to the NAPA locations, this "Prolink ID" also needs to be updated.

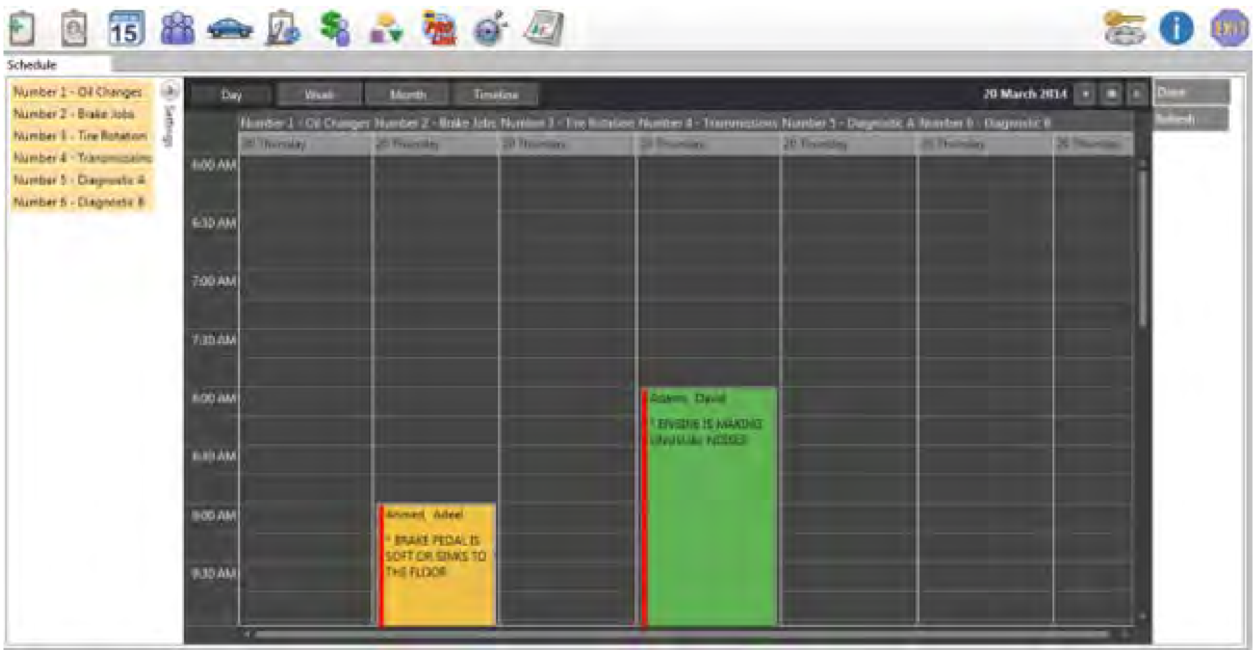
9. Click the **Done** button to close the window.

Chapter 12 Scheduling

About the Scheduler

When a customer asks that service be performed on their vehicle, you can create and schedule an appointment for that customer. You can perform service without an appointment being scheduled; however, by setting appointments, you can see how much work you have scheduled for each day. If one day looks particularly heavy, you can set appointments for other days to balance your work flow.

Use the **Schedule** screen to manage and schedule customer repairs.



Schedule Screen

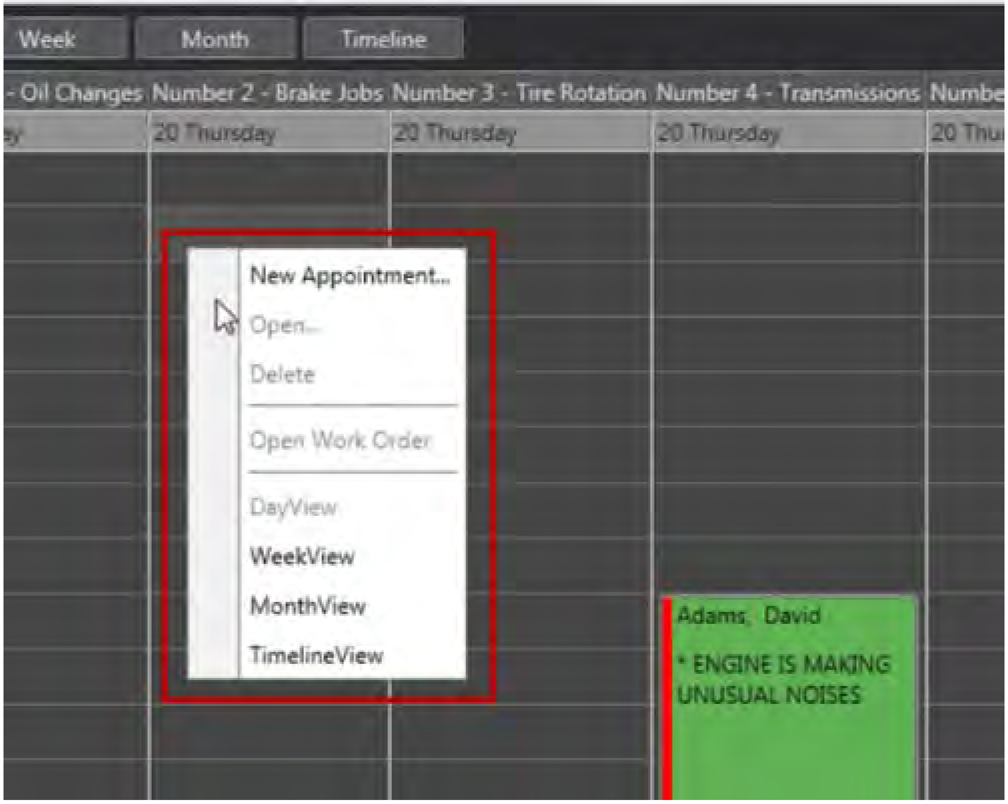
To access the scheduler, click the **Schedule**  icon from the NAPA TRACS menu bar.

Using the Pop-Up Menu

Right-click from anywhere in the scheduler window to display a pop-up menu where you can perform the following tasks:

- Create a new appointment
- Open an existing appointment
- Delete an existing appointment

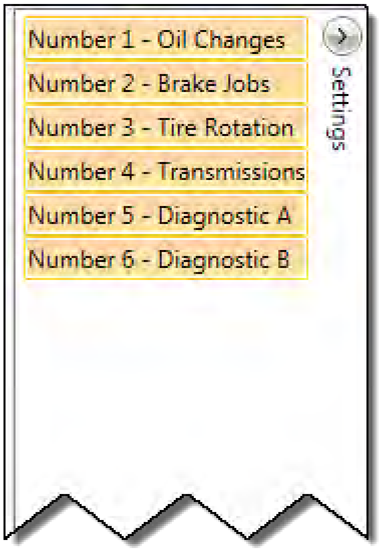
- Open a Work Order
- Switch to any of the three other available views



Tasks you cannot perform from the pop-up menu are grayed out.

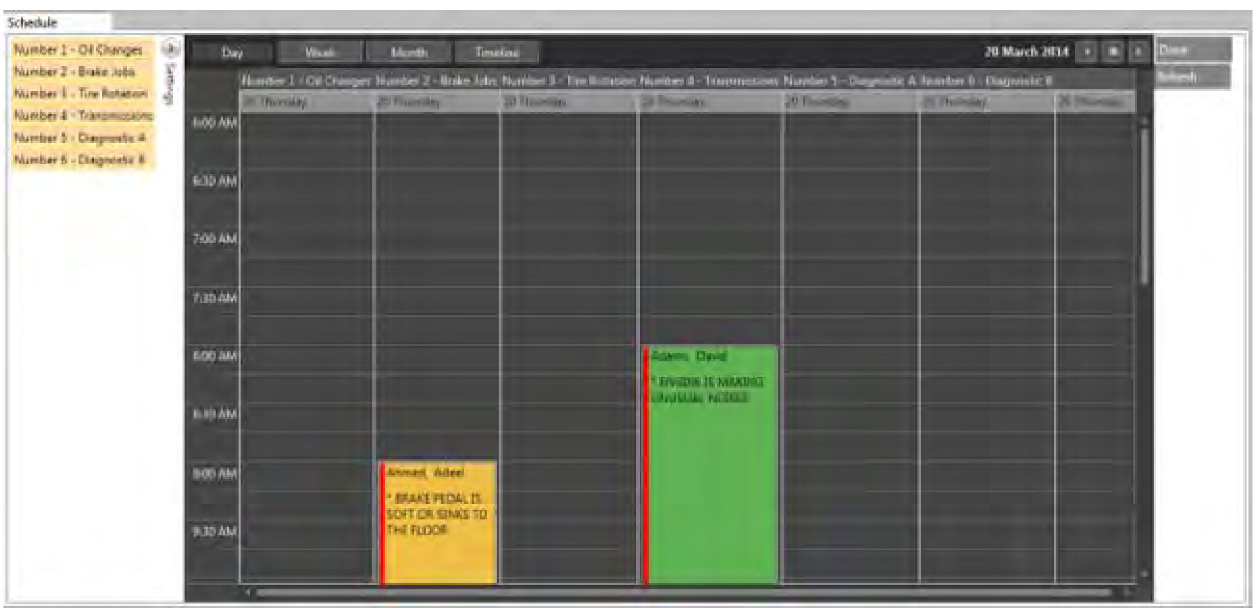
Schedule Settings

The **Settings** section of the scheduler allows you to determine which bays or technicians that appear. Bays and technicians are defined from the bay and employee list settings screens respectively.

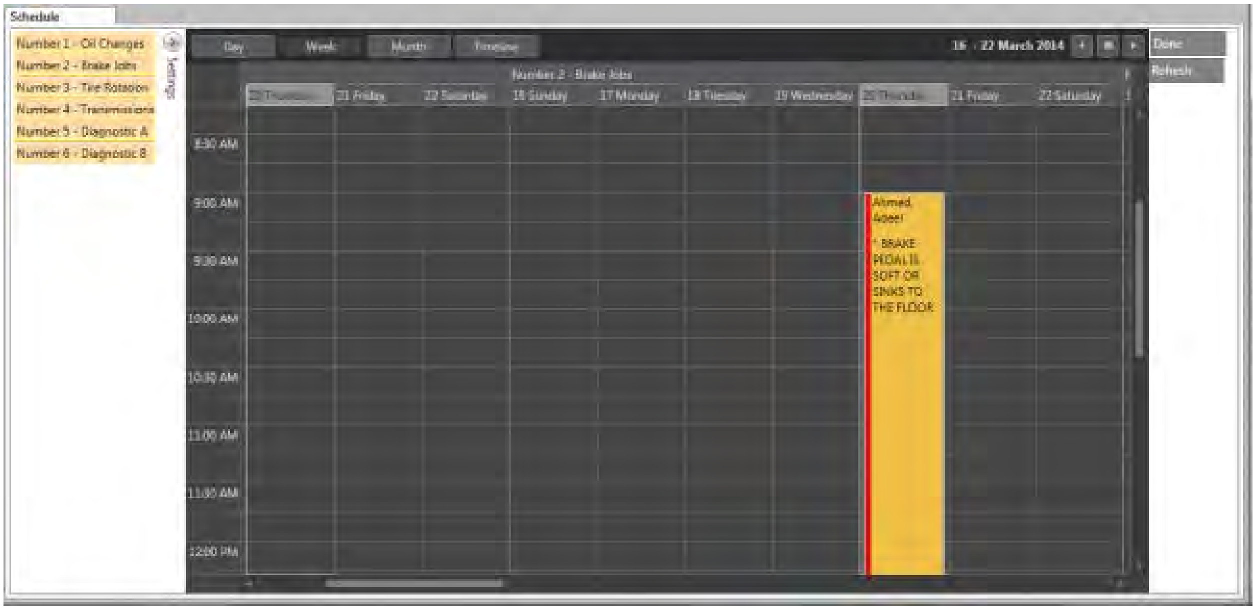


Schedule Layout Views

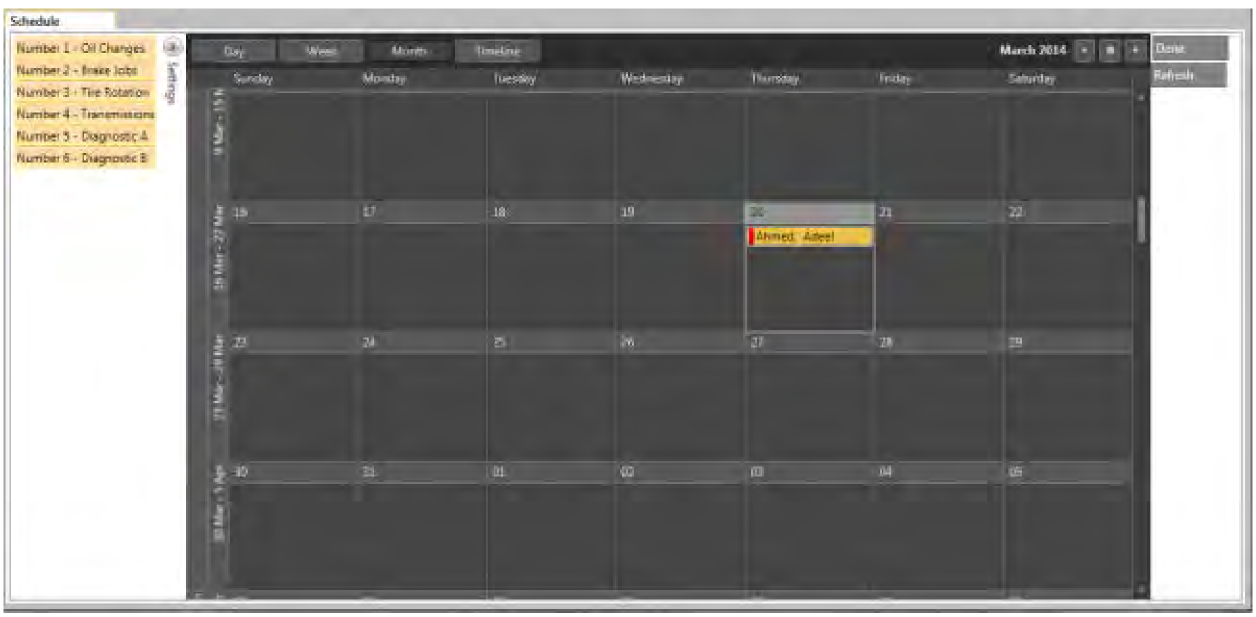
The scheduler has four different views: **Day**, **Week**, **Month**, and **Timeline**.



Schedule Screen - Day View



Schedule Screen - Week View



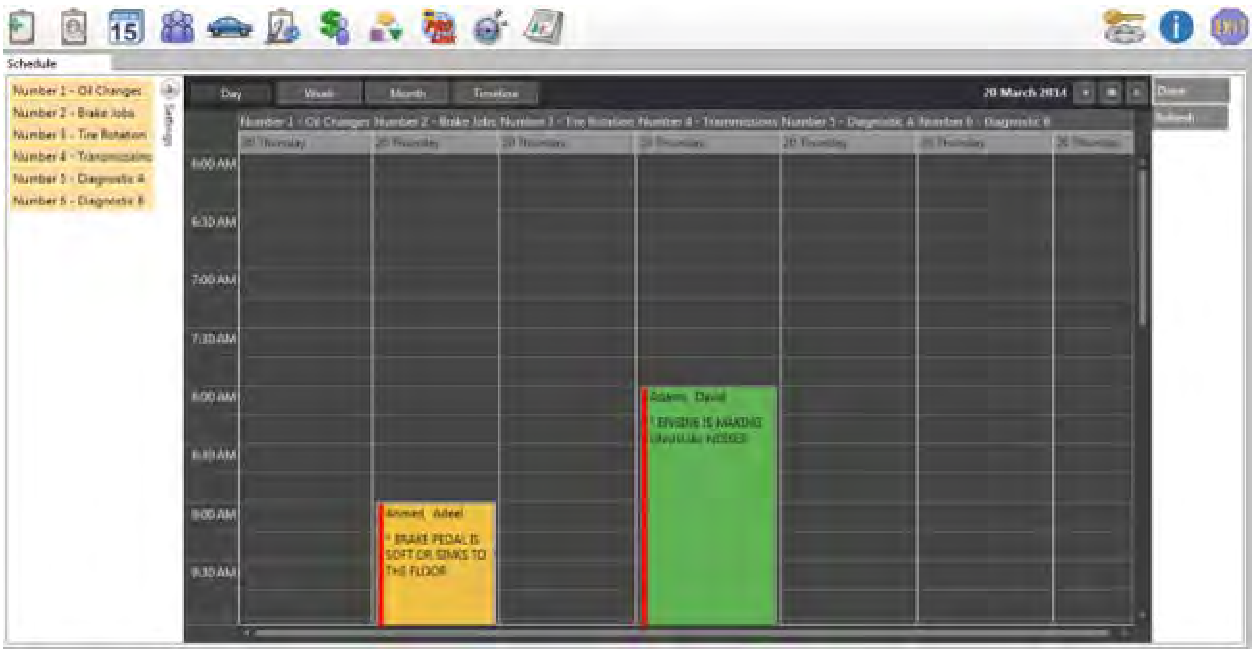
Schedule Screen - Month View

Schedule Screen - Timeline View

Viewing Scheduled Repairs

Viewing scheduled vehicle repairs allows you to see how much work you have scheduled for each day. If one day looks particularly heavy, you can set appointments for other days to balance your work flow.

To view scheduled vehicle repair for your shop, click the **Schedule**  icon from the NAPA TRACS menu bar to display the Scheduler screen.



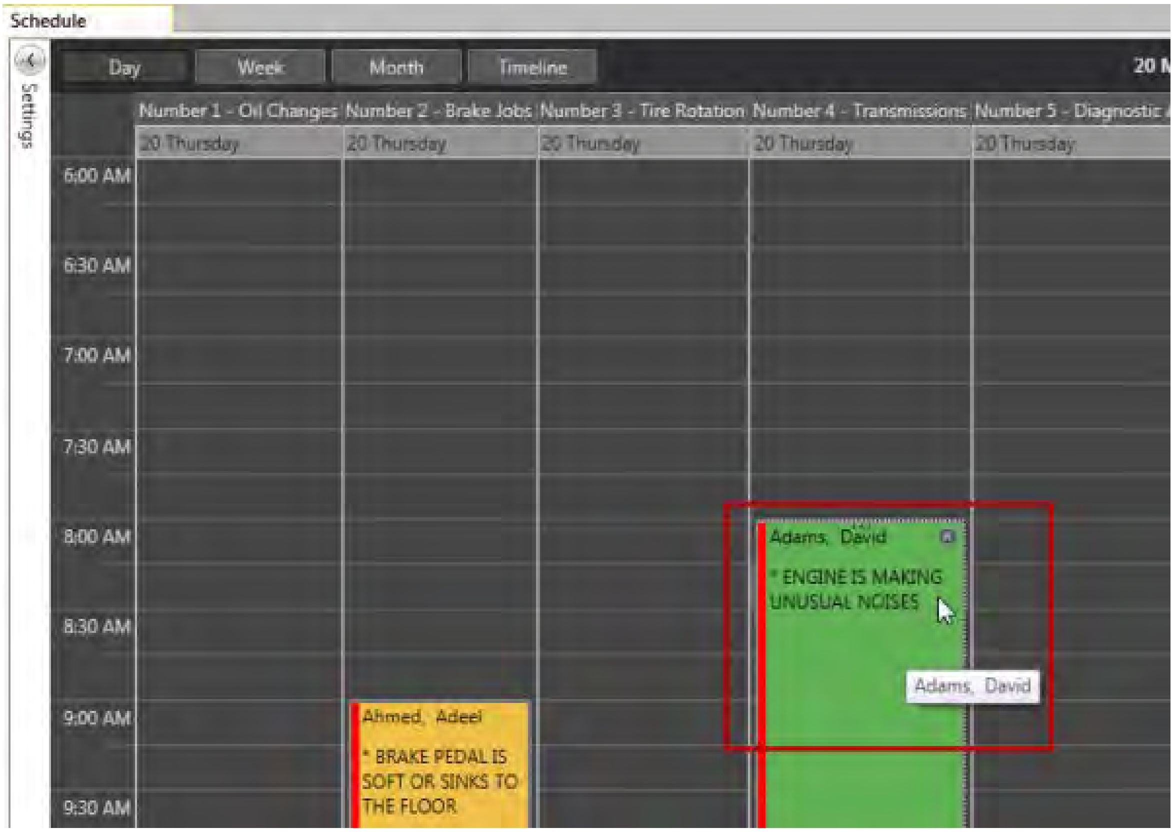
Schedule Screen

Editing a Scheduled Appointment

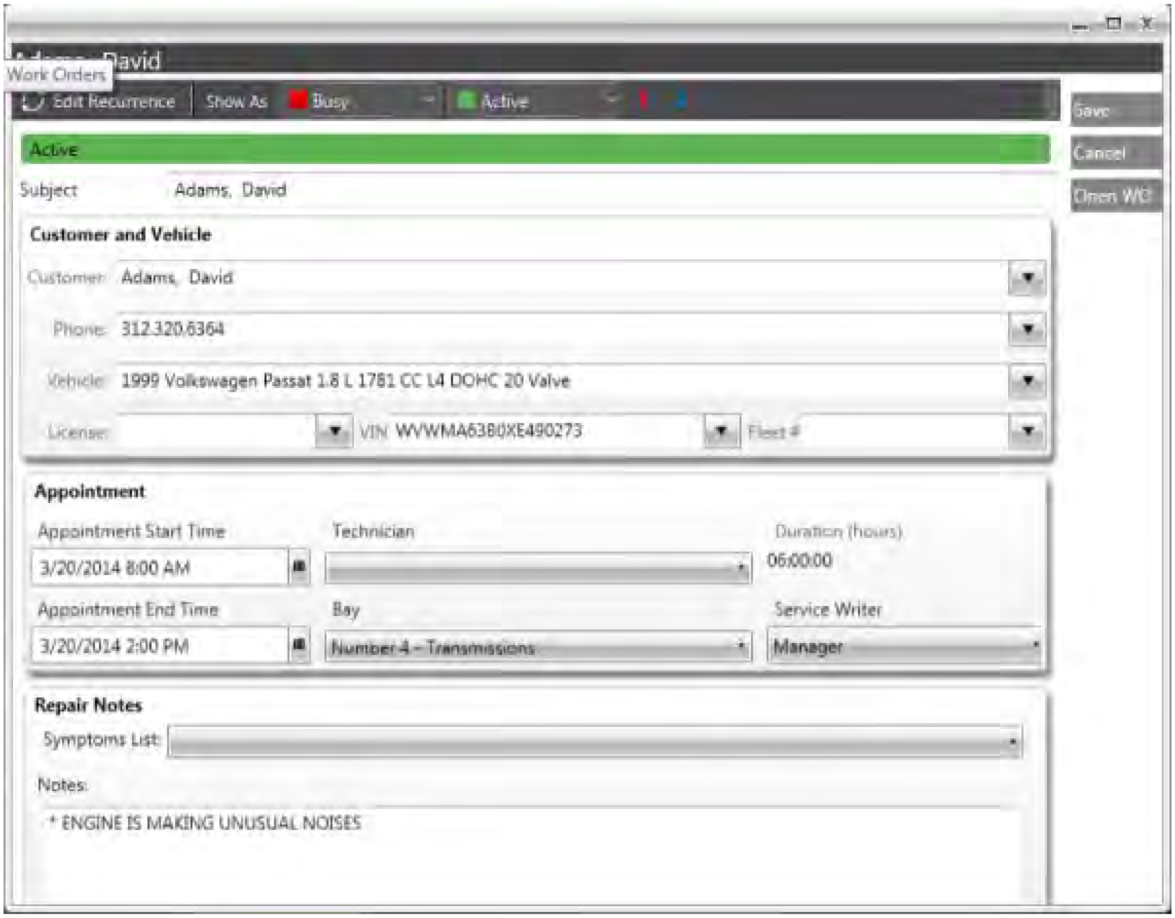
To edit a scheduled appointment:

1. Double-click an appointment on the scheduler

   - or -
   right-click on an appointment and select **Open**.



The appointment schedule window appears.



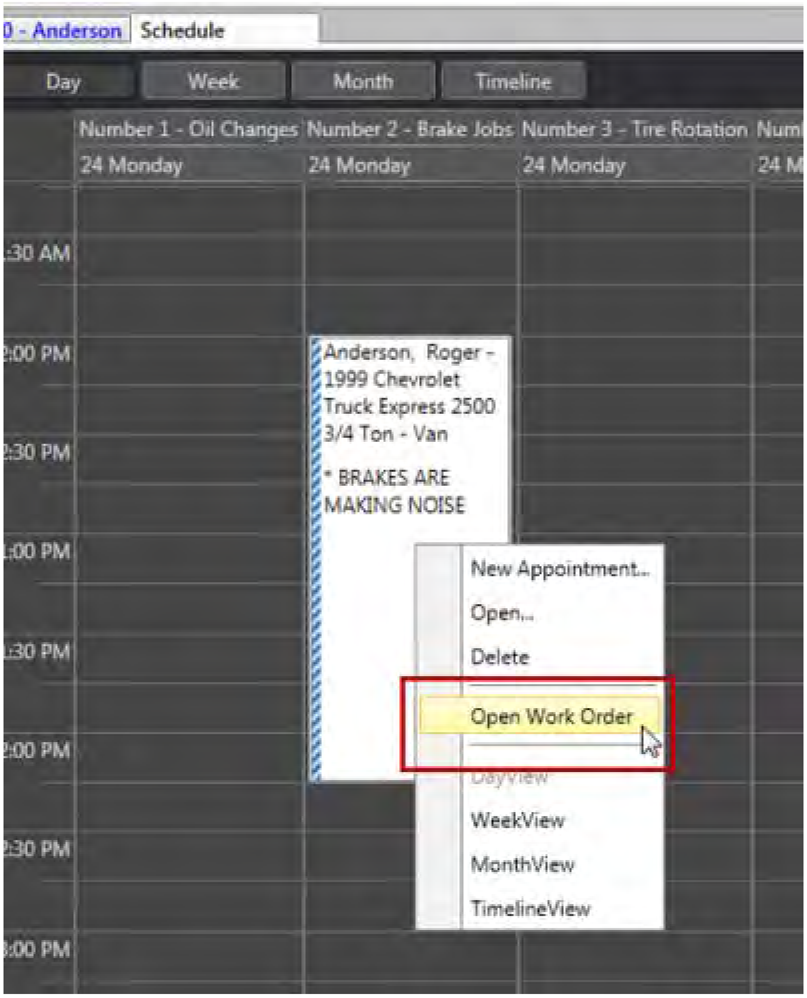
2. Make changes where needed and click the **Save** button to return to the Scheduler page.

Opening an Existing Work Order from the Scheduler

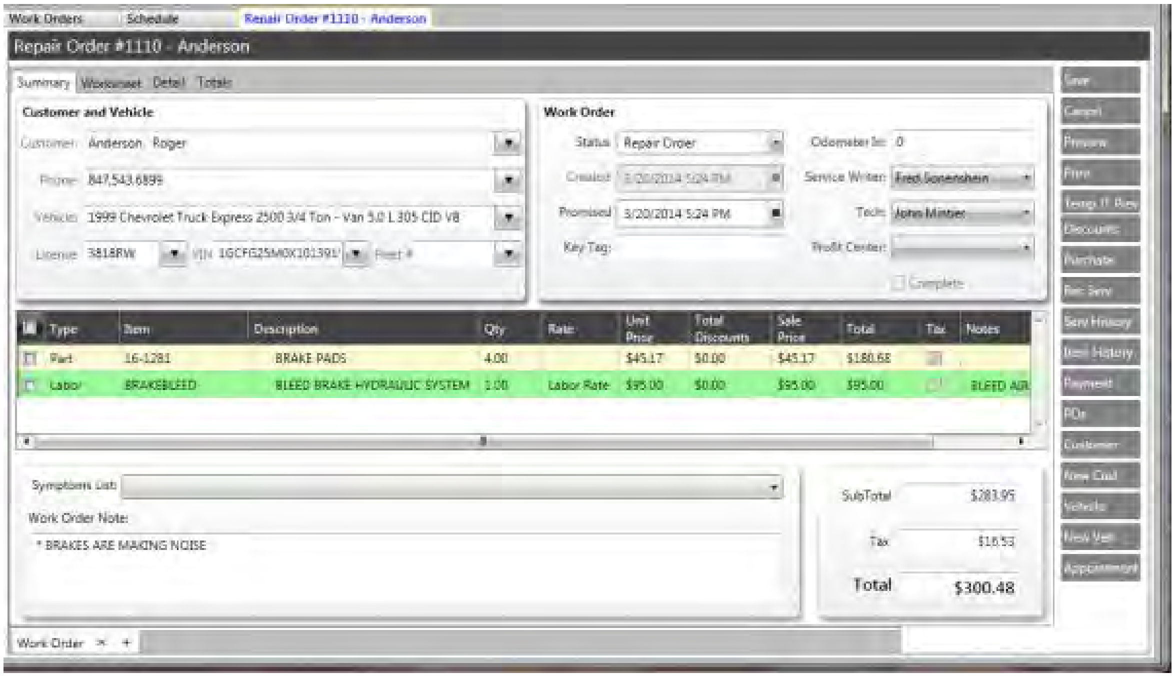
Opening a work order from the scheduler allows you to quickly view or edit information without leaving the scheduler interface.

To open a work order from the Scheduler:

1. Right-click on an existing scheduled appointment and select **Open Work Order** from the pop-up menu.



The work order screen for the selected customer appears.



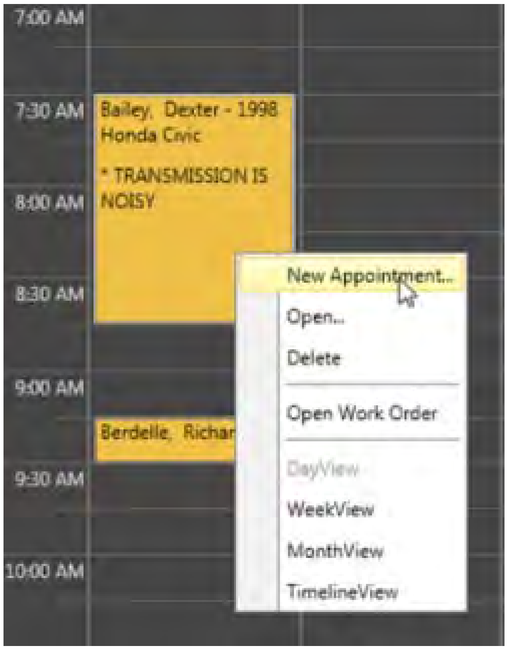
2. View or make changes where needed and click the **Save** button to return to the Scheduler page.

Creating a New Estimate from the Scheduler

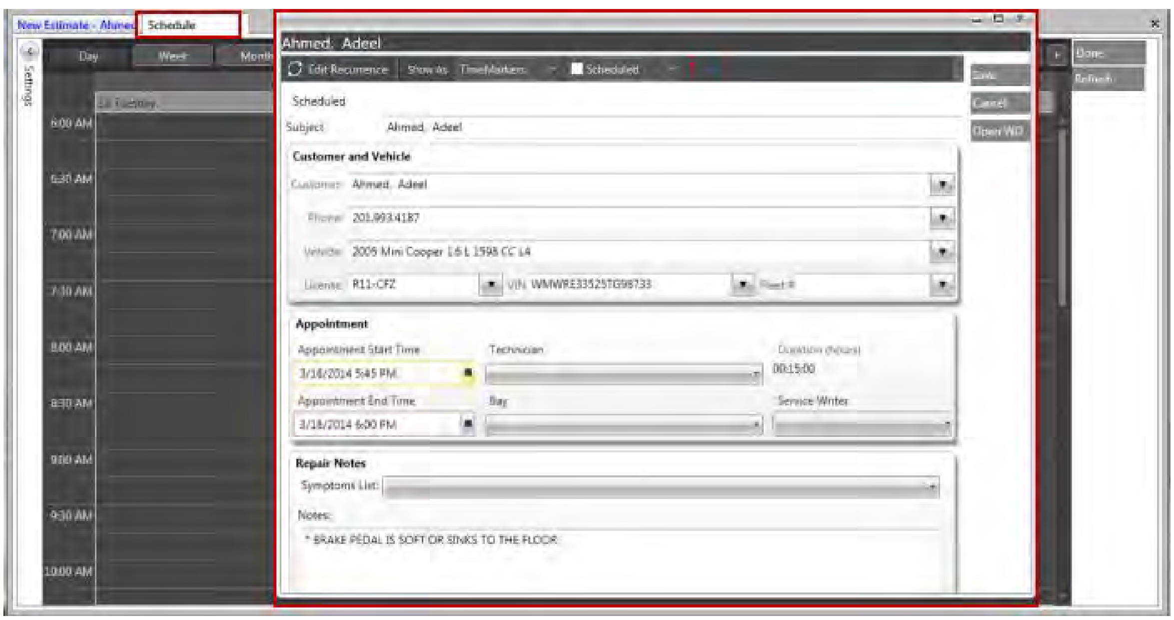
Use the Scheduler screen to create a new estimate without leaving the scheduler interface.

To create a new estimate from the Scheduler:

1. Place your cursor on a date and time on the Scheduler and right click to display a pop-up menu.
2. Select **New Appointment** from the pop-up menu.



A customer window appears where you can create a repair estimate for a new or existing customer.

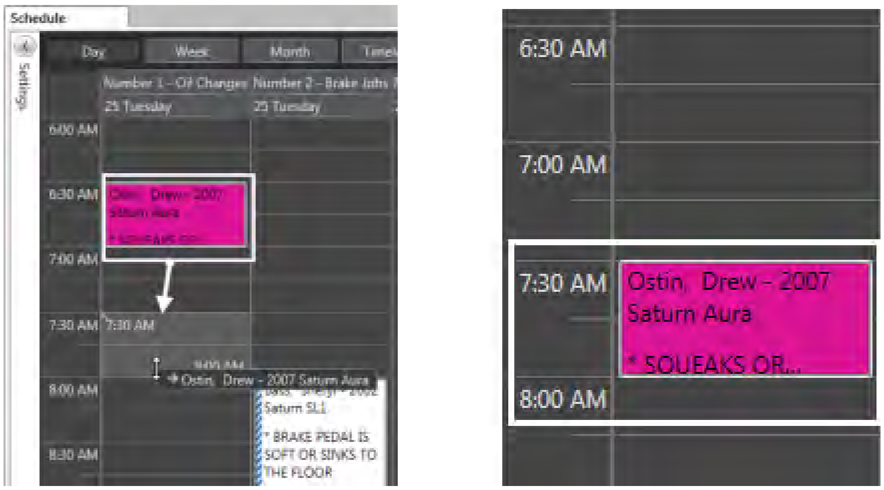


3. See [Creating a Repair Estimate](#) for information on creating a repair estimate.

Changing Appointment Times Using the Scheduler

Use the Scheduler screen to change appointment times or durations for a vehicle repair. Appointment changes made from the Scheduler can be done from the **Day**, **Week**, or **Timeline** view by dragging and dropping an appointment to another day, date, or time; or by grabbing and moving an the frame surrounding the appointment to another time slot. Time changes are updated automatically on the work order.

To change an appointment time from the **Day** view, click and drag the appointment on the scheduler screen to another time.

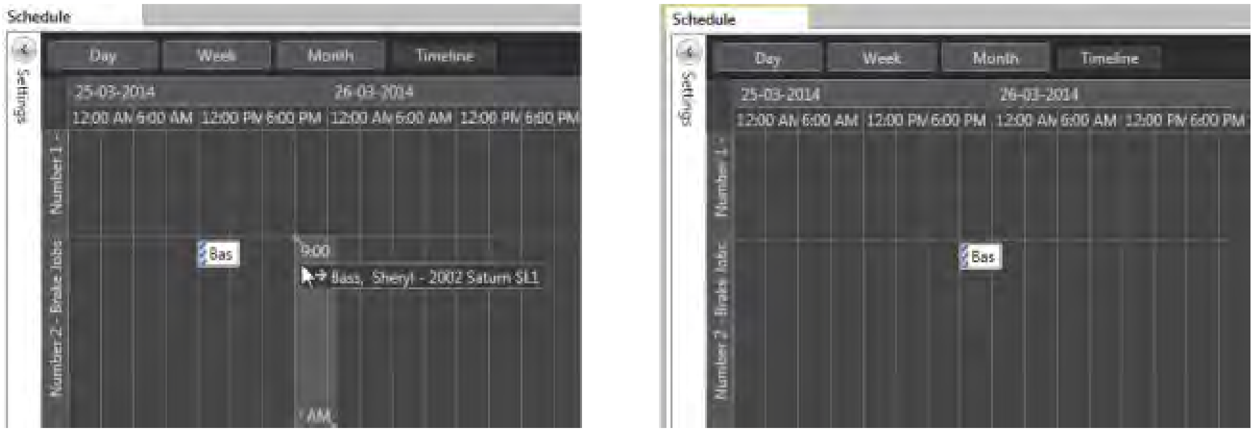


Appointment moved from 6:30 a.m. to 7:30 a.m.

To change an appointment time from the **Week** view, click and drag the appointment on the scheduler screen to another day.

Appointment moved from Tuesday, March 25 to Thursday, March 27

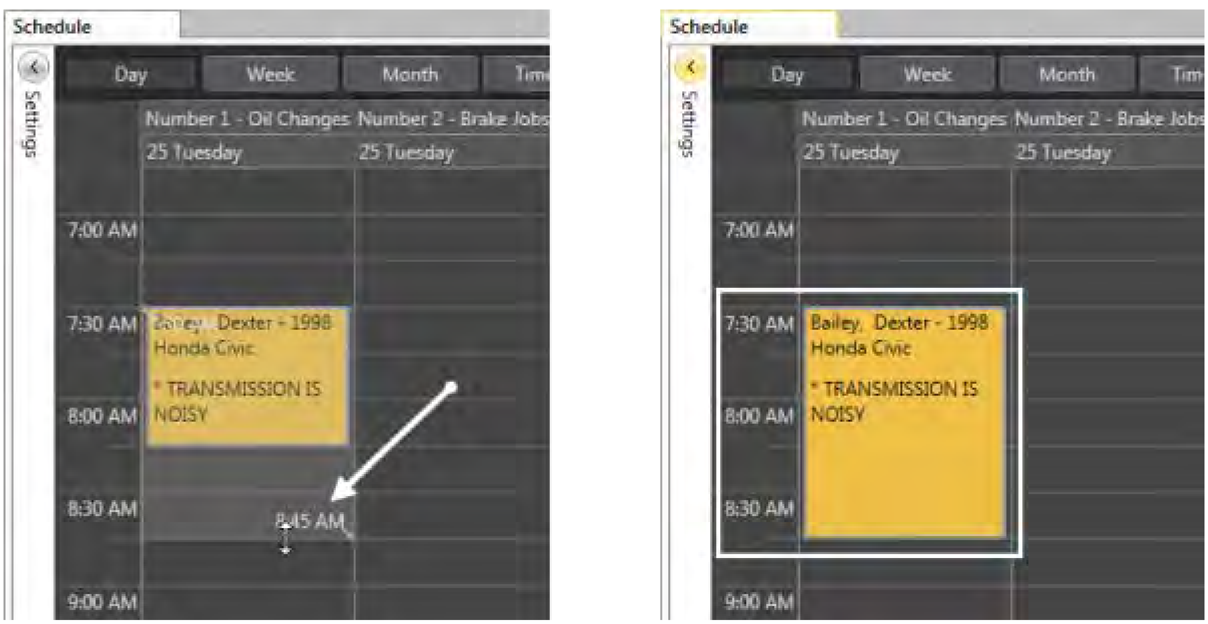
To change an appointment time from the **Timeline** view, click and drag the appointment on the scheduler screen to another day and/or time.



Appointment moved from Tuesday, March 25 at 12:00 p.m. to Thursday, March 25 at 9:00 a.m.

Changing the Duration of an Appointment

To change the duration of an appointment, grab and move the frame of the appointment to another time.



Appointment duration extended from 8:30 a.m. to 8:45 a.m.

Chapter 13 Carroll Tire Catalog

Using the Carroll Tire Catalog

The Carroll Tire Catalog program is a powerful tool that enables you to search for tires by size or item number.

Accessing the Carroll Tire Catalog

To access the Carroll Tire Catalog from an open work order or no work order:

1. Click on the **Carroll Tire Catalog** icon on the NAPA TRACS menu bar.

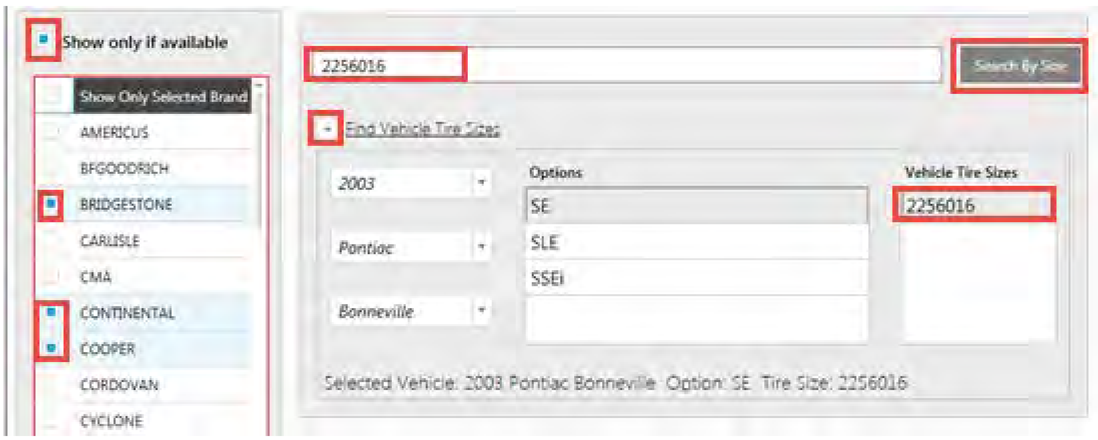
   The **Tire Search** screen appears in a separate tabbed screen. The **Find Tires** tab displays as default.

Search tires by (Year, Make, Model - Select Only Available - Certain Brands)

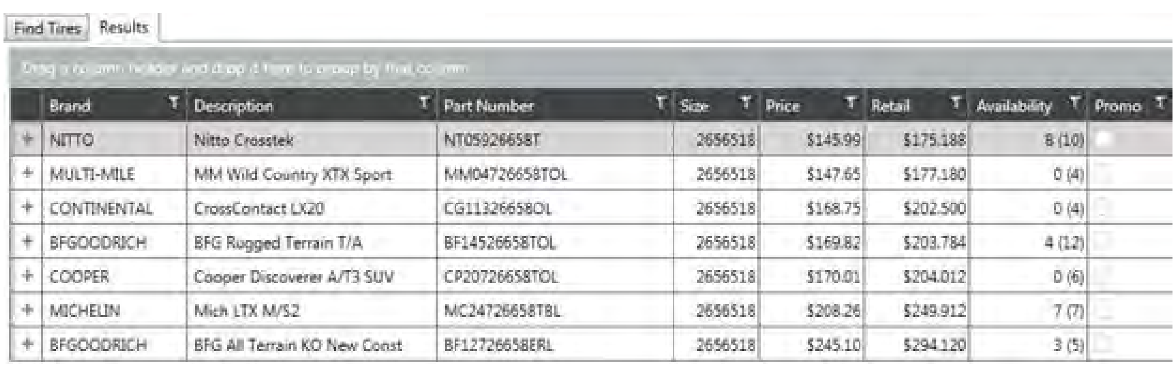
This section describes how to search for certain brands of tires and display only available tires for a specific year, make, and model vehicle.

1. Open a work order or estimate and click the **Carroll Tire Catalog** icon .
2. From the **Find Tires** tab, check the **Show only if available** option.
3. Check one or more check boxes next to the tire brands.

4. Click the **Find Vehicle Tire Size** down button to display the year, make, model, and other options.
5. Click the **year**, **make**, and **model** down buttons and select the applicable information.
6. Select a option from the **Options** box.
7. Click the tire size in the **Vehicle Tire Sizes** box to display the tire size in the **Search By Size** field.

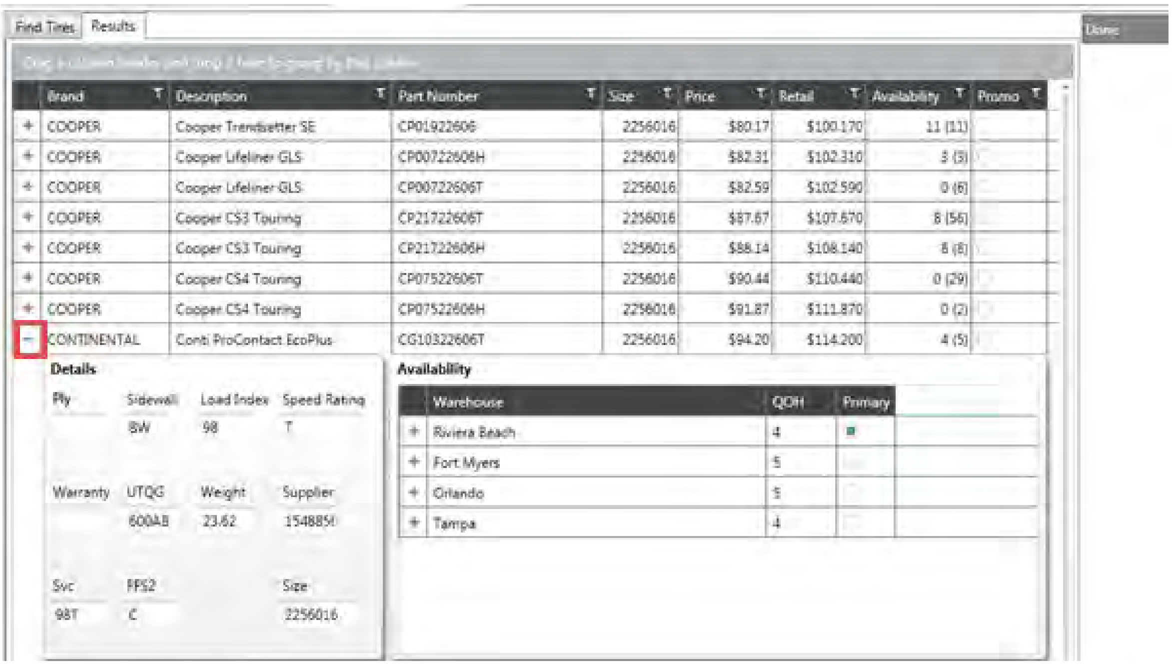


8. Click the **Search By Size** button. The **Results** screen displays a list of available tires. The **Availability** column displays the QOH from the warehouses.

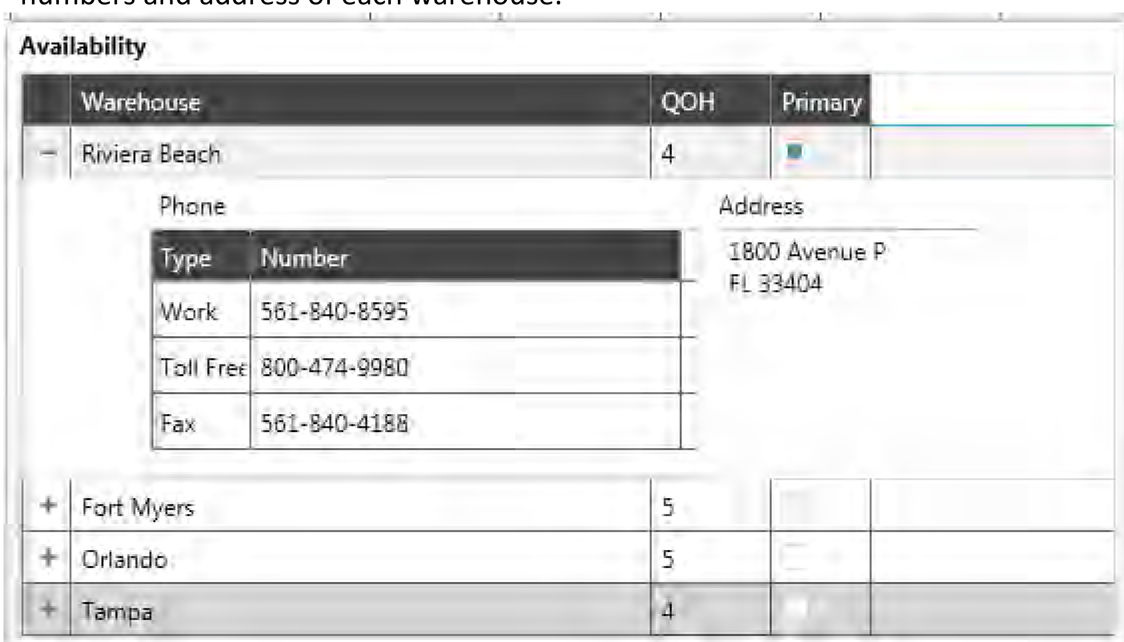


	Brand	Description	Part Number	Size	Price	Retail	Availability	Promo
+	NITTO	Nitto Crosstek	NT05926658T	2656518	$145.99	$175.188	8 (10)	
+	MULTI-MILE	MM Wild Country XTX Sport	MM04726658TOL	2656518	$147.65	$177.180	0 (4)	
+	CONTINENTAL	CrossContact LX20	CG11326658OL	2656518	$168.75	$202.500	0 (4)	
+	BFGOODRICH	BFG Rugged Terrain T/A	BF14526658TOL	2656518	$169.82	$203.784	4 (12)	
+	COOPER	Cooper Discoverer A/T3 SUV	CP20726658TOL	2656518	$170.01	$204.012	0 (6)	
+	MICHELIN	Mich LTX M/S2	MC24726658TBL	2656518	$208.26	$249.912	7 (7)	
+	BFGOODRICH	BFG All Terrain KO New Const	BF12726658ERL	2656518	$245.10	$294.120	3 (5)	

9. Click the plus sign **(+)** next to the **Brand** column; the minus **(-)** button appears. Additional details and warehouse availability for each brand appears.



10. Optionally, click the plus sign **(+)** next to the **Warehouse** column to display the phone numbers and address of each warehouse.



11. Highlight a row to select the tire.
12. Click the **Done** button to add the tire to the work order.
13. Change the quantity if applicable.

Search tires by (Tire Size - Select Only Available - Certain Brands)

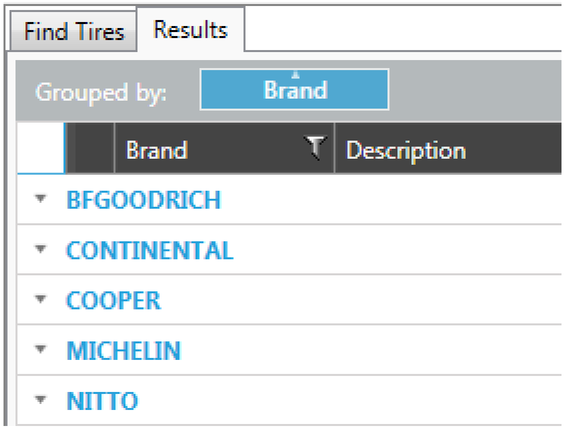
This section describes how to search for certain brands of tires and display only available tires for a specific size tire.

1. Open a work order or estimate and click the **Carroll Tire Catalog** icon .
2. From the **Find Tires** tab, check the **Show only if available** option.
3. Check one or more check boxes next to the tire brands.
4. Enter the tire size in the **Search By Size** field and click the **Search By Size** button.
5. The **Results** screen displays a list of available tires.
6. Click the plus sign **(+**) next to the **Brand** column to display additional details and warehouse availability for each brand.
7. Click the plus sign **(+**) next to the **Warehouse** column to display the phone numbers and address of each warehouse.
8. Click on a row to select a tire.
9. Click the **Done** button. The tire is added to the work order or estimate.

Search tires by (Year, Make, Mode - Select Only Available - Certain Brands)

This section describes how to search for tires ***without displaying a work order or estimate***.

1. Click the **Carroll Tire Catalog** icon .
2. From the **Find Tires** tab, click the **Find Vehicle Tire Size** down button to display the year, make, model, and other options.
3. Click the year, make, and model down buttons and select the applicable information.
4. Select a option from the **Options** box.
5. Click the tire size in the **Vehicle Tire Sizes** box to display the tire size in the **Search By Size** field.
6. Click the **Search By Size** button.
7. Check the **Show only if available** option under the **Filters** section.
8. From the **Results** tab, click and drag the **Brand** table header up to the solid gray row to group by **Brand**.



9. Use the up and down arrows to expand or collapse information.
10. Click the **Done** button.

Chapter 14 TRACS Dashboards

TRACS Profitability Dashboard

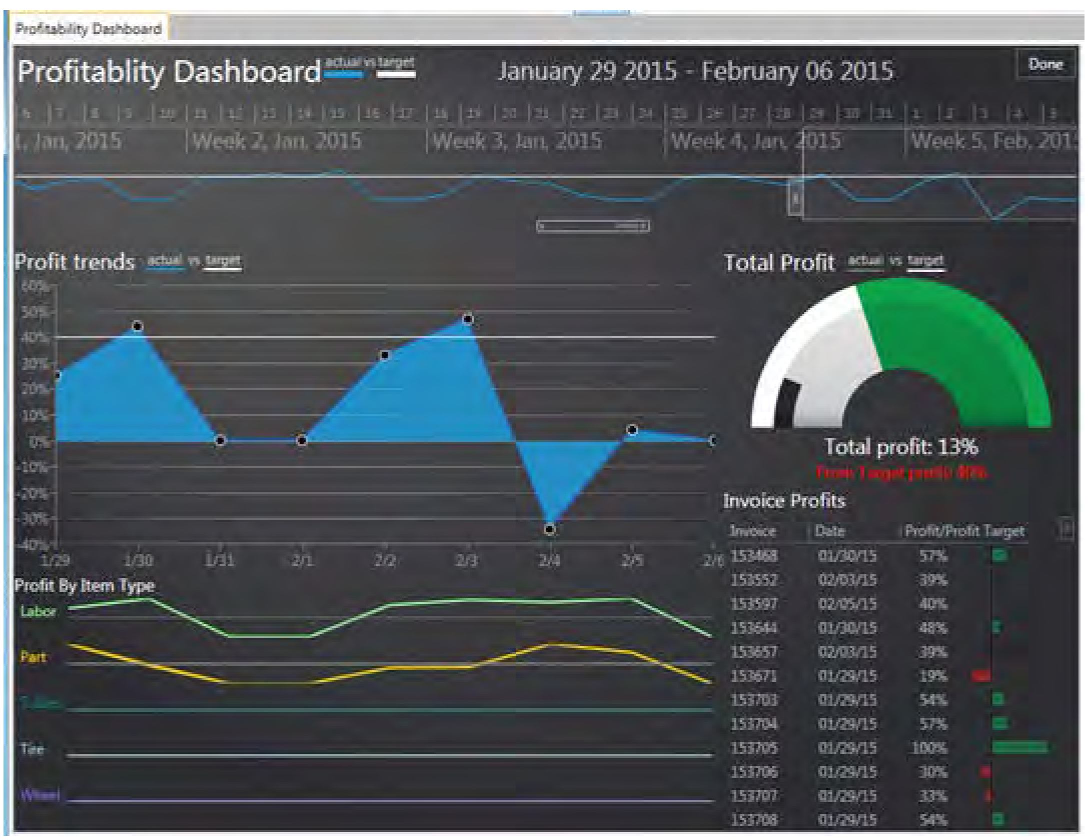
Dashboards often provide at-a-glance views of KPIs (key performance indicators) relevant to a particular objective or business process. The TRACS **Profitability Dashboard** displays profit trends (actual versus target), profit by item type, invoice profits, and total profit (actual versus target.)

Accessing the Profitability Dashboard

To access the **Profitability Dashboard**:

1. Click the **TRACS Dashboards**  icon from the NAPA TRACS menu bar.

   The **Profitability Dashboard** screen appears in a separate tabbed screen.



About the Profitability Dashboard Interface

This section describes the various parts of the Profitability Dashboard.

Changing the Weekly Date Range

To display the profitability for a different time frame:

1. Move your mouse pointer on top of the weekly date range box (white outlined box). The mouse pointer changes to a hand.
2. Left click, drag, and then release the mouse click.

3. Click the **Done** button to close the dashboard.

Increasing and Decreasing the Date Range

To increase or decrease the date range box:

1. Hover your mouse pointer over the bars  located to the top-right corner and left-bottom corner of the date range box. The mouse cursor changes to a double-arrow.
2. Click and drag to the left or right.
3. Click the **Done** button to close the dashboard.

Viewing Profit Trends Snapshot

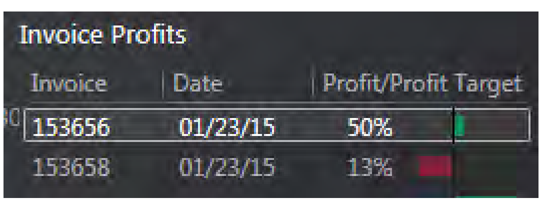
To view a snapshot of profit trends from the graph:

1. Hover you mouse pointer on any of the round circle indicators on the graph. The system displays a snapshot of profit trends for that particular date.

2. Click the **Done** button to close the dashboard.

Viewing Invoice Profits

To view an invoice listed in the **Invoice Profits** section double-click on a row.



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