

PROCEDE TESTING FAQ

January 26

CUSTOMER PAY RO'S - SERVICE TYPE

- When creating a new Customer Pay RO it is important that you check that the proper Service Type – either SRI or SRT (Service Retail International -OR- Service Retail TransTech) – is listed in the **Type** Box. It should default to SRI.
 - This is not necessary for Internal or Warranty RO's because the Bill to already indicates whether it's IC or TransTech or Cummins, and that automatically sets it to the correct Service Type.

The screenshot shows the 'Create Service Order' interface. On the left, there are tabs for 'Customer & Vehicle', 'Order', and 'Summary'. The main area is divided into 'Order-To' and 'Bill-To' sections. In the 'Order-To' section, fields include Vehicle (104413), VIN (1FDXE45F9YHA57911), Customer (11430), Name (GUILDERLAND CENTRAL SCHOOL DIS), Reference [PO Number], Estimate Amt (0.00), Revised Amt (0.00), Phone (518-861-6434), and Email (SIMMONS). A red box highlights the 'Type' dropdown menu in the 'Bill-To' section, which is set to 'SRI/SERVICE RETAIL INTERN'. The 'Terms' field is set to 'NET30/NET 30'. A red banner at the bottom of the 'Order-To' section reads '< PO REQUIRED >'. The 'Address...' field in the 'Bill-To' section is empty, and the address below it is 'PO BOX 18 8 SCHOOL RD, GUILDERLAND CENTER, NY 12085, ALBANY'.

CLOSING RO'S WITH BACKORDERED PARTS

- Service cannot post a job if it has incomplete items. If parts are still on backorder, the job will be incomplete, and the operation is unable to be closed.

COMPANY PO's

- **SERVICE MANAGERS, SERVICE ADVISORS, SERVICE PARTS RUNNERS**
- You have now been given access to Company Purchases to create any PO to a Vendor that is NOT TIED TO A VEHICLE (Vendor orders tied to vehicles must be handled as Sublets)
- To create a new Company PO:
 - Select the Company [All Departments] | Items | Purchase Type [Company] folder
 - Press Insert. to open the Create Company Purchase Type dialog
 - Complete the fields
 - Click OK
- ****PLEASE NOTE:**** Procede is still working to load the Cost codes for PO's so you will not have a full selection to choose from just yet.