

PROCEDE TESTING FAQ - UPDATED

January 21, 9am

DUPLICATE CUSTOMERS – WHICH TO CHOOSE

- In many cases you will have the choice of two options for the same customer
- **For Service RO's you should always choose the option where the CusId and the BillCusId match**
- If you have the CDK CUSTOMER NUMBER field visible, this will also be the choice that lists the old CDK # (you can make this field visible by right clicking on the header bar and opening the Field Chooser)

| CusId | Name | BillCusId | CDK CUSTO... | PhoneWor |
|-------|------------------------|-----------|-----------------|------------|
| add | | | | |
| 11586 | ADDISON CENTRAL SCHOOL | 11586 | 223 | 607-359-22 |
| 12124 | ADDISON CENTRAL SCHOOL | 11586 | ShipTo:Addis... | 607-359-22 |

WARRANTY / BILL TO ISSUE:

- Currently being addressed in backend accounting set-up. Hope to see resolution with 1/21 sandbox reset.

TECH99 QUESTIONS:

Tech99 will not be needed with Procede. Here are how the different operations where Tech99 applied will be handled:

Shop Supplies - UPDATED

Warranty & Internal RO's (Type: SII, SIC, SIT, SIO)

- From the second level of the Service Order (after creating the header) select Insert
- In the Job box type SS then hit tab and then enter

Retail RO's (Type: SRI, SRC, SRT, SRO)

- From the Header level of the RO, go to the Summary tab make sure that the Calculate Shop Supplies box is checked.
- 10% of the labor cost (up to \$250) will automatically be calculated on the RO
- You will not be able to add a Shop Supply line item to Retail RO's

Part only RO's

- Simply create the RO as you normally would and then, from the third level, delete the labor line that was created by right clicking and selecting delete

Any PO to a Vendor not requiring Labor (but tied to a vehicle)

This also answers the question regarding Q5 & Q6 from testing.

- From Service Document, select the desired operation then drill in and right click on the labor line and select *Delete* to remove the labor line from the RO
- Then, select *Insert Special* to add your Sublet

Service Purchase Orders (any order not tied to a vehicle)

- Company Purchase Orders are still being addressed in the backend accounting set-up. Hope to see resolution with 1/21 sandbox reset.