Filedrawer

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Brief Description

Filedrawer extends the capability of The Service Manager™ and C.A.R.S. by electronically filing all repair orders created by C.A.R.S. for each vehicle in complete detail. The repair orders are stored automatically as a result of the normal use of The Service Manager™ and C.A.R.S..

Concept

Filedrawer treats each vehicle service history record stored in The Service Manager™ as a file folder. Filedrawer allows you to find the file folder, open it and examine the repair orders contained in the file folder.

Posting to Filedrawer

Repair orders are placed into the correct file folder in reverse-date order by the combined action of the C.A.R.S. Transfer Paid Repair Orders function and The Service Manager™ Process Repair order function. A paid repair order will become accessible to Filedrawer only after both of these functions are selected.

> *Precision tip: If you have added Filedrawer to your system after using The Service Manager™ and C.A.R.S. for a period of time, only repair orders created AFTER Filedrawer has been initialized will appear in Filedrawer.*

Capacity

You may use Filedrawer to retrieve repair orders months or years after they have been filed. Filedrawer has a capacity of 1,000,000 repair orders. The actual capacity is limited only by available disk space.

Organization of this manual

Section 2 explains how to install and set up the system. Sections 3.0 through 3.2 explain the day-to-day use of the system.

Check for required space

When you initialize Filedrawer, the system will allocate space to store 1000 repair orders. This will require 4,608,000 bytes of disk storage space. After you have installed the Precision Data Systems' software and before trying to initialize Filedrawer, you must make sure that you have the required space on your hard disk.

Ms-Dos system

To do this on an Ms-Dos system, use the ⬚ to exit the programs to the Ms-Dos prompt (C:\PDS>). The Ms-Dos prompt should say **C:\PDS>**. If it does not, type ⒸⒹ ⬚ⓅⒹⓈ then press [ENTER]. Next, type:

ⒹⒾⓇ [Enter]

If this does not show more than 4,608,000 bytes free, drive "C" cannot be used to store the repair orders.

> Precision tip: Computers with one hard disk always have a drive "C". If your computer has two hard disks, you may use either "C" or "D". Your selection will not affect the storage of additional blocks of 1000 repair orders.

Windows systems

Exit the Precision Data Systems software to the Windows "Desktop". Click on the icon for the "Ms-Dos prompt". If you do not have an "Ms-Dos prompt" icon on the Windows "Desk top", click on the "Start" button. Next, click on Programs, then click Ms-Dos prompt.

> ***Precision tip: If you don't have an icon for the Ms-Dos prompt, call us. We will help you make one.***

The computer will go directly to an Ms-Dos "C" prompt. The Ms-Dos prompt should say C:\PDS>. If it does not, type ⒸⒹ ⬚ⓅⒹⓈ then press [ENTER]. Next, type:

ⒹⒾⓇ [Enter]

If this does not show more than 4,608,000 bytes free, drive "C" cannot be used to store the repair orders.

> ***Precision tip: Computers with one hard disk always have a drive "C". If your computer has two hard disks, you may use either "C" or "D". Your selection will not affect the storage of additional blocks of 1000 repair orders.***

Initialization

The first time you use the Filedrawer program, the system will attempt to initialize. However, before you attempt to initialize Filedrawer, C.A.R.S. and The Service Manager™ must be installed.
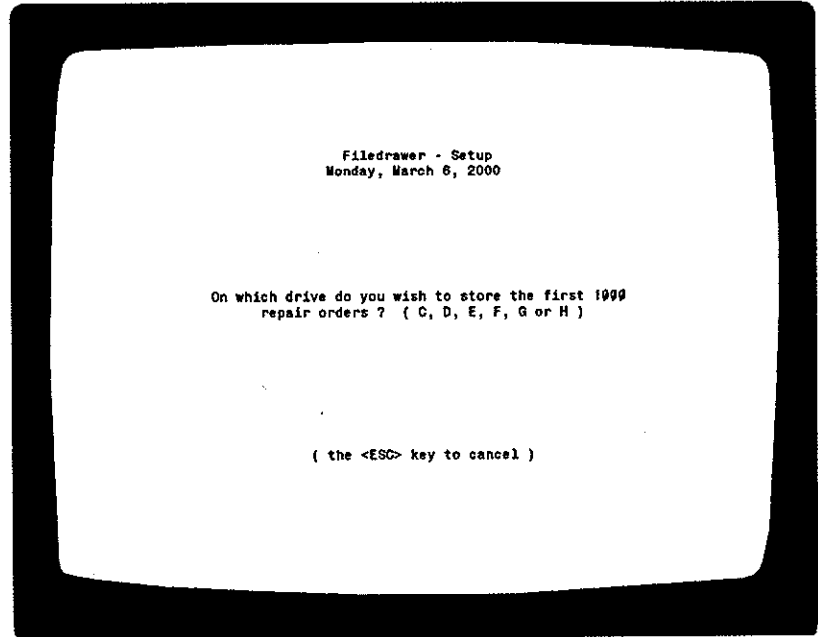
Precision tip: The Filedrawer must be initialized before you can enter the C.A.R.S. function.

Entering Filedrawer

Filedrawer is entered by pressing ⒡ at the "Precision" Main Menu. The first time you enter Filedrawer the following will be displayed:

```
                    Filedrawer - Setup
                   Monday, March 6, 2000




       On which drive do you wish to store the first 1999
              repair orders ?  ( C, D, E, F, G or H )




                    ( the <ESC> key to cancel )
```

Store information on which drive?

You must select a disk drive that has the necessary space available to store the information as determined by doing the procedure on page 3.

Select drive

Select the hard disk drive on which you wish the repair orders to be stored by pressing the appropriate letter. The initialization will only take a few moments. After the initialization, if you have not entered customers into The Service Manager™, the system will return to the Precision Main Menu. If you have entered customers into The Service Manager™, the first customer in your customer follow up system will be displayed.

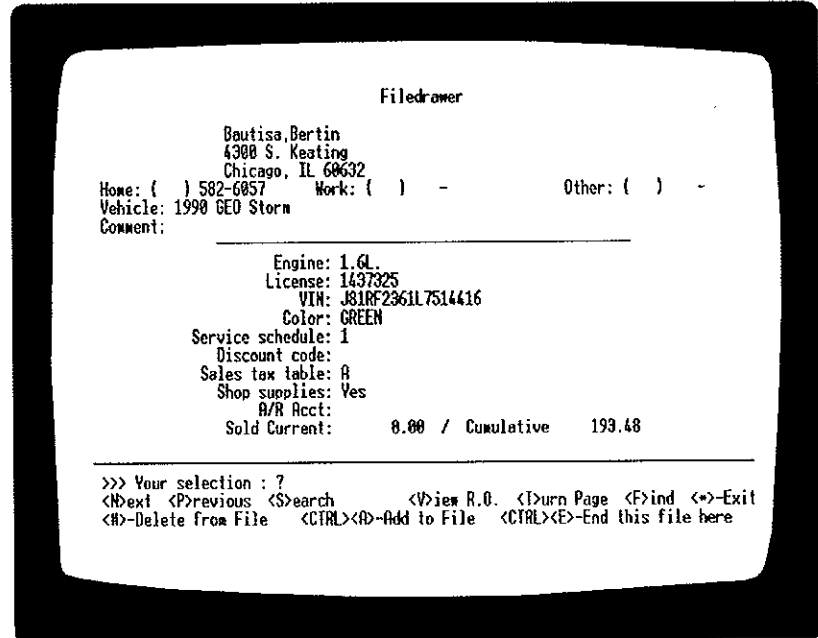Exit Filedrawer

To return to the "Precision" Main Menu press ⒠.

Entering Filedrawer

Filedrawer may be entered by pressing ⌷F at the "Precision" Main Menu. The Filedrawer main display will appear:

```
                              Filedrawer

                  Bautisa,Bertin
                  4300 S. Keating
                  Chicago, IL 60632
    Home: (   ) 582-6057    Work: (   )  -           Other: (   )  -
    Vehicle: 1990 GEO Storn
    Comment:
                  _____

                         Engine: 1.6L.
                        License: 1437325
                            VIN: J81RF2361L7514416
                          Color: GREEN
                Service schedule: 1
                  Discount code:
                 Sales tax table: A
                   Shop supplies: Yes
                        A/R Acct:
                     Sold Current:     0.00  /  Cumulative     193.48

    _____
    >>> Your selection : ?
    <N>ext  <P>revious  <S>earch          <V>iew R.O.  <T>urn Page  <F>ind  <*>-Exit
    <H>-Delete from File    <CTRL><A>-Add to File   <CTRL><E>-End this file here
```

File folders

Notice that the screen is exactly like the C.A.R.S. - Create New Repair Order screen and The Service Manager™ - Inquire/edit file. The repair orders are stored in file folders which are maintained by The Service Manager™. When entering Filedrawer the file folder for the first customer (alphabetically) in your customer follow up system will be displayed. The front of the file folder is displayed showing the customer and vehicle information. The back of the file folder shows the Service history for this vehicle.
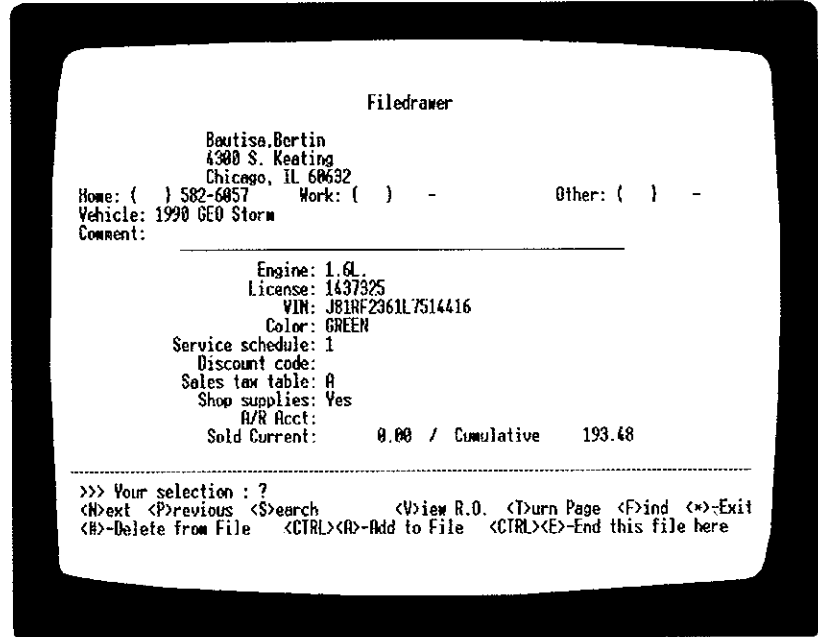
FILEDRAWER
Section 3.1
General Operation

Main display

Upon entering Filedrawer the main display screen will appear:

```
                              Filedrawer

                  Bautisa,Bertin
                  4300 S. Keating
                  Chicago, IL 60632
Home: (   ) 582-6857    Work: (   )  -              Other: (   )  -
Vehicle: 1990 GEO Storm
Comment:
                  _____

                        Engine: 1.6L.
                       License: 1437325
                           VIN: J81RF2361L7514416
                         Color: GREEN
                Service schedule: 1
                  Discount code:
                 Sales tax table: A
                  Shop supplies: Yes
                        A/R Acct:
                   Sold Current:      0.00  /  Cumulative     193.48

-----------------------------------------------------------------------
>>> Your selection : ?
<N>ext  <P>revious  <S>earch          <V>iew R.O.  <T>urn Page  <F>ind  <*>-Exit
<H>-Delete from File     <CTRL><A>-Add to File   <CTRL><E>-End this file here
```

Mini-menu

The Filedrawer mini-menu has more selections than those shown. The mini-menu will change every few seconds. If you would like to see the other choices before the mini-menu changes, press any key.

> *Precision tip: There are four sets of choices. The selection does not have to show on the mini-menu for the system to respond to your choice.*

Locating a repair order

There are two ways of locating a repair order. If you know the invoice number for the repair order you would like to see, you can search by the invoice number. This will allow you to view or print just this repair order. If you would like to view or print all of the repair orders for this vehicle, you must locate and open the file folder. Once opened, all repair orders in the file folder may be examined.

The order of the data

The system stores the file folders in alphabetical order so all the Burnsides are together. Next, the Burnsides are in order by the numeric portion of the address. For example, all the Burnsides who live at 301 Main will be filed before the ones living at 1027 W. Fifth. Last, all the Burnsides at 301 Main will be filed in order by vehicle. Recall that only the first few characters of the vehicle description are used by the system for filing purposes. (The number of characters the system uses depends upon how you have set up The Service Manager™. See The Service Manager™ instruction manual, Section 2 for additional information.)

Next and Previous

Pressing Ⓝext will display the next file folder alphabetically as described above. Pressing Ⓟrevious sill display the previous file folder alphabetically as described above.

Search

Pressing Ⓢearch will search for and display a particular customer's file folder. You will be prompted to identify the desired file folder by the owner's last name. The file folders are stored by company name or last name only. Do not enter titles, initials or first names. You need not enter the whole name. Enter only enough letters to cause the computer to correctly identify the name. For example, if you wished to find the file folder for Burnside, it probably would be adequate to type "Burnsi". The system will display the first match found. If the file folder displayed is not the correct one, you can use Ⓝext or Ⓟrevious to display the correct file folder.

Sometimes when searching for a name, the computer will find a match that contains the name you are searching for, but not the exact name. For example, if you search for Ball the system may find Ballard or when searching for Johns the system may find Johnson. To display a customer with the exact last name, type in the WHOLE last name followed by a comma. Then press [ENTER]. If the file folder displayed is not the correct one, you can use Ⓝext or Ⓟrevious to display the correct file folder.

> *Precision tip: If the customer's name was not found, the system will display the six names alphabetically preceding the name requested and the six names after the name requested. This will aid in locating the correct spelling of a name. Pressing [Page Up] will display the six names following the name shown on the top of screen. Pressing [Page Down] will display the previous six names preceding the name shown at the top of the screen. Using this feature will aid in finding a name when you are unsure of the spelling.*

Extended search

The search function can be used to find a customer who lives at a particular address. This will make it easier to find the information when the owner has a common last name. To do this, type in the WHOLE last name followed by a comma, followed by the numerical portion of the house address. (Example: Smith,1227)

The search function can also be used to find a particular vehicle in a fleet of vehicles belonging to a company. To do this, type in the company name, followed by a colon (:), followed by at least one character of the vehicle description. (Example: Smith Corp:B421)

See The Service Manager™ instruction manual, Section 3.6 Inquire/Edit, for more information.

[Page Up] [Page Down]

Pressing [Page Up] or [Page Down] will display the six names before and the six names following the name on the top of screen.

Once the list of thirteen names is displayed, pressing [Page Up] will display the thirteen names following the name shown at the top of the screen. Once the list of thirteen names is displayed, pressing [Page Down] will display the previous thirteen names preceding the name shown at the top of the screen. Using this feature will aid in finding a name when you are unsure of the spelling.

> *Precision tip: If you would like to reverse the direction the [Page Up], [Page Down], [Up Arrow] and [Down Arrow] work, press [Ctrl]-Ⓡ. The action of [Ctrl]-Ⓡ will be saved only if a repair order has been created before exiting C.A.R.S..*

[Up Arrow] [Down Arrow]

With the list of thirteen names displayed pressing [Up Arrow], [F1] or [F2] will move the names up into the highlight bar one name at a time. Pressing [Down Arrow], [F9], or [F10] will move the names down into the highlight bar one name at a time.

Search by invoice number

The search function may also be used to search for and display a specific repair order. Press Ⓢ, then enter the invoice number of the repair order you wish displayed.

⊞ / ⊟

After searching for a repair order by invoice number you can display the next repair order in invoice number order, by pressing ⊞. For example, if you searched for invoice number 373 pressing ⊞ would display invoice number 374.

To display the repair order immediately preceding the invoice number you searched for, press ⊟. For example, if you searched for invoice number 373, pressing ⊟ would display invoice number 372.

> *Precision tip: The ⊞ / ⊟ prompt will appear only when you have searched by invoice number.*

Turn Page

Once you have located the file folder for the vehicle for which you are interested, you may display the current service history information or open the file folder to examine repair orders. If you wish to display the current service history information, press Ⓣ to turn the page.

Find

Pressing Ⓕ (find) will allow you to search for and display a file folder by License, by VIN or by phone. You do not have to type in the complete License or VIN. When using Find by phone, you **MUST** enter the phone number as 7 or 10 digits. When using Find the system will display the first file folder it finds with a matching License, VIN or Phone number. If the file folder displayed is not the file folder

you are looking for and you wish to find another match, repeat the Find. This will display the next match.

> *Precision tip: If you tell the computer to find "ABC" the system will find a vehicle that has "ABC" in the license or "ABC" in the VIN.*

> *Precision tip: If you have entered the phone number as 10 digits (phone number with the area code) and the system does not find the phone number, repeat the ⒻInd. This time enter the 7 digit phone number (phone number without the area code).*

Earlier repair order

If the displayed customer's vehicle has a repair order on file, pressing Ⓔarlier Repair Order will display the first (most recent) repair order. The repair order number and its date will appear in the upper right-hand corner of the screen. Once a repair order is displayed on the screen, you may use ⓉUrn page to display the pages of the repair order. Notice that this works the same as in the C.A.R.S. Repair Orders - Pending function. (See ①, ②, ③, ④ on page 13 for more information.)

```
                              Filedrawer

                 Alanis,Nancy                      Invoice# 005465 Page 1
                 Rc Cola 2801 W. 47th.             Total          25.48
                 Chicago, IL 60632                 January 14, 2003
       Home: (   ) 650-2253     Work: (   )   -    Other: (   )   -
       Vehicle: 1995 VW Jetta
       Comment:
                                   _____
                         Engine: 2.0L.
                        License: 1575027
                            VIN: 3VWRB81H0SM014501
                          Color: RED                ┌─────Status─────┐
                Service schedule: 1                 │Created on: 01/14/03│
                  Discount code:                    │Paid - C.Card       │
                Sales tax table: A                  │  Marked paid: 01/15/03│
                Shop supplies: Yes                  │No thank you letter │
                       A/R Acct:       Source:      └────────────────┘
                        Mileage: 120720
                     Technician: 5

       >>> Your selection : ?
        <N>ext  <P>revious  <S>earch      <V>iew R.O.  <T>urn Page <F>ind <•>-Exit
        <Q>uick hard copy        <H>ard copy options    <U>tilities   <1> <2> <3> <4>
```

> *Precision tip: If the repair order contains too many parts and/or labor items for all of them to appear on the screen, you may scroll the parts and labor items up and down using [Page Up] and [Page Down].*

Pressing ⓔ again will display the next earlier (older) repair order. This may be repeated until the earliest repair order in the file for that vehicle is displayed.

Later repair order

You may also step back one repair order at a time by pressing Ⓛater Repair Order to display the next later (more recent) repair order. This may be repeated until the most recent repair order is displayed.

Display by department

There may be times when you need to know how the sales on a repair order were distributed (how much in labor, parts, sales tax, etc.). If you wish to see this information on the screen, press Ⓓept..

```
                          Filedrawer

            Alanis,Nancy                    Invoice# 005465 Page 1
            Rc Cola 2801 W. 47th.           Total      25.48
            Chicago, IL 60632               January 14, 2003
 Home: (   ) 650-2253     Work: (   )  --   Other: (   )  --
 Vehicle: 1995 VW Jetta
 Comment:
 ░░░░░░░░░░░░░░░░░░░░░░░░░Retail░░░░░░░░░░░Cost░░░░░░░░Margin░░░░░░░░░
                          0.00         0.00       0.00
 Oil                      9.75         5.35       4.40       45.1%
 Labor                    5.00         0.00       5.00      100.0%
 Parts                    8.55         3.60       4.95       57.9%
 Sublet                   0.00         0.00       0.00
 Tires                    0.00         0.00       0.00
 Package                  0.00         0.00       0.00
 Snow Plowing             0.00         0.00       0.00
 Road Service/Tow         0.00         0.00       0.00
 EPA Charges              0.50         0.00       0.50      100.0%
        Discount          0.00         0.00       0.00
        Sales Tax         1.60         1.60       0.00        0.0%
       -----------------------------------------------------------
        TOTAL DUE        25.48        10.55      14.93       58.6%

                >>> Press ▓ENTER▓ to continue <<<
```

Delete from file

You may delete a repair order from the customer's file by pressing ⓕ. The displayed repair order will be removed from the customer file but will not be erased. This function in combination with the Add to File function described below will enable you to move a repair order from one customer file to another. Thus, if you had processed a repair order using the wrong vehicle description, you can re-file the repair order in the correct vehicle file. Note that the vehicle description on the repair order will not change.

Precision tip: Make a note of the repair order number before deleting the repair order from the customer file.

Add to file

To add a repair order to a customer file, display the customer file to which you wish to add the repair order, then press [Ctrl]-Ⓐ. You will

be asked for the repair order number.

End this file here

If you fail to expand the system before Filedrawer runs out of space, the system will erase the oldest repair orders to make room for storing the newest repair orders. If this has occurred you will find that when looking at earlier repair orders you may suddenly be looking at a repair order for a different customer. The "End this file here" function will allow you to tell the system where the end of the customer's file is.
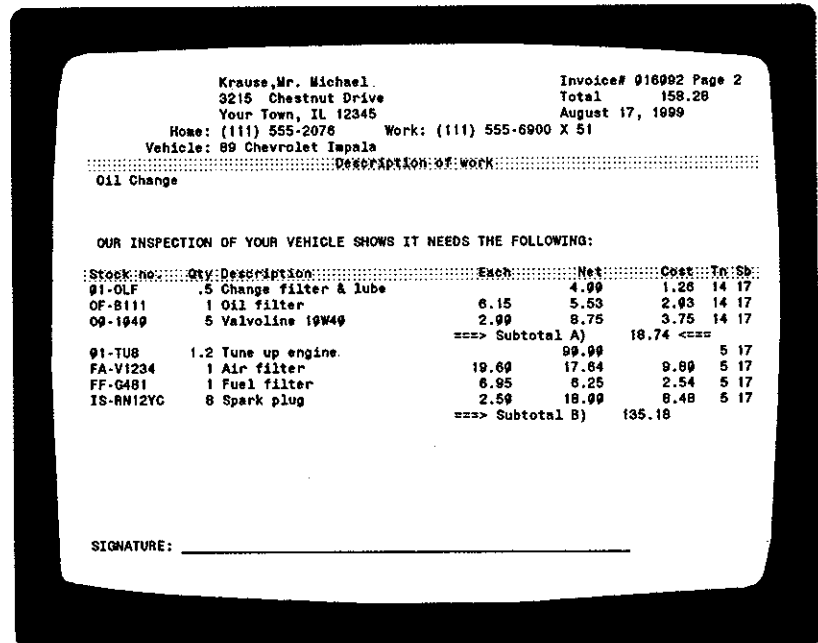
To use the "End this file here" function, display the last valid repair order in the customer's file and then press [Ctrl]-[E].

1 2 3 4 keys

Similar to the Turn Page function, pressing [1] will cause the system to display the Name and Address page regardless of what page is currently displayed. Pressing [2] will cause the system to display the Stock Number page, pressing [3] will display Description of Work page, and pressing [4] will display the Service History page.

View R.O.

The [V]iew repair order function displays a copy of the repair order on the screen as it will appear on paper.

```
                 Krause,Mr. Michael.              Invoice# 016992 Page 2
                 3215  Chestnut Drive             Total       158.28
                 Your Town, IL 12345              August 17, 1999
          Home: (111) 555-2076    Work: (111) 555-6900 X 51
       Vehicle: 89 Chevrolet Impala
       :::::::::::::::::::::::::::::Description of work:::::::::::::::::::::::::::
       Oil Change


       OUR INSPECTION OF YOUR VEHICLE SHOWS IT NEEDS THE FOLLOWING:

       :Stock no::::Qty:Description::::::::::::::::::::::Each:::::::::Net:::::::Cost:::Tn:Sb:
       01-OLF       .5 Change filter & lube                  4.99           1.26  14 17
       OF-B111      1  Oil filter                     6.15   5.53           2.03  14 17
       09-1949      5  Valvoline 19W49                2.99   8.75           3.75  14 17
                                                      ===> Subtotal A)     18.74 <===
       01-TU8       1.2 Tune up engine.                     99.99                 5 17
       FA-V1234     1  Air filter                     19.69  17.64          9.89  5 17
       FF-G481      1  Fuel filter                    6.95   6.25           2.54  5 17
       IS-RN12YC    8  Spark plug                     2.59   18.99          8.48  5 17
                                                      ===> Subtotal B)    135.18

       SIGNATURE: _____
```

The Page 1 information has been condensed due to lack of space. The Service History and Totals box will not appear. If your system is set up to produce different copies using [H] and [Shift]-[H] (for example, suppress part numbers on customer copy is set to Yes) the screen display will produce similar results using [V] and [Shift]-[V].

Quick hard copy

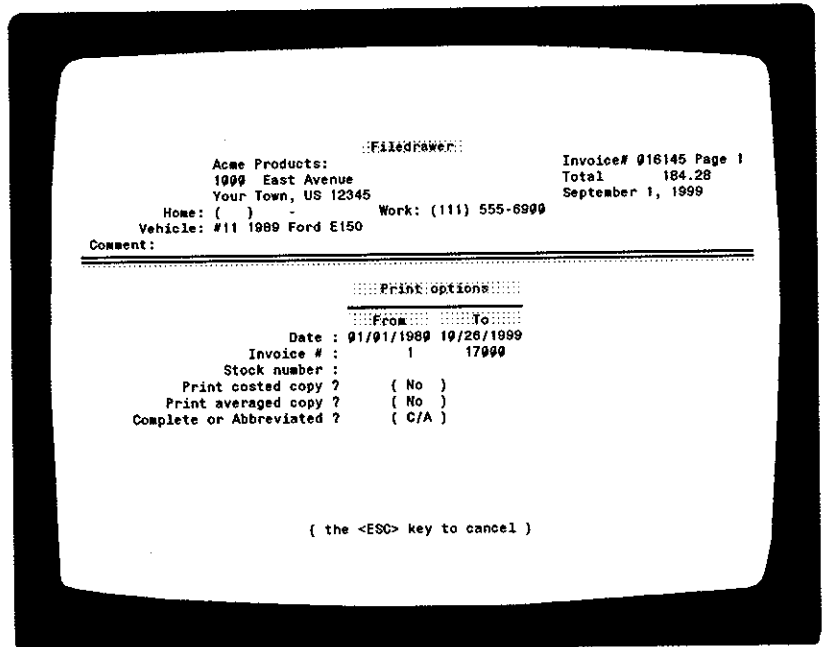Any repair order displayed may be printed by pressing Quick hard copy. ⧈uick hard copy will print a customer copy (a copy not showing cost) of the repair order currently on the screen.

> *Precision tip: If no repair order is currently displayed, pressing ⧈ (Quick hard copy) will cause the system to display the most recent repair order for the vehicle shown and print it.*

Hard copy options

The ⧈ard Copy Options will allow you to print more than one repair order at a time, to print a job costed copy of each repair order, to total all repair orders printed, and to print averaged total sales of the repair orders just printed. To use the Hard Copy Options, press ⧈. The Hard Copy Options display will appear.

> *Precision tip: ⧈ard Copy Options will not work if you are displaying an invoice which was searched for by invoice number. Hard Copy Options works only within a customer's file. You must search by customer name to display the customer's file.*

```
                            :Filedrawer:
            Acme Products:                      Invoice# 016145 Page 1
            1000 East Avenue                    Total      184.28
            Your Town, US 12345                 September 1, 1999
      Home: (   )    -          Work: (111) 555-6900
   Vehicle: #11 1989 Ford E150
Comment:
_____

                            :::Print options::::

                            :::From::: :::To::::
               Date :  01/01/1989 10/26/1999
          Invoice # :         1       17000
       Stock number :
    Print costed copy ?        ( No  )
   Print averaged copy ?       ( No  )
Complete or Abbreviated ?      ( C/A )



                    ( the <ESC> key to cancel )
```

Limiting repair orders printed

The Hard Copy Options may be used to limit the repair orders printed for the vehicle displayed. You may limit the repair orders that will print by entering a range of dates. Any repair orders created prior to the date entered into the "From" column will not print. Any repair orders created after the date entered into the "To" column will not print.

Invoice number (Repair order number)

You may also limit the repair orders to be printed by invoice number (repair order number). Any repair orders with an invoice number less than that entered into the "From" column will not print. Any repair orders with an invoice number greater than that entered into the "To" column will not print.

Stock number

If a stock number is entered the system will only print the repair orders which contain the entered stock number. For example, if your group for bulbs is EB and you want to print only the repair orders for this customer which contain a 9004 halogen bulb you would enter [E][B]-[9][0][0][4].

Using Wildcards, Example #1

The repair orders printed can be limited by a range of stock numbers. This can be done by using a "Wildcard". The system uses the question mark (?) as the Wildcard character. The question mark substitutes for any single character just as when playing cards a wild joker can be used in place of any card.

For example, if your group for bulbs is EB and you wanted to print any repair order that contains either a 9004 or a 9006 halogen bulb you would enter [E][B]-[9][0][0][?] for the stock number. If you would like to print repair orders that contain either an 1157 or an 1157A bulb you would enter [E][B]-[1][1][5][7][?]" for the stock number. Note that repair orders containing an EB-1157NA would not print.

> *Precision tip: All stock numbers contain the number of blank space characters to fill all the space available for the stock number. For example, if your system is set up to use the group number, a dash and 11 characters for the stock number and the stock number is "EB-1157" there are 7 blank space characters following the "7". The question mark in the above example means that any character in the fifth column after the dash is acceptable. This includes the blank space character.*

Using Wildcards, Example #2

Normally tire stock numbers are entered in the form T0-205754REGTB where 205 represents the size, 75 is the aspect ratio, 4 means 14 inch rim, R is non-speed rated radial, EGT is an Eagle GT and B is a black wall. If you wanted to print all repair orders containing an Eagle GT regardless of the size, aspect ratio, speed rating or side wall you would enter [T][0]-[?][?][?][?][?][?][?][E][G][T][?] for the stock number.

Print costed copy?

Answering [Y]es to this question will cause the system to print job costed copies. These will be identical to the copies produced by the C.A.R.S. Transfer Paid Repair Orders function. Answering [N]o to this question will cause the system to print customer copies (showing no cost).

Print averaged copy?

When using Hard Copy Options, if more than one repair order prints, the system will print the total of all repair orders just printed.

Answering Ⓨes to this question, will print an additional summary repair order showing the average sale amount of the repair orders just printed. If you are printing costed copies, the cost will be averaged as well.

Complete or Abbreviated copy

Pressing Ⓒ for a complete copy will print the repair orders in complete detail including individual part numbers, description of work and service history.

Pressing Ⓐ for an abbreviated copy will print the invoice number, customer name, address, type of payment, vehicle description and mileage. It will show retail figures for each sales department. If costed copies were requested it will also print the cost and profit figures for each sales department. It will not print the description of work, service history or individual part numbers.

Go to C.A.R.S.

Pressing Ⓖo will cause the system to leave Filedrawer and go directly to C.A.R.S.- Create new repair order and display the same vehicle you were viewing in Filedrawer.

Exit Filedrawer

Press ⊡ to leave Filedrawer and return to the "Precision" Main Menu.

SECTION 3.2
UTILITIES

Utilities menu

Selecting the Utilities function will display the Utilities menu as shown below.

```
            Filedrawer :: Utilities Menu
              Tuesday, October 26, 1989


                <E> Expand system
                <B> Backup Filedrawer
                <R> Restore backups
                <O> Offload oldest repair orders

                Print from <F>iledrawer
                Print from <D>iskettes

                <CTRL><F> Force a backup

                <*> Exit Utilities

        >>> Your selection : ?


            Space available for 1968 repair orders.
```
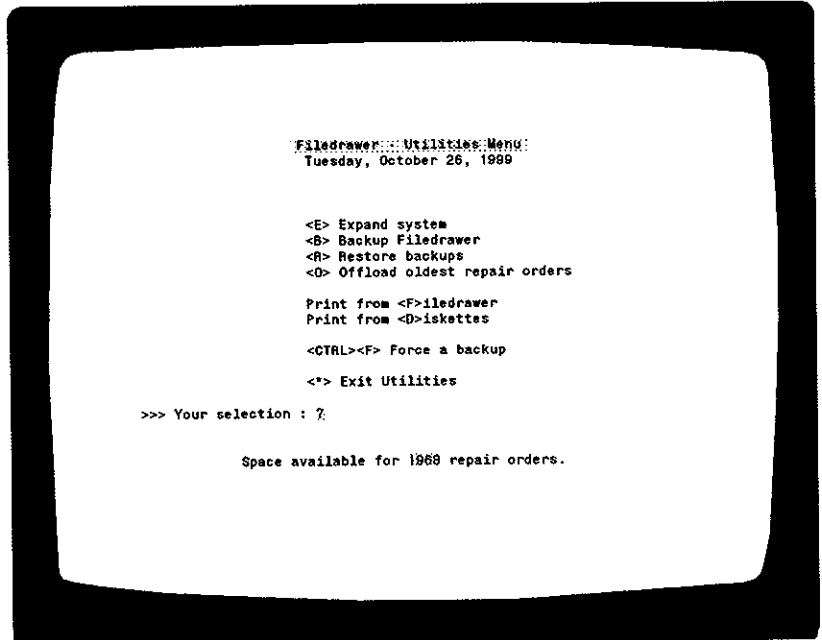
Space available

The amount of space available to store additional repair orders before the system needs expansion is shown below the Utilities Menu. Monitor this. Expand the system (hard disk space permitting) before you run out of room to store additional repair orders.

> *Precision tip: If the system contains space for less than 1000 repair orders, a reminder to expand the system will be displayed.*

Expand system

As explained earlier, Filedrawer allocates space to store repair orders 1000 repair orders at a time. 4,608,000 bytes are required for each 1000 repair orders. The Expand System function will allocate space for an additional 1000 repair orders. Selecting the Expand System function will show the following:

```
            Filedrawer - Expand system
            Tuesday, October 26, 1999




    System currently holds 2000 repair orders. Expanding the
    system will increase the capacity by 1000 repair orders.
    Do you wish to increase system capacity now ?  ( Y/N )




                ( the <ESC> key to exit )
```

If you wish to expand the system, press [Y]. (Pressing [N] or [ESC] will return you to the Utilities Menu without expanding the system.) After pressing [Y], the system will try to find space on the same drive that contains the storage space for the first 1,000 repair orders. If the space is found, the system will expand onto that drive.

If there is insufficient space on that drive the system will ask:

> Onto which disk drive do you wish to expand the additional repair orders ? (D, E, F, G, or H)

You may select any disk drive with sufficient space for an additional 1000 repair orders. (You should start with the lowest drive letter first and work your way to the highest. See Section 2, starting on page 3, for additional information.) After the system has expanded, you will be returned to the Utilities Menu.

Precision tip: If you FAIL to expand the system before Filedrawer runs out of space, the system will begin ERASING the oldest repair orders stored on the hard disk, to make room for storing the newest repair orders.

Precision tip: If you do not have space on the hard disk to expand the system, use the Offload oldest repair orders function explained on page 23. This will make space on the hard disk by moving the oldest 1000 repair

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orders off of the hard disk and onto floppy disks. After using the Offload function you will have the space available to expand the system.

Backup Filedrawer

To prevent the loss of stored repair orders in the event of a hard disk failure, a complete set of Filedrawer backups must be maintained. Filedrawer has its own built-in backup function.

As repair orders are added to Filedrawer, the system keeps track of these repair orders and flags them for backup by the Backup Filedrawer function. Depending on the type of backup drive you have, the Backup Filedrawer function will organize your backups into groups of 250 or 1000 repair orders. The first group of 250 repair orders will contain repair orders numbered 1 through 250. The first group of 1000 repair orders will contain repair orders numbered 1 to 1000. The second group of 250 repair orders will contain repair orders numbered 251 through 500, etc. The second group of 1000 repair orders will contain repair orders numbered 1001 through 2000, etc. When you select the Backup Filedrawer function, the system will show you which groups of 250 repair orders need to be backed up.

```
                  Filedrawer - Backup Filedrawer
                    Tuesday, October 26, 1999


        The following groups of repair orders have been filed since
        the last time backups have been made of the Filedrawer:
       _____

 1 to 1000






                     >>> Press <ENTER> to continue <<<
```
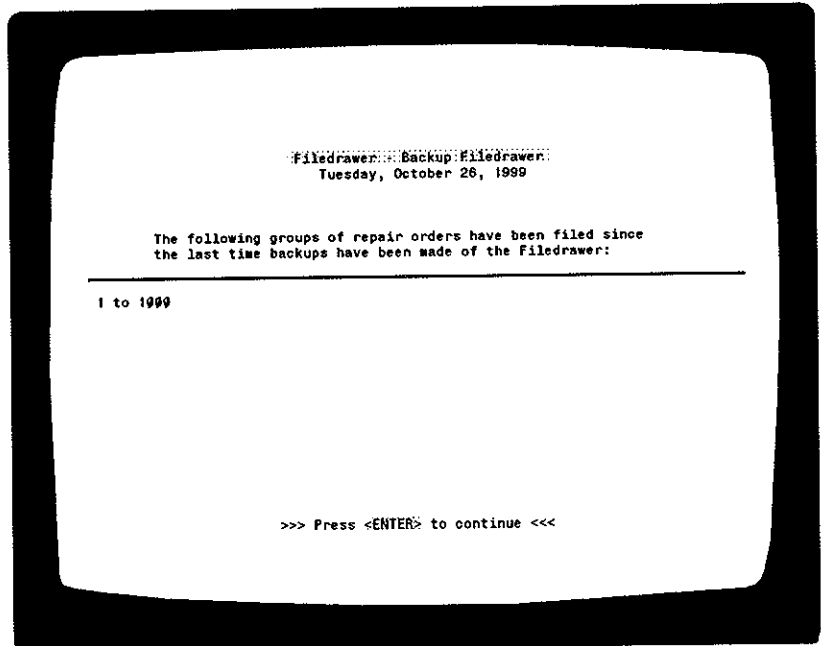
Precision tip: If you are using a 1.44meg drive, the system will backup in groups of 250 repair orders. If you are using a Zip drive or other high capacity backup, Filedrawer will backup in groups of 1000.

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Correct backup disk

After pressing [ENTER] to continue the backup process, the system will prompt you as to which backup disk is required. Insert it, then press [ENTER]. If you have inserted the incorrect backup disk, or if this group of 250 (or 1000) repair orders has never been backed up before, the system will display the following:

```
        Filedrawer - Backup Filedrawer
           Tuesday, October 26, 1999




                  >>> Please wait <<<




    Filedrawer backup file for repair order numbers 1 to 1000
    ( File A:FdBu0001.Dta ) was not found on backup disk.
                  Create it ?  ( Y/N )
```
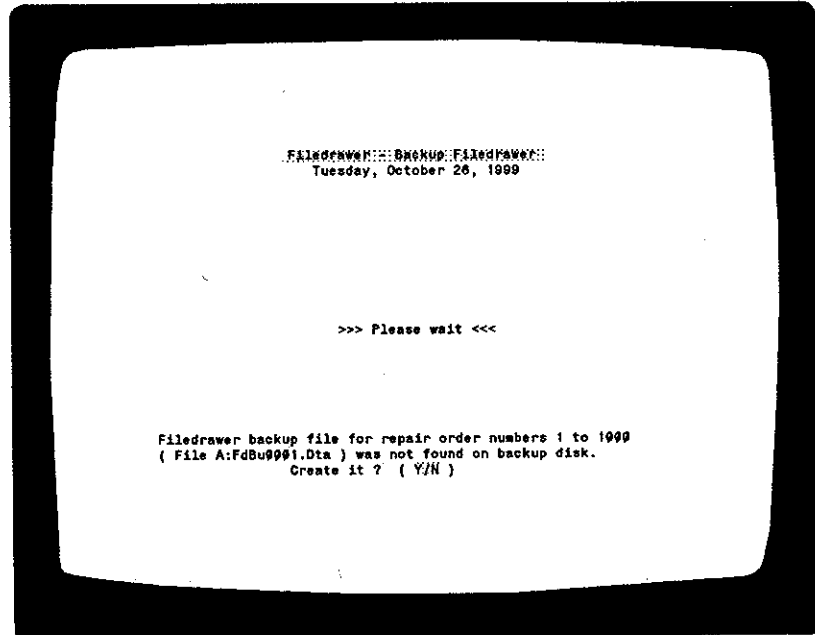
Create backup file

If this message appears, check to make sure you have inserted the correct disk. If this is the very first time this group of 250 (or 1,000) repair orders has been backed up, press Ⓨ. If this is **NOT** the very first time this group of 250 (or 1,000) repair orders has been up, **YOU HAVE INSERTED THE WRONG DISK.** Press Ⓝ. You will be prompted for the backup disk again. Repeat the procedure until all backup disks requested by the system have been used.

Precision tip: The file created on the backup disk to store the backup copy of repair orders numbered 1 to 250 or 1 to 1000 is called FDBU0001.DTA. The file created on the backup disk to store the backup copy of repair orders 251 to 500 or 1001 to 2000 is called FDBU0002.DTA, etc.

Precision tip: You may abort the process any time the system is requesting another backup disk. The system will remember where it left off so you can complete the backup later.

Precision tip: The system will copy all 250 or 1000 repair orders in the backup group only the first time that group

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is backed up. When the system uses the same backup disk for subsequent backups, THE SYSTEM WILL BACKUP ONLY THE REPAIR ORDERS STORED IN FILEDRAWER SINCE THE LAST TIME BACKUPS WERE MADE USING THAT DISK. For this reason, you CANNOT ALTERNATE between sets of backup disks.

Precision tip: Using The Service Manager™ Inquire / Edit File function can cause two files to be combined. This may cause old repair orders to be flagged for backup. Also, using the Delete from File and Add to File functions described in Section 3.1 may also cause old repair orders to be flagged for backup. This is normal. Follow the system's prompting and insert the correct disks.

Force backup

You may force the system to backup a specific repair order by using the Force a Backup function. To do this, press [Ctrl]-F at the Utilities Menu. You will be prompted to enter the number of the repair order you wish to force the system to backup. That repair order will backup the next time you select the Backup Filedrawer function.

Replacement of damaged backup disks

There may be times when you need to re-create a damaged backup disk. This can be done by forcing the backup of one repair order in the backup group of 250 (or 1000) that was on the damaged backup disk. Replace the damaged disk with a freshly formatted backup disk. Then, using the Backup Filedrawer utility, proceed with the backup. Remember, the first time you backup a group of 250 (or 1000) repair orders the system will copy all 250 (or 1000) repair orders in that group.

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Restore backups to hard disk

The Restore Backups utility is used to re-construct your Filedrawer after a major hard disk disaster, when moving your Filedrawer to a new computer, or when moving your Filedrawer to a new hard disk. If you have encountered a serious Filedrawer problem you will see the following:
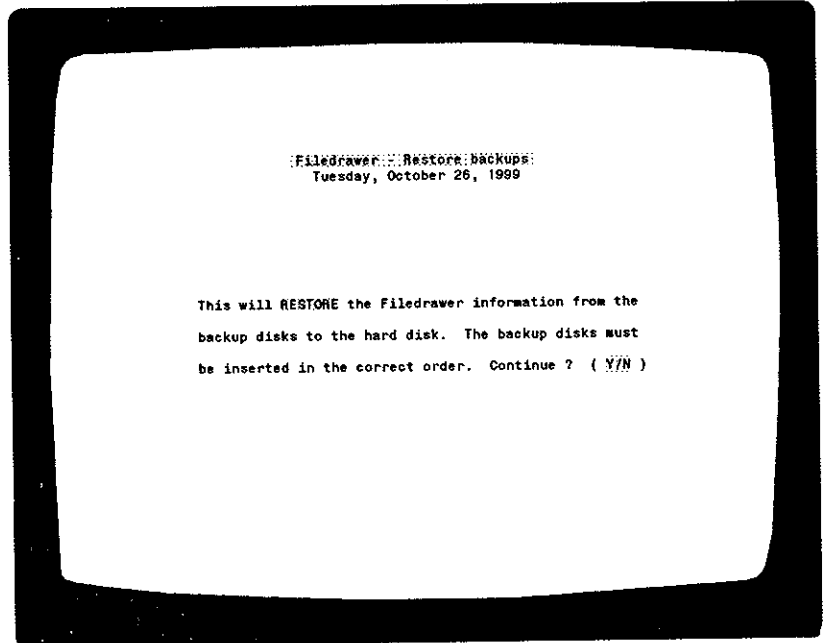
```
::Filedrawer:::::Serious:problem:
     Tuesday, October 26, 1999




        > > >  W A R N I N G !  < < <

The system has discovered a serious problem.  Either the last
BACKUP! was never finished successfully or you are rebuilding
your Filedrawer after a MAJOR hard disk FAILURE.

Did you have a MAJOR hard disk FAILURE ?  ( Yes/No )
```
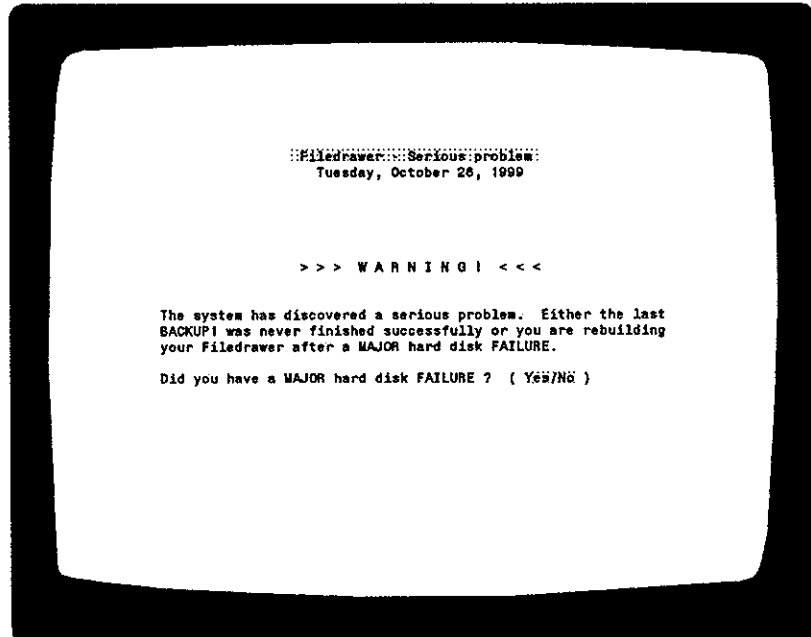
If you have not experienced a Major hard disk failure, answer Ⓝo. Go to the "C" prompt (C:\PDS>) and redo the Backup1. If you have experienced a Major hard disk failure or you are moving the system to another computer, answer Ⓨes.

The system will now ask which disk drive you wish to store each of the Filedrawer files. After this is complete the system will show the following:

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```
       Filedrawer : Restore backups
         Tuesday, October 26, 1999




  This will RESTORE the Filedrawer information from the

  backup disks to the hard disk.  The backup disks must

  be inserted in the correct order.  Continue ?  ( Y/N )
```

After answering Yes the system will ask:

    Start with repair order :   X
      End with repair order : XXXXXX

***Precision tip: The X's represent the repair order numbers
to be restored.***

You will be prompted for your Filedrawer backup disks in order. After the restoration is complete, you will be returned to the Filedrawer Utilities menu.

Offload oldest repair orders

If you are about to run out of space on your hard disk to store repair orders this function will provide the needed hard disk space to expand Filedrawer. The Offload oldest repair orders function will copy 1000 repair orders from your hard disk onto floppy disks. 250 repair orders will fit onto each disk. Therefore, you will need 4 formatted floppy disks to Offload 1000 repair orders. After the repair orders have been copied onto floppy disks they will be erased from your hard disk.

If you are doing backups onto Zip disks or other higher capacity disks, the Offload will be done in groups of 1000 repair orders. Zip disks will hold 21000 repair orders per disk.

Pressing Ⓞ, will display the following:

```
Filedrawer - Offload oldest repair orders
         Tuesday, October 26, 1999




     This function will make more space available on your hard
     disk by copying repair order numbers 1 to 1000 onto
     offload  diskettes.  These repair orders will then be ERASED
     from the hard disk but will still be available by using
     floppy diskettes.

     Are you sure that you want to do this ?  ( Yes/No )
```
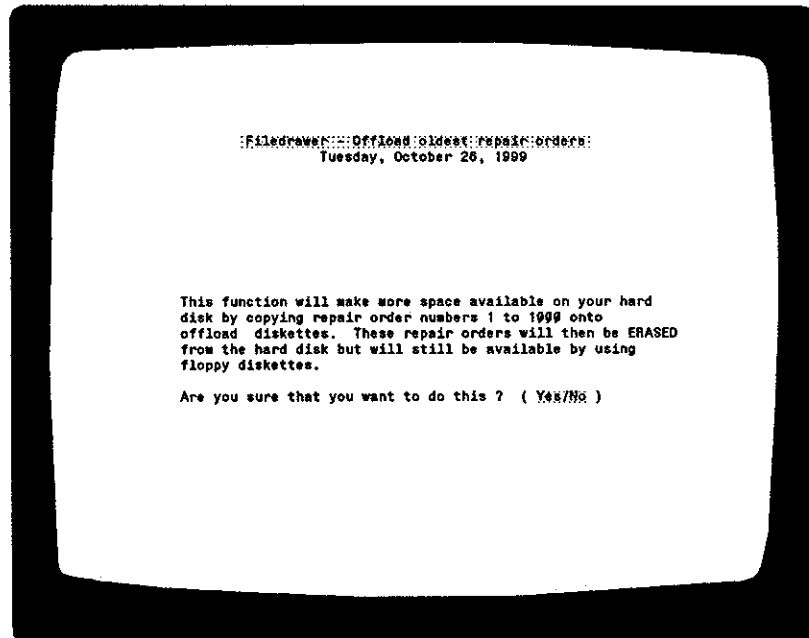
Type [Y]es, then press [ENTER]. The following will appear:

```
Filedrawer - Offload oldest repair orders
         Tuesday, October 26, 1999




     Insert offload disk with repair order numbers 1 to 1000
     ( File FdBu0001.Dta ) into drive D.

     >>> Press <ENTER> to continue or the <ESC> key to cancel <<<
```
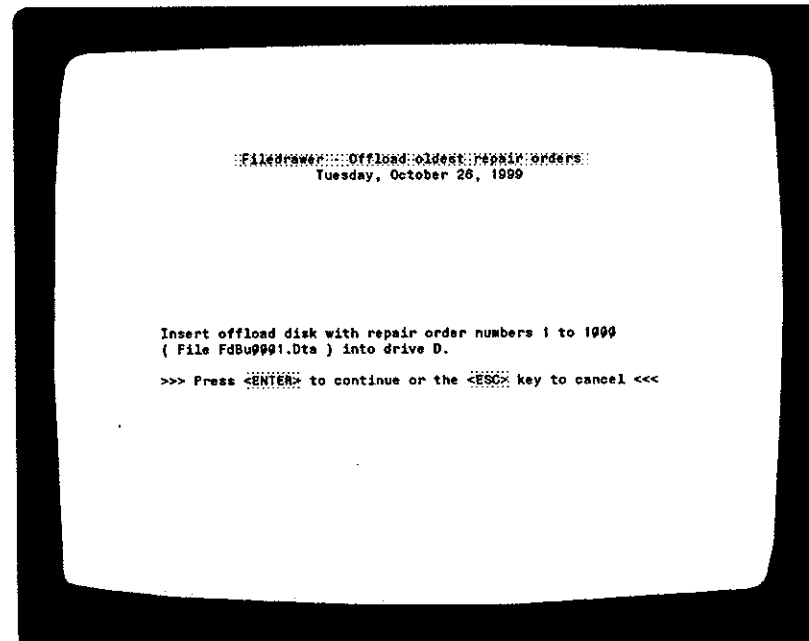
Insert Offload disk

You will be prompted to insert the Offload disk for the first group of 250 (or 1000) repair orders for this 1000 repair orders. Label one of the formatted disks as above and insert it into drive "A", then press [ENTER].

Create the file on Offload disk

The group of repair orders will not be found on the Offload disk

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in the drive where you do your backups so you will see the following displayed:

```
Filedrawer  Offload oldest repair orders
           Tuesday, October 26, 1999




                >>> Please wait <<<




Filedrawer offload file for repair order number 1 to 1999
( File D:FdBu0001.Dta ) was not found on offload disk.
              Create it ?  ( Y/N )
```
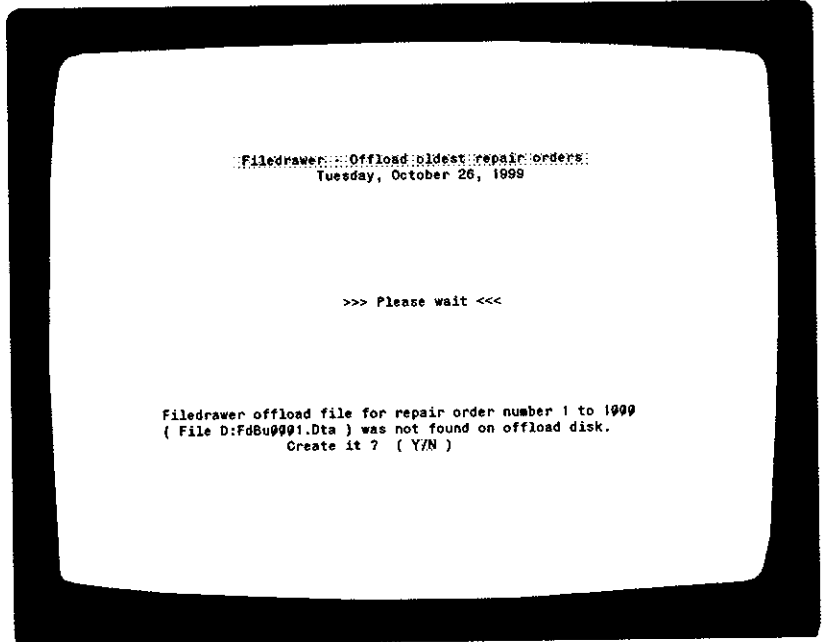
Check to make sure that you have labeled the disk correctly, then press [ENTER]. Repeat the process until the system no longer asks for Offload disks.

Print from Filedrawer

The Print from Filedrawer function will allow you to print repair orders using the same criteria as Hard Copy Options function (described in Section 3.1). It will also allow the printing of repair orders by using the customer's name, vehicle description, license or VIN.

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```
:Filedrawer: Print from Filedrawer:
        Tuesday, October 26, 1999




                    :::::Print options:::::

                    :::::From::::  :::::To:::::
            Date :  01/01/1980  10/26/1999
       Invoice # :      1          3999
    Stock number :
 Print costed copy ?     ( No  )
 Print averaged copy ?   ( No  )
Complete or Abbreviated ? ( C/A )
   Customer's name :
 Vehicle description :
         License :
             VIN :

         ( the <ESC> key to cancel )
```
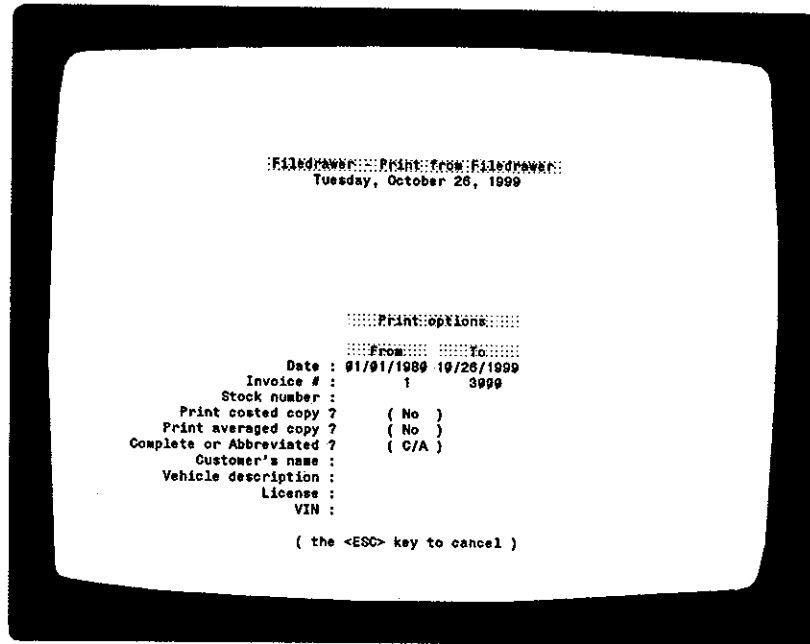
Limiting the repair orders printed

You may limit the repair orders that will print by entering a range of dates. Any repair orders created prior to the date entered into the "From" column will not print. Any repair orders created after the date entered into the "To" column will not print.

Invoice number (repair order number)

You may also limit the repair orders to be printed by invoice number (repair order number). Any repair orders with an invoice number less than that entered into the "From" column will not print. Any repair orders with an invoice number greater than that entered into the "To" column will not print.

Stock number

If a stock number is entered the system will only print the repair orders which contain the entered stock number. For example, if your group for bulbs is EB and you want to print only the repair orders which contain a 9004 halogen bulb you would enter EB-9004.

Using Wildcards in stock number

The repair orders printed can be limited by a range of stock numbers. This can be done by using a "Wildcard". The system uses the question mark (?) as the Wildcard character. The question mark substitutes for any single character just as when playing cards a wild joker can be used in place of any card.

Using Wildcards, Example #1

For example, if your group for bulbs is EB and you wanted to print any repair order that contains either a 9004 or a 9006 halogen bulb you would enter EB-900? for the stock number. If you would like to print repair orders that contain either an 1157

or an 1157A bulb you would enter EB-1157? for the stock number. Note that repair orders containing an EB-1157NA would not print.

> *Precision tip: All stock numbers contain the number of blank space characters to fill all the space available for the stock number. For example, if your system is set up to use the group number, a dash and 11 characters for the stock number and the stock number is "EB-1157" there are 7 blank space characters following the "7". The question mark in the above example means that any character in the fifth column after the dash is acceptable. This includes the blank space character.*

Using Wildcards, Example #2

Normally tire stock numbers are entered in the form TØ-205754REGTB where 2Ø5 represents the size, 75 is the aspect ratio, 4 means 14 inch rim, R is non-speed rated radial, EGT is an Eagle GT and B is a black wall. If you wanted to print all repair orders containing an Eagle GT regardless of the size, aspect ratio, speed rating or side wall you would enter TØ-???????EGT? for the stock number.

Print costed copy?

Answering Ⓨes to this question will cause the system to print job costed copies. These will be identical to the copies produced by the C.A.R.S. Transfer Paid Repair Orders function. Answering No to this question will cause the system to print customer copies (showing no cost).

> *Precision tip: When limiting repair order by Date, Invoice number or Stock numbers Print from Filedrawer will print repair orders WITHOUT regard to customer.*

Print averaged copy?

When using Print from Filedrawer, if more than one repair order prints, the system will print the total of all repair orders just printed. Answering Ⓨes to this question, will print an additional summary repair order showing the average sale amount of the repair orders just printed. If you are printing costed copies, the cost will be averaged as well.

Complete or Abbreviated copy

Pressing Ⓒ for a complete copy will print the repair orders in complete detail including individual part numbers, description of work and service history.

Pressing Ⓐ for an abbreviated copy will print the invoice number, customer name, address, type of payment, vehicle description and mileage. It will show retail figures for each sales department. If costed copies were requested it will also print the cost and profit figures for each sales department. It will not print

the description of work, service history or individual part numbers.

Customer's name

If a customer's name or part of a name is entered the system will print the repair orders which contain the entered name. For example, if you select using the name "Ball" the system will print repair orders for the names Ball and Ballard. To print a customer with the exact name, type in the WHOLE last name followed by a comma, the press [ENTER]. Capitalization does not matter when selecting by name.

> *Precision tip: This feature can be used when an individual customer or company has more than one vehicle and you would like copies of all their repair orders regardless of vehicle.*

Vehicle description

If a vehicle description or part of a vehicle description is entered the system will only print the repair orders which contain the entered vehicle description. The part of the vehicle description you enter may appear anywhere within the vehicle description. For example, if you have entered "Dodge" the system will print all repair orders which contain the word Dodge in the vehicle description, regardless of customer.

This may be used in conjunction with the Customer's name. For example, you may want to print just the repair orders for all the Fords ABC Company owns. To do this enter "ABC Company" for the Customer's name and "Ford" for the vehicle description. The system will print all the repair orders filed under ABC Company which contain Ford in the vehicle description.

License

If a license or part of a license is entered the system will only print the repair orders which contain the entered license. The part of the license you enter may appear anywhere within the license field. For example, if you have entered UAE the system will print all repair orders which contain the letters UAE in the license field, regardless of customer.

VIN

If a VIN or part of a VIN is entered the system will only print the repair orders which contain the entered VIN. The part of the VIN you enter may appear anywhere within the VIN.

Print from Diskettes

Similar to the Print from Filedrawer function described above, it will print directly from your Filedrawer backup diskettes.

> *Precision tip: As explained in Expand System on page 18, when Filedrawer fills up, it begins erasing the oldest repair orders on file. By using the Offload oldest repair*

orders function before this occurs you can save your oldest repair orders. This function may be used to print repair orders from the Offload disks. (See Offload oldest repair orders on page 23 for more information.)

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