



QUICK START VERIFY FOR BOOKKEEPER/MANAGER

How to verify a work order

Complete info in the *Verify* document via the [Clients](#) link at www.quicktracsw.com

Once a work order has been paid for by the customer you will need to verify the work order. This process finalizes information for Analytics and compares the Service Advisor inputs and Technician production values against the actual numbers on the final Work Order. **It is recommended that you verify all paid work orders the next business day.**

1. Log into the program per Quick Start Log In Process.
2. Click on **Verify** on the top right of the menu.
3. Type the WO number you wish to verify, this will bring up the WO number. Confirm that all is correct in the **Initial Work Edit** screen or modify as necessary and click on the continue button.
4. Confirm that all of the sold work entered by your front end staff is correct in the **Sold Work Screen**. Each event will show the SALES, the DISPATCH data, and the PRODUCED data. All data can be edited as necessary.
5. After confirming sold work move on to the **Actuals** tab to enter the actual dollars collected on the final work order. First, select the **Closing Date** which is when the Work Order was paid for by the customer. Use the calendar icon to select the date. Under the closing date you will enter the amounts collected on labor, parts, sublet, other, tax, and discounts. Click on the **“Continue”** button, and then click on the **“Verify Work Order”** button. Once a work order is verified, it will be included in Analytics.
6. Repeat the above steps for each Work Order.

A missed work order can be created in the welcome screen. Simply enter the new (missed) work order number and click on the BEGIN button or press the enter button on your keyboard.

A dialogue box will appear informing you that a new work order will be created and to either cancel or confirm the request.

HOME COMPACT TOOLS OPTIONS VERIFY ANALYTICS SCOREBOARD LOGOUT

WELCOME INITIAL WORK EDIT SOLD WORK ACTUALS VERIFY!

Work Order Number: 4888

Date Created: 2008-10-01

Ad-Code: Drive-by

Delete Work Order Save Changes Continue...

Edit Initial Record Information

This screen allows you to update the controlling information about the work order. The work order number is a 4-16 digit alpha-numeric field that is fully editable. The created-date allows you to book the work for any calendar date in the past. You may also adjust the ad-code which is used in reports to help you to determine effective advertising strategies. If a work order has already been verified, you may un-verify it, removing the information from the reporting tables. Finally, you can delete the work order if it is in an unverified state, or un-delete the work order if it's in a deleted state.