



## QUICK START GUIDE FOR SERVICE ADVISOR

### How to create, dispatch and upsell a work order

Complete info in the *How to Create a Work Order* document via the [Clients](#) link at [www.quicktracsw.com](http://www.quicktracsw.com)

**Note:** Immediately upon **creating** a Work Order (vehicle has a POS WO and waiting to be dispatched) or **completing** a new sale, it is important that it is entered into QuickTrac! (This allows real time viewing of the Work Orders you have processed)

1. From the **Service Advisor Main Page** click on your Service Advisor bar graph.
2. To create a **New WO** entry, enter the order number from your point of sale on the left hand side in the **SEARCH/NEW WO** box. This will create a data entry location in the center box on the page.
3. Select the appropriate **AD CODE** for your WO by selecting it from the **AD CODE** drop down box. You must enter an ad code to continue or the entries will not be accepted. (see Manager to add **AD CODES**)
4. Select the **SOLD BY** name to select who sold this work order so that they can get credit for that sale
5. Select the appropriate **CATEGORY**, **SOURCE**, and **BRAND** which may fall under either customer pay, non-billable, internal, or mfg warranty. (See the Work Codes user guide for more information on Categories, Source, and Brand.)
6. Select technician from the “**Tech Credited**” drop down box when an upsell is made to credit a technician with finding work (when applicable – selecting a tech is not mandatory). When the customer is using a non-billable category, select “Tech Credited” to indicate which technician was responsible for the non-billable work.
7. Enter the estimated initial total hours in the **SOLD HOURS** box.
8. Enter the estimated total non-discounted dollars sold in the **SOLD DOLLARS** box (includes part, labor, tax, everything!).
9. Hit the **ENTER** button on your keyboard to confirm entries. This new entry will now appear in the upper left box marked **WorkOrders** which contains all WO’s that have hours left to be dispatched.
10. When you are ready to **dispatch** the WO to a technician click on the collapsible **DISPATCH WORK GREEN BAR** (if it isn’t already collapsed) and select a technician from the **SERVICE TECHNICIAN** drop down box. Tab over and enter the dispatch work **HOURS** for this technician. The WO will now appear in the **ACTIVE WO’S** box on the left hand side and on the technician’s personal page as a dispatched job.
11. To enter **additional sold work** after the Technician inspects the vehicle select the correct WO from either the **WORK ORDERS** box or by typing it in the **SEARCH/NEW WO** box on the left hand bottom of the page. Enter the amount of **HOURS** and **DOLLARS** only for the additional sold work and then enter the **DECLINED WORK HOURS** and **DOLLARS** amount for all estimated work that was presented to the customer but they chose not to have done. Click on the **ENTER** button on your keyboard to save entries. The WO will appear in the **Work Orders** box for dispatching.
12. Dispatch the new work hours as explained in Step 10.

**Note:** If you have both **CUSTOMER PAY** and **NON-BILLABLE** time to dispatch, create each entry separately on the same work order.