

gross profit number at the bottom of the report is likely to be insignificant and probably would not warrant rerunning the shop report.

Chapter 12, “Returning Parts & Keeping On Top Of Parts”

RETURNING PARTS

Returning parts whether ordered and not needed, or received in excess, is handled through the PARTS SCREEN of the RO. You bring up the PARTS TRACKING SCREEN by pressing “F4” twice from the RO HEADER SCREEN. Once you have the PARTS TRACKING SCREEN displayed, merely highlight the part to be returned and press “F5”. This will change the status to “R” for returned. You may tag as many parts as need be, so long as they are all on the same invoice. Once you have tagged the lines for return, you press “ESC” and the system identifies the Vendor, the Invoice #, and the Amount of the tagged lines being returned. It also allows you to verify the ACCT # that you’ll be crediting with the return

CC3’s PARTS TRACKING System will automatically print out two (2) copies of the Return Slip. You should have the driver sign one copy for your records and send one along with the returned part(s).

You may not have realized that when you Posted that Parts Invoice that you were actually creating a Payable out in the Accounting System. Likewise when you create a Return Parts Slip, you are posting a Return Credit directly into the Accounting System.

All parts returned are then noted to the RO’s notation screen with time and date stamp for audit.

RO Lines marked with status ‘R’ or ‘E’ and have no time and 0 amount will not print on the RO or Supplement, so the line is preserved for tracking only. You can use this type of line to receive a part that was accidentally to your shop, you can add the part as a line on the RO, and then return it, and the part never shows up on any printed RO for the customer or insurance company.

You must post a return to print the return parts sheet. You do not wait for the credit memo to come back from the vendor. This system is now superior to anything that the dealership is using; therefore your records will be more clear and concise if you post the return. There are 2 return sheets that print out, one signed by the driver and placed in the file. Therefore, with a signed return sheet in your file, you can feel confident that having the return posted before the credit memo arrives is appropriate.

To return a part on a closed Archived RO, the system is not nearly so cool, but will allow you to handle the transaction. You will first post an invoice to the RO for a negative amount (see the previous chapter). You will then go into the actual part line tracking of that RO and appropriately notate, as well as notate thru F10-Notation of that closed RO. No Return Parts sheet will print as of the date of printing this manual. On a side note, from the Main Menu, an option called Locate Lost Part will allow you to cross reference a lost part # to either a closed or open RO. So a part sitting around the shop for a few months, could be quickly tracked to an Archived RO. Locate Lost Parts only works if the part number is entered on a line-by-line basis, and that does occur automatically whenever an estimate is bridged in from Mitchell, ADP, or CCC.

PARTS RETURN CHECK - If a check comes back to the shop for return of parts on a particular RO, which is sometimes the case with used parts that didn’t work out, the check can be deposited and “jobcosted”, meaning the check amount deposited will be removed from the ROs jobcosting. Just go

to Deposit to RO Parts Refund Check from the main menu, the same place you would otherwise deposit any check against the RO, there is an option for it.

Parts Reconciliation report is available that will cross reference on a line by line basis whether the part was tracked to a invoice posted to the RO or not. It will simultaneously make sure that the amount of money on an invoice posted to the RO is represented in the lines of the RO itself. Run this Parts Reconciliation report from F4-Line, F4-Parts, F7-Print, (R)econciliation from any open RO. You can also print it from the F6-Closeout screen, or on a closed Archived RO from the F8-Jobcost/Closeout screen.

Chapter 13, “Assigning Work in CC3 & Work Orders”

Press “F4” to bring up the LINES Screen.

Press “F2” to bring up the WORK ORDER Screen.

Allocated	RO Hrs	Diff.	Est. Hrs	Hrs	WOHrs	Tech	EPhrs	Phrs	WOPhrs	PTech
0.0	8.4	8.4	0.00	1.50	0.00		0.00	0.00	0.00	
			1.50	0.00	1.50		0.00	0.00	0.00	
			0.30	0.00	0.30		0.00	0.00	0.00	
			0.30	0.00	0.30		0.00	0.00	0.00	
			1.50	1.00	1.50		0.00	0.00	0.00	
			0.00	0.00	0.00		2.00	2.00	2.00	
			0.00	0.00	0.00		0.00	0.00	0.00	
			0.30	0.00	0.30		0.00	0.00	0.00	
			0.30	0.00	0.30		0.00	0.40	0.00	
			0.00	0.00	0.00		0.00	0.00	0.00	
			0.00	1.40	0.00		0.00	0.00	0.00	
			0.00	0.30	0.00		0.00	0.00	0.00	
			0.00	1.80	0.00		0.00	0.00	0.00	
			0.00	0.00	0.00		0.00	0.00	0.00	

As you study this screen, you’ll see each line has an Estimate Time, a RO Time, and a WO Time. If no “Detail Adjustment” was taken, then all three entries should be the same. If your shop utilizes “Detail Adjustment”, then the WO column would show a percentage discount on the hours allowed for the item. The hours shown are rounded for the display, however the printed Work Order will have hours carried out to the hundreds.