**Basic Service Advisor Part 2**

Four sections covered in this class

* Work Order write up and review
* Review Work Order ribbons, Technician View, Labor, and Material lines
* Using the Catalog Lookup
* Receiving Materials, Returns, Sublet, and Posting

**Section 1 Work Order write up and review**

* Start Work Order how to search how to add a new customer and vehicle. Use an existing contact and vehicle to start a Work Order.
* Add concern, inspection, service package reviewing the story book format.
* Accessing the Fly Out
* Deferred work
* Service Intervals what it is and how it works
* Reminders what it is how to add a Reminder how to edit
* Finish the work order write up

**Section 2 Review Work Order ribbons, Technician View, Labor, and Material lines**

* In the Work Order go over the top ribbon features
* Service package tab review
* Utilities tab review
* Prioritization Overview and Tech View and do a basic overview (Digital Job Board)
* Right side of Work Order go over the various features assign a Tech and enter in Mileage
* Open a Labor line and show what can be done pricing, hours, tech time
* Open a Material line and go over the basic features/entries

**Section 3 Using the Catalog Lookup**

* Use Catalog Lookup to start the search for Labor time and Materials
* Labor how to change the lookup, filter, multiply, add multiple labor times together then Apply
* Materials how to change lookup, filter, multiple items selection then Apply
* Inventory search how the system reverse searches the supplier lookup then Apply
* Work Order review the bottom tabs Deferred, Inspections, History, Analysis, Labor Hours, and Purchases
* How to use the Drag, Collapse, and Review Service Packages features

**Section 4 Receiving Materials, Returning, Sublet, and Posting**

* What the **Golden Rule** is in Protractor
* Order and receive materials through the purchases
* Manually receive an item
* Return an Item
* Remember if you don’t receive it you can’t return it
* Receiving a Sublet
* Post to check if any issues
* Change Work Order status
* Final Posting and Edit