

Packages – Creating Service Packages
AV Ref # 556

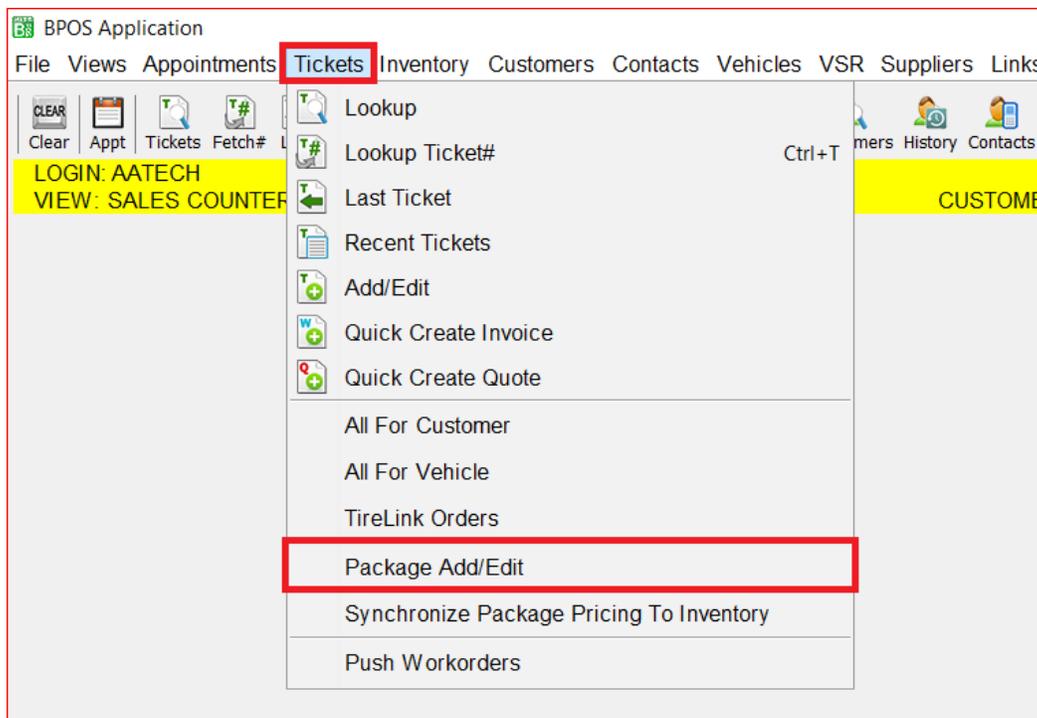
There is also a video showing how to perform this function:
Creating Service Packages (4:51) – AV Ref# 294

About:

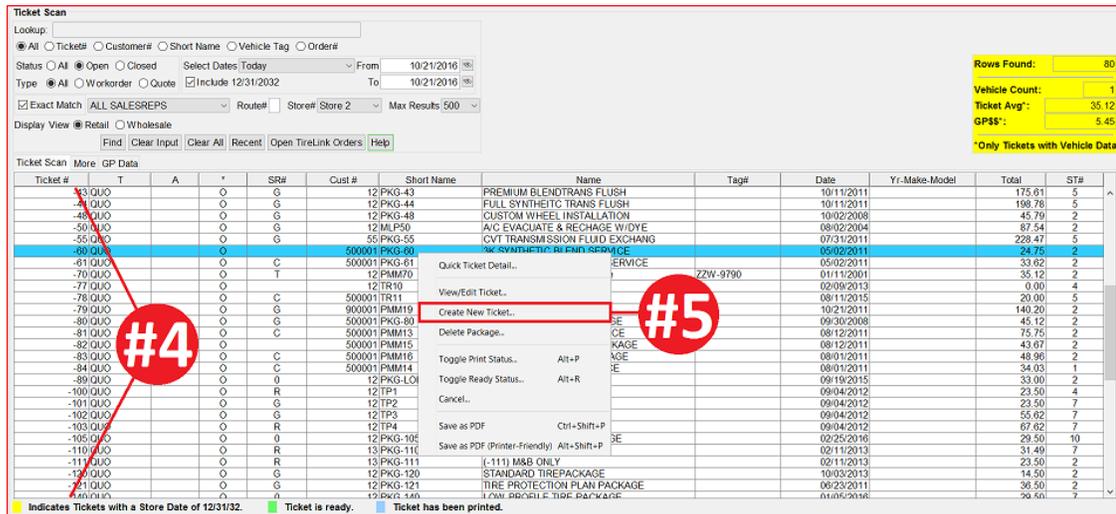
If you are like most retailers, you frequently find yourself creating the same, exact work order over and over for different customers (ex. Oil Changes, Brake Jobs). You may have even started copying those lines from one ticket to another. BPOS allows you to create a Service Package quickly and easily. **Packages are simply “Dummy Tickets”**. **The Ticket #'s are between -1 and -10,000** which is done intentionally to protect them from accidental deletion.

How:

1. Click on **Views** → **Sales Counter**.
2. Click on the **Tickets** drop-down menu above the toolbar and select **Packages Add/Edit**:



3. On the **Ticket Scan** screen (shown below), you will receive a warning message which explains what packages are. You can close the screen by clicking **OK**.
4. Find your next available ticket # to use. (Avoid using tickets in the -100 range as those are used for tire packages.)
5. **Right-click** anywhere on the ticket list and select **Create New Ticket**:



Ticket Scan

Lookup:

All Ticket# Customer# Short Name Vehicle Tag Order#

Status All Open Closed Select Dates Today From 10/21/2016 To 10/21/2016

Type All Workorder Quote Include 12/31/2032

Exact Match ALL SALESREPS Route# Store# Store 2 Max Results: 500

Display View Retail Wholesale

Find Clear Input Clear All Recent Open TireLink Orders Help

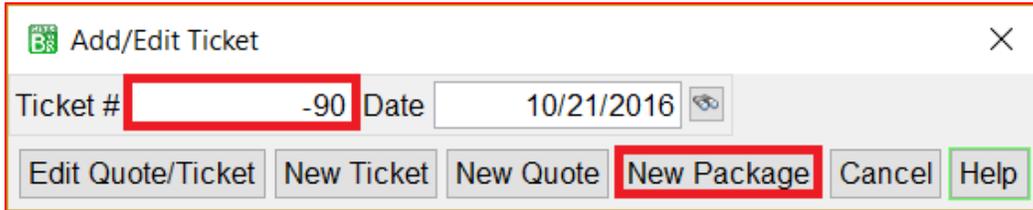
Rows Found: 80
Vehicle Count: 1
Ticket Avg: 35.12
GP\$: 5.45
*Only Tickets with Vehicle Data

Ticket #	T	A	*	SR#	Cust #	Short Name	Name	Tag#	Date	Yr-Make-Model	Total	ST#
43	QUO		O	G	12	PKG-43	PREMIUM BLENDTRANS FLUSH		10/11/2011		175.01	5
44	QUO		O	G	12	PKG-44	FULL SYNTHETIC TRANS FLUSH		10/11/2011		198.78	5
48	QUO		O	G	12	PKG-48	CUSTOM WHEEL INSTALLATION		10/02/2008		45.79	2
50	QUO		O	G	12	MALP50	A/C EVACUATE & RECHARGE W/DYE		08/02/2004		87.54	2
55	QUO		O	G	55	PKG-55	CVT TRANSMISSION FLUID EXCHANGE		07/31/2011		228.47	5
80	QUO		O	G	500001	PKG-80	SAFARI 4X4 REPAIR SERVICE		09/02/2011		24.75	2
81	QUO		O	C	500001	PKG-81	SAFARI 4X4 REPAIR SERVICE		05/02/2011		33.02	2
70	QUO		O	T	12	PMM70	Quick Ticket Detail...	ZZW-9790	01/11/2001		35.12	2
77	QUO		O		12	TR10	View/Edit Ticket...		02/09/2013		0.00	4
78	QUO		O	C	500001	TR11	Create New Ticket...		08/11/2015		20.00	5
79	QUO		O	G	900001	PMM19	Delete Package...		10/21/2011		140.20	2
80	QUO		O	G	500001	PKG-80	Toggle Print Status...	Alt+P	09/30/2008		45.12	2
81	QUO		O	G	500001	PMM13	Delete Package...	SE	08/12/2011		75.75	2
82	QUO		O		500001	PMM15	Toggle Ready Status...	Alt+R	08/12/2011		43.07	2
83	QUO		O	C	500001	PMM16	Cancel...		08/01/2011		48.96	2
84	QUO		O	C	500001	PMM14	Save as PDF	Ctrl+Shift+P	08/01/2011		34.03	1
89	QUO		O	O	12	PKG-LOI	Save as PDF (Printer-Friendly)	Alt+Shift+P	09/19/2015		33.00	2
100	QUO		O	R	12	TP1			09/04/2012		23.50	4
101	QUO		O	G	12	TP2			09/04/2012		23.50	7
102	QUO		O	G	12	TP3			09/04/2012		56.02	7
103	QUO		O	R	12	TP4			09/04/2012		87.02	7
105	QUO		O	O	12	PKG-105			02/25/2016		29.50	10
110	QUO		O	R	13	PKG-110			02/11/2013		31.49	7
111	QUO		O	R	13	PKG-111	(-111) M&B ONLY		02/11/2013		23.50	2
120	QUO		O	G	12	PKG-120	STANDARD TIREPACKAGE		10/03/2013		14.50	2
121	QUO		O	G	12	PKG-121	TIRE PROTECTION PLAN PACKAGE		06/23/2011		36.50	2
122	QUO		O	G	12	PKG-122	1.5M PROBLE TIRE PACKAGE		01/05/2016		50.50	7

Indicates Tickets with a Store Date of 12/31/32. Ticket is ready. Ticket has been printed.

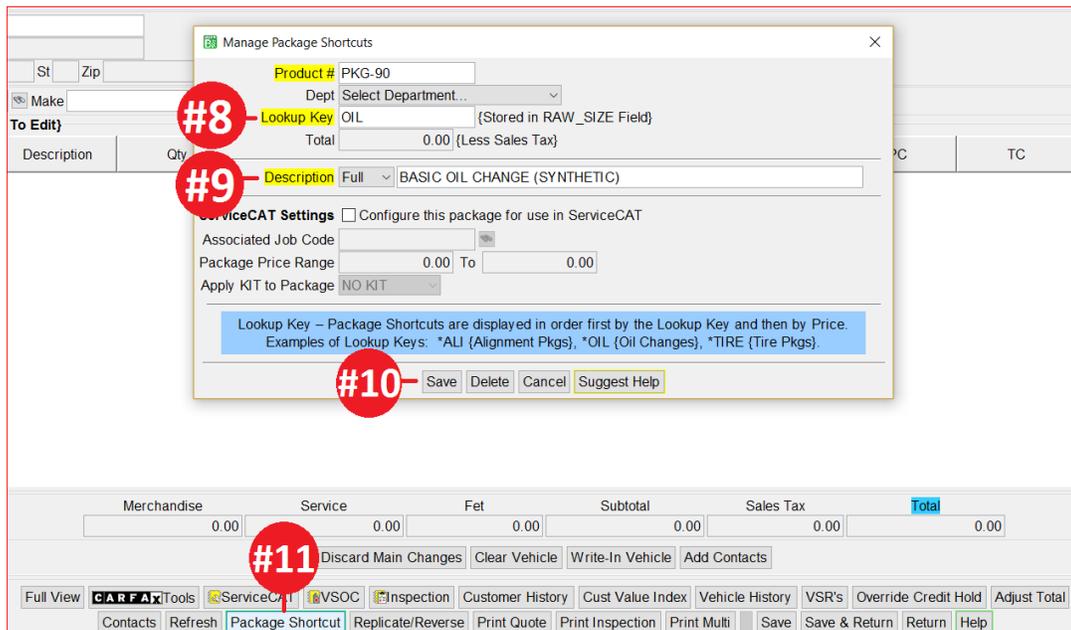
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6. On the **Add/Edit Ticket** screen (shown below), key in your target package number and click on the **New Package** button:



The screenshot shows a software window titled "Add/Edit Ticket" with a close button (X) in the top right corner. The window contains two input fields: "Ticket #" with the value "-90" and "Date" with the value "10/21/2016". Below these fields is a row of six buttons: "Edit Quote/Ticket", "New Ticket", "New Quote", "New Package", "Cancel", and "Help". The "New Package" button is highlighted with a red border, and the "Help" button is highlighted with a green border.

7. On the **Ticket View/Edit** screen (shown below), click on the **OK** button on the warning screen regarding the Package Shortcut Button.
8. Click on the **Package Shortcut** Button at the bottom of the screen.
9. In the **Lookup Key** field, key in a lookup word to describe the service package.
(Ex. "OIL" or "BRAKE").
10. In the **Description** field, key in a description of the package you are building.
11. Click on the **Save** button:



The screenshot shows the 'Manage Package Shortcuts' dialog box overlaid on a software interface. The dialog box contains the following fields and options:

- Product #**: PKG-90
- Dept**: Select Department...
- Lookup Key**: OIL (Stored in RAW_SIZE Field)
- Total**: 0.00 (Less Sales Tax)
- Description**: Full BASIC OIL CHANGE (SYNTHETIC)
- ServiceCAT Settings**: Configure this package for use in ServiceCAT
- Associated Job Code**: [Empty field]
- Package Price Range**: 0.00 To 0.00
- Apply KIT to Package**: NO KIT

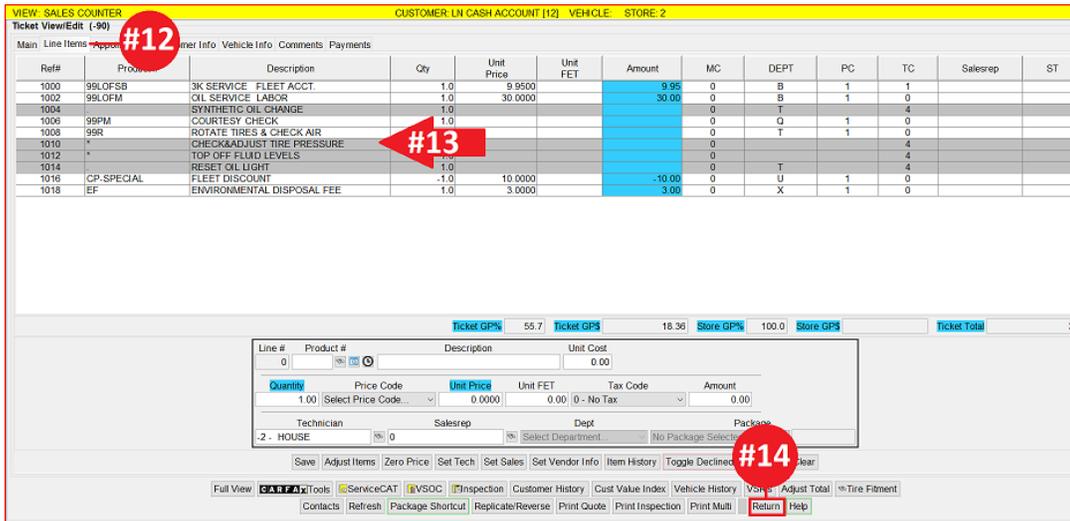
Below the dialog box, a summary table is visible:

Merchandise	Service	Fet	Subtotal	Sales Tax	Total
0.00	0.00	0.00	0.00	0.00	0.00

At the bottom of the screen, a toolbar contains several buttons, with the **Package Shortcut** button highlighted by callout #11. Other buttons include 'Discard Main Changes', 'Clear Vehicle', 'Write-In Vehicle', 'Add Contacts', 'Full View', 'CARFAX Tools', 'ServiceCAT', 'VSOC', 'Inspection', 'Customer History', 'Cust Value Index', 'Vehicle History', 'VSR's', 'Override Credit Hold', 'Adjust Total', 'Contacts', 'Refresh', 'Replicate/Reverse', 'Print Quote', 'Print Inspection', 'Print Multi', 'Save', 'Save & Return', 'Return', and 'Help'.

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12. On the **Ticket View/Edit** screen (shown below), click on the **Line Item** tab.
13. Add each line item that you want to see on this package. Verify pricing. Include any comments that you need on the package, as well. If you already have a ticket with the line items you want, you can right-click in the body of the package you are creating and select the option to **Copy Items From (Import)**. You will need to know the ticket # you are wanting to copy from.
14. When you have finished adding line items and the package pricing is correct, you are finished. If you have more packages to build, you can click on the **Return** button at the bottom:



VIEW: SALES COUNTER CUSTOMER: LN CASH ACCOUNT (12) VEHICLE: STORE: 2

Ticket View/Edit (-90)

Main Line Items Appro... Item Info Vehicle Info Comments Payments

Ref#	Product	Description	Qty	Unit Price	Unit FET	Amount	MC	DEPT	PC	TC	Salesrep	ST
1000	99LOFSB	3K SERVICE FLEET ACCT.	1.0	9.9500		9.95	0	B	1	1		
1002	99LOFM	OIL SERVICE LABOR	1.0	30.0000		30.00	0	B	1	0		
1004		SYNTHETIC OIL CHANGE	1.0			0	0	T		4		
1005	999PA	COURTESY CHECK	1.0			0	0	Q	1	0		
1008	999R	ROTATE TIRES & CHECK AIR				0	0	T	1	0		
1010	*	CHECK&ADJUST TIRE PRESSURE				0	0			4		
1012	*	TOP OFF FLUID LEVELS				0	0			4		
1014		RESET OIL LIGHT	1.0			0	0	T		4		
1016	CP-SPECIAL	FLEET DISCOUNT	-1.0	10.0000		-10.00	0	U	1	0		
1018	EF	ENVIRONMENTAL DISPOSAL FEE	1.0	3.0000		3.00	0	X	1	0		

Ticket GPS: 55.7 Ticket GPS: 18.36 Store GPS: 100.0 Store GPS: Ticket Total: 33

Line # Product # Description Unit Cost
0 0.00

Quantity: 1.00 Price Code: Select Price Code... Unit Price: 0.0000 Unit FET: 0.00 Tax Code: 0 - No Tax Amount: 0.00

Technician: -2 - HOUSE Salesrep: 0 Dept: Select Department Package: No Package Selected

Save Adjust Items Zero Price Set Tech Set Sales Set Vendor Info Item History Toggle Declined Hear

Full View Customer History Cust Value Index Vehicle History Adjust Total

Contacts Refresh Package Shortcut Replicate/Reverse Print Quote Print Inspection Print Multi **Return** Help

**** Note** – Users must have permission settings in the system to have the ability to create invoices (P16). If you need to give a user permission to have the permission setting, please contact the HITS Technical Support Center.