

# Creating a Customer Service Order

1. Click 'Create Service Order' or the '+' icon.

2. Ensure the 'CUSTOMER' radio is selected.

3. Select customer from dropdown.

4. Complete required fields.

5. Use the dropdown to select Customer Equipment or click 'Add Customer Equipment' to create new.

(continued on next slide)



# Creating a Customer Service Order (continued)

Line Options

Transaction	Barcode #	*Product #	Product Name	Related Sales Order	Qty	Group	Sell Price	Sell Ext	Action
Normal Sale		123	Golf	- Select SO -		-None-	0.00	0.00	

1. Select 'Transaction' Type from dropdown.

2. Search/select by Product # or Product Name.

3. Select group if applicable.

4. Click 'Add Product' to list multiple products.

5. Click 'Add Kits' to add a kit to SO.

SO Total: 0.00

Grand Total: 0.00

Account Balance: 0.00

Print/Email Documents As Per Account Document Preferences

Quote Appointment  Work In Progress Promised Time: 05:00 PM INTERVIEW

View Print Email W RS Recommended Services Report Save Finalize All Pending PO Finalize All Pending ST

General SO Comments Cancel

Cash (F4) Check (F6)

Credit Card (F7)

Split Payment Refund To Gift Card

Credit Card Manual



# Creating a Company Service Order

The screenshot shows the OMNNA software interface for creating a company service order. The interface includes a navigation menu, a main form, and a table of service lines. Numbered callouts (1-7) and green instruction boxes provide step-by-step guidance:

1. Click 'Create Service Order'.
2. Click the 'COMPANY' radio.
3. Type Serial Number to Select Car. Select Default Technician.
4. Enter Product Number and adjust necessary fields.
5. Click 'Add Option' to create another line.
6. Click 'General Comments' to add comments.
7. Click to 'Save As Pending' or 'Finalize'.

The main form includes fields for 'Select Car' (BN2010053853), 'Select Location' (FORT MYERS), and 'Default Technician' (John Smith). The table below shows the service lines:

#	Product #	Product Name	QoH/TA	Qty	Price	Technician	Hours
1	10016	WINDSHIELD, CC PREC, I	5/5	1	150	John Smith	
2	1014	NUT, 1/4-20 BRASS HEX	10/10	4	2.5		
3	LABOR	LABOR	9994/9991	1	150	John Smith	1.5

The 'Add Option' button is located below the table. The 'General Comments' button is located below the 'Add Option' button. The 'Save As Pending' and 'Finalize WIP' buttons are located at the bottom of the form.

The 'WIP Comment' dialog box is open, showing a text area for 'Insert comment here.' and 'Submit' and 'Close' buttons.



# Creating a Service Appointment

The screenshot shows the OMNIA software interface for creating a service appointment. The interface includes a top navigation bar with various modules like Point Of Sale, Sales Management, and Deliveries. Below this is a breadcrumb trail: Sales Orders > Service Orders > Create Service Order. A calendar for December 2023 is visible, with the 5th highlighted. A row of icons includes '+ ADD OR SEARCH (F2)', 'CALENDAR', 'ACC INFO', 'RECEIVE', 'MANAGER CALENDAR', and 'TECH HRS (F6)'. The main form is titled 'Schedule Appointment' and contains several sections: 'Type of Service' with radio buttons for 'In House Service' (selected) and 'Field Service'; '\*Primary Service Requested' with radio buttons for '15-point inspection', 'Other', 'Alignment', 'General Service' (selected), 'Balancing', 'Oil Change eMax S20', 'Oil Change', 'Differential Service', and 'Bumper'; 'Search' with fields for 'Name' (Gary Golfer) and 'Phone (Type Phone # And Press Enter To Search)' ((999) 999-9999); '\*Customer' with a dropdown for 'Accounts' and a text field for 'Gary Golfer'; 'Customer Equipment' with a dropdown menu showing '2023,Club Car,Golf Car,CARRYALL 100,Consumer,123456789'; and 'Notes' with an 'Equipment Catalog' button. At the bottom, there are buttons for 'CALL', 'APPT', 'CHECK IN', and 'QUOTE IT'. Seven numbered callouts provide step-by-step instructions: 1. Click the '+' button. 2. Select the Type of Service and Primary Service. 3. Click 'Interview' to access options and notes. 4. Click the '+' button to add new primary service. This is a role-based function. 5. Type Customer Phone # and press enter. 6. Select Customer Equipment from the dropdown. 7. Click 'CALL' to log a call. Click 'APPT' to add to calendar. Click 'Check In' or 'Quote It' to create a SO.

1. Click the '+' button.

2. Select the Type of Service and Primary Service.

3. Click 'Interview' to access options and notes.

4. Click the '+' button to add new primary service. This is a role-based function.

5. Type Customer Phone # and press enter.

6. Select Customer Equipment from the dropdown.

7. Click 'CALL' to log a call. Click 'APPT' to add to calendar. Click 'Check In' or 'Quote It' to create a SO.



# Service Quotes: View/Print/Email

1. Click the 'ALL' button.

2. Click the button of the service quote.

3. Select to View, Print, or Email Estimate.

4. Click the 'Submit' button.

5. The quote will open in a new window.

**!** Make sure any pop-up blocker is turned off.

**!** Printing will open an additional window. Choose Printer from dropdown.

Service Order No	Customer	Phone	Primary Service Requested	Service Manager	Customer Equipment	License (plate)	Email	Total
<input type="checkbox"/> S13459	John Smith				2023,Club Car, Customer Equipment,TRANSPORTER,,AAA1			\$0.00
<input type="checkbox"/> S13428	Jane Doe							
<input type="checkbox"/> S13425	John							

  

Qty.	Pa.	Description	Tech	Each	Core	Total
1	-1000	(NLA)CONTROLLER; CURTIS,		\$ 1010.000	\$ 0.00	\$ 1010.00
-None: Subtotal						\$ 1010.00

  

Vehicle Information		DEPARTMENT	SALE
Vehicle :		Labor	\$ 0.00
License # :		Parts	\$ 1010.00
Miles :		SUB TOTAL	\$ 1010.00
V.I.N. :		SALES TAX	\$ 0.00
Unit # :		ESTIMATE AMOUNT	\$ 1010.00

