

DOs and Canned Jobs

Some things to discuss among yourselves before we start this project.

There needs to be PDI DOs. Most dealers have separate PDI codes for Diesel and Gas Motorized. Some have separate codes for trailers and FWs. You might even have a separate one for the little tiny trailers. Most have a code for NEW and one for USED.

PDITTN - New Trailers
PDIFWN - New FW
PDITTU - Used Trailer
PDIFWU - Used FW
etc

You should also have DO codes for any items that are sold regularly. Window awning, Fantastic Fan, Equalizer hitch, FW hitch etc. Keep a spreadsheet of the standard DOs so the salespeople know what they have to work with. Review it monthly and make changes as required. Sales and service have to be involved in creating this list. One department cannot do it on their own.

Each DO has a place for cost and retail. Cost is what service charges you. Retail is what you charge the customer. PDI generally has no retail, only a cost. The cost is not an exact cost but a cost you can use to work the deal. The actual cost will get posted to the deal when the PDI work order is completed.

All DOs should be attached to a canned job. The DO and canned job should have the same code to minimize confusion.

All canned jobs should have a full description of the work to be done, and at least the hours required to complete the job. On some Canned jobs, it makes sense to have parts also. for example a PDITTN might have 2 batteries, 2 battery boxes, 15 gallons of propane. If you used only one battery and 10 gallons of lp, you can adjust the wo. At least the parts are there and will not get missed.

When you do CS in blue screen or convert to a deal in G2, the system will prompt you to create a work order. Do not create the work order until you are sure the deal is solid. If you are waiting for financing approval or additional down etc, answer No. Once the deal is ready to go, go back to CS again and create the work order. A work order will not be created unless there is at least one DO on the deal.