

Did You?

◆ = Social CRM Related
● = Message Center Related



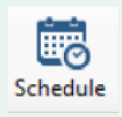
Before you post that invoice...



Get Email

-Offer to email the estimate or invoice

(Customer Tab)



Schedule Next Appointment

-Use LOF button [Print LOF](#)

(Order Tab)



Add Recommendations

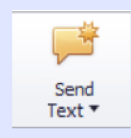
-Create note templates

(Vehicle Tab)
(Setup, Standard Desc, Notes)



Inform The Customer

-They are "penciled-in" for the next appointment



Send Text With The Next Appointment Date

-Use text templates

(Text, Settings, Templates)



F2 Spell Check

F3 Find Customer

F5 Batch Payment

F6 New (Est/RO)

F7 Quote

F12 Check Profit

ALT+O Convert to...

ALT+ Tab Swch Apps

CTRL+ C = Copy

CTRL+V = Paste

CTRL+X = Cut

CTRL+Z = Undo