Before You Post

That Invoice

Did You?
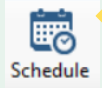
◆ = Social CRM Related

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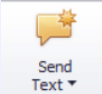
(Vehicle Tab)
(Setup, Standard Desc, Notes)

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	F7 Quote	CTRL+ C = Copy
F3 Find Customer	F12 Check Profit	CTRL+V = Paste
F5 Batch Payment	ALT+O Convert to...	CTRL+X = Cut
F6 New (Est/RO)	ALT+ Tab Swch Apps	CTRL+Z = Undo