



ACHIEVE PEAK PERFORMANCE  
IN YOUR BUSINESS!

# Forms/Letters

TRAINING AND REFERENCE MANUAL

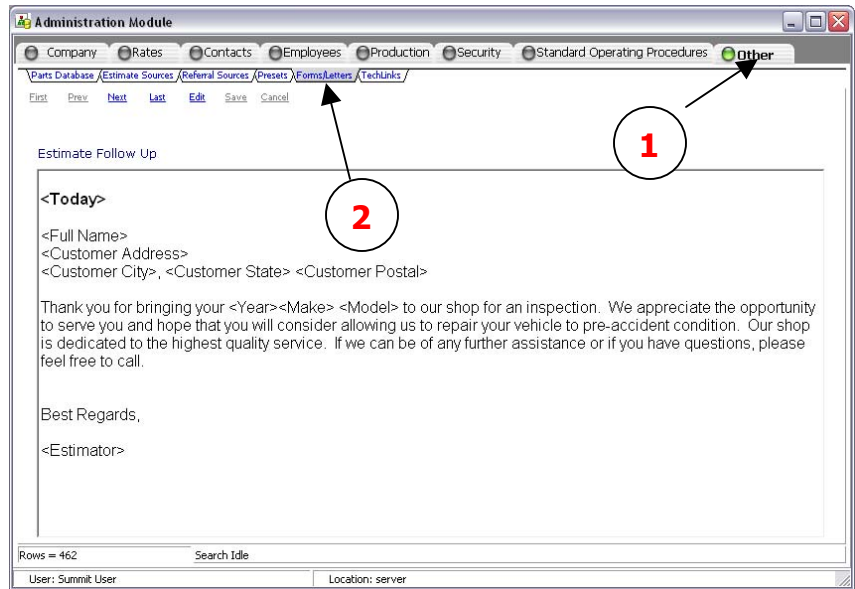
# Introduction: Forms/Letters

There are over 50 forms and letters available to be created and edited in Version 6.0. To access, view, edit and create the form of your choice you can follow this guide.

Log in to the Administration Module, click on the "Other" (1) tab and choose the Forms/Letters (2) tab.

The following are pre-built forms that can be edited to meet your needs:

- Estimate Follow-up,
- Estimate Follow-up #2
- Thank You Letter
- Vehicle Warranty
- Repair Authorization
- Estimate Disclaimer
- Repair Order Disclaimer
- Supplement Disclaimer
- Invoice Disclaimer
- Quality Control Checklist



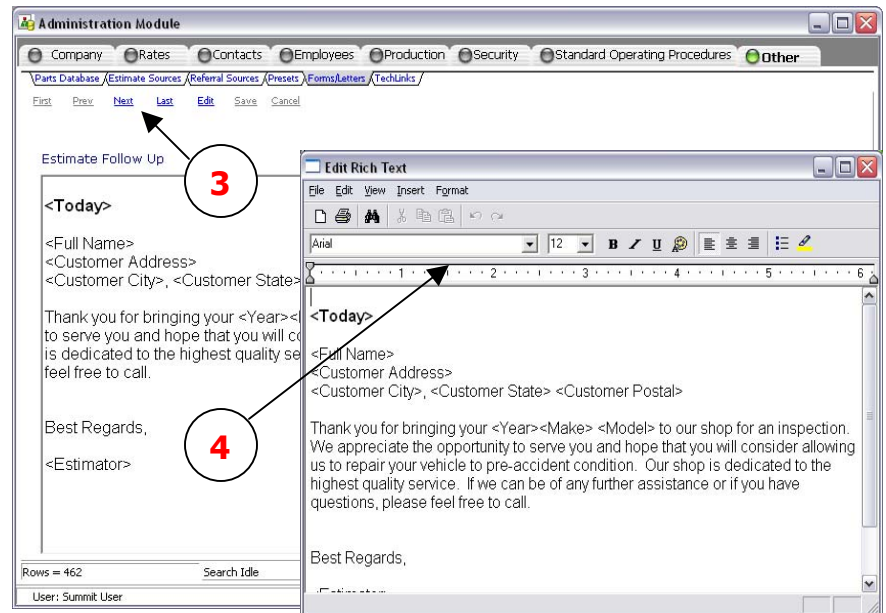
To look at any of these you can simply click on the "next" link (3) until you see the form name.

## Editing Existing Forms

There are two ways to edit forms. Rich Text editing and using the "insert" key on your keyboard.

Rich Text Editing:

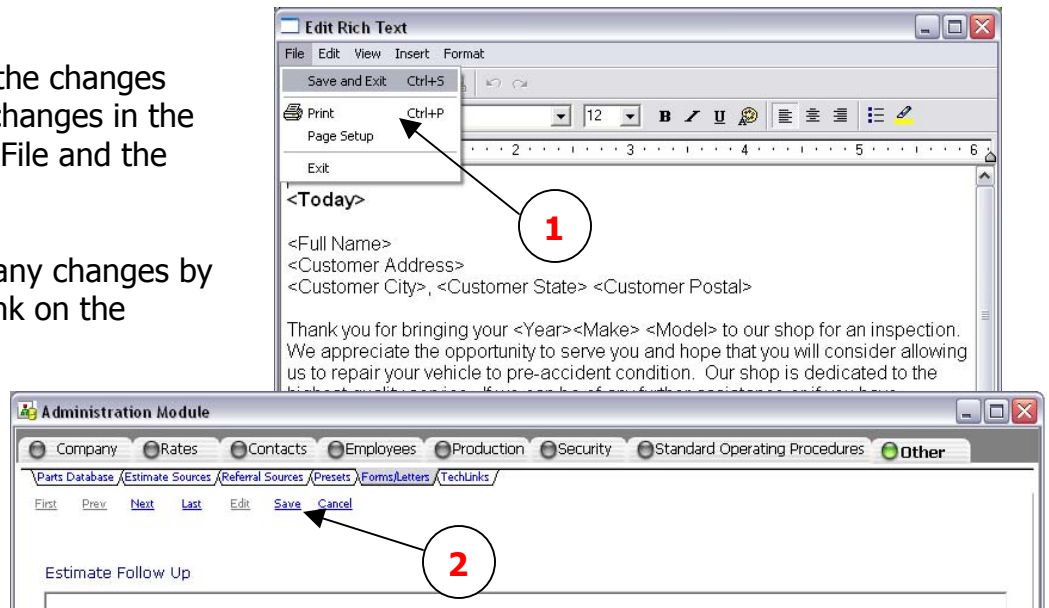
Click your cursor into the document you wish to edit. Hit the F2 key at the top of your keyboard and the rich text editor screen will pop open. This allows you to change font sizes and styles (4) and make the document look the way you'd like.



You can also copy and paste verbiage in from a Notepad Document or Microsoft Word Document. Note: Microsoft Word will copy the verbiage "as is" into the rich text editor including font sizes, styles and spacing.

When you have completed the changes make sure you save those changes in the Rich Text editor by click on File and the Save and Exit. (1)

You will then need to save any changes by clicking on the "save" (2) link on the screen.

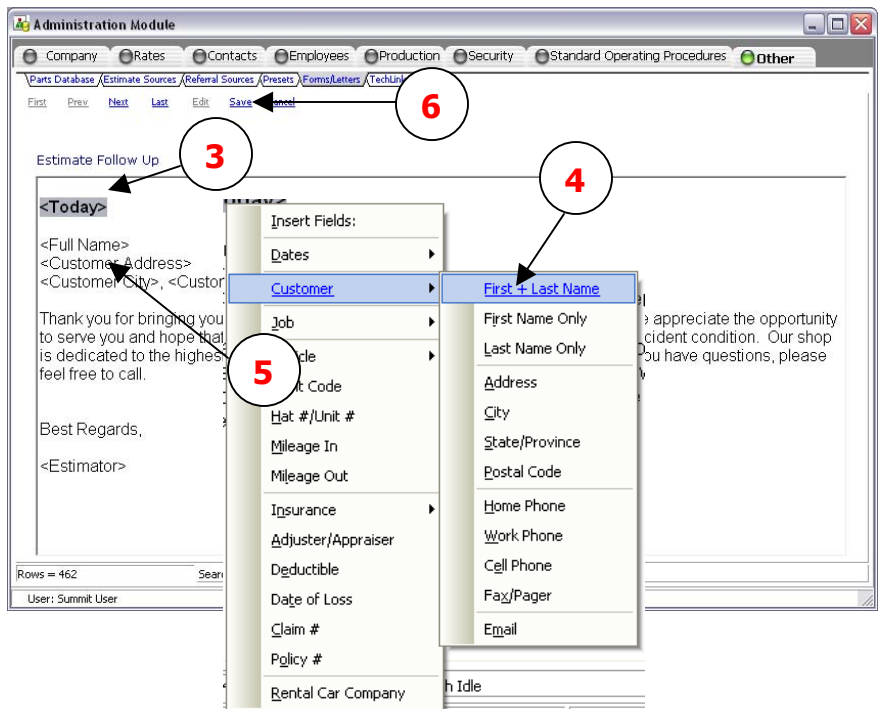


## Insert Fields

To insert fields into your forms, simply place you cursor (3) where you'd like the insert, tap the "Insert" key on your computer keyboard and a drop down of choices will appear.

Simply choose the field you'd like to insert (4) and the system will drop that insert into the chosen area and indicate by showing you a "less than" (<) and "greater than" (>) sign on either side. (5)

Make sure you save all changes prior to closing the document or moving to another. (6)



## Creating Custom Forms

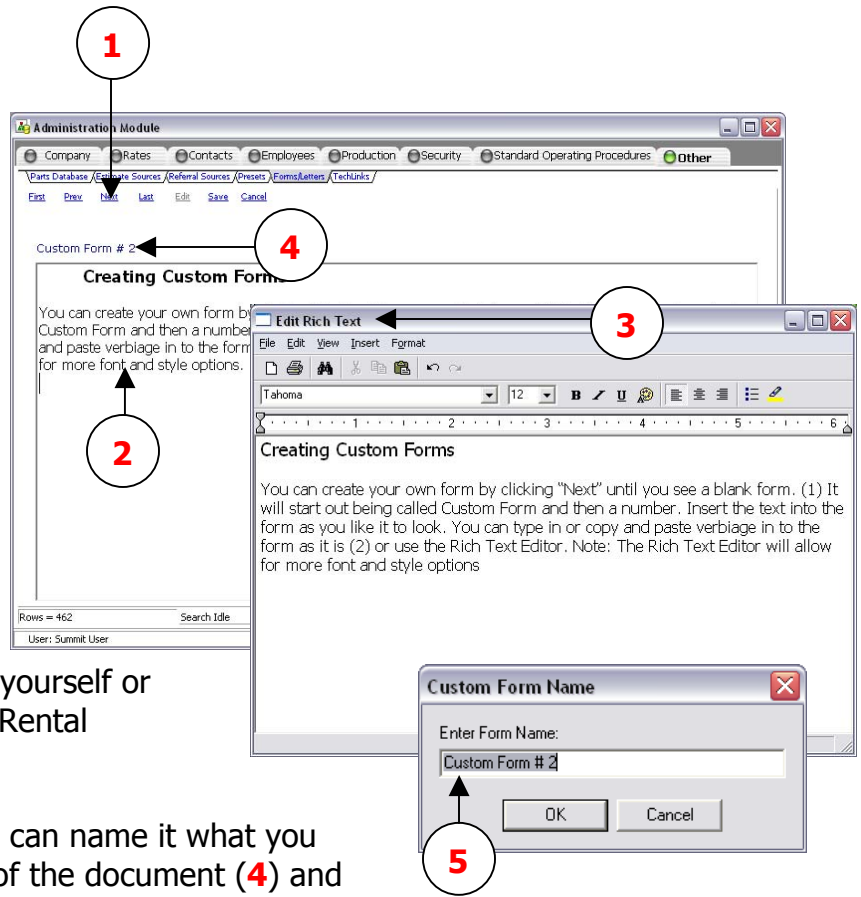
You can create your own form by clicking "Next" until you see a blank form. (1) It will start out being called Custom Form and then a number. Insert the text into the form as you like it to look. You can type in or copy and paste verbiage in to the form as it is (2) or use the Rich Text Editor. (3)

**Note:** The Rich Text Editor will allow for more font and style options.

You can also insert fields into these

forms and create a myriad of forms for yourself or others including Insurance Companies, Rental Companies or any other entity.

Once you have completed the form you can name it what you desire by clicking on the current name of the document (4) and filling in what you'd like in the window that will pop up. (5)



## Custom Form Inserts

The insert ability gives you many options to have data in the summit program populate fields of your choice.

