



How to enter a "Chrome Deal" into Talon



Parts Department Standard Operating Procedure: Chrome 1

NOTE: Before starting this standard operating procedure, you will need the following:

1.) A login and password for Talon

2.) Access to the Job Time Codes spread sheet

3.) A list of the current Task Codes that have been entered into Talon

-If you do not have any of the items listed in 1-3, ask your supervisor to provide them.

4.) A completed Opportunity Worksheet like the one shown below

-This will be given to you by the motorcycle salesperson working on the deal.

House of Harley Davidson 6221 West Layton Ave. Milwaukee, WI 53220 (414) 282-2211		Opportunity Worksheet	
Salesperson: Alan Currie		Date:	
Last Name: HENSIK First Name: ALAN Address 1: 16128 DURAND AVE Address 2: City: UNION GROVE State: WI Zip: 53182 DL#		Preferred Contact Method <input type="checkbox"/> phone <input type="checkbox"/> email <input type="checkbox"/> letter Nickname: Daytime Phone: Evening Phone: 2628781375 Mobile Phone: Email Address: Opportunity Source: Referral Birth date: Gender: male <input type="checkbox"/> female <input type="checkbox"/>	
Vehicle Purchase: Make: HD Selling Price: \$23,995.00 Model: FLTRXS P&A: Year: 2016 General Merch: Color: BLACK QUARTZ W/PINSTRIPES Tax, Title & Lic: VIN #: 1HD1KTM16GB633036 Doc Fee: Stock #: 5591 Freight: Miles: 5 Total: Options: abs <input type="checkbox"/> cruise <input type="checkbox"/> SEC <input type="checkbox"/> Other Condition: new <input type="checkbox"/> used <input type="checkbox"/>		Trade-in Vehicle: Lienholder: Payoff: Make: Mileage: Model: Year: Plate #: ESP: new <input type="checkbox"/> used <input type="checkbox"/> Color: VIN #: Trade Allowance: Add'l Equip: Condition:	
Insurance Information: Company: Agent: Address: Policy No: Comp. Ded: City: Col. Ded: State: Zip: Effective Dates: Phone:			
Method of Payment: <input type="checkbox"/> cash <input type="checkbox"/> check <input type="checkbox"/> credit card <input type="checkbox"/> finance		Down Payment: Amount: Percentage: Monthly Investment: <input type="checkbox"/> 24 <input type="checkbox"/> 36 <input type="checkbox"/> 48	
I hereby indicate my intent to purchase a motorcycle. I have available, or can obtain, sufficient funds to complete the transaction. I authorize the dealer representative to investigate my credit and employment history to evaluate my ability to purchase the above referenced motorcycle.			
Customer Authorization: Date: Mgr's Initials:			
Co-Buyer:			

<https://custom-ux.h-dconnect.com/Preview.html> 2/15/2016

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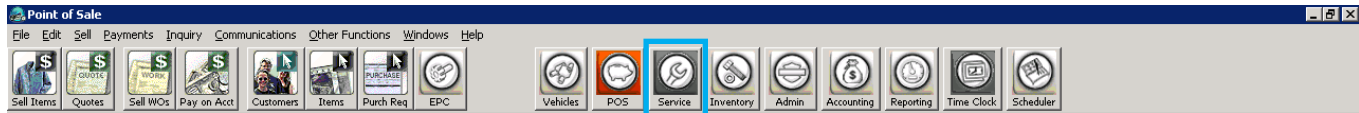
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Entering Talon's Service Module



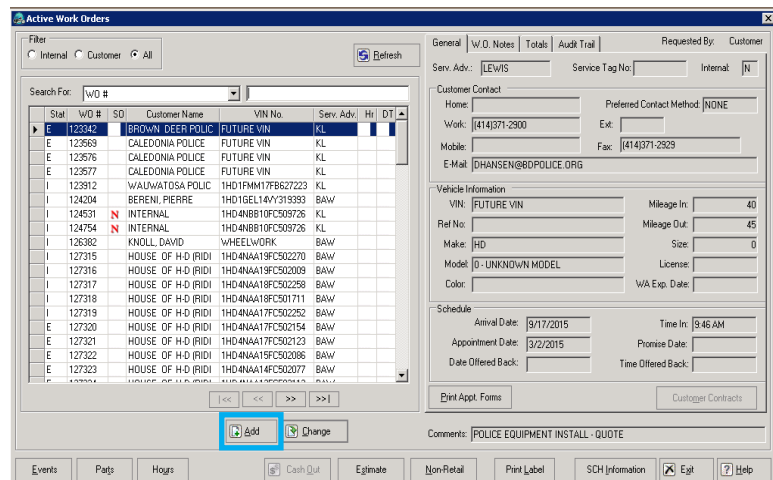
- Step 1.)** Locate and click on the “**Service**” button in the tool bar at the top of your Talon screen *(or use the shortcut keys Ctrl + 3)* to display the tool bar in step 2.

Opening a New Work Order

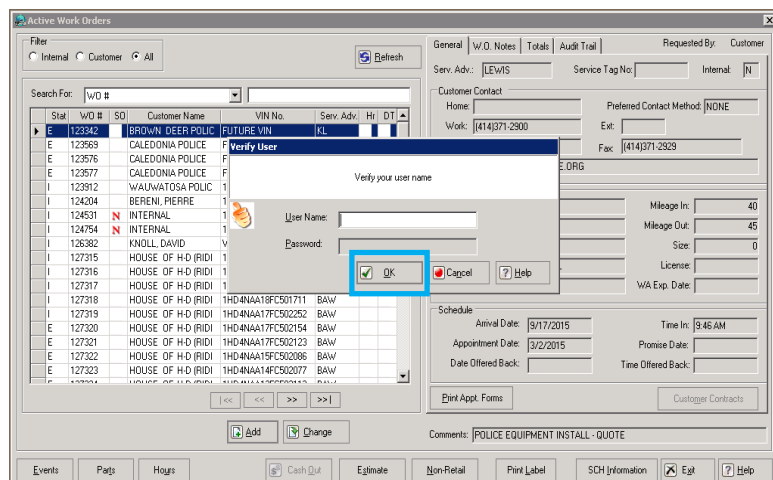


- Step 2.)** Click the “**Edit WOs**” button located in the Service tool bar at the top of your Talon screen to open the window in step 3.

- Step 3.)** Click the “**Add**” button in the Active Work Orders window to open the window in step 4.



- Step 4.)** You must enter your user name and password, then click the “**OK**” button before moving on to step 5.



Entering a Customer Name

Step 5.) Select “**Customer**” then click the “**Continue**” button in the “Work Order Type” window to start a new customer work order.

NOTE: Select “**Internal**” only if you are instructed to do so. This option is to start a work order for a dealer-owned motorcycle that is to be modified for display purposes. Internal work orders are typically entered by the Service Department.

Step 6.) Click the down arrow in the “**Search For**” box and select “**Customer Name**” from the drop down menu.

Step 7.) Type the customer’s name in the “**Search For**” box as follows: Last Name, First Name.

NOTE: If there is more than one name that matches your customer’s name displayed in the search field, verify the customer’s address and phone number before selecting one.

To add the verified customer’s name to the work order highlight it in blue by clicking on it, and then clicking the “**Select**” button.

Entering the Vehicle Stock Number and VIN

Step 8.)

Locate the “Comments” field and enter the vehicle stock number as it is listed on the opportunity worksheet, then enter the sales person’s name followed by your name.

NOTE: If the opportunity worksheet does not list a vehicle stock number, enter “No Stock#” instead.

After entering the stock number and names in the Comments field, click the magnifying glass next to the “VIN\Serial No.” field to open the window shown in step 9.

Step 9.)

Click the “Add” button to open the window shown in step 10.

Step 10.)

Type the VIN, as it is on the opportunity worksheet, in the “VIN” field located in the “Update Customer Vehicles” window.

NOTE: If there is no VIN listed on the opportunity worksheet, enter the words “Future VIN” instead.

After entering the VIN, hit the “Tab” key on your keyboard to populate the vehicle information fields.

Step 11.) After hitting the tab key in the last step, this window opens to let you know that data on the vehicle located in the dealership's database will be used to populate the fields in the Update Customer Vehicles window.

Click the **"OK"** button in the **"i"** window to populate the fields then move on to step 12.

The screenshot shows the 'Update Customer Vehicles' window. At the top, the Customer No. is 109280 and the name is HENSIK, ALAN. The VIN field is populated with 1HD1KTM16GB633036. An information dialog box is open in the center, stating: 'The VIN entered exists within your dealership system. Data will be populated based on existing data for this vehicle. If VIN was entered erroneously, please correct and resubmit.' The 'OK' button in the dialog box is highlighted with a blue rectangle. The background window shows fields for Make, Model, Color, Year, Size, Purchase Price, and Purchase Date. At the bottom, there is a table for 'Contracts' with columns: Plan Code, Plan Name, Contract Date, Policy #/Contract ID, Exp. Date, Exp. Mil, Price, and Status. The 'OK', 'Cancel', and 'Help' buttons are at the bottom right.

Step 12.) Click the **"OK"** button in the window to accept the VIN information then, click **"Exit"** on the next window to get to the **"Active Work Orders"** screen shown in step 13.

This screenshot shows the 'Update Customer Vehicles' window after the information dialog box has been closed. The VIN field remains 1HD1KTM16GB633036. Other fields are populated: Make is HD, Model is FLTRXS, Color is BLACK QUARTZ W/PINSTR, Year is 2016, Size is 1690, and Purchase Price is 0.00. The 'OK' button at the bottom right is highlighted with a blue rectangle. The 'Contracts' table is still visible at the bottom.

Entering Events

Step 13.) While on the **"Active Work Orders"** screen, you can add events, parts, and hours (*labor*) to the work order. Start by clicking the **"Events"** button to open the window shown in step 14.

The screenshot shows the 'Active Work Orders' window. The 'Filter' section at the top has 'Customer' selected. A table lists work orders with columns: Stat, WO #, SO, Customer Name, VIN No., Serv. Adv., H, and DT. The first row is highlighted: E, 130685, HENSIK, ALAN, 1HD1KTM16GB633036, CAR, H, DT. The 'Events' button at the bottom left is highlighted with a blue rectangle. The right side of the window contains various fields for customer contact, vehicle information, and schedule. The 'Events' button is part of a row that also includes 'Parts', 'Hours', 'Cash Out', 'Estimate', 'Non-Retail', 'Print Label', 'SCH Information', 'Exit', and 'Help'.

Step 14.) Click the “Add” button on the “Work Order Events window” to open the window shown in step 15.

Step 15.) Click the down arrow in the “Job Type” field to open the drop menu, select “Installation,” then click OK.

NOTE: Selecting repair in the “Job Type” drop menu is for the service department when they enter a work order for a motorcycle repair job.

Step 16.) You should now be on the “Work Order Events” screen as shown in this step.

If you need to add more events, repeat steps 14-16 until all events are entered.

When all events are entered, click “Exit” and move on to step 17.

Entering Parts

- Step 17.)** You should now be back to the “**Active Work Order**” screen. Make sure your customer’s name is still highlighted in blue, then click the “**Parts**” button to start adding parts to the event(s) entered previously.

The screenshot shows the 'Active Work Orders' window. At the top, there's a filter section with 'Internal', 'Customer', and 'All' options. Below is a table with columns: Stat, WO #, SO, Customer Name, VIN No., Serv. Adv., H, DT. The first row is highlighted in blue. At the bottom, there are buttons for 'Events', 'Parts', 'Hours', 'Cash Out', 'Estimate', 'Non-Retail', 'Print Label', 'SCH Information', 'Exit', and 'Help'. The 'Parts' button is highlighted with a blue box.

- Step 18.)** Click “**Add**” on the “**Parts on Work Order**” screen, then move on to step 19.

The screenshot shows the 'Parts on Work Order' window. It has a table with columns: SO, Event, Item, Description, Qty Used, Pending Qty, Total, L, Pick, Bin1, Bin2, Total w/Tax. At the bottom, there are buttons for 'Add', 'Change', and 'Delete'. The 'Add' button is highlighted with a blue box.

- Step 19.)** First, you must select which event you will add the parts to by typing the event number into the “**Event No**” field and then pressing “**Tab**” on your keyboard.

The screenshot shows the 'Edit Work Order Item' window. At the top, there's a 'Work Order No.' field and a 'Salesperson' dropdown. Below is an 'Event No.' field, which is highlighted with a blue box. There are also fields for 'Event Description', 'Item', 'Item Description', 'Vendor', and 'Category'. At the bottom, there are buttons for 'Deliver SO Or Layaway', 'Add Task Items', 'Non Inventory', 'Deliver Pre-Paid Items', 'Import Deal Items', 'OK', 'Cancel', and 'Help'.

Step 20.) Type the part number into the “Item” field and press the “Tab” key to populate the rest of the fields.

Locate the “Quantity” field and enter the total quantity needed of this part number.

If instructed to enter a discount in “Discount Percent” or “Discount Each” fields. To add this part to the event, click “OK.”

Repeat step 20 until all the parts needed for this event are entered, then click “Cancel” to close this window and move on to step 21.

Step 21.) This window shows every part from all the events, so take a moment to review the complete parts list.

Be sure you have entered all the needed parts. Consider any hidden parts needed to complete installations like gaskets, fluids, wiring harnesses, or hardware.

Check quantities and be sure you know what parts are sold as sets of two or more, and which parts are sold as single items. Consider things like bolts sold as single units, even though more may be required to complete an installation.

After double checking your parts list, click “Exit” to move on to step 22.

Entering Hours / Labor Charges

Step 22.) You should now be back to the “**Active Work Order**” screen. Make sure your customer’s name is still highlighted in blue, then click the “**Hours**” button to start adding labor charges to the event(s) and part(s) entered previously.

The screenshot shows the 'Active Work Orders' window. The 'Hours' button is highlighted with a blue box. The window displays a list of work orders with columns for Stat, WO #, SO, Customer Name, VIN No, Serv. Adv., H, and DT. The first row is highlighted in blue. The right side of the window shows customer contact information, vehicle information, and a schedule.

Step 23.) Click the “**Add Labor**” button to open the window shown in step 24.

The screenshot shows the 'Shop Hours Browse' window for customer 130585 HENSIK, ALAN. The 'Add Labor' button is highlighted with a blue box. The window displays a table with columns for Events, Work Descri, Hours, Rate, Amou, Ext. Di, Tax, Total, PPL Dep, Amt. D, and L. Below the table are fields for Event Description, Labor Code, Notes, Work Description, and Contractor. A Totals section on the right shows Reg. Labor Total, Warranty Labor Total, Contract Labor Total, PPL Deposit Applied, and Work Order Total.

Step 24.) Enter the event number in the “**Event Number**” field and then hit “**Tab**” on your keyboard.

The screenshot shows the 'Maintain Shop Hours' window for customer 130585 HENSIK, ALAN. The 'Event No.' field is highlighted with a blue box and contains the value '1'. The window displays fields for Event Type, Task Code, Work Description, Resolution Description, Labor Code, Hours, Code Description, Hours Summary, Charges, and Totals.

Step 25.) Locate and check the “**Override Bill Hours**” box to open the “**Billed Hours**” field.

Refer to the “**Job Time Codes**” spreadsheet to add up the total hours needed to install all the parts in this event, type that total into the “**Billed Hours**” field, and then press “**Tab**” on your keyboard to populate the other fields.

Step 26.) To add labor to other tasks, repeat steps 23 - 25, until all labor times are added to all tasks. When all the labor hours are entered, click the “**Exit**” button and move on to step 27.

Entering Tasks

Step 27.) A task is a preloaded event, complete with all the parts and labor needed for installation. Although tasks are not available for every instance, using them on a work order saves time and makes the chrome deal process easier.

To enter a task click the “**Events**” button in the “**Active Work Orders**” window.

NOTE: Some tasks may need modification on the work order. Painted part codes should be double checked for accuracy.

- Step 28.)** Click **"Add"** on the **"Work Order Events"** screen to open the window shown in step 29.

The screenshot shows the 'Work Order Events' window for Work Order No. 130585 and Customer Name: HENSIK, ALAN. The 'Search For' field is set to 'Event'. A table lists events, with the first event being '1 INSTALL ENGINE GUARD' with a Type of 'R', HD Warranty of 'No', Sub Total of 264.49, and Est. Hrs of 0.00. At the bottom, the 'Add' button is highlighted with a blue box. Other buttons include Change, Delete, Exit, and Help.

- Step 29.)** Locate and click on the magnifying glass button located next to the **"Event Description"** field to open the window shown in step 30.

The screenshot shows the 'Work Order Event' window for Work Order Number: 130585. The 'Event Number' is 2 and 'Estimated Hours' is 0.00. The 'Event Description' field has a magnifying glass button highlighted with a blue box. The window includes tabs for General, H-D Warranty, and Digital Technician Notes. The 'Event Type' is set to Regular. The 'Job Type' is set to PDI. The 'Policy #/Contract ID' is empty. The 'Plan Code' is empty. The 'Vendor' is empty. The 'ESP/PPM Task Code' is empty. The 'Deductible' is 0.00. The 'Expiration Date' is empty. The 'Exp. Mileage' is 0. The 'Event Taxable' checkbox is unchecked. The 'Recall (Safety/Product)' checkbox is unchecked. The 'Bulletin/Campaign' is empty. The 'Recall Parts Not Reimbursed (Parts sent to dealer free of charge.)' checkbox is unchecked. The 'Recall Parts Reimbursed (Manufacturer will pay for parts.)' checkbox is unchecked. The 'Service' checkbox is unchecked. The 'Parts' checkbox is unchecked. The 'Sales' checkbox is unchecked. The 'Goodwill' checkbox is unchecked. The 'OK', 'Cancel', and 'Help' buttons are at the bottom.

- Step 30.)** If the left side **"Search For"** field does not show **"List ID,"** click on the drop down arrow to open the drop menu and select **"List ID."**

Refer to your list of task codes, or the package book, to get the task code.

Once you have the task code, enter it in the right side **"Search For"** field, then click the **"Select"** button.

The screenshot shows the 'Task/Pick List' window. The 'Search For' field is set to 'List ID'. The 'List ID' field is highlighted with a blue box and contains the value 'BOFLTRX4'. The 'Select' button is highlighted with a blue box. The window includes a table with columns: List ID, Description, Est. Parts, Est. Labor, and Total. The first row is 'BOFLTRX4' with Description 'ALL GO-BLACK FLTRX / FLTRXS', Est. Parts 1,725.65, Est. Labor 554.40, and Total 2,280.05. The 'Review Notes Before Transfer Notes' field contains the text: 'CALL GO* BLACK PACKAGE FOR 2015 - 2016 FLTRX & FLTRXS (BOFLTRX4)'. The 'Parts/Labor' section includes a table with columns: Item, Description, and Qty. The first row is 'LABOR' with Description 'Labor' and Qty 2.300000. The 'Labor Information' section includes fields for Rate (99.00) and Amt. (227.70). The 'Parts Information' section includes fields for Vendor, Ext. List (0.00), On Hand (0), and On Order (0). The 'Exit' and 'Help' buttons are at the bottom.

- Step 31.)** Click the down arrow in the “**Job Type**” field to open the drop menu, select “**Installation**,” and then click the “**OK**” button.

The screenshot shows the 'Work Order Event' window with the 'Job Type' dropdown menu open. The 'Installation' option is selected. The 'OK' button is highlighted with a red box.

- Step 32.)** After clicking the “**OK**” button in step 31, a window opens asking, “Would you like to add task/pick list items to work order?” Click the “**Yes**” button displayed in this window to move on to step 33.

The screenshot shows the 'Work Order Event' window with a 'TALONES' dialog box open. The dialog box asks 'Would you like to add task/pick list items to work order?' and has 'Yes' and 'No' buttons. The 'Yes' button is highlighted with a red box.

- Step 33.)** Notice that all the fields in the “**Maintain Shop Hours**” window are now populated with the “**Install Package**” event information from the task entered previously.

Click the “**OK**” button to move on to step 34.

The screenshot shows the 'Maintain Shop Hours' window. The 'Event No.' is 2, 'Event Type' is R, and 'Task Code' is 80FLTRX4. The 'Work Description' is 'INSTALL PACKAGE'. The 'Hours Summary' shows 'Actual Hours' as 0.00, 'Pay Hours' as 0.00, 'Billable Hours' as 0.00, and 'Billed Hours' as 2.30. The 'Charges' section shows 'Billed Hours' as 2.30, 'Labor Rate' as 99.00, 'Discount Amount' as 0.00, 'Labor Amount' as 227.70, 'Prepaid Amt Applied' as 0.00, 'Tax/Fee(s)' as 12.76, and 'Total' as 12.76. The 'OK' button is highlighted with a red box.

Step 34.) Because this task used for this tutorial had more than one event in it, the fields auto populated with the next event's information after clicking the **"OK"** button in step 33.

NOTE: You will be required to click the **"OK"** button to confirm every event included in the task that you are entering into the work order.

Click the **"OK"** button to move on to step 35.

Step 35.) If you have entered all the events, parts, hours, and tasks required to complete the work order for the chrome deal, click the **"Exit"** button in the **"Work Order Events"** window to move on to step 36.

Step 36.) Click the **"Estimate"** button in the **"Active Work Orders"** window once to print one copy of the work order. Give this copy to a supervisor or more experienced co-worker and ask them to double check your work and then make any needed corrections.

When everything is correct, click the **"Estimate"** button three more times to print three copies. Give the three copies back to the salesperson who is working the sale and keep one for your records.

An example of a completed work order estimate is shown below in step 37.

Finished Estimate

Step 37.) Congratulations, you have completed your first work order for a chrome deal!

Here is what the finished estimate sheet looks like for the work order used to create this S.O.P.

2/15/16
1:40PM
HOUSE OF HARLEY-DAVIDSON
6221 W. LAYTON AVENUE
GREENFIELD, WI 53220
(414) 282-2211

WORK ORDER ESTIMATE
DEALER COPY

Page:1

Customer: 109280
HENSIK, ALAN
16128 DURAND AVE
UNION GROVE, WI 53182
*Phone: (262)878-1375
Fax:
P.O. No:
Comments: STOCK# 5591 / ALAN CURRIE / CHAD HENSIK

W.O. Number: 130585
Appointment: 2/15/16 11:37AM
Offered Back:
Year: 2016
Mfg: HD
Model: FLTRXS
VIN: 1HD1KTM16GB833036
Color: BLACK QUARTZ W/PIN
Ref. No.:
Dir. Lic #: MC-223

W.O. Mileage In: 5
Mileage Out: 0
Shop Tag:
Plate No:
Service Advisor: CAH
Sold By: CAH
Invoice No: 0

Item Number / Job Code	Item Description / Labor Description	Delivered Quantity / Hours	Price Each / Hourly Rate	Extended Amount
Event Number: 1 Type: R				
Description: INSTALL ENGINE GUARD				
49050-09A	GLOSS BLACK ENGINE GUARD	1.00	214.99	214.99
LABOR	Job Code: 0	0.50	99.00	49.50
Work Description: INSTALL ENGINE GUARD				
Sub-total For Event (without Tax):				264.49
Event Number: 2 Type: R				
Description: ALL GO-BLACK FLTRX / FLTRXS				
29400172	KIT-A/C HEAVY BREATHER, GL	1.00	399.95	399.95
32109-08C	KIT-EFI SUPER TUNER, SCREA	1.00	459.95	459.95
64900167A	KIT-MUFFLER, 4 INCH, BLK/FL	1.00	449.95	449.95
64981-09	HEAT SHIELD KIT, BLACK, F	1.00	249.95	249.95
65100028	END CAP KIT, 4 INCH, S.E.	1.00	149.95	149.95
65296-95A	CLAMP, MUFFLER	2.00	7.95	15.90
LABOR	Job Code: 0	2.30	99.00	227.70
Work Description: INSTALL PACKAGE				
LABOR	Job Code: 0	3.30	99.00	326.70
Work Description: DYNO TUNE & MAP WITH TUNER				
Sub-total For Event (without Tax):				2,280.05

This Is An Estimate Only!
Prices Subject To Change!
Not a Receipt!
* Indicates Special Order Item

SO/Layaway Deposit: 0.00
Work Order Deposits: 0.00

Item Total: 1,940.64
Labor Total: 603.90
Contract Labor: 0.00
Shop Supplies: 38.85
Storage Fees: 0.00
Tax Total: 144.69
Deductible(s) Total: 0.00
Work Order Total: 2,727.88
Deposits: 0.00
Total Balance Due: 2,727.88

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