How to enter a “Chrome Deal” into Talon

Parts Department Standard Operating Proceedure: Chrome 1

NOTE: Before starting this standard operating proceedure, 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.

Page 1 of 1

House of Harley Davidson
6221 West Layton Ave.
Milwaukee, WI 53220
(414) 282-2211

Opportunity Worksheet

Salesperson: Alan Currie Date:

Last Name: HENSIAK
First Name: ALAN
Address 1: 16128 DURAND AVE
Address 2:
City: UNION GROVE
State: WI
Zip: 53182
DL# ________________

Preferred Contact Method ☐ phone ☐ email ☐ letter
Nickname:
Daytime Phone:
Evening Phone: 2628781375
Mobile Phone:
Email Address:
Opportunity Source: Referral
Birth date: Gender: male ☐ female ☐

Vehicle Purchase:
Make: HD Selling Price: $23,995.00
Model: FLTRXS P&A: ________________
Year: 2016 General Merch: ________
Color: BLACK QUARTZ W/PINSTRIPE Tax, Title & Lic: ______________
VIN #: 1HD1KTM16GB633036 Doc Fee: __________
Stock #: 5591 Freight: ______________
Miles: 5 Total: _____________
Options: abs ☐ cruise ☐ SEC ☐ Other _______
Condition: new ☐ used ☐

Trade-in Vehicle:
Lienholder: __________ Payoff: ____________
Make: Mileage:
Model:
Year: Plate #: __________
ESP: new ☐ used ☐
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:
☐ cash ☐ check ☐ credit card ☐ finance
____

Down Payment:
Amount: _____________ Percentage: ______________
Monthly Investment: ☐ 24 ☐ 36 ☐ 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

Table of Contents

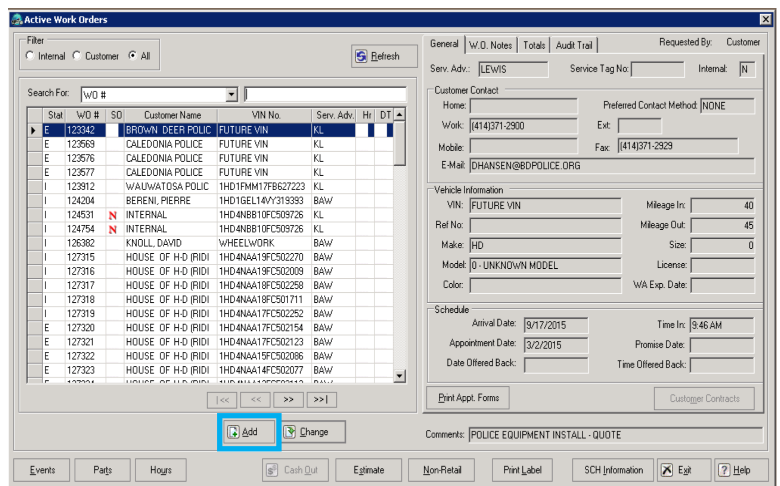
Entering Talon's Service Module

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.

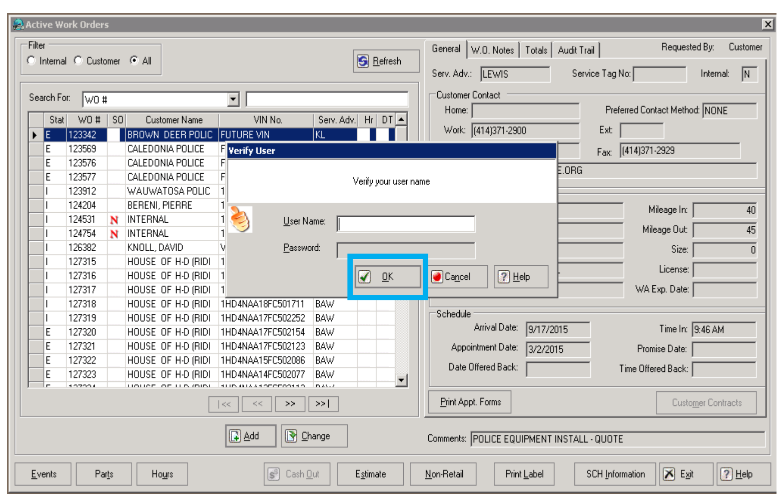
Opening a New Work Order

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.



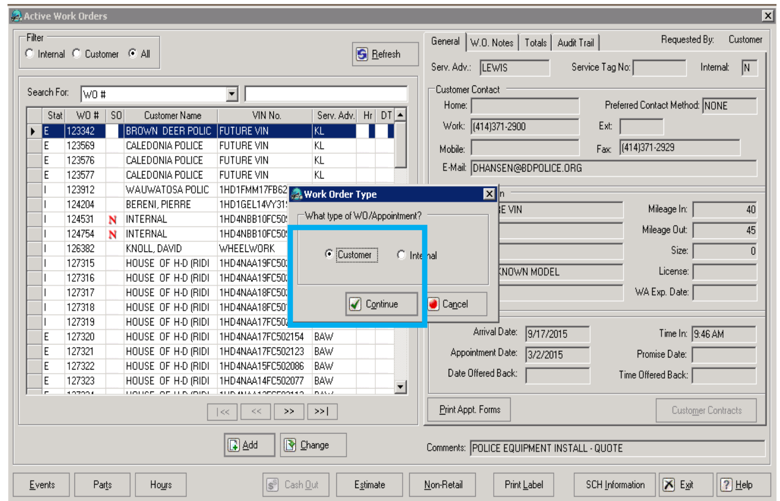
Chad Hensiak / Last Edit 03/07/2016

Entering a Customer Name

Step 5.)

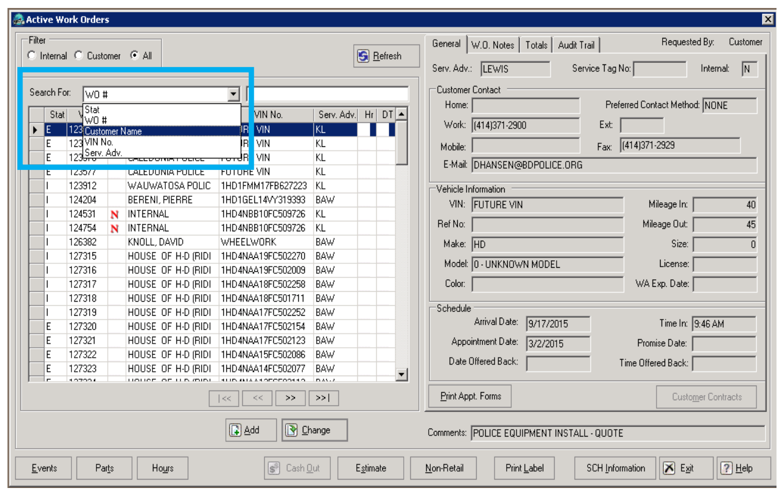
Select "**Customer**" then click the "**Continue**" button in the "Work Order Type" window to start a new customer work order.

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.

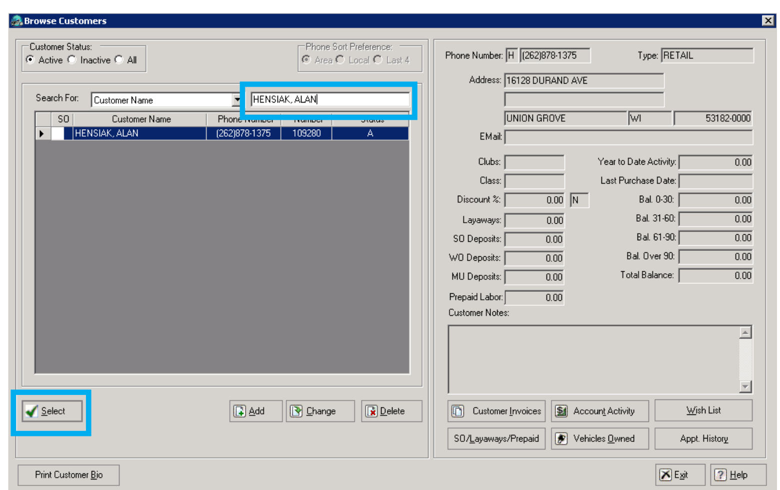


Step 7.)

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.



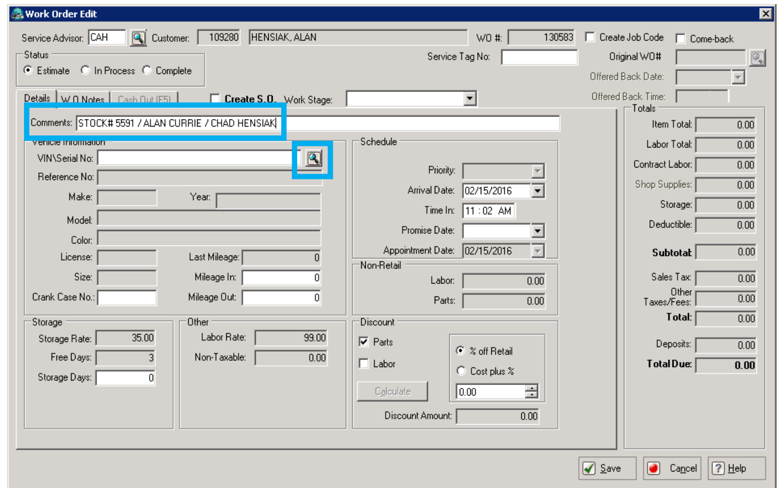
Entering the Vehicle Stock Number and VIN

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.

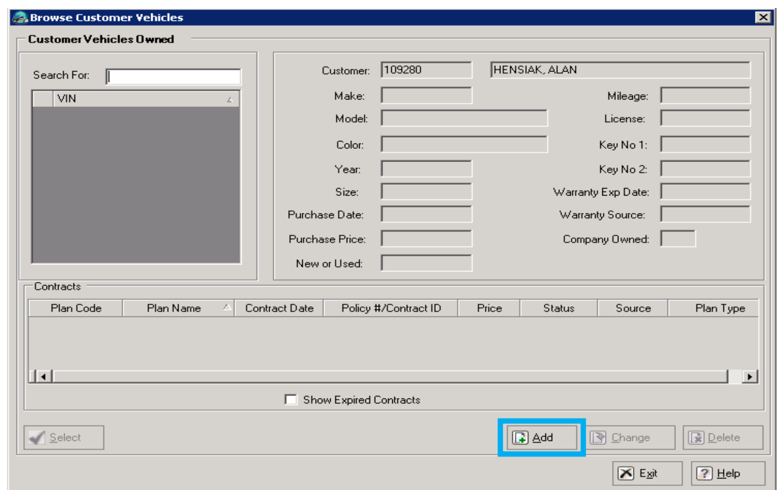
NOTE: *If the opportunity worksheet does not list a vehice stock number, enter “No Stock#” instead.*

After enering 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.

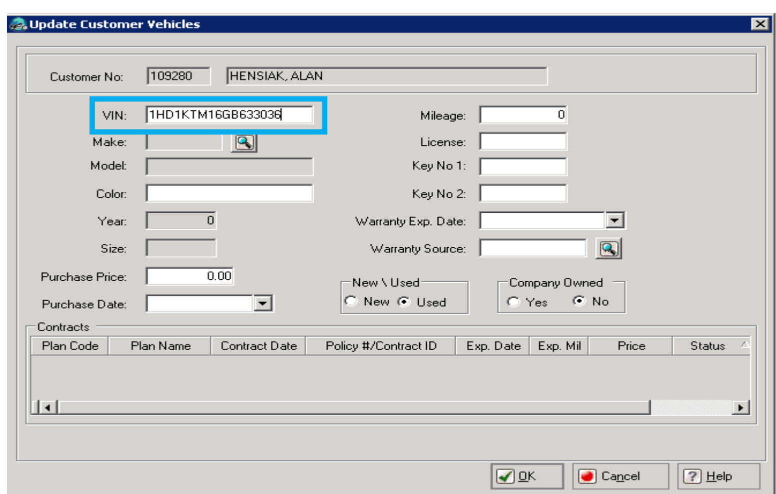


Step 10.)

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

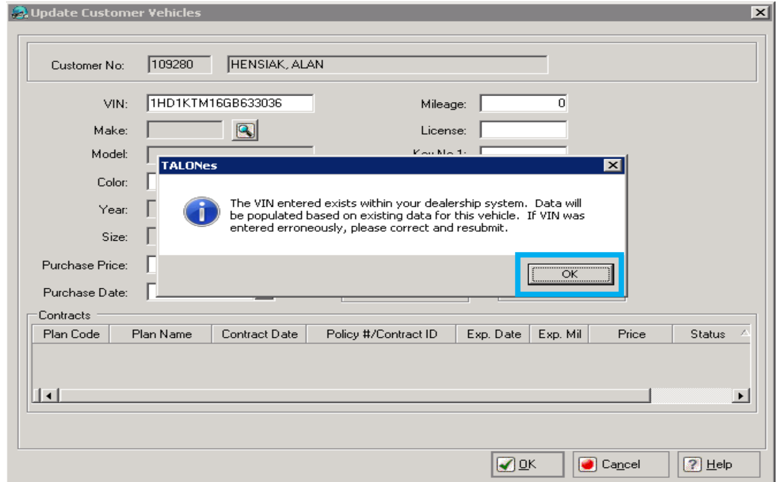
NOTE: *If there is no VIN listed on the opportunity worksheet, enter the words “Future VIN” instead.*

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

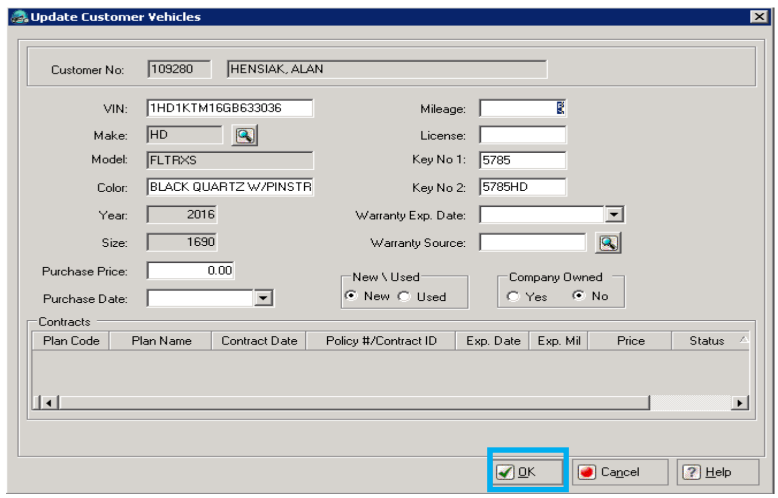


Step 11.) After hitting the tab key in the last step, this window opens to let you know that data on the vehicle located in the dealership's database will be used to populate the fields in the Udate Customer Vehicles window.

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

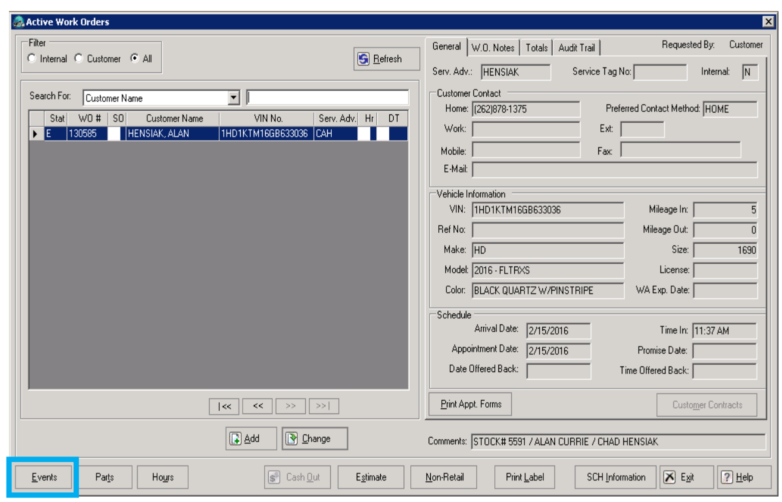


Step 12.) Click the "**OK"** button in the window to accept the VIN information then, click "**Exit**" on the next window to get to the "**Active Work Orders**" screen shown in step 13.

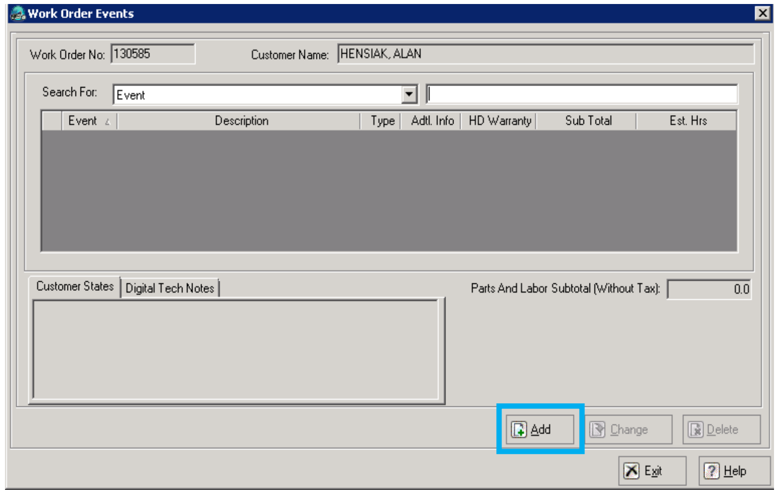


Entering Events

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.

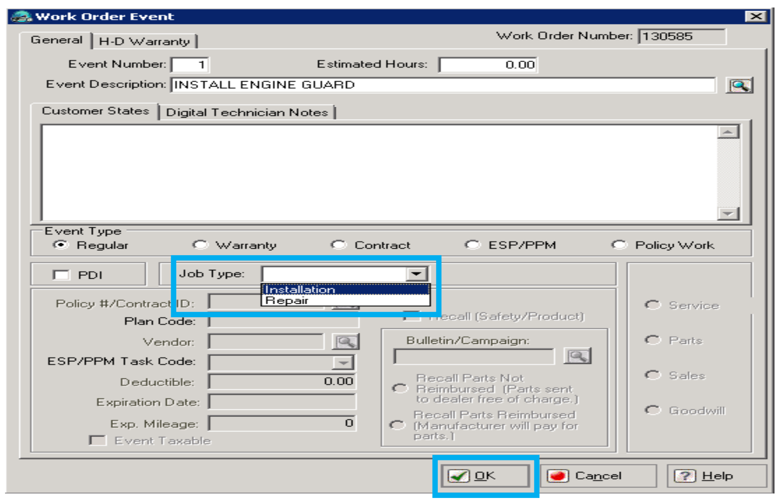


Step 14.) Click the "**Add**" button on the "**Work Order Events window**" to open the window shown in step 15.



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

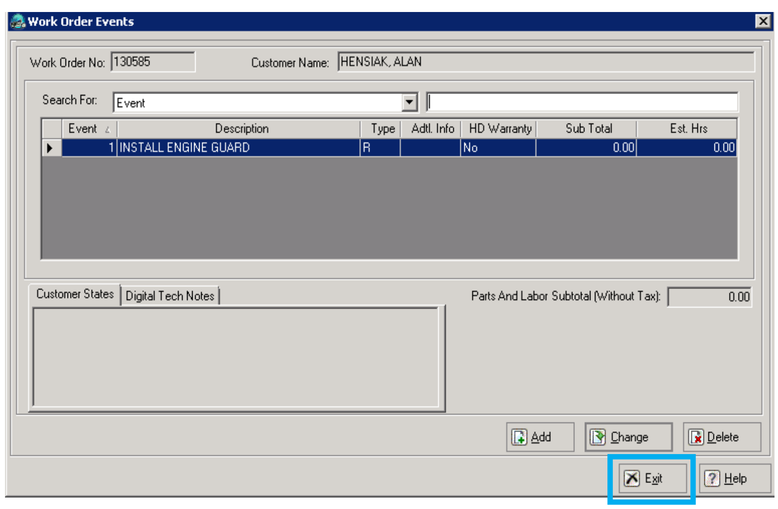
NOTE: *Selecting repair in the "Job Type" drop menu is for the service department when they enter a work order for a motorcycle repair job.*



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

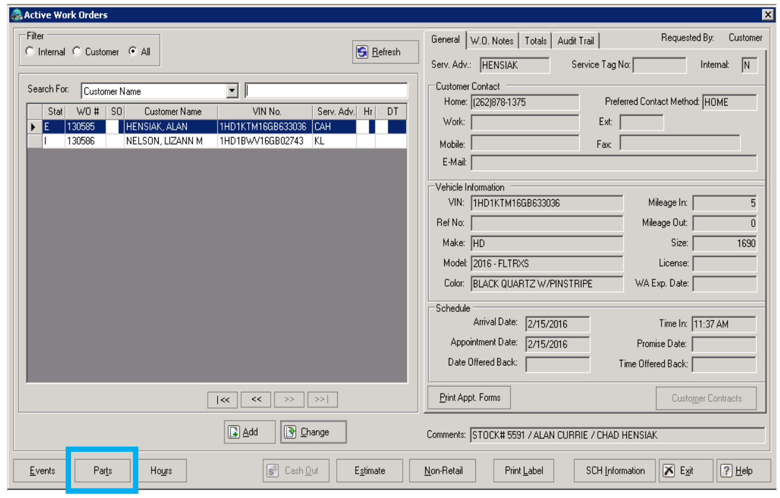
If you need to add more events, repeat steps 14-16 until all events are entered.

When all events are entered, click "**Exit**" and move on to step 17.

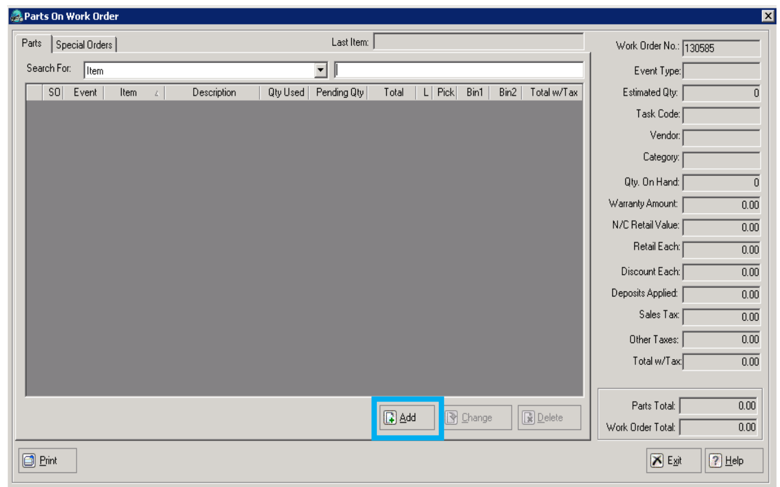


Entering Parts

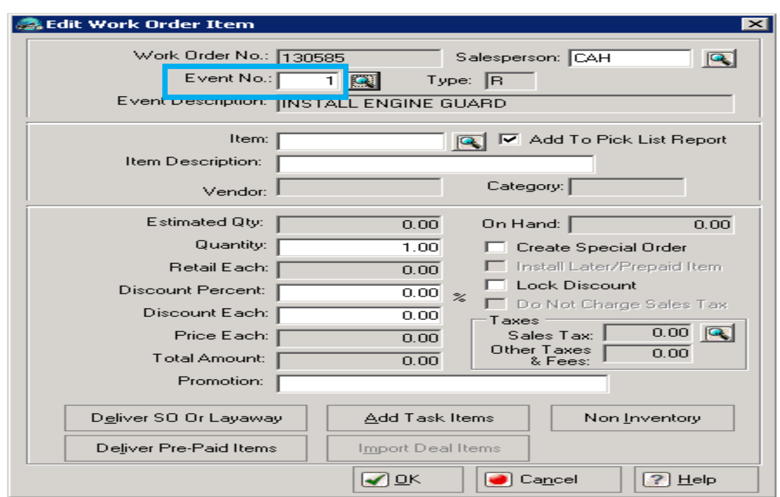
Step 17.) You should now be back to the "**Active Work Order**" screen. Make sure your customer's name is still highlighted in blue, then click the "**Parts**" button to start adding parts to the event(s) entered previously.



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



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.

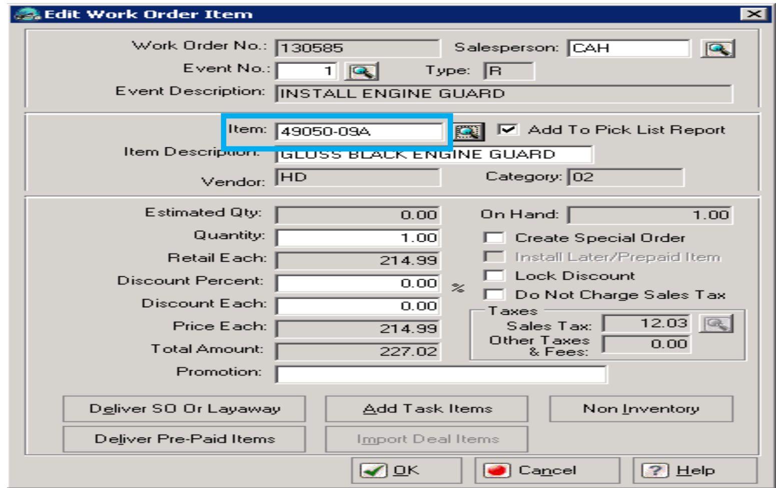


Step 20.) Type the part number into the “**Item**” field and press the “**Tab**” key to populate the rest of the fields.

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.

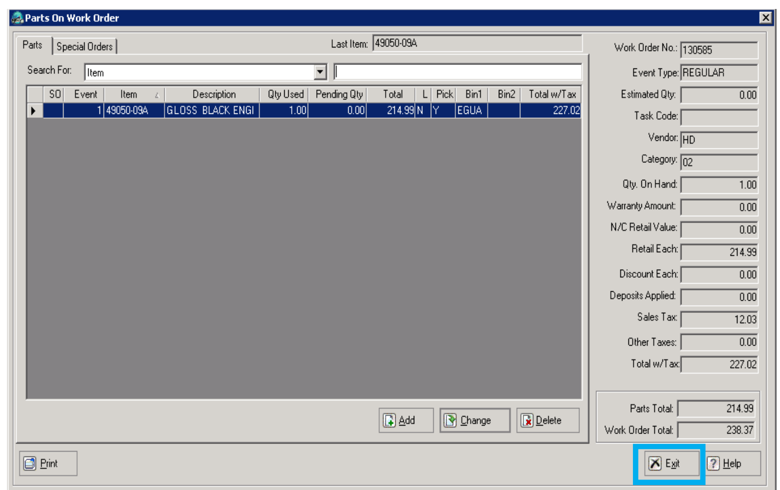


Step 21.) This window shows every part from all the events, so take a moment to review the complete parts list.

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

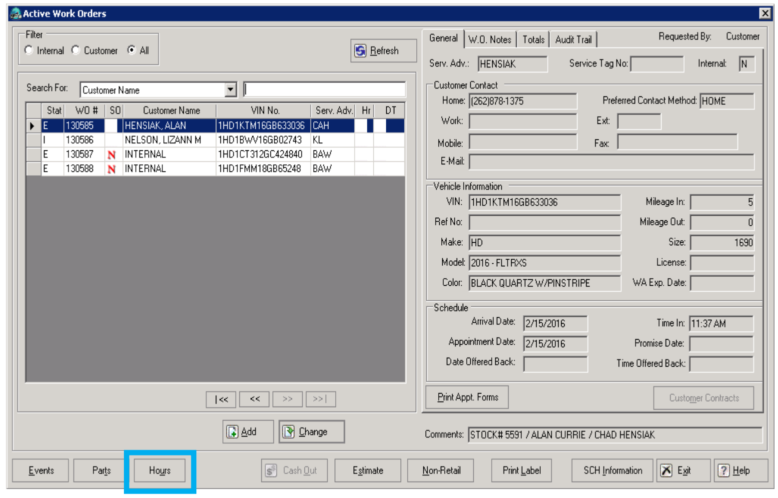
Check quantities and be sure you know what parts are sold as sets of two or more, and which parts are sold as single items. Consider things like bolts solds as single units, even though more may be required to complete an installation.

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

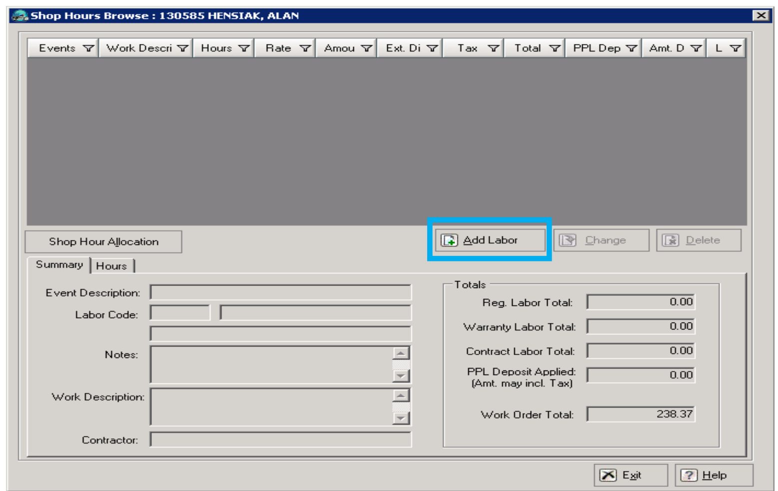


Entering Hours / Labor Charges

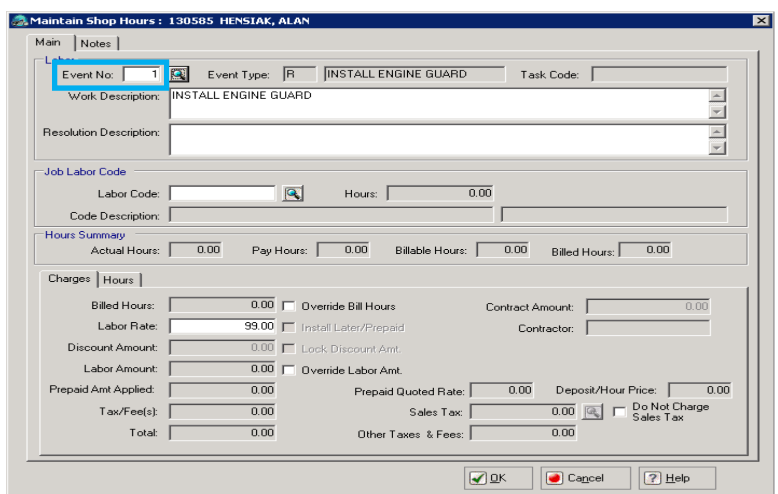
Step 22.) You should now be back to the "**Active Work Order**" screen. Make sure your customer's name is still highlighted in blue, then click the "**Hours**" button to start adding labor charges to the event(s) and part(s) entered previously.



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

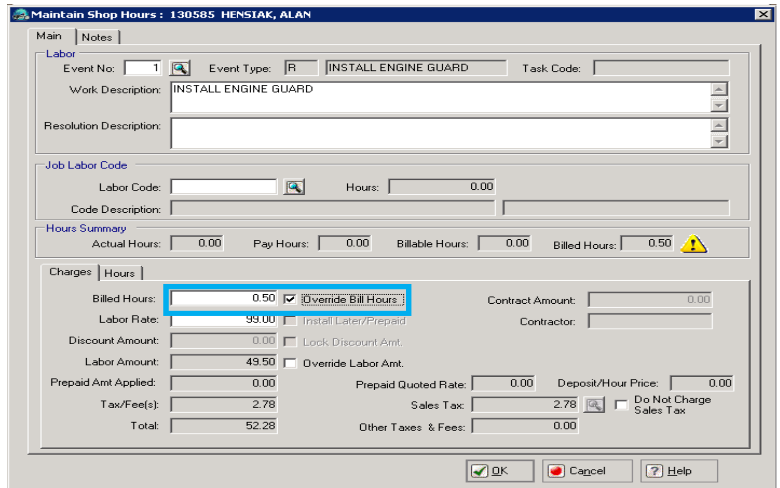


Step 24.) Enter the event number in the "**Event Number**" field and then hit "**Tab"** on your keyboard.

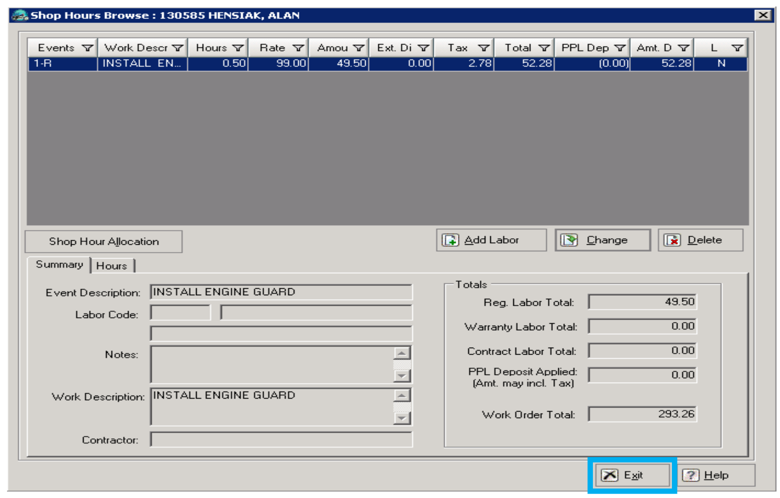


Step 25.) Locate and check the "**Override Bill Hours**" box to open the "**Billed Hours**" field.

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.

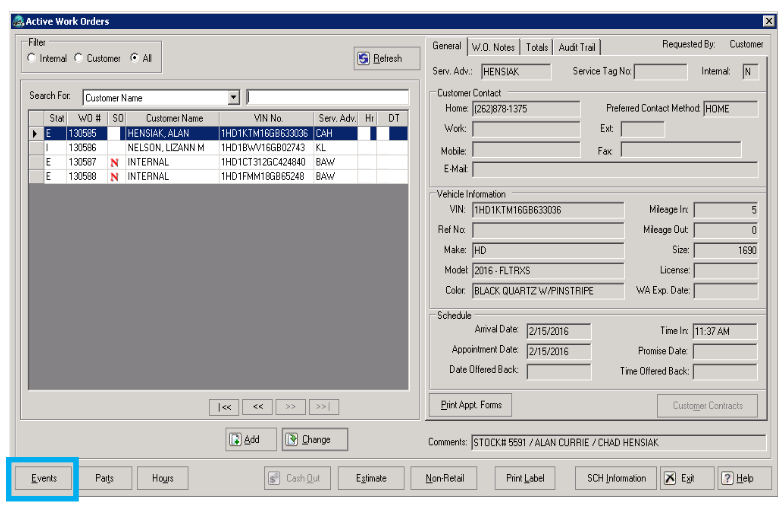


Entering Tasks

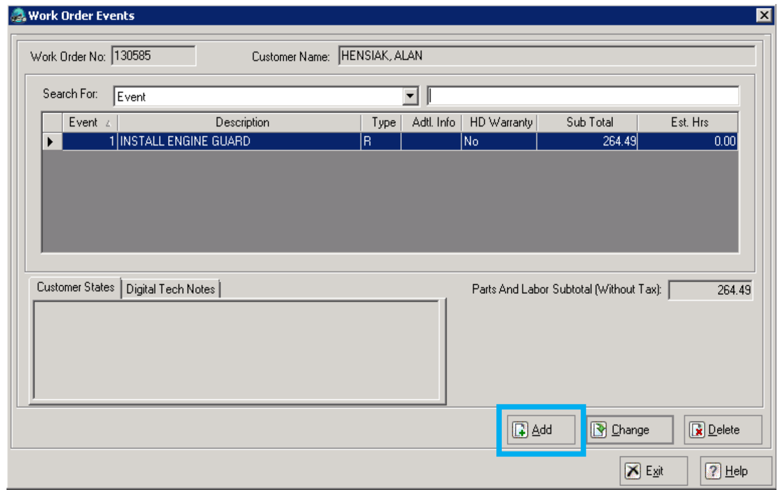
Step 27.) A task is a preloaded event, complete with all the parts and labor needed for installation. Although tasks are not available for every instance, using them on a work order saves time and makes the chrome deal process easier.

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

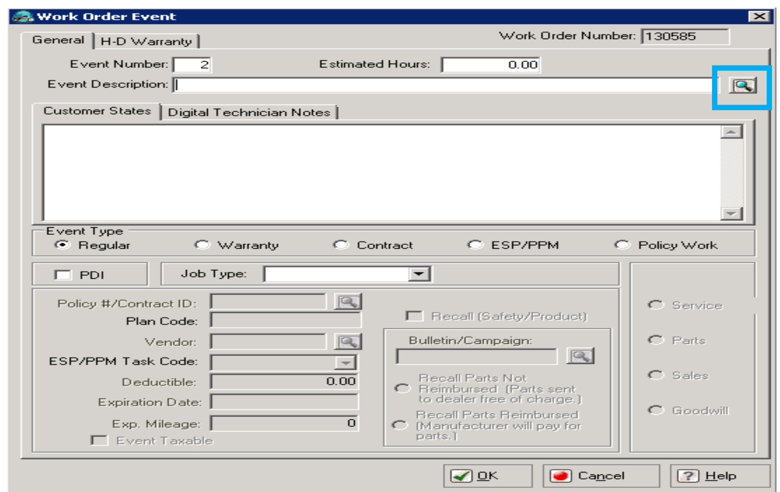
NOTE: *Some tasks may need modification on the work order. Painted part codes should be double checked for accuracy.*



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



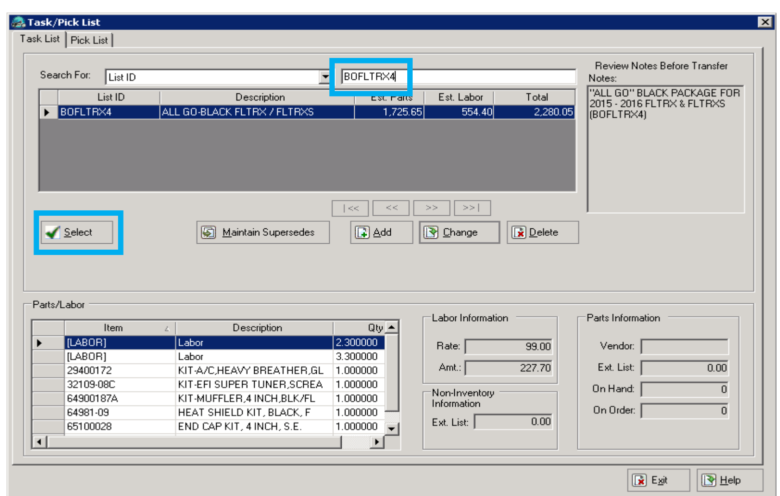
Step 29.) Locate and click on the magifying glass button located next to the "**Event Description**" field to open the window shown in step 30.



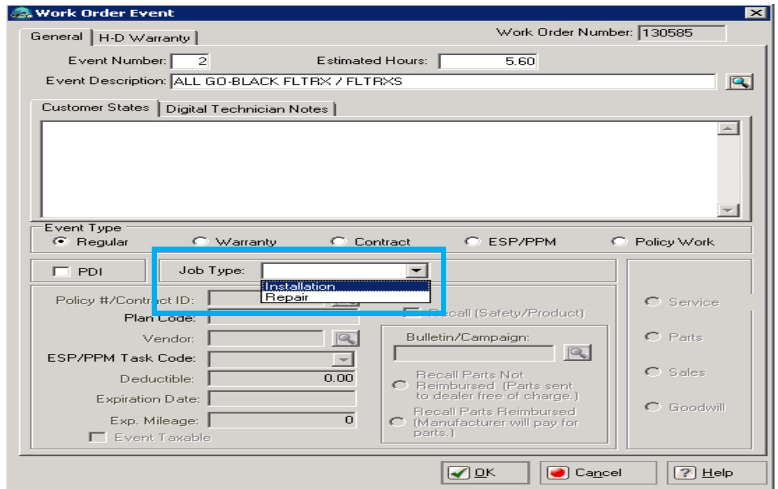
Step 30.) If the left side "**Search For**" field does not show "**List ID**," click on the drop down arrow to open the drop menu and select "**List ID**."

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

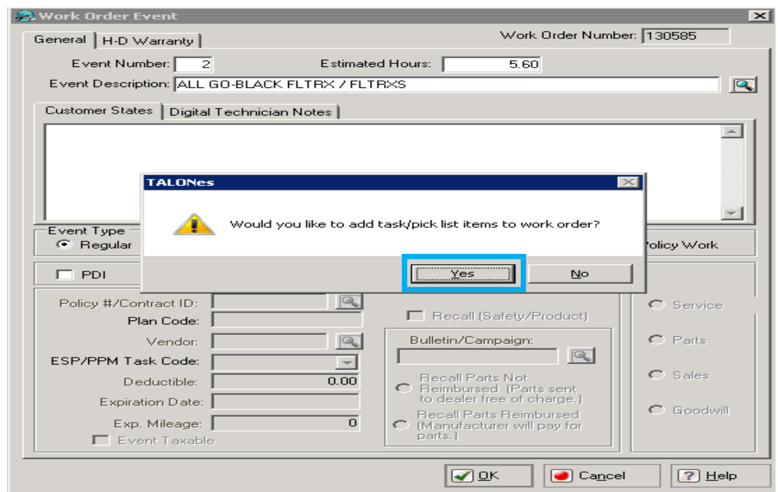
Once you have the task code, enter it in the right side "**Search For**" fiield, then click the "**Select**" button.



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

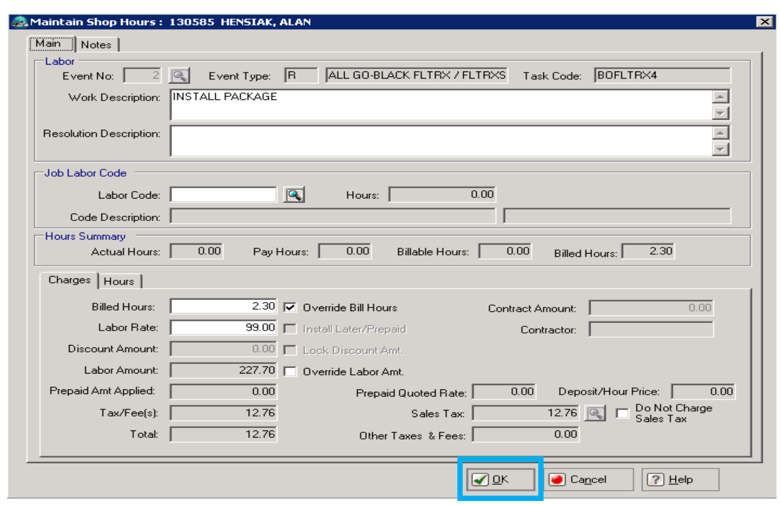


Step 32.) After clicking the "**OK**" button in step 31, a window opens asking, "Would you like to add task/pick list items to work order?" Click the "**Yes**" button displayed in this window to move on to step 33.



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

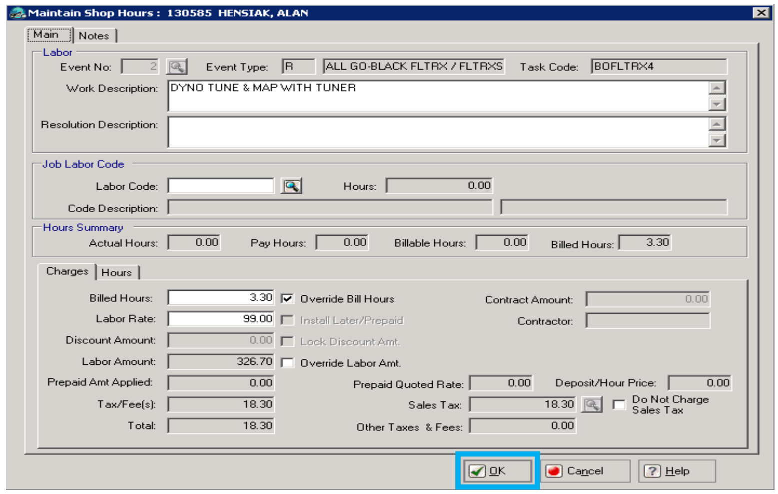
Click the "**OK**" button to move on to step 34.



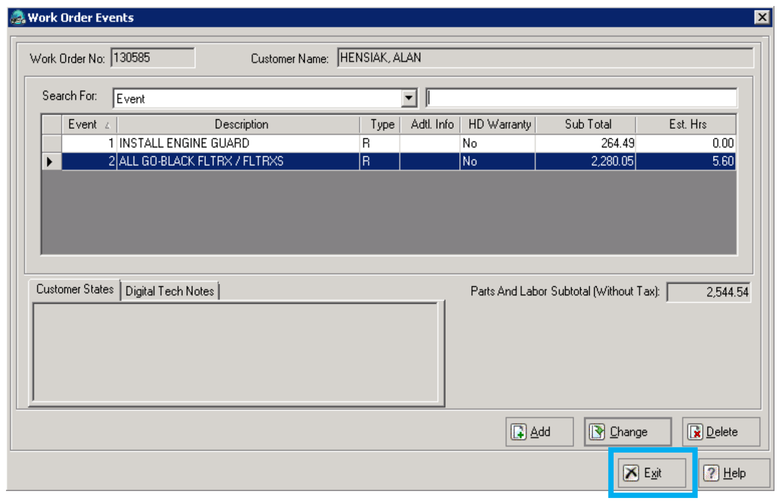
Step 34.) Because this task used for this tutorial had more than one event in it, the fields auto populated with the next event's information after clicking the "**OK**" button in step 33.

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.



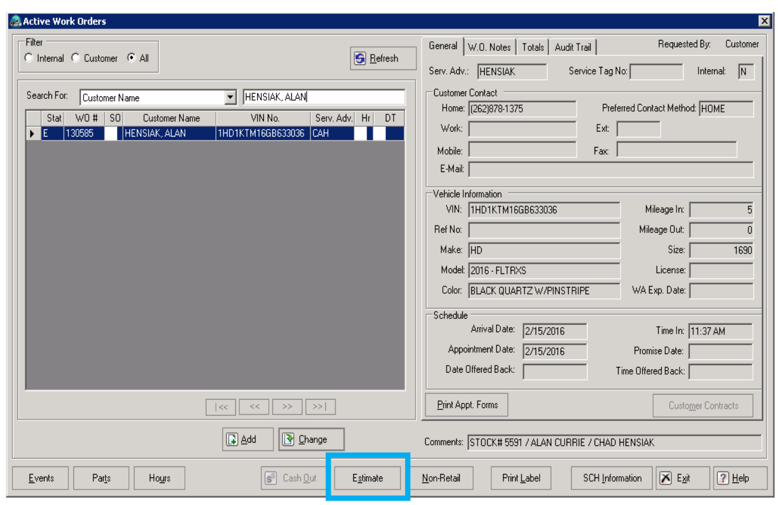
Step 35.) If you have entered all the events, parts, hours, and tasks required to complete the work order for the chrome deal, click the "**Exit**" button in the "**Work Order Events**" window to move on to step 36.



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

WORK ORDER ESTIMATE
DEALER COPY

Page:1

HOUSE OF HARLEY-DAVIDSON
6221 W. LAYTON AVENUE
GREENFIELD, WI 53220
(414) 282-2211

W.O. Number: 130585

Customer: 109280
HENSIAK, ALAN
16128 DURAND AVE

UNION GROVE, WI 53182
*Phone: (262)878-1375 Work: Ext:
Fax: Mobile:
P.O. No: Tax No: Tax Exempt: No
Comments: STOCK# 5591 / ALAN CURRIE / CHAD HENSIAK

Appointment: 2/15/16 11:37AM Mileage In: 5
Offered Back: Mileage Out: 0
Year: 2016 Shop Tag:
Mfg: HD Plate No:
Model: FLTRXS Service Advisor: CAH
VIN: 1HD1KTM16GB633036 Sold By: CAH
Color: BLACK QUARTZ W/PINSInvoice No: 0
Ref. No.: Dlr. Lic #: MC-223

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
64900187A	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:	38.65
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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