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Chapter 1
Introduction

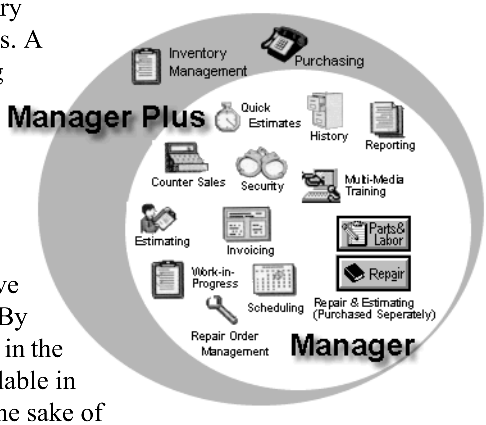
Overview

Welcome to Manager and Manager Plus. These products represent the culmination of decades of experience in the hands-on management of automobile repair facilities.

These products are comprehensive shop management systems which use the best database management technology available to provide an automated approach to creating estimates, repair orders, and invoices. Reporting features are available which allow you to track and easily access the information you need to run your shop in an efficient and profitable fashion.

Manager and Manager Plus

Manager is a subset of Manager Plus. The primary difference between the two systems is that Manager Plus includes inventory management and purchasing functions. A corollary result is additional reporting capabilities for Manager Plus users. The relationship is depicted graphically in the figure to the right.



About this User's Guide

This User's Guide is structured to serve users of Manager and Manager Plus. By describing all of the features available in the Manager Plus, all of the features available in both programs are documented. For the sake of simplicity, the title “Manager,” is used generically throughout this User's Guide to refer to both systems.

As such, there are some features described in the book which do not apply to users of Manager. Description of these features is concentrated, as much as possible, in Chapter 11, “Inventory,” and in Chapter 12, “Purchase Orders.” If you are a Manager user, you can simply ignore these chapters as well as the occasional reference to an inventory or purchasing function in other chapters of the book.

Similarly, if you are not a purchaser of Estimator, you can disregard the information in Chapter 7, “Parts and Labor Interface.”

How Manager Works

Managing your shop with Managers essentially a seven-step process. These steps are explained in detail below.

Step 1 - Set up Information about your Shop Before you can begin working with Manager, you must enter certain information about your shop. You must enter rate information (labor, parts mark-up, tax rates, etc.) and administrative information (shop name, technicians).

Step 2 - Set up a Parts and Labor Database for your Shop When you go to build an Order (Estimate, Repair Order, or Invoice) you will need to know what parts to use and the amount of labor time that will be required. To accomplish this efficiently, you need to maintain a database of the parts that your shop uses on a daily basis. You will want to have **Part Kits** set up for parts that are frequently used in combination with one another. You will want to have **Canned Jobs** set up for parts and labor operations required for frequently performed jobs such as alignment jobs. Finally, you will want to set up the **Tire**, **Lube and Oil Filter**, and **Brake Packages**.

Step 3 - Create Estimate Creating estimates quickly and accurately is central to the success of your business.

Manager allows you to tap into your parts and labor database to build estimates without wading through stacks of thick books. The developers of Manager know what it is like to open the doors at 8 am to a line of impatient customers. With this in mind, we have built a product that will allow you to deliver estimates quickly and confidently.

The **Quick Estimating** feature allows you to build a quick quote requiring a bare minimum of information. This feature is most useful for situations where you may, or may not, get the job, such as in the case of a customer calling around for prices. The quote can then be converted to an estimate, or repair order, once the customer indicates acceptance.

Step 4 - Convert Estimate to Repair Order Once the customer has agreed to the necessary work, a single command converts your estimate to a repair order. You can print the order so that the customer can authorize the work to be performed. Then you can schedule the job. Once work has begun, the system allows you to track the location and status of the vehicle in your shop in the Work in Progress screen.

Step 5 - Create an Invoice Once work has been completed, you will need to create an invoice—a request for payment for services provided. Again, a single command turns your repair order into an invoice.

As with estimates and repair orders, the status of the invoice is tracked in the Work in Progress screen.

Step 6 - Post Invoice Posting the invoice indicates that the car has been picked up. At this point, the order is closed and removed from Work in Progress to Order History. A complete record of the repair and payment history are maintained where they can be viewed at any time.

Step 7 - Utilize Shop Management Tools The final step in the process is making use of the management reporting tools that Manager provides. Reports have been structured that pinpoint where your shop is making, *and losing,* money. All of your inventory and purchasing functions are fully automated within Manager.

Before You Begin

Manager runs under the Microsoft Windows 98 Second Edition, Windows 2000, Windows XP and Windows NT operating system. The Windows Graphical User Interface (GUI) helps to make the program easy to learn and use.

This guide assumes a basic familiarity with Windows. If you are not familiar with Windows, you should refer to the Windows online tutorials and documentation, as necessary.

Hardware and Software Requirements

NOTE These are the published system requirements as of the printing of this document. Due to the rapid evolution of computing, these requirements are updated frequently. For the most current version of the requirements, please visit our website at http://www.mitchell1.com.

Mitchell 1 recommends using business class Pentium computers. Although custom-built clone machines may run well, the majority of problems result from poorly engineered equipment. Mitchell 1 recommends using name brand business computers from Dell®, Gateway®, Compaq®, and HP®. 3COM® or Intel® cards are required for networking. Systems intended for five (5) or more concurrent users should consider a dedicated Windows server. Most Windows networks should be configured with a DVD drive for OnDemand5 data and a standard CD-ROM for Parts and Labor estimating data. Although there are various processors available in the market place (e.g., Cyrix and AMD), Mitchell 1 highly recommends the Intel processors for product reliability. For applications requiring a modem, 3COM/US Robotics modems are the best choice. OnDemand5 and Manager include optional training videos. Users wishing to view the videos will require a system configured with a sound card and speakers.

Minimum System Requirements

- Microsoft® Windows 98*, Windows ME, Windows 2000*, Windows XP
- 233 MHz Intel® Business class Computer
- 64 Megabytes (MB) Random Access Memory (RAM)
- 3.5” 1.44 MB diskette drive
- CD-ROM Drive
- DVD-ROM Drive (Repair users only).
- 15” Super VGA color monitor 800x600 resolution
- 8 Gigabyte hard disk drive or greater
- Microsoftâ compatible mouse
- 1 Parallel port
- 1 Serial Port
- 56k modem
- Inkjet printer
- Iomega Zip Drive 100/250 MB (for Manager/ManagerPlus users only)
- UPS (Un-interruptible Power Supply for Manager/ManagerPlus users only)

NOTE The minimum system requirements may not be compatible with future software releases.

Networking Requirements

- Windows 98*, Windows ME, Windows 2000*, Windows XP
- Required Network Card: 3-Com or Intel 10/100 Mb/sec
- TCP/IP is required as a network protocol

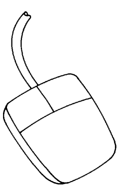
Optimum System Requirements

- Windows 2000*, Windows XP
- Intel® Pentium 4 Business class computer or better
- 256 Megabytes (MB) Random Access Memory (RAM)
- 3.5” 1.44 Mb diskette drive
- CD-ROM Drive

- DVD-ROM Drive
- Sound Card and speakers (For training videos)
- 17” super VGA color monitor 1024x780 Resolution
- 40 Gigabyte hard disk drive
- 2 Parallel printer ports (for multiple printers)
- 1 Serial port
- 56k modem
- Laser or Inkjet printer
- Iomega 250 Zip Drive (for Manager/ManagerPlus data backups.)
- UPS (Un-interruptible Power Supply)
- Internet connection

NOTE: * Windows 98 should be Second Edition (SE), Windows 2000 should be Service Pack (SP) 2.

Mouse and Keyboard



The information in Manager can be accessed with a keyboard or mouse. The keyboard is simple, though access is slower. You don't need to know how to type to run the Manager software.

Using a Mouse

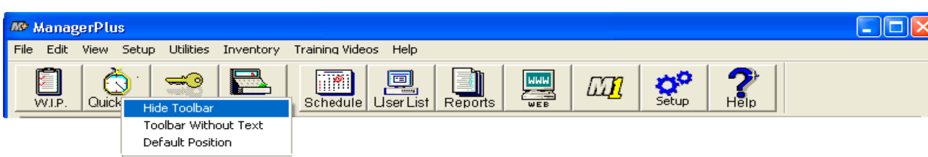
To make a selection using a mouse, roll the mouse on a flat surface until the arrow on your screen is in the desired location, and press the left mouse button. This is known as “clicking.” When you release the mouse button, the computer calls your choice onto the screen.

Throughout this manual, whenever you are told to “select” or “click on” a function, menu item, icon, or button, this means to place your mouse cursor (arrow) on the selection, and click the left mouse button.

Right-Clicking Right-clicking allows you to access some of the functions you use most often without leaving the work area to look for menus or icons. To right-click, simply aim your mouse pointer towards the appropriate area of the screen and click the right mouse button. The appropriate menu displays or dialog box opens.

Some of the right-clicking functions are described below:

Function	Description
Setup Dialog Boxes	Right-click on the gray area at the bottom of any of the three major setup dialog boxes (Standard Descriptions, Standard Tables, Shop Data Setup) to select from a menu of the other setup dialog boxes.
Quick Canned Jobs List	Right-click on an empty grid line in any order panel to display a listing of Quick Canned Jobs or display the Canned Job List.
WIP Detail	Right-click on any item in the Work-In-Progress screen to display the Work-In-Progress Detail dialog box for that item.
Toolbar Menu	Right-click on the gray space between icons on the toolbar (usually appears as a thin vertical bar) to open a menu of toolbar selections (as shown below).



Right-click example

Protecting Your Data

The most important part of your investment in Manager is the data that you input. Every effort possible has gone into making the system stable, but there are some things that the end-user can do to extend protection of their data. A database's biggest enemy is file corruption. This problem is common to ALL databases, not just Manager.

The most common form of corruption is caused when data is incorrectly written to disk. This is typically caused by power fluctuations to the computer. A sudden, short term voltage drop across the computer's circuitry could result in data being written some place other than where the operating system expects it to be. Manager will no longer be able to access this “lost” data. The result is lost records and incorrect reports.

In automobile repair shops the biggest culprit is the air compressor. However, even connecting the computer to the same circuit as a coffee maker or copier can cause voltage drops at the computer when those devices cycle.

The best solution to this problem is an Uninterruptible Power Supply (UPS) equipped with line conditioning. A UPS provides a back-up power supply which allows the user to save their work and shut down the computer normally in the event of a power outage. More importantly, the line conditioner uses battery power from the UPS to provide a constant 110 volt power supply to the computer as voltage drops occur. Line voltage fluctuation is the #1 cause of premature hardware failure.

In addition to using a UPS, Mitchell 1 recommends the following:

- If at all possible, connect the computer to a dedicated circuit.
- DO NOT connect copiers, coffee makers, fax machines, etc. on the computer's circuit.
- Back up your data regularly.

Uninterruptible Power Supply (UPS)

In order to be most effective, the UPS should provide 10-15 minutes of back-up power. This will allow for an orderly shut down of the computer. The line conditioning should be constant. Some UPSs have an alarm that sounds when UPS services are being used. This feature is useful for indicating voltage drops and brownout conditions.

For network installations, the file server as well as each of the individual workstations should each be protected by a UPS. The network solution provider should be able to provide recommendations for power protection for the network.

Backing Up Your Data

Backups protect against data loss due to a disk crash, fire, theft, software/hardware failure, accidental deletion, and power fluctuations. The Manager automated backup system, used properly, can save you time and money. If a data loss occurs, you simply restore from the backup, eliminating costly reconstruction of your data.

A variety of backup solutions may be used with Manager. However, Mitchell 1 recommends using an Iomega® Zip. Refer to Appendix B, “Backup” for details on backing up your data.

How to Use this Guide

The *Manager User's Guide* is designed to help you learn and work with the system. General, as well as detailed, information is provided so that new learners as well as experienced users are provided with the information they need to use Manager effectively.

User's Guide Contents

This guide contains all of the information you need to install, start, learn, and work with Manager. The information is divided into the following chapters:

Chapter 1, “Introduction” provides an overview of the Manager product and this User's Guide.

Chapter 2, “Getting Started” details procedures for installing, starting, and exiting the system. Manager menu and button bars are also introduced.

Chapter 3, “Shop Setup” describes the steps necessary to set up and maintain, administrative and rate information about your shop.

Chapter 4, “Utilities” describes setup of customer and vehicle information, as well as setup of parts kits and canned jobs. Other selections available from the Utilities menu are described as well.

Chapter 5, “Security” details options for providing password protection for sensitive system functions.

Chapter 6, “Manager Orders” details the procedures to be followed to create quick estimates, regular estimates, repair orders and counter sales.

Chapter 7, “Parts and Labor” describes the interface with Manager’s estimating program interface.

Chapter 8, “Work In Progress” describes the options available in the Work In Progress screen and how its view can be customized for individual users. A detailed description is also provided of the options available for scheduling, and looking at scheduled orders.

Chapter 9, “History Records” details the options available for working with historical Manager records.

Chapter 10, “Reporting” details the reports that Manager provides for managing your shop in an efficient and profitable manner.

Chapter 11, “Inventory” describes the process of setting up inventory items and receiving and issuing parts from inventory.

Chapter 12, “Purchase Orders” explains the tools that Manager offers for generating and working with Manager Purchase Orders.

Chapter 13, “Marketing” details the many ways that Manager provides to help you reach out to your customers. Packages, Discount Coupons, Marketing Data collection, and Mail Merge Postcards and Letters are all described.

Appendix A, “Customer Service” describes common questions and answers and where to call for help.

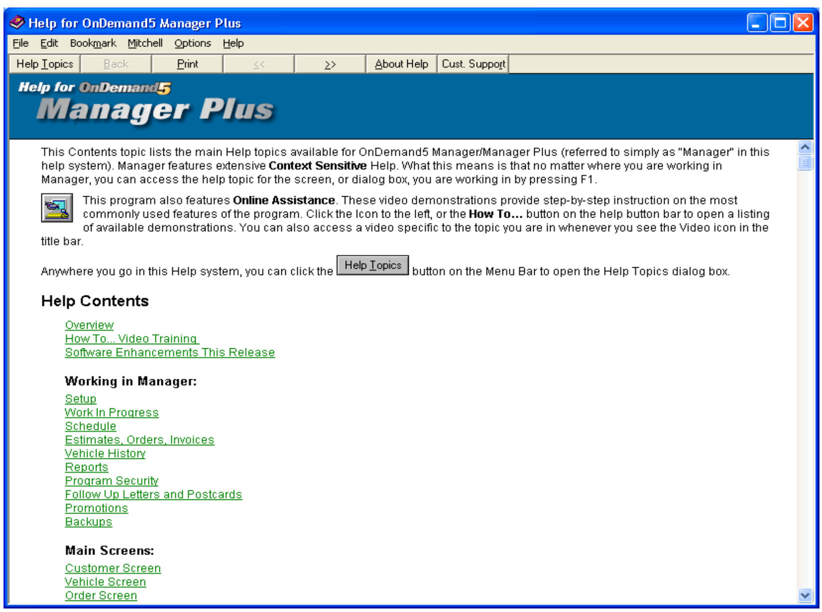
Appendix B, “Backup” describes backup considerations, and provides recommendations for a suitable backup (hardware and software) system.

Appendix C, “Importing Data Into Manager” describes the Import and Database Creation Utilities, which allows for import of data into the Manager database.

Appendix D, “Parts Ordering” provides information about ordering parts from participating parts distributors.

Online Help

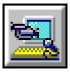
Manager provides extensive *context-sensitive* online Help. What this means is that no matter where you are working in the system, you can access Help specific to the dialog box you are working in by pressing [F1]. You can also open online help by selecting the Help button on the tool bar.



Online Help

Select the Help Topics button on the toolbar to open the Help Topics dialog box, or the Search button to utilize the key word search option.

Online Assistance



To facilitate the process of learning to work with the Manager system, a set of online demonstrations has been included on CD. These demos, created and displayed using the Lotus® ScreenCam® program feature voice instruction coupled with actual online demonstration of how to use the program.

NOTE: You need a 16-bit (or better) sound card and speaker(s) if you desire to hear the narration (highly recommended). For best viewing, it is recommended that your computer video resolution be set at 800x600, or higher. For convenience and best performance, Mitchell recommends that you install the videos to your hard drive when prompted during installation.

Online Assistance is optionally installed as part of the Manager setup. Online Assistance is accessed from the Manager CD from within the Help program in either of two ways:

- Click on the camera icon in the title of any Help topic for a related demonstration.

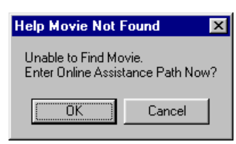
OR

- Select the How To... button on the Help screen button bar to open a menu of all available demonstrations.

The first time you work in Online Assistance, a dialog box asks that you specify the directory where the Training Videos are located.

To specify a location for the Training Videos:

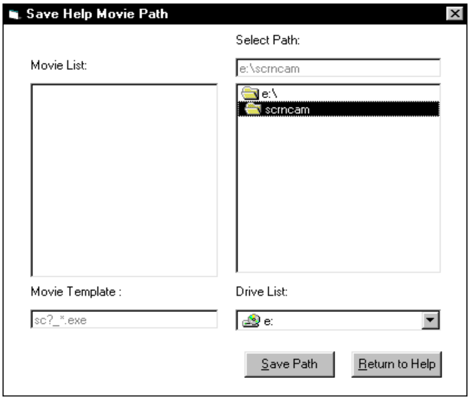
1. With the Manager CD inserted in the CD-ROM drive, open the Online Help.
2. Choose How To... to open the list of Training Videos.
3. Click on any Title. The Help Movie Not Found dialog box displays.



Help Movie Not Found

4. Click OK.

The Save Help Movie Path dialog box displays. This dialog box allows you to specify the path for the Online Assistance demonstrations.



Save Help Movie Path

5 Select the movie path by choosing the drive letter of your CD-ROM from the Drive List and then the movie path in the Select Path: control group. For example, if your CD-ROM drive was e: your path would be:

```
e:\scrncam\movies\
```

6 Choose Save Path.

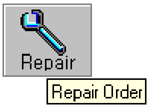
You are now able to run Online Assistance.

FAQs

The FAQs help topic provides access to **F**requently **A**sked **Q**uestions—a listing of some of the questions that are most often asked of our customer service representatives. Click on the desired question and you are taken directly to the Help topic that addresses the question. FAQs can be opened from the Additional Help Resources section of the Help contents.

Before dialing our Customer Support department, give FAQs a try. It might save you a phone call.

Tool Tips



Manager features Bubble Help (also known as “Tool Tips”) for the toolbar icons. To use bubble help, simply position your mouse pointer over a toolbar icon and a help bubble pops up displaying a description of the icon's function.

Notational Conventions

In order to make the instructions in this manual easy to understand, this User's Guide makes use of certain standard conventions.

Keys When you use the keyboard to work with the Manager system, you will need to "press a key." In this guide, a key is represented by Helvetica font. For example:

Press Esc to exit the dialog box.

Commands Commands have been bolded in the procedures of this user's guide. For example:

- Enter customer information and click **OK** when finished.

Bolding allows you to scan quickly through a procedure and still pick up on necessary actions.

Text When you need to type a command in order to perform a task, this Guide displays the command using the Courier font. For example:

Type:

`d:\setup`

and then click **OK** to install the Manager software.

Notes When information in the text needs to be emphasized, it is shown as a NOTE:, with a shaded background behind the text. For example:

NOTE: Information is displayed in this format for emphasis. As you work with this Guide, you should look for these notes.

Procedures The primary purpose of this User's Guide is to explain the procedures for using Manager. So that you can easily locate these procedures, the introductory phrase is printed in a bold typeface. For example:

To follow a Procedure:

- The steps of the procedure are numbered when there is more than one action item, or bulleted if there is only a single action.

Summary

Now that you know the requirements for using the system, and are familiar with the structure and conventions of this User's Guide, you are ready to install and use Manager.

Chapter 2
Getting Started

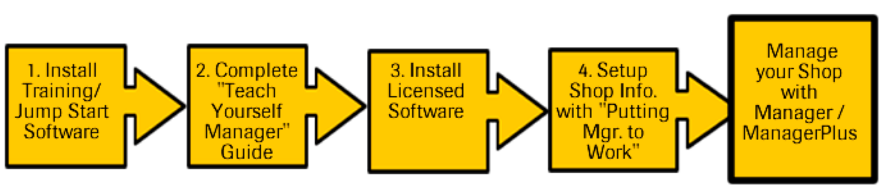
Overview

To prepare your system for processing orders, you must install the software and enter some system settings. This chapter provides an overview of these processes as well as steps for starting and exiting the program. The chapter concludes with an overview of the system's menus and buttons.

Setup

Your Manager CD contains everything you need to install, learn and use the Manager program. Just insert the CD in your CD-Drive and the menu will come up on your screen.

To facilitate a smooth process of implementing Manager in your business, Mitchell strongly recommends that you carefully follow these "5-steps-to-success," in order.



Manager Setup and Training “5-Steps-to-Success”:

1 Insert the installation CD in your PC. The autorun menu displays on your screen.

Autorun Setup Menu

Install the **Training/Jump Start** version of the software. This installs the Manager software to your computer along with a sample database of customer and vehicle information

2 Work through the exercises in the **Teach Yourself Manager/ManagerPlus** guide included with your software package.

IMPORTANT NOTE: Do NOT enter real shop/customer information into this version of the program. This version is for practice purposes only and has limitations in the number of customers and vehicles you can enter. You will NOT be able to transfer this information to the "live" program.

3 Once you are comfortable working with the Management System, using the Installation CD again, **install your licensed version of Manager/Manager Plus**. When you install the "live" software, you will need to use the CD and your Key Diskette, which "activates" the software and "unlocks" all program features.

4 Follow the step-by-step instructions in the **Putting Manager to Work** guide to setup your shop information, rates, etc.

5 Begin running your business with the finest Management System available - OnDemand5 Manager/ManagerPlus. Refer to this User's Guide, the Online Help (F1), and the Video Training (accessible through Help) for detailed step-by-step instruction on all program features.

Follow these "five steps to success" to help ensure a successful and trouble-free implementation.

Installing Manager

To install Manager (Demo or Live Version) just select the appropriate setup option from the autorun menu and follow the on-screen instructions. For additional information, refer to the documentation that accompanied your software package.

Starting the Program

Manager is opened by selecting the appropriate program icon from the Start menu or your desktop.

To start Manager:

- Choose the Manager icon from the Start menu.

OR

- Click the Manager icon on your desktop.

  The Manager Front screen displays.

Manager Screen

The Manager screen consists of the following sections: Title Bar, Menu Bar, Button Bar, Work Area, and Status Bar. When you first open the program, the Manager logo appears in the Work Area.

Manager Front Screen

Screen Layout

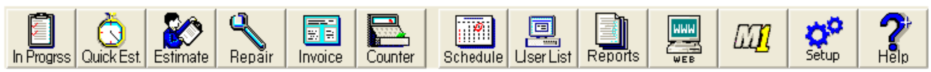
The Manager screen layout is consistent with that of other Windows applications. Each area of the screen is described below.

Title and Menu Bar The Title Bar is the upper strip of the Manager screen. To the left is the application title. To the far left is the control menu box, and to the right are the minimize and maximize buttons.

Manager provides menus that allow you to move freely through the system using whichever method (keyboard or mouse) you prefer. The Menu Bar contains drop-down menus from which you can select a command or an option. These drop-down menus are: File, Edit, View, Setup, Utilities, Inventory, and Help.

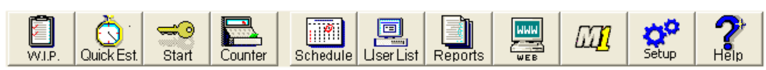
Each menu is described in detail later in this guide. For the convenience of keyboard users, the View menu commands correspond to the Button Bar functions.

Toolbar Manager features a row of icons, or buttons, each representing a different step in the daily shop operations process. When you select a button, the program overlays the work area with a window or dialog box allowing you to perform a system function. Displayed below is the ManagerToolbar in the standard (default) configuration.



Toolbar (Standard)

The **One-Start Toolbar** configuration allows you to run your shop in a more systematic fashion, replacing the Estimate, Repair and Invoice icons with a single Start icon. The One Start Toolbar is displayed below.



One Start Toolbar

Refer to “One Start Toolbar” on page 31 for details.

The Manager toolbar is *customizable*. What this means is that you can move it around on your desktop. Simply click and hold down your mouse pointer on the line in the middle or at either end of the toolbar. You can then move the toolbar to a different location on your screen. Displayed below is an example screen with the toolbar moved to the side.

Toolbar on Side Example

You can restore the toolbar to its original position by choosing Default toolbar from the Toolbars selection from the View menu.

Work Area The work area is the portion of the screen that displays the windows and dialog boxes in which you work. This is the largest area of the Manager screen and works in conjunction with icons selected from the Button Bar, Menu commands, and hyperlinked areas of certain dialog boxes. These allow you to jump to a different, related dialog box. Depending on which command you choose, the work area displays the appropriate information or data entry screen.

Status Bar The Status Bar is located at the bottom of the screen—displaying information for quick referencing.

Moving Around in Manager

Manager has been designed with flexibility in mind. You can move from one window/function to the next using the mouse or the keyboard.

Using a Mouse

A mouse allows you to move around in Manager a lot quicker than when using the keyboard alone. For instructions on installing, setting up, and using your mouse, refer to your mouse documentation and the *Microsoft Windows User's Guide*.

Using the Keyboard

Although a mouse is a convenient tool, many Manager operations can be completed by keyboard. The system not only uses all the standard typewriter key functions, but also some PC-specific keys, as described below. As you work with the program, these keyboard commands will become second nature to you.

The View menu on the menu bar provides keyboard access to all system functions represented on the Manager button bar.

Key	Screen Function
Tab	Moves the cursor (data entry point) forward to the next field.
Shift+Tab	Moves the cursor backward one field at a time.
Backspace	Removes the character to the left of the cursor.
Delete	Erases one character or a highlighted group of characters or data field.
Arrow Keys	Moves the cursor (or highlight bar, as the case may be) one character in the direction of the arrow (Up, Down, Left, or Right).
Alt	Used in combination with a hot key to select an option. (See the section, Using Hot Keys.)
Enter	Function varies depending on where you are in the program.

Key	Screen Function
	In dialog boxes with fields that allow for longer text passages (for example, Notes) pressing the Enter key acts like the carriage return on a typewriter, moving you to the first character position on the next line. In other windows, the Enter key has no function.

Using Hot Keys The hot key is any underlined letter or character on the screen. It is used in combination with the Alt key to select a menu or a command option. For example, in Manager, pressing Alt and the letter F accesses the File menu. When the File menu is open, pressing X exits you from the program. Where possible, the hot key for an item is the first letter of the item name (such as N for New).

Using Function Keys

Manager function keys provide one-click access to the program features you use most often. The function keys are normally located on the top row (or near the top) of your keyboard. The following keys are available:

- **F1** Help
- **F2** Spell Check
- **F3** Find Customer
- **F4** History
- **F5** Batch Payment
- **F6** Quick Start
- **F7** Quick Estimate
- **F8** New Estimate
- **F9** New Repair Order
- **F10** New Invoice
- **F11** New Counter Sale
- **F12** Check Profit

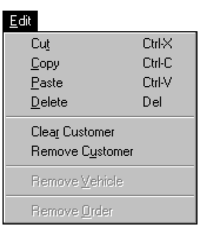
Menu Bar

Described below are the menu options offered on the Manager menu bar. Each of the menu options can be accessed either by mouse or by keyboard as described in the previous section.

Menu Bar

File The File menu contains selections which allow you to exit Manager or to pull up any of the last four orders on which you were working. This list is customized to the current user in the user list—if a different user is selected, the list changes.

You can also choose to Print or Print Preview the current order or choose Print Setup to open the Reports/Printers Selection dialog box in which you can specify the printer to be used for each type of report.



Edit The Edit menu provides options for entering and removing information from your Manager orders.

Option	Description
Cut	Removes a highlighted section of repair lines out of the order. The section is copied to your Windows clipboard, from which it can be pasted elsewhere, if desired.
Copy	Copies a highlighted section of repair lines from within the order. The section is copied to your Windows clipboard, from which it can be pasted elsewhere, if desired.
Paste	Pastes a section of repair lines from the clipboard into an order.
Delete	Deletes a highlighted section of repair lines from the order.
Clear Customer	Clears customer and vehicle information from an order.

Option	Description
Remove Customer	Removes the currently selected customer's record, and all associated vehicles, from the database. This option is only available if the customer has no current orders in Work In Progress.
Remove Vehicle	Removes a selected vehicle from the Manager database. This option is only available if the vehicle has no current orders in Work In Progress.
Remove Order	Removes the current order from the database.

View The View menu allows you to access, by keyboard or mouse, all of the options available from the button bar. Details of these menu operations are provided in Chapter 8, "Work In Progress." Additional options allow you to quickly locate a customer, alter certain elements of your display, and show or hide the Toolbar and Status Bar.

Options available from the View menu are described below:

Option	Description
Work In Progress	Accesses the Work In Progress display allowing the selection of any open order (Estimate, Repair Order, Invoice).
Quick Estimate	Opens a new Quick Estimate.
Estimate	Opens a new Estimate.
Repair Order	Opens a new Repair Order.
Invoice	Opens a new Invoice.
Counter Sale	Opens a new Counter Sale.
Special Order	Begins a Special Order.
Applications	Allows you to open, or switch to, other Manager applications you have installed on your system.
Schedule	Brings up the Schedule window.

Option	Description
User List	Allows you to select the current user and add or delete users.
Reports	Brings up the Report Selections dialog box allowing you to select from available Client, Management, Accounting, and Inventory reports for viewing and printing.
Toolbar	Allows you to display and/or hide the Manager toolbar (program icons) and allows you to restore the toolbar to its default settings. A checkmark next to the Toolbar command signifies that the toolbar is currently displayed. Choose Default Toolbar to restore the toolbar to its default settings.
Status Bar	Allows you to toggle on or off the Manager status bar.

Setup Menu The Setup menu provides access to options allowing you to set up and maintain your Manager database. These options are described briefly below, and in detail in Chapter 3, “Shop Setup.”

Option	Description
Standard Descriptions	Opens the Standard Descriptions dialog box. Refer to Chapter 3 for details of the setup activities that are available in this dialog box.
Standard Tables	Opens the Standard Tables dialog box. Refer to Chapter 3 for details of the setup activities that are available in this dialog box.
Shop Data Setup	Opens the Shop Data Setup dialog box. Refer to Chapter 3 for details of the setup activities that are available in this dialog box.

Option	Description
Vendor Setup	Opens the Vendor List dialog, from which you can add, edit, or delete vendor codes and names.
Technicians Setup	Allows you to add, edit, or delete technician names and types.
Reports/Printers	Allows you to individually select a unique printer and report type for Estimates, Repair Orders, Invoices, and Counter Sales.
End of Day Reports	End of day reporting allows you to designate reports to be printed when you exit the program at the end of the day or over any other desired time period.
Packages & Discounts	Opens Packages and Discounts setup. See page 99 for details on setting up packages and discounts.
Tire Packages	Opens Tire Packages setup. Refer to page 103 for details on setting up Tire Packages.
Brake Packages	Opens Brake Packages setup. Refer to page 105 for details on setting up Brake Packages.
Lube, Oil, and Filter Packages	Opens Lube, Oil, and Filter (LOF) setup. Refer to page 106 for details on setting up LOF Packages.
Program Security	Allows a System Administrator to enable password protection for designated system functions and define user access to those functions.
Diagnostic Reports	Pulls up the Error Reporting Preferences dialog box, in which you are able to select error logging options and set a log file name.

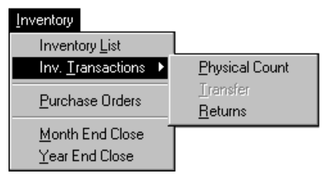
Option	Description
Special Maintenance	Provides access to a submenu allowing you to access some special system maintenance utilities.

Utilities The Utilities menu contains the following selections.

Option	Description
Find Customer	Allows you to quickly locate a customer record from anywhere in Manager.
Find History Record	Allows you to quickly locate a history record from anywhere in Manager.
Batch Payment	Opens the Batch Payments dialog box, allowing you to make payments on a number of invoices without opening them individually.
Parts List	**NOTE:** Available in Manager only. ManagerPlus users refer to Inventory List, (opened from the Inventory menu.) Opens the Parts List dialog box, allowing you to add, edit, and delete parts from the Parts List.
Part Kits	Opens the Part Kits dialog box, allowing you to add, edit, and delete Parts Kits.
Canned Jobs	Opens the Canned Job List, allowing you to copy, add, edit, and delete Canned Jobs.
Promotions	Opens the Promotions dialog box, from which you can add, edit, and delete Packages and Discount Coupons.
Customer Screen	Opens the Customer screen, allowing you to enter customer information into the Manager database.

Option	Description
Vehicle Screen	Opens the Vehicle screen, allowing you to enter vehicle information into the Manager database.
End of Day	Opens the End of Day procedure dialog box.

Inventory Menu The Inventory menu allows access to all inventory and purchasing functions. These options are described briefly below, and in detail in Chapter 11, “Inventory” and Chapter 12, “Purchase Orders.”



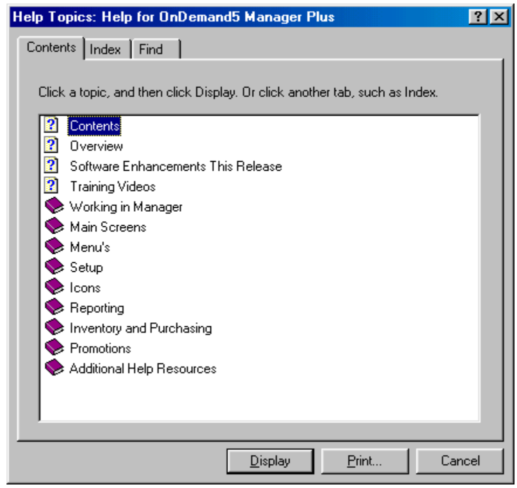
NOTE: The Inventory menu is available only to ManagerPlus users. Manager users use Parts List (Utilities menu) to enter parts. Manager users also select Year End Close from the Utilities menu.

Option	Description
Inventory List	Opens the Inventory List dialog box, allowing you to add, edit, and delete Inventory List records.
Inventory Transactions	Opens the Inventory Transactions submenu. The three available selections, Physical Count, Transfer, and Returns, are described below.
Physical Count	Opens the Physical Count Update dialog box, allowing you to record an inventory count adjustment.
Transfer	Unavailable in this software release.

Option	Description
Returns	Opens the Return Part to Vendor dialog box allowing you to to reduce the on-hand quantity of an inventory item to account for parts that are returned to the vendor.
Purchase Orders	The Purchase Orders dialog box provides options for creating new purchase orders, viewing open purchase orders, and performing operations on open POs (Edit PO, Receive Parts, etc.).
Month-End Close	Opens the Close Month dialog box, allowing you to close a month for accounting purposes.
Year-End Close	Initiates a transaction to close a year for accounting purposes. (Manager users select Year-End Close from Utilities menu.)

Training Videos Use this menu selection to access a selection of available Training Videos.

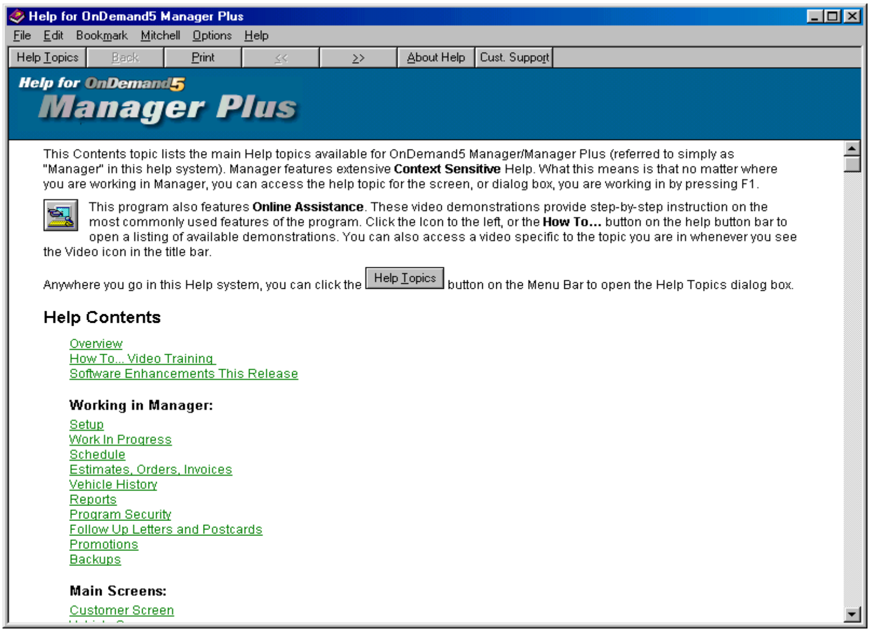
Help The Help selection provides access to the online help system. When you access Help via the Index selection from the Help menu, you open the Help Topics dialog box.



Help Topics

This dialog box allows you to search help via a structured Contents lookup, an Index search or a word search (Find).

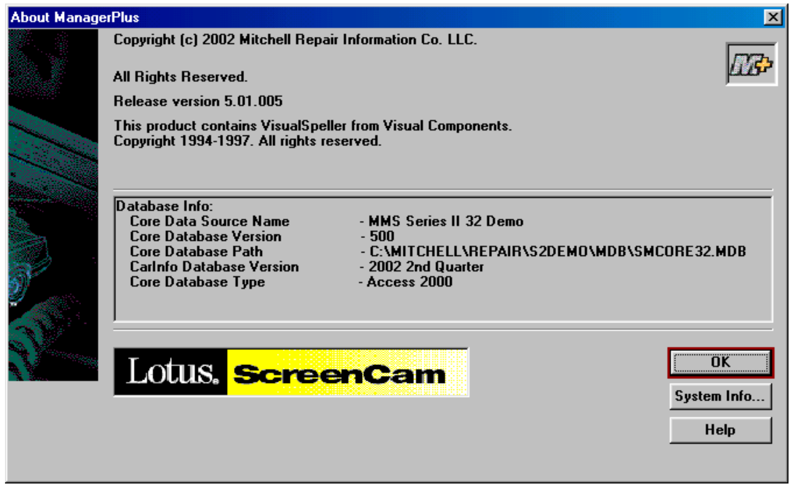
You can also access Help for any program function by pressing [F1] or the Help button on the toolbar.



Online Help

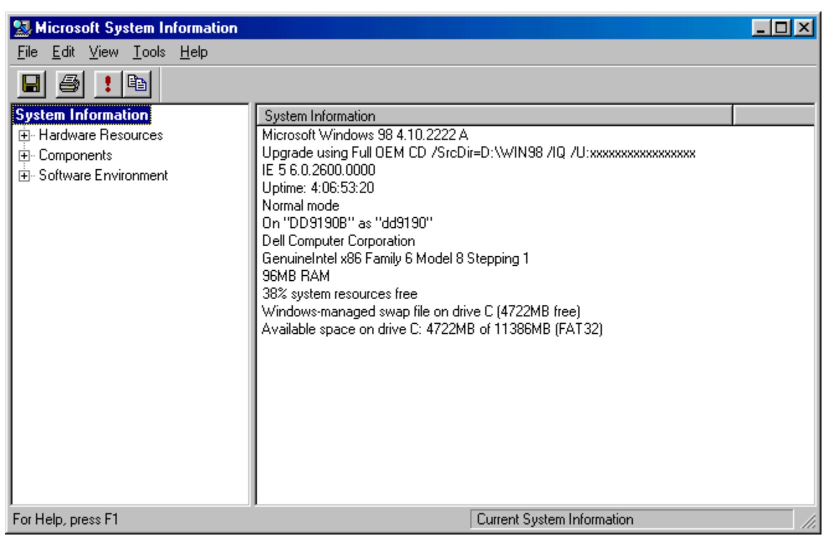
NOTE: You can access Help specific to any screen by pressing [F1].

The Help Menu also provides access to the About dialog box, which provides program version identification.



About

You can also click the **System Info ...** button to pull up the Microsoft System Information dialog box.



Microsoft System Information

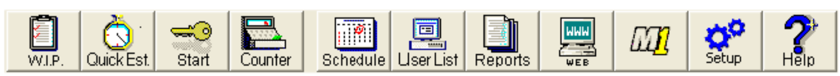
This dialog box provides information about your operating system, memory, and other aspects of your computer environment that may be of use in troubleshooting performance issues.

NOTE: The Microsoft System Information dialog box is only available if you have either Microsoft Office or Windows 98 installed on your system.

One Start Toolbar

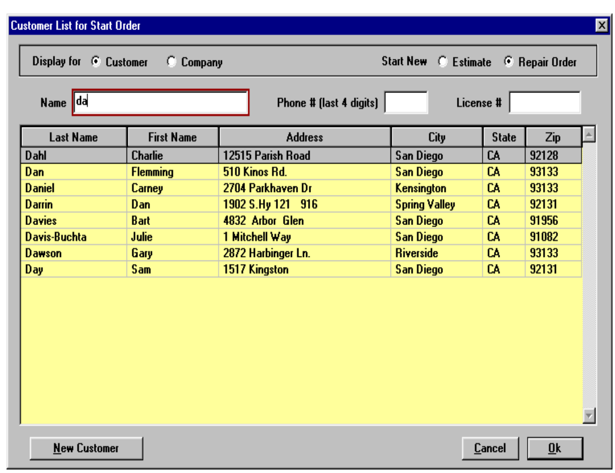
The Screen View panel in Shop Data Setup now contains a setting that allows you to display the Manager **One Start** toolbar. (Select **Shop Data Setup** from the **Setup** menu and then the **Screen View** tab to open the Screen View panel.) See "Screen View" on page "Screen View" on page 83, for details.

Selecting the One Start Toolbar option causes the One Start Toolbar to display as your toolbar.



One Start Toolbar

The One Start Toolbar replaces the Estimate, Order, and Invoice icons with the **Start** icon. Clicking on the Start icon to start the order at the Customer List for Start Order dialog box, which allows you to look up a customer by Name, Phone Number, or License number, or start a new customer.



Customer List for Start Order

To begin an order using the Start icon:

1 With the One Start toolbar enabled, select the **Start** icon from the Toolbar. (See “Screen View” on page 88, for details on enabling the One Start toolbar).

The Customer List for Start Order dialog box displays. Manager “remembers” whether you chose to start an estimate or a repair order the last time you created an order.

2 Click the other option button to change your selection, if desired.

3 Input known information. As you start typing in the Name field, the grid area below displays last name matches. When you see the name you are looking for, simply click on it and click **OK**. You can also search for the first name by typing a comma (,) followed by the name (for example, you might type “,jim” to find a customer named Jim Johnson).

You are taken to the Customer panel with information about the selected customer entered into the fields of the dialog box.

If the Customer is not in your database, you need to create a new customer record. Click **New Customer** to close the dialog box and start at an empty Customer screen.

Printing and Faxing

Many screens and dialog boxes in Manager allow you to print and/or fax.

Printing

For each type of order (Estimate, Repair Order, etc.) you can select a different printer in the Reports/Printer Selection dialog box (refer to Chapter 3, “Shop Setup,” for details).

To print in Manager:

1 Select the **Print** button.

OR

Select **Print** from the **File** menu.

The document is sent to the printer that you specified in the Reports/Printer Selection dialog box.

OR

The Report prints to your screen if you have selected Default Print To Screen in the Reports Printers dialog box.

NOTE: Additional dialog boxes may appear requesting information before you can continue your print job.

2 If you have selected Print To Screen, click on the small print icon at the top of the screen to send the document to the printer.

Faxing

A number of screens in Manager allow you to fax to a customer, vendor, etc. Faxing in Manager is simple—the process is very much like printing to a printer, only that instead of sending to a printer, you send to a fax driver on your computer which sends the job to a fax machine. The only requirement is that you have a working modem and fax software.

Faxing with Third Party Software Manager normally works very well with third-party faxing software.

To fax with third-party software, you must first select a fax printer in the Reports/Printers dialog box (refer to Fax Printer Selection in Chapter 3, "Shop Setup," if necessary).

To Fax with Third-Party Faxing Software:

1 Select the **Fax** button from within a screen or dialog box that allows faxing.

A dialog box displays requiring that you enter fax information (Fax Phone Number, Sender Name, Receiver Name, etc.). This dialog box varies depending on your software vendor.

OR

If you have selected Default Print to Screen for the fax printer in the Reports/Printers dialog box, the report prints to screen. You can continue the fax by selecting the Print icon at the bottom of the Screen Print.

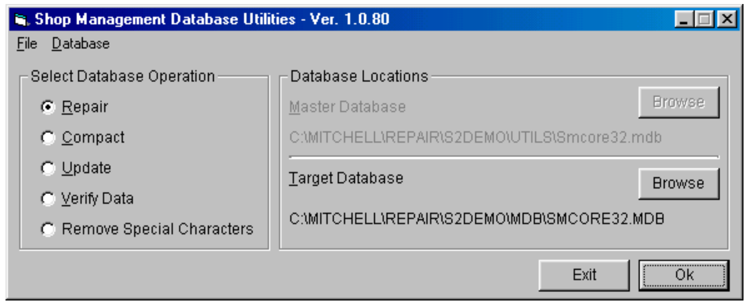
2 Enter required information.

3 Select **Send** (or corresponding command to send the fax).

The fax is sent.

Maintenance Program Utilities

The Shop Management Database Utilities dialog box includes the Repair, Compact, Update and Verify Data database utilities. These utilities can be used, **with the help of Mitchell 1's technical support department**, to troubleshoot and repair database problems.



Database Utilities

The dialog box is opened by selecting the Database Utility icon in the Mitchell 1 program group.

NOTE: It is recommended that you *not* run these utilities without the assistance of Mitchell 1's Technical Support Department. Misuse could result in damage to the database and loss of information.

Exiting the Program

The Manager system is exited by selecting Exit from the File menu. Because all changes are recorded to the database *real-time*, or as soon as you make them, you do not need to save anything when exiting the program.

To exit Manager:

- Choose Exit from the File menu. Manager closes.

NOTE: Do NOT exit program by turning off computer. **This may result in lost or corrupted files and data**.

Summary

In this chapter you installed and learned to start and exit the Manager system. The following chapter describes basic setup activities.

Chapter 3
Shop Setup

Overview

Before you are able to build Orders (Estimates, Repair Orders, and Invoices) in Manager, you must perform certain setup activities. You need to set up lists of descriptions, rates, and shop information. This chapter details how you set up Manager for order processing using the options available from the Setup menu.

Before You Begin

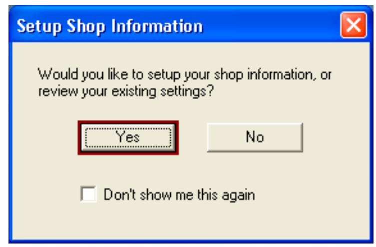
Before you begin this chapter, you should already have Manager installed and running on your computer. If you have not already done so, you must complete the installation instructions in Chapter 2, “Getting Started.” You may also wish to skim the first two chapters for general information about Manager.

This chapter supplements and adds detail to the setup information provided in the *Putting Manager to Work* workbook. It is highly recommended that you work through the setup steps detailed in the workbook before attempting to go live with Manager.

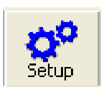
The following sections describe the dialog boxes that are accessed though the Setup menu. The Setup menu is selected by choosing Setup from the menu bar in any Manager screen. Selecting any option on the Setup menu brings up a dialog box in which you enter/edit lists of descriptions and rates necessary for order processing.

Setup Dialog Box

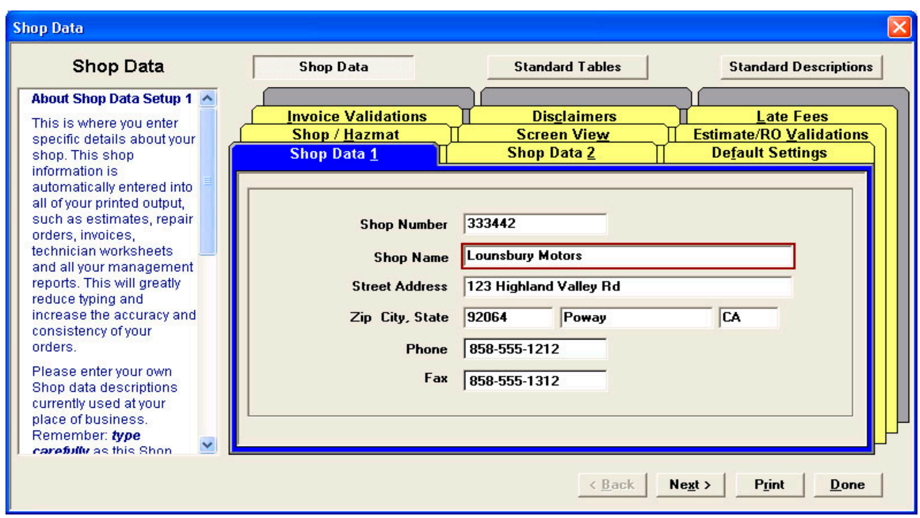
When you log on to Manager, you are prompted to set up your shop information. This is to emphasize the importance of setup activity and to provide a visible reminder of required setup activity until it has been completed.



Setup Shop Information?



Click **Yes** to open Shop Setup. You can also open the Shop Setup dialog boxes anytime using the Setup button.



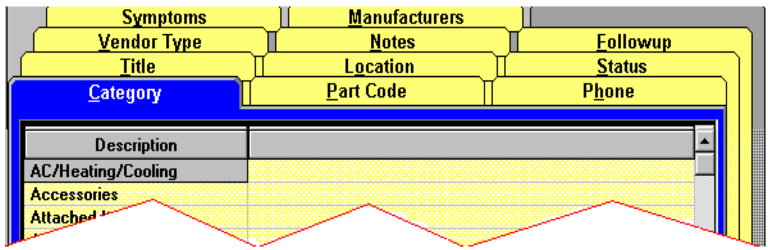
Shop Setup

Shop Setup is comprised of three sections: Shop Data, Standard Tables, and Standard Descriptions. Any of these sections may be selected by choosing its button across the top of the dialog box. An information area on the left side of the dialog box provides important information and tips for working in each of the setup panels.

Standard Descriptions

Standard Descriptions is where you create and maintain lists of standard descriptions to be used in the various pull-down menus in Manager. These standard descriptions simplify data entry into Manager while at the same time improving the consistency of terminology in the database.

The Standard Descriptions dialog box is comprised of several separate, but related, panels. The tabs on this dialog box work like a card file.



Standard Descriptions Tabs

Click on any tab to move the selected panel to the forefront of the dialog box.

The following sections describe how to use the panels available from within the Standard Descriptions dialog box.

Category Descriptions

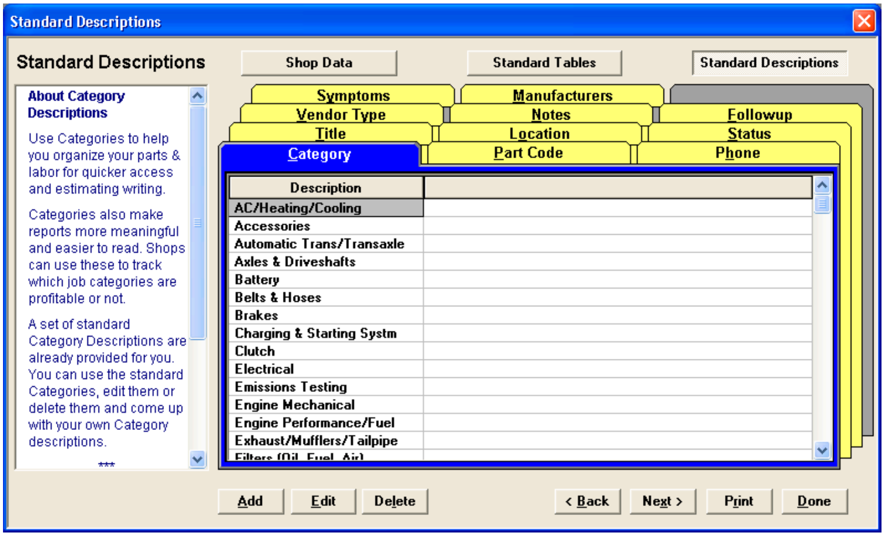
Category descriptions are used throughout Manager to describe groupings of parts and labor operations. This allows for the opportunity to collect information on types of work performed.

Manager comes pre-loaded with a set of standard category descriptions (see figure below). Use this dialog box to Add, Edit, or Delete a Category description.

To add a Category Description:

1 Choose Category Descriptions in the Standard Descriptions section of the Setup dialog box.

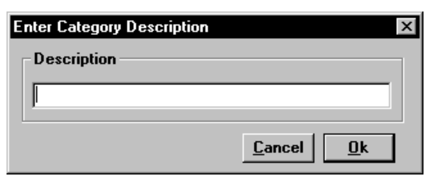
The Category Descriptions panel displays.



Category Descriptions

2 Select **Add**.

The Enter Category Description dialog box appears.



Enter Category Description

3 Type in a new category description.

4 Select **OK**.

The new description is added to the list.

To edit a Category Description:

1 Move the cell marker to the cell of the category description entry you wish to edit. The cell marker can be moved by clicking your mouse-pointer on the desired description or by using your Up and Down arrow keys.

The selected description will be highlighted.

2 Select the **Edit** button. The Edit Category Descriptions dialog box displays the current Category description.

3 Make any desired edits.

4 Select **OK**. The new description appears in the Category Descriptions dialog box.

To delete a Category Description:

1 Move the cell marker to the cell of the category description entry you wish to delete. The selected description will be highlighted.

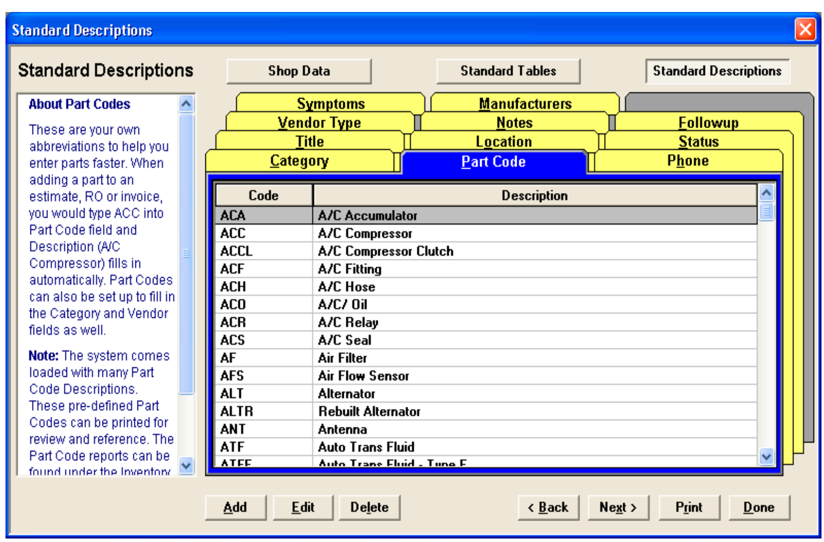
2 Select the **Delete** button. A message warns that a loss of information may occur if the category has ever been used in a previous order.

3 Select **OK** to delete the Category Description.

NOTE: The deleting of a category will not affect your open or historical records, but will affect any reports that collect information based upon Category.

Part Code Descriptions

Part Code Descriptions greatly improve the speed of data entry and the consistency of parts descriptions in the Manager database. These coded descriptions ensure that part names, category, and vendor information can be quickly and consistently retrieved by simply typing in a couple of keystrokes, or by selecting a part code from a list.



Part Code Descriptions

Part Codes are short cuts for entering part Description, Category and Vendor. For example, you could choose “AF” to pick the Description, Category and Vendor for an “Air Filter.” This saves time and improves consistency.

The program comes pre-set with a number of the descriptions you are likely to use most often. When you need to add, edit, or delete Part Code Descriptions, you work in the Part Code Descriptions panel of the Standard Descriptions dialog box.

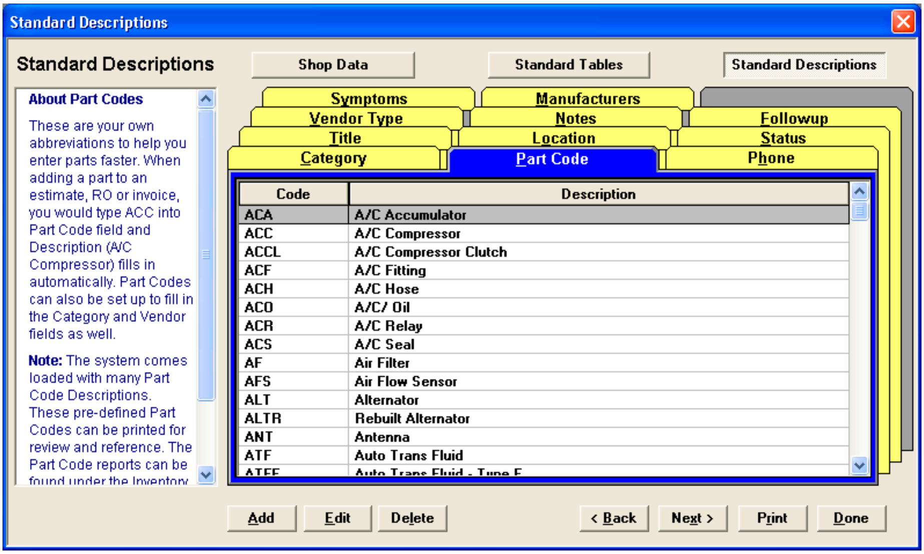
The following options are available in the Part Code Descriptions dialog box:

Option	Description
Add	Allows you to add a new part code and description.
Edit	Allows you to edit a part code/description.
Delete	Allows you to delete a part code/description.

To add a Part Code Description:

1 Choose **Part Code Descriptions** from the Standard Descriptions dialog box.

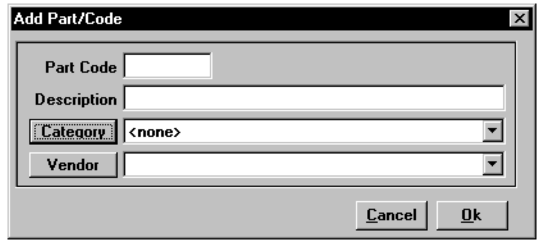
The Part Code Descriptions dialog box displays.



Part Code Descriptions

2 Select **Add**.

The Add Part/Code dialog box displays.



Add Part Code

3 Type in a new Part Code (up to eight characters, no apostrophes).

4 Enter a Description (up to 31 characters).

5 Select a Category from the pull-down list.

OR

Add a new category by selecting the **Category** button (refer to the Category Descriptions section of this chapter for instructions).

6 Select a **Vendor** from the pull-down list (refer to the Vendor Descriptions section of this chapter for instructions on setting up vendors).

OR

Add a new vendor by selecting the **Vendor** button (refer to the Vendor Descriptions section of this chapter for instructions).

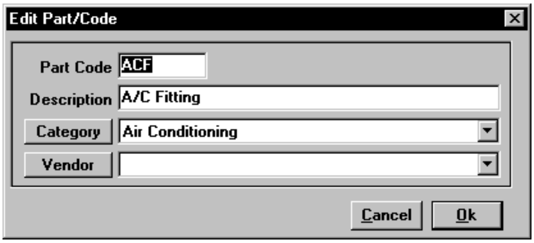
7 Select **OK**.

Your Part Code Description is added to the Part Code Descriptions list.

To edit a Part/Code Description:

1 Move the cell marker to the cell of the Part Code Description entry you want to edit.

The selected description is highlighted.



Edit Parts/Code

2. Select the **Edit** button.

   The Edit Part/Code dialog box displays.

3. Make any desired edits/selections (refer to the Add Part/Code Description procedure, if necessary, for instructions).

4. Select **OK**.

To delete a Part/Code Description:

1. Move the cell marker to the cell of the part/type entry you wish to delete.

   The selected description is highlighted.

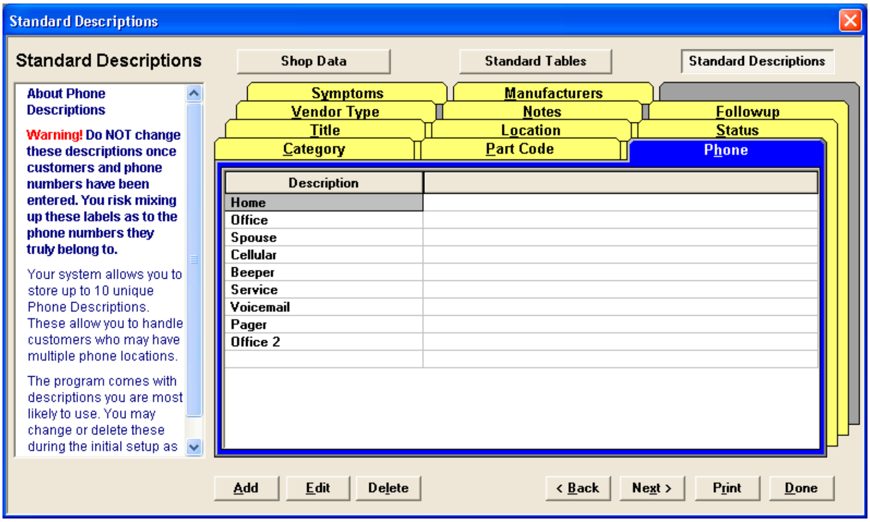
2. Select the **Delete** button.

   You are asked to confirm your deletion.

3. Select **OK** to delete the part code description.

Phone Descriptions

The Phone Descriptions panel of the Standard Descriptions dialog box allows you to input/remove standard phone descriptions for your customers. These descriptions are used in the pull-down menus in panels in which customer information is used.

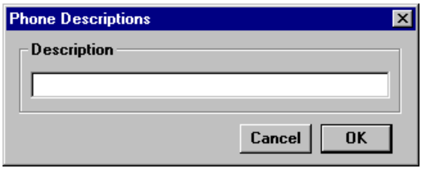


Phone Descriptions

To add a Phone Description:

1 Click the **Add** button.

The Phone Descriptions dialog box displays.



Phone Descriptions

2 Type in a new description.

3 Select **OK**.

The new description is added to the list.

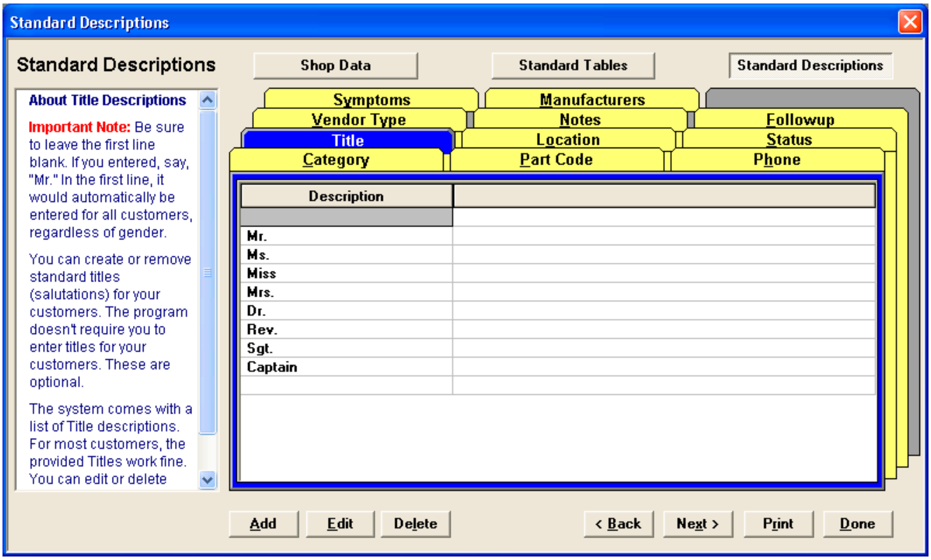
To remove/edit a Phone Description:

1 Move the cell marker to the cell of the phone description entry you wish to delete or edit.

2 Choose **Edit** to edit the description or Delete to delete it

Title Descriptions

The Title Descriptions panel allows you to input/remove standard title descriptions for your customers. These descriptions are used in the pull-down menus in panels in which customer information is entered.

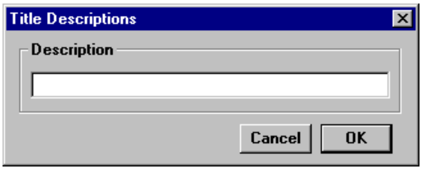


Title Descriptions

To add a Title Description:

1 Click the **Add** button.

The Title Descriptions dialog box displays.



Title Descriptions

2 Type in a new description.

3 Select **OK**. The new description is added to the list.

To remove/edit a Title Description:

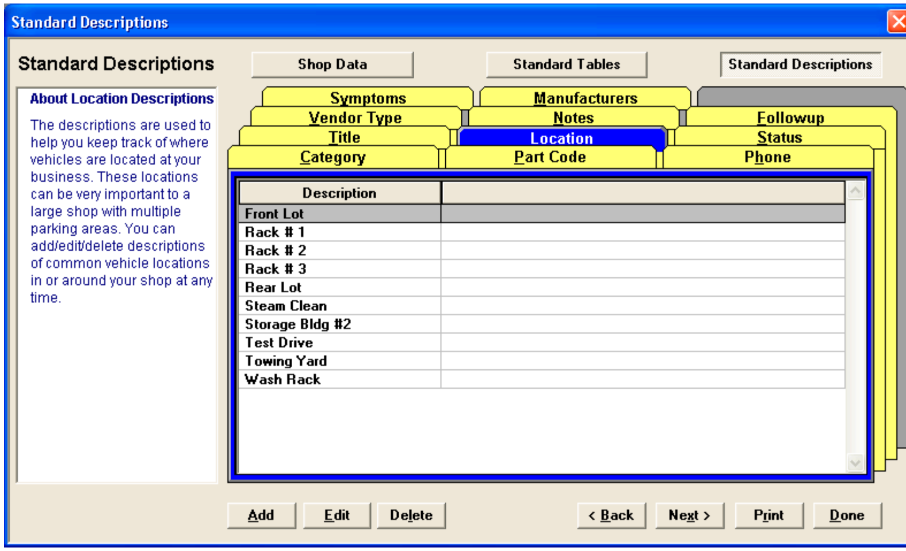
1 Move the cell marker to the cell of the title description entry you wish to delete or edit.

2 Choose **Edit** to edit the description or Delete to delete it.

IMPORTANT NOTE: Do not change or remove your Title Descriptions once you have set them up and begun using them. This can cause undesired results in orders and reports.

Location Descriptions

The Location Descriptions panel of the Standard Descriptions dialog box is where you maintain a set of standard descriptions of common vehicle locations in your shop. These descriptions are used to track the locations of vehicles under repair.



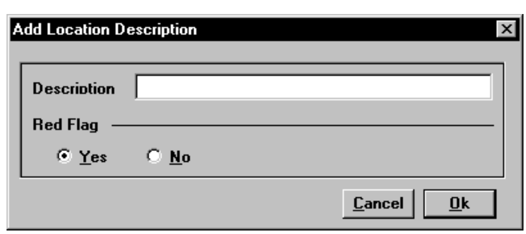
Location Descriptions

You can Add, Edit, and Delete Location Descriptions.

To add a Location Description:

1 Select **Add**.

The Add Location Description dialog box appears.



Add Location Description

2 Type in a Location Description.

3 Designate if the location should be Red Flagged.

Red Flagging a location highlights an order in the Work in Progress grid (in red) for vehicle(s) that are in that area. Red Flagging is intended to alert shop personnel to situations that warrant special attention.

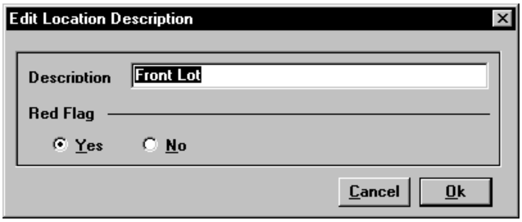
4 Select **OK**.

To edit a Location Description:

1 Select the Location Description you wish to edit.

2 Select **Edit**.

The Edit Location Description dialog box appears with the current Description and Red Flag settings displayed.



Edit Location Description

3 Overtype the current Description and/or change the Red Flag setting.

4 Select **OK** to save your change(s).

To delete a Location Description:

1 Select the Location Description you wish to delete.

2 Select **Delete**.

A dialog box directs you to confirm your deletion.

3 Select **Yes** to delete the Location Description.

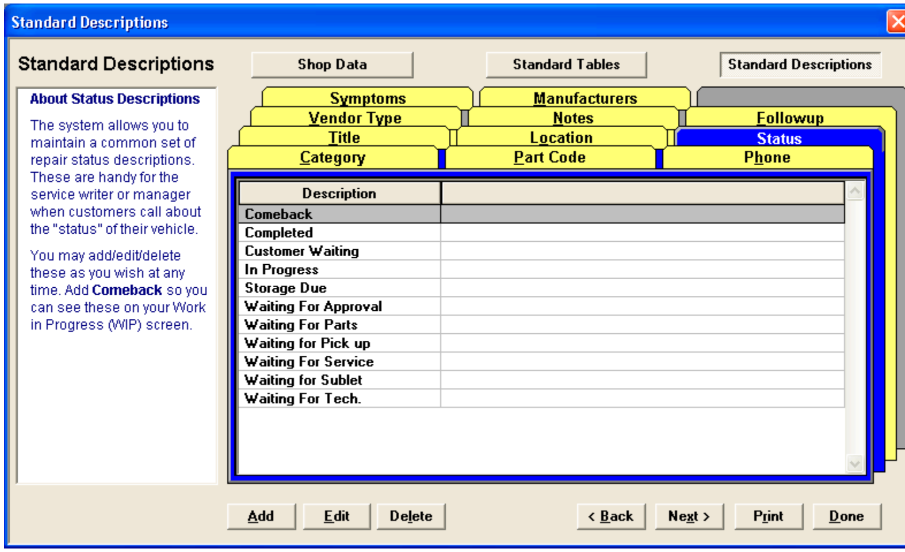
Status Descriptions

The Status panel of the Standard Descriptions dialog box is used to maintain a common set of repair status descriptions (for example, “Waiting For Parts”). These descriptions are used in pull-down choice lists for tracking the status of vehicles being repaired.

You can Add, Edit, and Delete Status Descriptions.

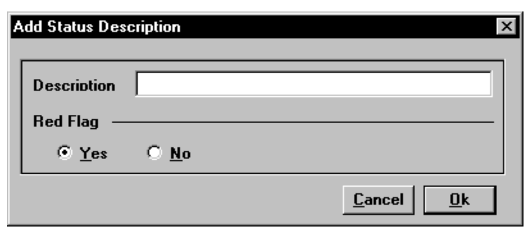
To add a Status Description:

1 In the Status Description dialog box, select **Add**.



Status Descriptions

The Add Status Description dialog box displays.



Add Status Descriptions

2 Type in a Status Description.

3 Designate if the status should be Red Flagged.

Red Flagging a status highlights an order in the Work in Progress grid (in red) for vehicle(s) with that status. Red Flagging is intended to alert shop personnel to situations that warrant special attention (for example, a vehicle that is waiting for a part).

4 Select **OK** to save your change(s).

To edit a Status Description:

1 Select the Status Description you wish to edit.

2 Select **Edit**.

3 The Edit Status Description dialog box displays. Overtype the current Description and/or change the Red Flag setting.

4 Click **OK** to save your changes.

To delete a Status Description:

1 Select the Status Description you wish to delete.

2 Select **Delete**.

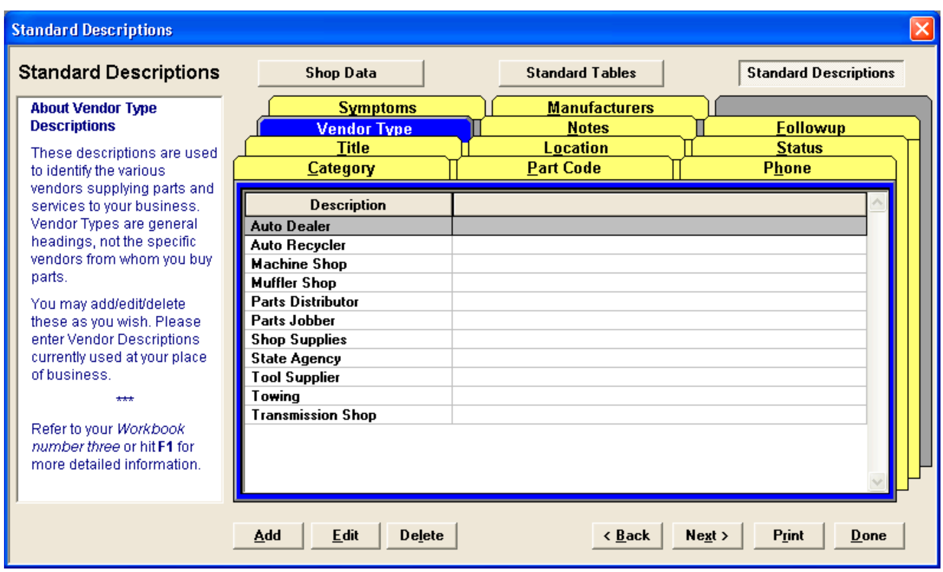
A dialog box directs you to confirm your deletion.

3 Select **Yes** to delete the Status Description.

The Status Description is removed from the list.

Vendor Type Descriptions

The Vendor Type Descriptions panel of the Standard Descriptions dialog box is used to maintain a common set of Vendor Type descriptions.

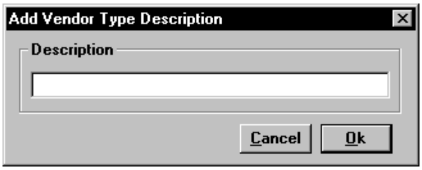


Vendor Type Descriptions

To add a Vendor Type Description:

In the Vendor Type panel of the Standard Descriptions dialog box, select **Add**.

1 The Add Vendor Type Description dialog box appears.



Add Vendor Type Description

2 Type in a Vendor Type Description.

3 Select **OK**. The new description appears in the Vendor Type Descriptions dialog box.

To edit a Vendor Type Description:

1 Select a Vendor Type Description you want to edit.

2 Select **Edit**.

3 The Edit Vendor Type Description dialog box displays. Overtype the current Description with a new one.

4 Click **OK** to save your changes.

To delete a Vendor Type Description:

1 Select the Vendor Type Description you wish to delete.

2 Select **Delete**.

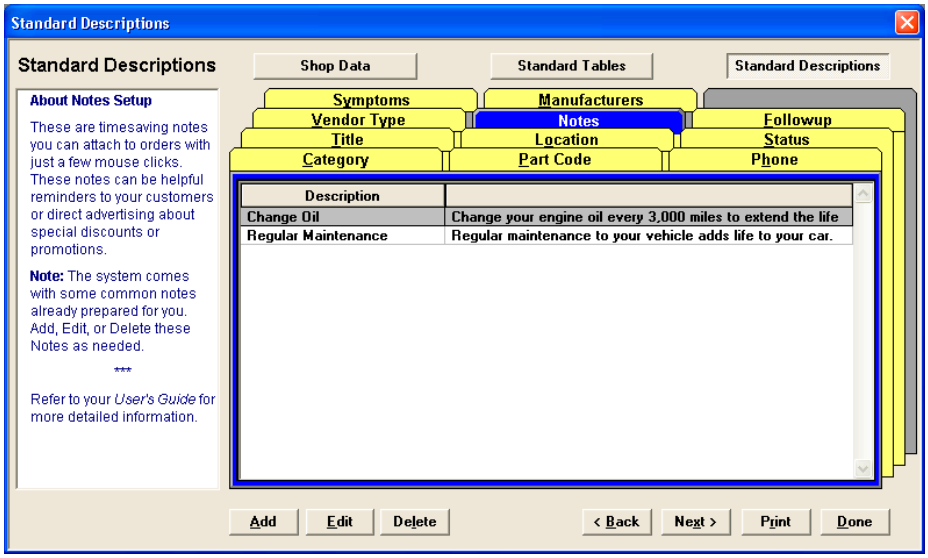
A dialog box directs you to confirm your deletion.

3 Select Yes to delete the Vendor Type Description.

The Vendor Type Description is removed from the list.

Standard Notes

Standard Notes contain pre-prepared text which you can attach to Manager Orders. Each note has a Title (which appears in a pull-down choice list when you are creating the repair lines of an order), and Note Text (the text that appears in the repair lines in the Work-In-Progress screen and on the printed order). The Standard Notes panel in the Standard Descriptions dialog box allows you to add, edit, and delete notes.

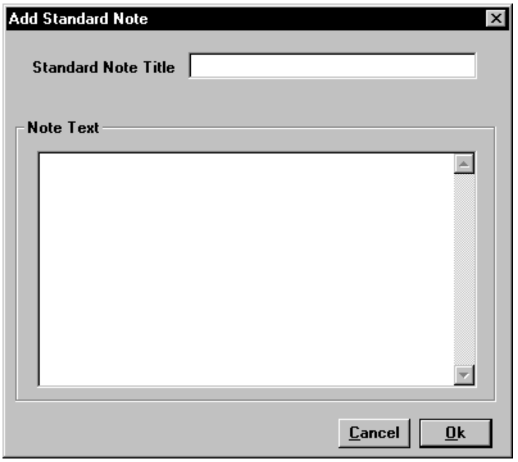


Standard Notes

To create a Standard Note:

1 Choose the **Add** button.

The Add Standard Note dialog box appears.



Add Standard Notes

2 Type in a **Standard Note Title**. This is the title that appears in your pull-down lists. Standard Note Titles can be up to 30 characters.

3 Type in the note text (up to 509 characters).

4 Select **OK** to save.

You are returned to the Standard Notes dialog box and your note is added to the list.

To edit a Standard Note:

1 Highlight the title of the Standard Note you wish to edit.

2 Choose the **Edit** button.

The Edit Standard Note dialog box appears with the text from the current note displayed.

3 Edit the current Note Title and/or Text as desired.

4 Select **OK** to save.

To delete a Standard Note:

1 Highlight the title of the Standard Note you wish to delete.

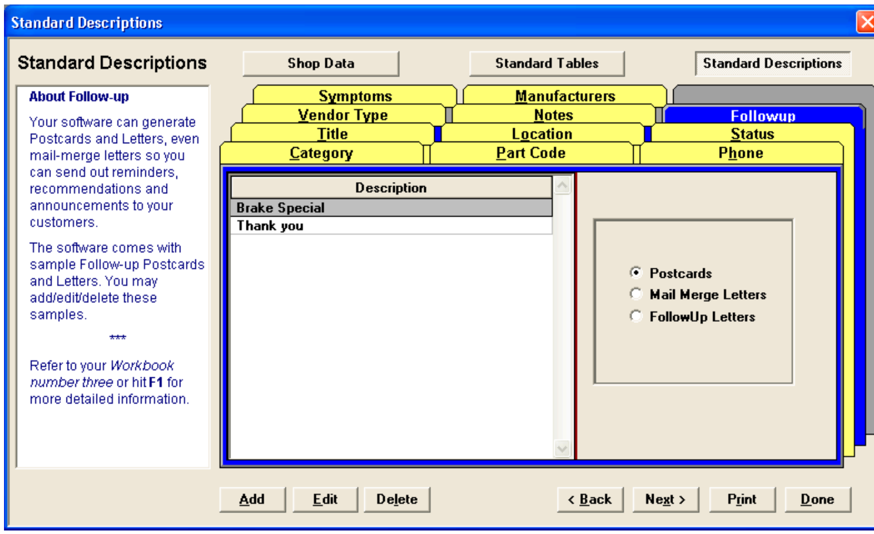
2 Choose the **Delete** button.

A dialog box asks you to confirm your deletion.

3 Select **Yes** to delete.

Followup Postcards and Letters Setup

You can use Followup Postcards and Letters to maintain postal reminders, recommendations, and announcements to customers, such as “Thank You” postcards and standard form letters. The following procedures describe setup activity necessary prior to generating Followup Postcards and Letters. Refer to Chapter 13, “Marketing,” for complete details on generating followup postcards and letters.



Followup Postcards and Letters

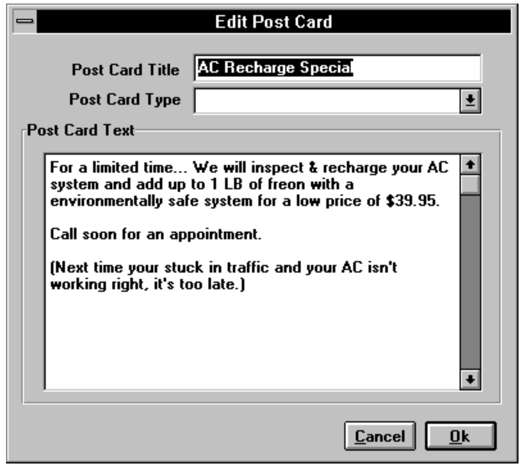
Option buttons on the right-hand side of the dialog box allow you to switch the display between Post Cards, Mail Merge letters, and Followup letters.

Postcard Description Setup The first option button in the Followup dialog box provides access to Postcard Description setup.

To add a Postcard Description:

1. Select **Add**.
2. The Add Postcard dialog box displays.
3. Type in the **Postcard Title**.
4. Select a **Postcard Type** from the pull-down menu.
5. Type in your **Postcard Text**.

6 Select **OK** to save the changes.



Add/Edit Post Card

To edit a Postcard Description:

1 Click on a description to highlight it.

2 Select **Edit** to display the Edit Postcard dialog.

3 Make any desired changes to the Postcard Description.

4 Select **OK** to save changes.

To delete a Postcard Description:

1 Highlight the description you want to delete.

2 Select **Delete**.

3 A dialog box appears asking you to confirm the deletion.

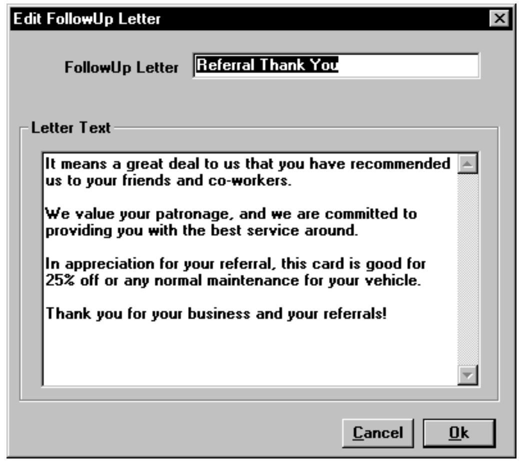
4 Select **Yes** to delete the Postcard Description.

Mail Merge Letter Setup Successful creation of a Mail Merge document requires that you perform extensive setup activity in Manager and in Microsoft Word. It also requires that you have the following software installed on your computer:

- Manager Plus or Manager.
- Microsoft Word 2000.

Refer to Chapter 13, “Marketing,” for detailed instructions on setting up and running Mail Merge letters.

Followup Letter Setup FollowUp Letters provide a mechanism for you to write simple form letters, service reminders, recommendations, etc., to your customers. The Add/Edit FollowUp Letters dialog box displays as the result of an Add or Edit request in the Followup Post Cards and Letters Setup dialog box.



Add/Edit FollowUp Letters

Two fields are available:

- The **FollowUp Letter** field is where you type the name for your letter. This is the name that will appear in the selection list you use when you go to process a followup request.
- The **Letter Text** field is where you type the text of your letter. This is the text that will appear in the body of your letter.

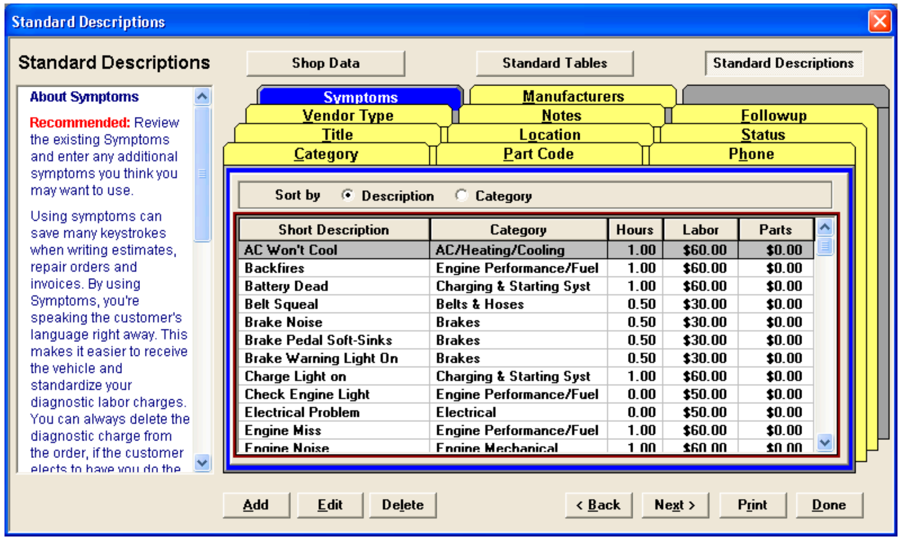
Click **OK** when finished with your entries/edits to save and exit.

Note:

NOTE: Refer to Reports/Printer Setup beginning on page 96 for details on selecting a letter format.

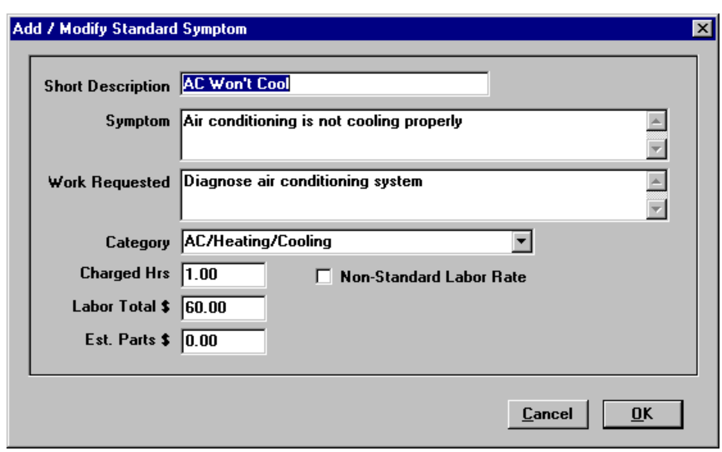
Symptoms

Symptoms are added, edited, and deleted in the Symptoms panel of the Standard Descriptions dialog box. They can also be saved when created for an order.



Symptoms

Selecting **Add** or **Edit** (with a Symptom Description selected) opens the Add/Modify Standard Symptoms dialog box.



Add/Modify Standard Symptoms

The Add/Modify Standard Symptoms dialog box is where you create and maintain Symptoms, and their descriptions, for use on Manager orders.

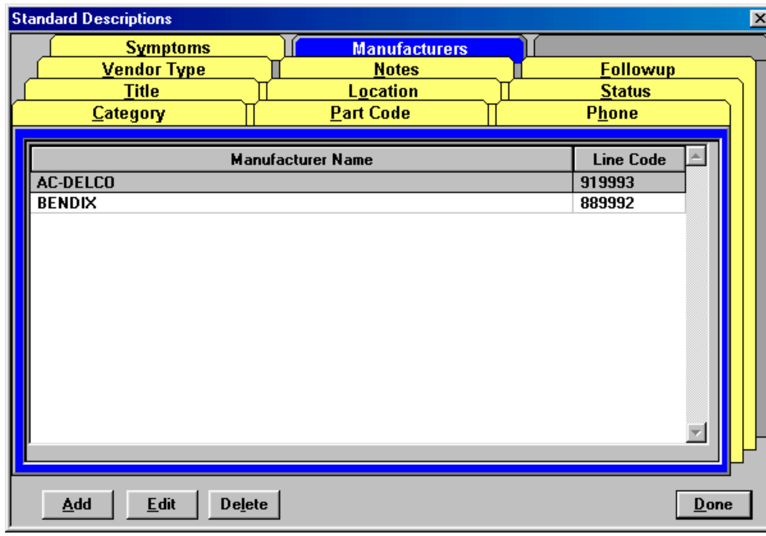
The Add/Modify Standard Symptoms dialog box contains the following fields/options:

Field/Option	Description
Short Description	Standard (short) name for the symptom. Type a short description for the symptom in the field.
Symptom	Extended description of the symptom. Description fills in automatically if Standard Symptom is selected from the list.
Work Requested	Work requested by customer.
Category	The Category for the Symptom.
Charged Hours	Labor hours to be charged for the diagnosis/repair. These hours will be added to the order.
Labor Total $	Labor $ as calculated by Charged Hours extended at your shop rate.
Est. Parts $	Estimated Parts cost. This total will be added to the order.
Non-Standard Labor Rate	Select Non-Standard Labor Rate to charge a flat rate, ignoring the shop's labor rate calculation.

When you have finished entering/editing data, click **OK**. The Standard Symptom will be available on future orders.

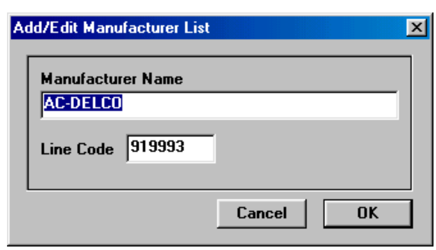
Manufacturers

Manufacturer names can be used in Manager to narrow parts searches by Manufacturer or further part identification. Manufacturers are added, edited, and deleted in the Manufacturer panel of the Standard Descriptions dialog box.



Manufacturers

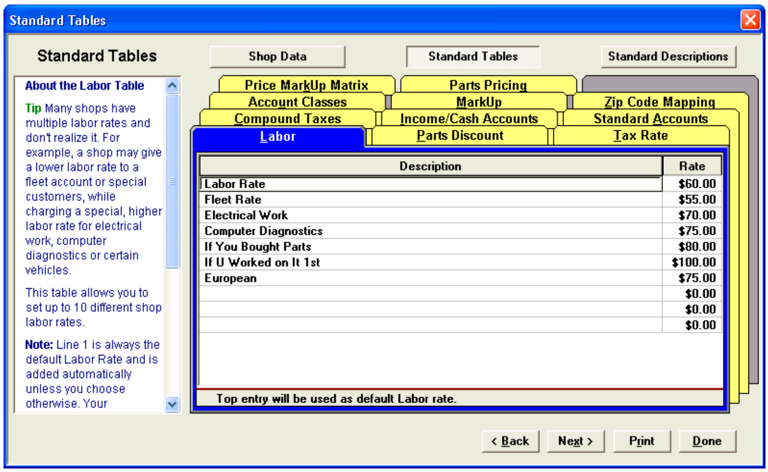
Selecting **Add** or **Edit** (with a Manufacturer selected) opens the Add/Edit Manufacturer List dialog box.



Add/Edit Manufacturer List

Standard Tables

The Standard Tables dialog box (opened from the Setup menu) provides options for you to maintain Labor and Parts Rates, Tax Rates, and information about accounts. The tabs on this dialog box works like a card file. Click on any tab to move the selected panel to the forefront of the dialog box.



Standard Tables

To select an item in the Standard Tables submenu:

1 Select Standard Tables from the Setup menu. The Standard Tables dialog box displays.

2 Select the tab for the Standard Tables panel you want to work with.

Labor Rate Table

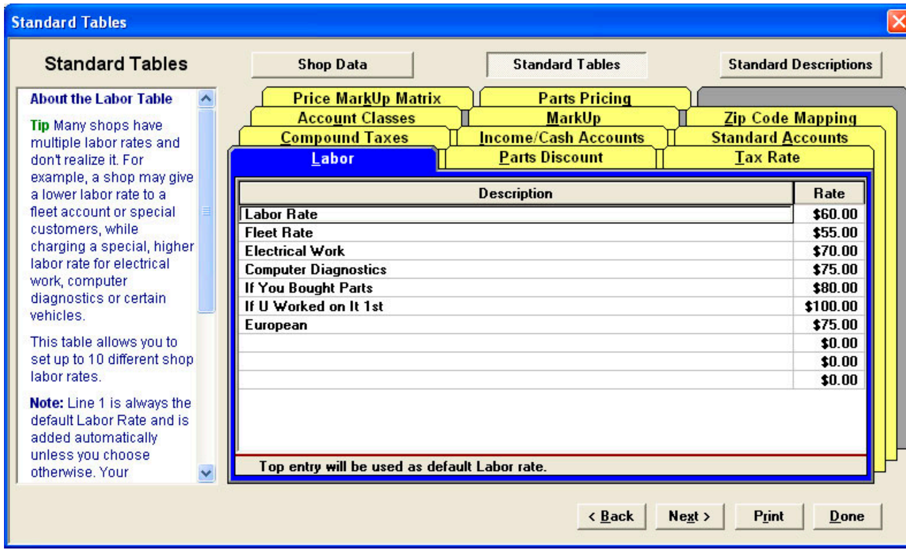
The Labor Rates Table provides you with a mechanism to maintain up to ten labor rates for your shop. The table is opened by selecting Labor Rate Table from the Standard Tables submenu.

NOTE: Give careful consideration to which labor rate you enter in the first row of the Labor Rate Table! Your first entry becomes the default labor rate for all Manager customers.

To add/edit a Labor Rate Item:

1 Select the **Labor** tab in the Standard Tables dialog box.

The Labor Rate Table displays.



Labor Rate Table

2 Add/edit the fields of the Labor Rate Table as necessary. The Labor Rate Table contains the following two columns.

Setting	Description
Description	The name of the labor item as it appears in the menus and on printed reports.
Rate	The dollar amount, per hour, at which the specified type of labor will be charged.

3 Select **Done** to save your additions/changes.

If you change the first (base) labor rate, you will get a message, "The Base Labor Rate has changed... Adjust sale price in Canned Jobs, Standard Symptoms, and Inventory?" Click **Yes** to change the rate for these items or **No** to leave the items as is. Any items with Non-Standard Labor Rate checked will not be affected.

Parts Discount Table

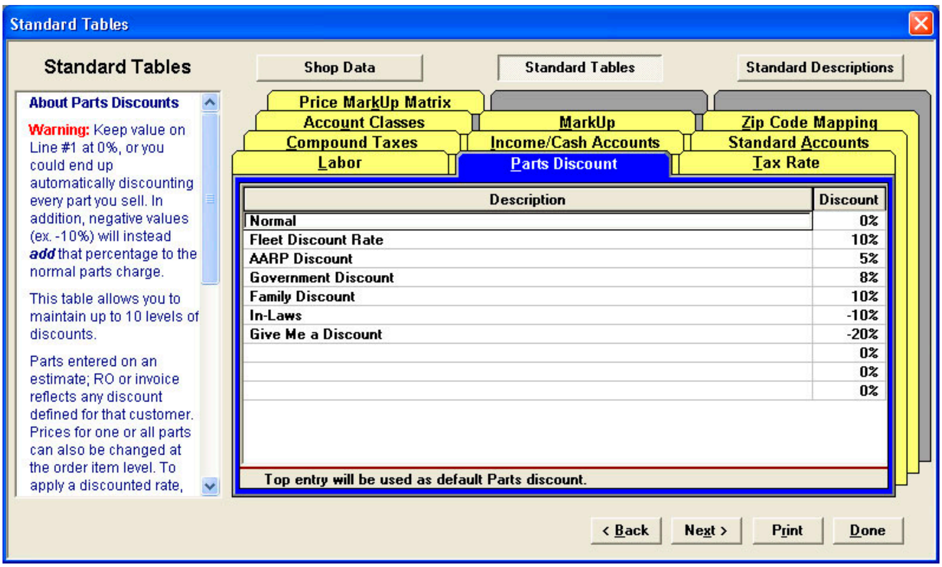
The Part Discount Table provides a mechanism to maintain up to ten levels of parts discounts for your shop. The table is opened by selecting the Parts Discount tab in the Standard Tables dialog box. Parts discounts are automatically applied to all parts entered on an order but can be changed on a line-by-line basis by the user.

NOTE: Give careful consideration to which parts discount you enter in the first row of the Parts Discount Table! Your first entry becomes the default parts discount for all Manager customers.

To add/edit a Part Discount item:

1 Select the **Parts Discount** tab from the Standard Tables dialog box.

The Parts Discount Table displays.



Parts Discount Table

2 Add/edit the fields of the Parts Discount Table as necessary. The table is comprised of the following two fields.

Setting	Description
Description	The name of the part rate category as it appears in the menus and on printed reports.

Setting	Description
Discount	The percentage of the part's price that will be applied as a discount to the order. A negative percentage will decrease the part price.

3 Select **Done** to save your additions/changes.

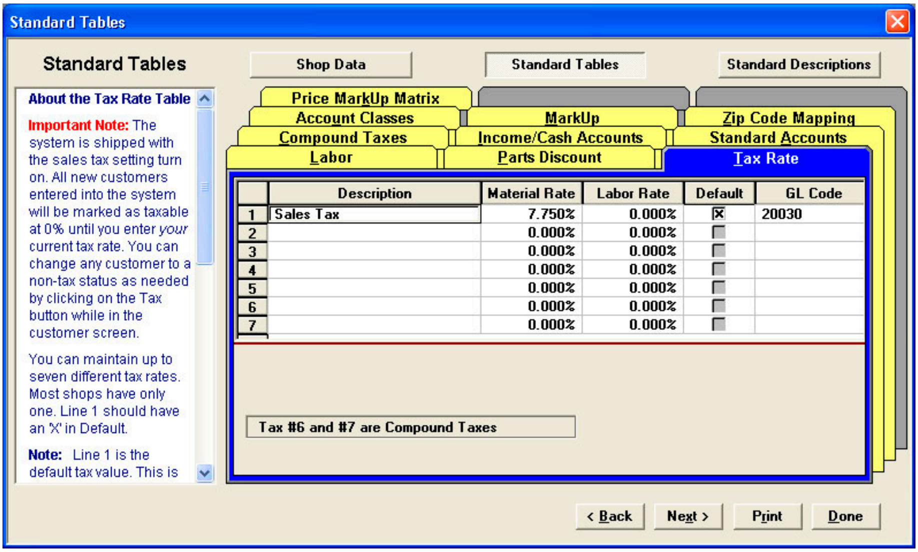
Tax Rate Table

The Tax Rate Table provides the ability to maintain up to seven tax rates. The table is opened by selecting the Tax Rate tab in the Standard Tables dialog box.

To add/edit a Tax Rate item:

1 Select the **Tax Rate** tab in the Standard Tables dialog box.

The Tax Rate Table appears.



Tax Rate Table

2 Add/edit the fields of the Tax Rate Table as necessary. **Default** must be selected for a tax to be applied to new customers. The table is comprised of the following fields.

Setting	Description
Description	The name of the tax rate category as it appears in the menus and on printed reports.
Material Rate	The percentage of an order's material list price that is applied as a tax to the order.
Labor Rate	The percentage of an order's labor charge that is applied as a tax to the order.
Default	Selects which items to apply to new customers as the default.
G.L. Code	The General Ledger Code applied to the tax item.

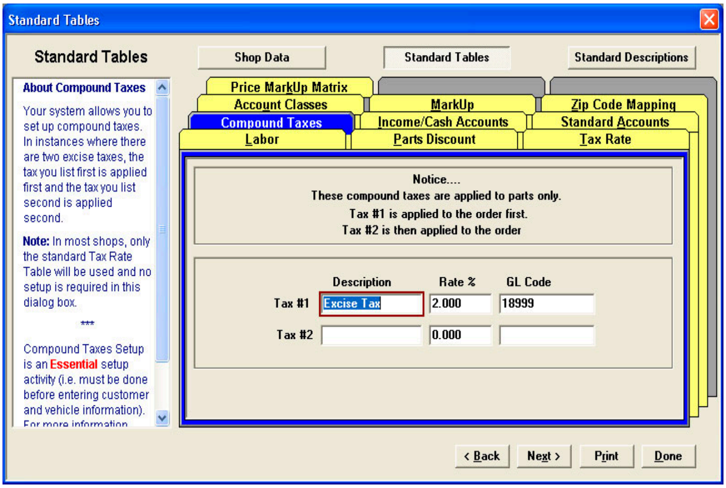
3 Select **Done** to save your additions/changes.

Compound Tax Table

The Compound Tax Table allows you to set up compound taxes. These taxes are applied to the order after sales tax (and any other tax, if applicable), has been applied. These taxes are only applied to parts and are normally used for tires. You can specify up to two excise taxes. If there are two excise taxes, you specify which tax is applied first and which tax is applied second.

To add/edit an Compound Tax item:

1 Select the **Compound Taxes** tab in the Standard Tables dialog box to display the Compound Taxes table.



Compound Tax Table

2 Add/edit the fields of the Compound Tax Table as necessary. The table is comprised of the following fields.

Setting	Description
Description	The name of the tax rate category as it appears in pull-down menus and on printed reports.
Rate	The percentage of a part's selling price that is applied as a tax to the order.
G.L. Code	The General Ledger Code which is applied to the tax item.

3 Select **Done** to save your additions/changes.

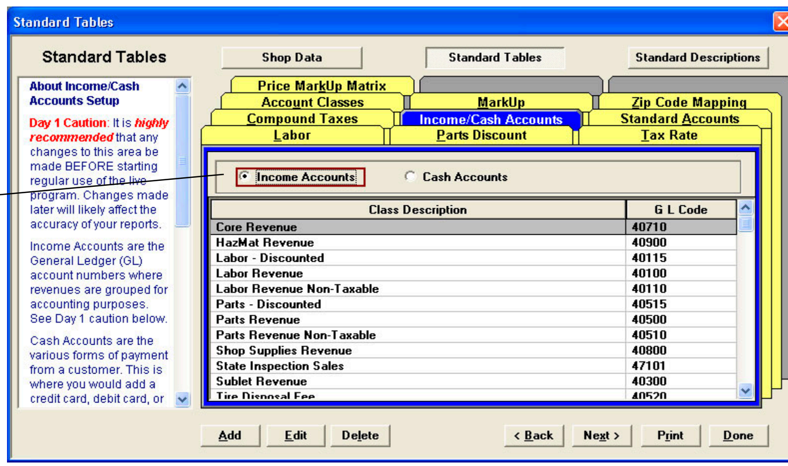
Income/Cash Accounts

Income accounts are the general ledger (GL) accounts into which you group your revenues for accounting purposes. Cash accounts are the form of payment from a customer.

NOTE: In Manager terminology, Cash refers to any payment by cash, credit card, check, etc.—in other words, any payment to an order balance other than a charge to a customer's in-house credit account.

When you select Income/Cash Accounts in the Standard Tables dialog box, the Income/Cash Accounts table opens with Income Accounts displayed, as shown below.

Use option buttons to switch between Income and Cash Accounts.



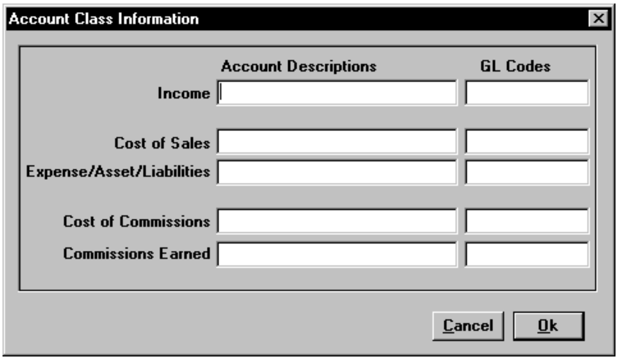
Income/Cash Accounts (Income)

Select the option button for Cash Accounts (top of display) to dynamically alter your display to show Cash Accounts.

To add an Income Account Description:

1 In the Income/Cash Accounts dialog box with Income Accounts selected, choose **Add**.

The Account Class Information dialog box displays.



Account Class Information (Income)

2 Type in a new **Income Account Description** and **General Ledger (GL) Code**.

3 Add Account Descriptions and GL Codes, as determined by your shops accounting needs, for:

- **Cost of Sales**
- **Expense/Asset/Liabilities**
- **Cost of Commissions**
- **Commissions Earned**

NOTE: Contact your accountant if you have any questions as to what to use for these values.

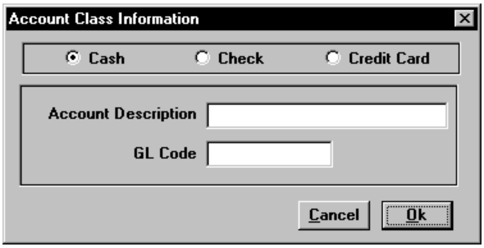
4 Select **OK**.

You are returned to the Income/Cash Accounts panel with your new Income Account(s) added to the list.

To add a Cash Account Description:

1 In the Income/Cash Accounts dialog box with Cash Accounts selected, choose **Add**.

The Account Class Information dialog box displays.



Account Class Information (Cash)

2 Choose whether the account is a Cash, Check, or Credit Card account.

3 Type in an Account Description.

4 Type in a GL Code.

5 Choose **OK**.

You are returned to the Income/Cash Accounts dialog box with your new Cash Account added to the list.

To edit an Income/Cash Account:

1 In the Income/Cash Accounts dialog box, highlight the line of the account you wish to edit.

2 Choose **Edit**.

The Account Class Information dialog box appears with the current information displayed in the data fields.

3 Enter/edit information as necessary.

4 Choose **OK** to save your new account information.

To delete an Income/Cash Account:

1 Highlight the line of the account you wish to delete.

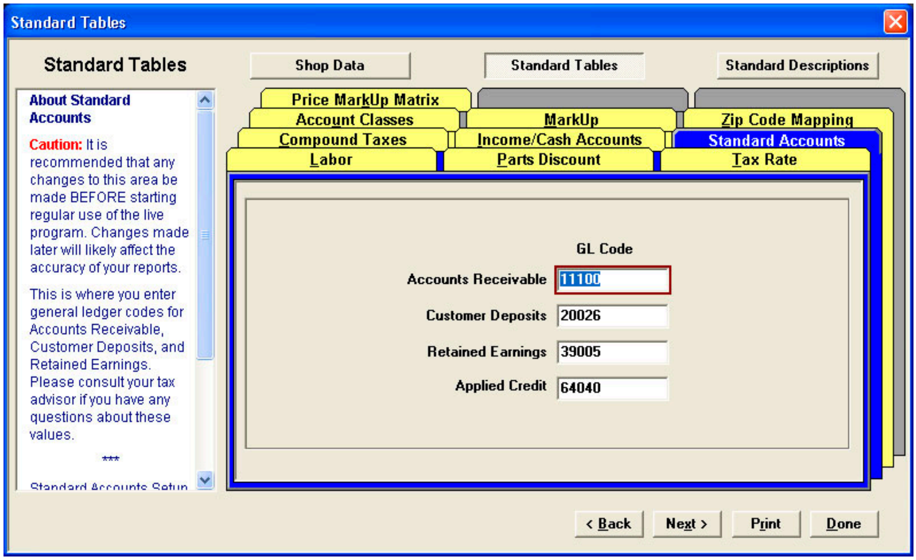
2 Choose **Delete**.

A dialog box directs you to confirm your deletion.

3 Choose **Yes** to delete.

Standard Accounts

The Standard Accounts Table is accessed via the Standard Accounts selection from the Standard Tables dialog box. This table is where you enter general ledger codes for Accounts Receivable, Customer Deposits, and Retained Earnings.



Standard Accounts

To change a Standard Account:

1. Overtype the existing account number with a new account number.
2. Select **Done** to save your changes.

Zip Code Mapping

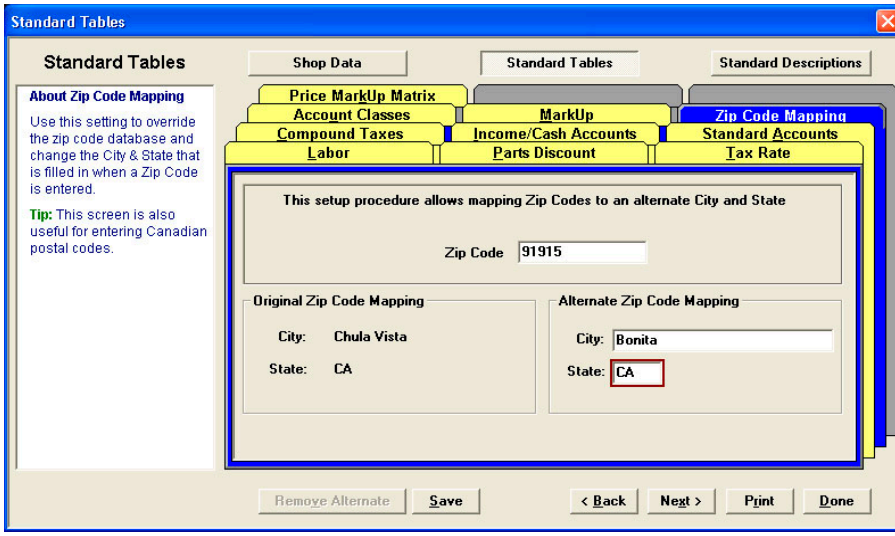
A handy feature of Managers the ability of the program to look up a city and state when entering a customer's zip code. You simply enter the zip code in the Customer screen and press Tab, or click in any other field, and the City and State are automatically entered for you. This saves you time in entering customer information.

A problem that some of our customers have encountered, however, is that zip codes change and new zip codes are added more frequently than the Manager zip code table is updated. To account for these situations, the Zip Code Mapping dialog box has been added to allow you to map or re-map zip codes.

To map/re-map a zip code:

1. Select **Zip Code Mapping** from the Shop Data Setup submenu.

The Zip Code Mapping dialog box displays.



Zip Code Mapping

2 Enter the zip code you want to map. Original Zip Code Mapping (if any) displays below.

3 Type the new City/State information in the Alternate Zip Code Mapping control group.

4 Choose **Save** to save the new mapping without exiting the dialog box.

OR

Choose **Done** to save the new mapping and close the dialog box.

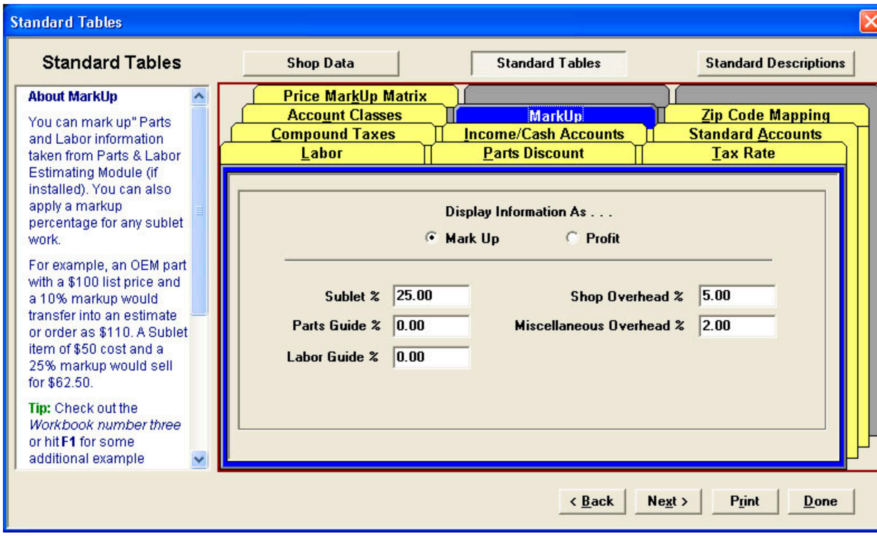
Removing the Alternate Mapping Once you have mapped an alternate zip code, you can use the **Remove Alternate** button to restore the original zip code.

Markup

Selecting **MarkUp** in the Shop Data dialog box opens the MarkUp Add On Costs panel.

In this dialog box you are able to enter and maintain standard markups and add-on costs on the parts and labor rates with which you build orders. You can also enter overhead markups for use with the Profit Wizard.

NOTE: These markups are only the defaults and can be overwritten on any Manager order.



MarkUp Add On Costs

To enter/edit Markup Information:

1. Select **Markup** from the Setup menu.

   The MarkUp Add On Costs dialog box displays.

2. Select the appropriate option button to display percentages as a **MarkUp** over cost or as a percentage of the **Profit**.

   For example, a part that costs $1.00 with a 100% *Mark Up* will be priced at $2.00 on the order. A $1.00 part with a 50% *Profit* will also be priced at $2.00 on the order.

   Enter/edit data as necessary. The dialog box contains the following data fields:

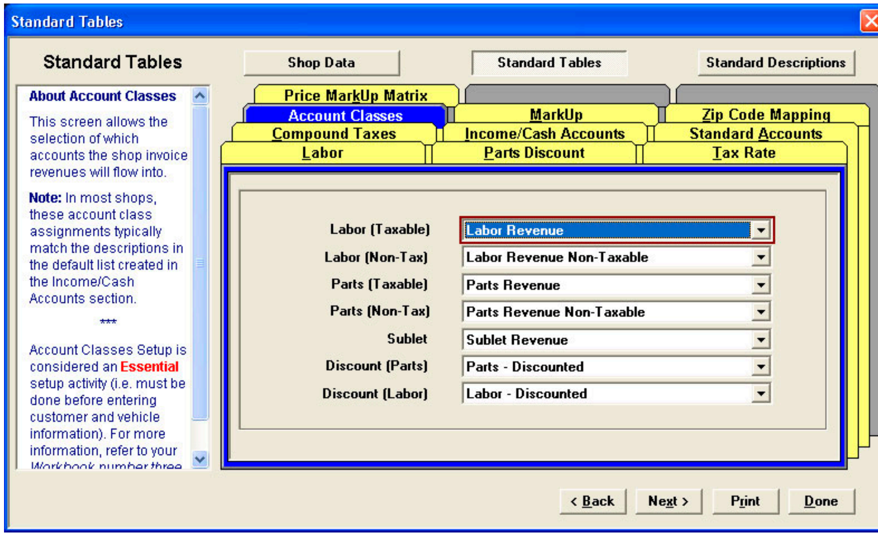
Field	Description
Sublet %	The percentage, *over/under cost*, or *profit percentage*, that sublet operations are priced at on the order.

Field	Description
Parts Guide %	The percentage, *over/under Estimating Guide list price*, that parts taken from the Estimating Guide will be priced at on the order. For example, a part with an Estimating Guide price of $1.00 that is marked up at 5% will be priced at $1.05 on the order.
Labor Guide %	The percentage, *over/under Estimating Guide labor time*, that labor operations taken from the Estimating Guide will be entered onto the order. For example, a labor operation with an Estimating Guide value of one hour that is marked up at 5% will be entered as 1.05 hours on the order.
Shop Overhead %	The percentage allocated for shop overhead of parts and labor subtotal (before taxes) for use in profit wizard analysis. These costs can include cost of doing business, shop rent, utilities, etc. Your accountant should be able to suggest an appropriate percentage.
Miscellaneous Overhead %	The percentage allocated for miscellaneous overhead of parts and labor subtotal (before taxes) for use in profit wizard analysis.

3 Select **Done** to save your entries and exit.

Account Classes

The Account Classes panel of the Standard Tables dialog box allows you to assign default Accounts to revenue and discount classes.



Account Classes

These default classifications can be overwritten in the Edit Part dialog box or at the time a part or labor item is added to an order in the **Order Item Entry – Parts** or **Order Item Entry – Labor** dialog box.

Price MarkUp Matrix

The Price MarkUp Matrix panel in Standard Tables allows you to apply markups to parts as they are added to orders and to inventory items. These markups can be structured based upon the item cost to create a tiered pricing structure.

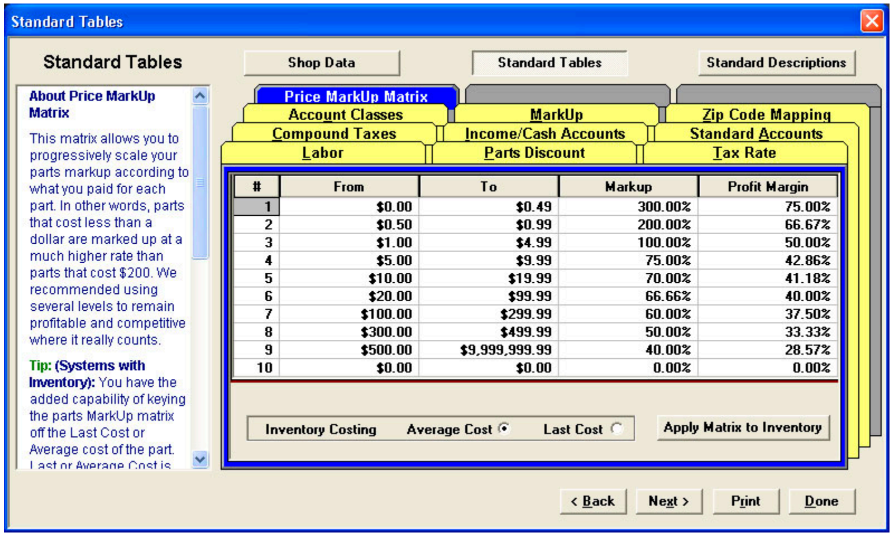
To set up a Price Markup Matrix:

1. Select **Standard Tables** from the Setup menu.

   The Standard Tables dialog box displays.

2. Click the **Price MarkUp Matrix** tab to display the Price MarkUp panel.
3. Enter a **From** and **To** price in the first row of the Matrix for the parts cost range for the first markup tier.
4. Enter a Markup percentage.

Markup percentage is the percent over (or under, as represented by a negative number) cost at which you want the part to be priced at on Manager orders.



Price MarkUp Matrix

5 Repeat steps 3 and 4 to apply markups to as many pricing levels as you desire.

6 Choose whether you'd like to apply pricing to inventory items based on Average Cost (the average cost of each inventory item on an individual basis) or Last Cost (the cost of the most recently purchased inventory items).

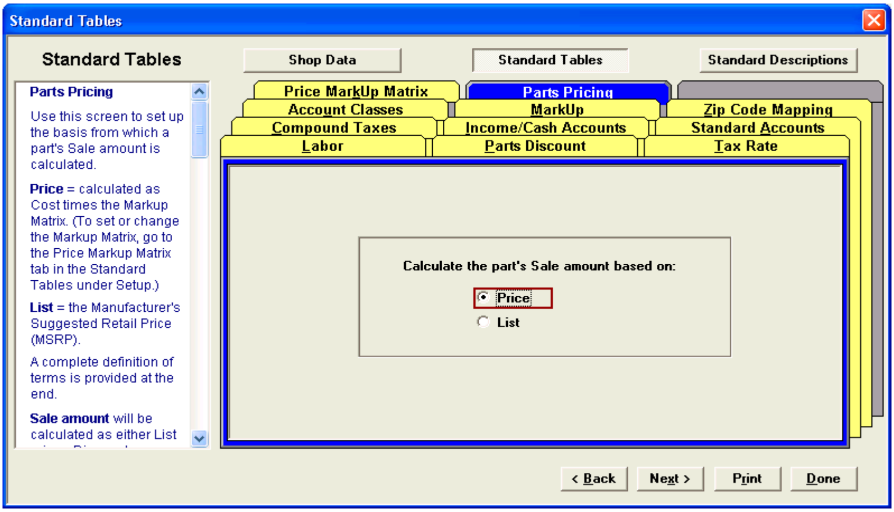
7 Click **Apply Matrix to Inventory** if you want to overwrite the current inventory markups with the new pricing structure. **Choose this option carefully!** All inventory, parts kits, and canned jobs will be affected. In any case, User Entered List price items will not be affected.

> **NOTE:** If you choose not to apply the matrix to your inventory, the new pricing structure will only apply to inventory items and parts added to orders as they are added in the future.

8 Click **Done** when finished.

Parts Pricing

Use this screen to set up the basis from which a part's Sale amount is calculated.



Parts Pricing

- **Price** = calculated as Cost times the Markup Matrix. (To set or change the Markup Matrix, go to the Price Markup Matrix tab in the Standard Tables under Setup.)
- **List** = the Manufacturer's Suggested Retail Price (MSRP).

Sale amount will be calculated as either List minus Discounts or as Price minus Discounts. Use the radio buttons to select whether Price or List shall be the basis for calculating Sale.

When the radio button selection is changed, the rules for the new selection will go into effect. The new rules will apply to newly created Estimates and Repair Orders. The new rules will not effect Estimates, Repair Orders, or Invoice created prior to this change. If a prior Estimate, Repair Order, or Invoice is opened and a part's line item is edited or added, the new rules will apply only to that part's line item. When a part from a canned job, parts kit, or inventory (ManagerPlus only) are added to an order, the part's Sale amount will reflect the current rules.

The program will attempt to ensure you don't end up with a Sale amount of zero. If you chose to calculate Sale based on List and no List amount has been entered for the part, the program will use the Price to calculate the Sale amount (see "

Price" definition below). If you chose to calculate Sale based on Price and no Price amount has been entered for the part, the program will use the List amount (See "List" definition below).

Definition of Terms:

Cost - amount the parts distributor billed for the part.

Price - calculated as Cost times the Markup Matrix. (To set or change the Markup Matrix, go to the Price Markup Matrix tab in the Standard Tables under Setup.)

List - the Manufacturer's Suggested Retail Price (MSRP).

Sale - the final amount to the customer. This includes any discounts. Sale may be calculated as either List minus Discounts or as Price minus Discounts. Use this tab to set the calculation basis.

Discounts - a percentage that is deducted from either Price or List to arrive at a Sale amount. (To set or change, go to the Part Discount tab in the Standard Tables under Setup.)

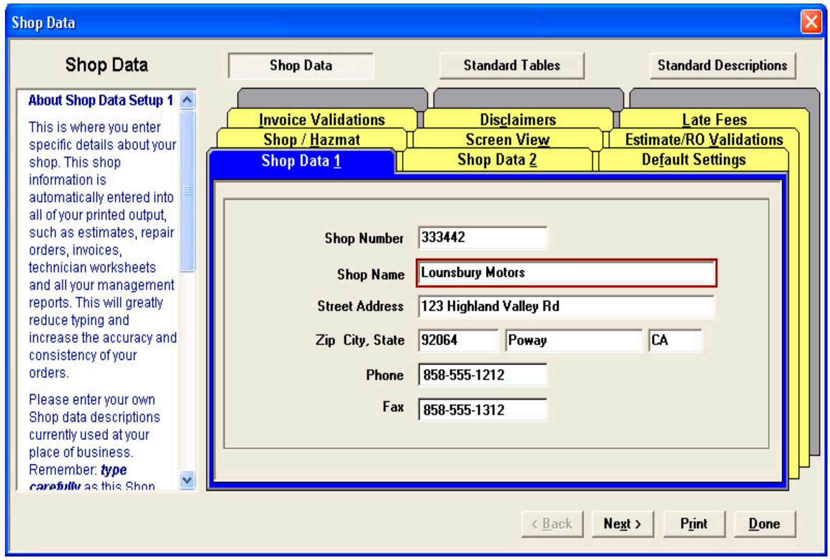
NOTE: the Cost, Price, List and Sale fields may be user edited under in which case the definitions given above may not apply.

User Entered Sale - the Sale fields may be manually edited on the Estimate, RO, or Invoice by the user in which case the definitions given above may not apply. In this case the “User Entered Sale” amount specified by the user is the final amount to the customer and further discounts will not be applied.

Shop Data Setup

The Shop Data Setup dialog box contains selections which allow you to enter information about your shop. This shop information is automatically entered into your orders for you, reducing the need for data entry and increasing the accuracy of your orders.

The tabs on this dialog box works like a card file. Click on any tab to move the selected panel to the forefront of the dialog box.



Shop Data Setup

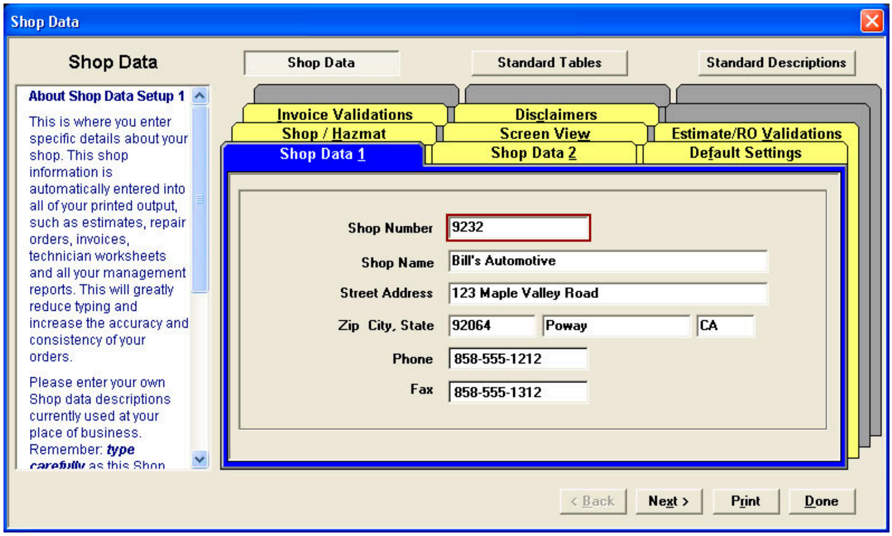
The following sections describe data input into the panels that are accessed through the Shop Data Setup dialog box.

Shop Data

The Shop Data 1 and Shop Data 2 dialog boxes are where you enter, and maintain, administrative information (name, address, phone number, etc.) about your business. This information can display on printed reports.

To enter/edit Shop Information:

1 Select **Shop Data 1** or **Shop Data 2** from the Shop Data Setup dialog box to display the selected Shop Data panel.



Shop Data I

2 Enter/edit data as necessary. The two panels contain the following data fields:

Field	Description
Shop Number	The number of your shop, if applicable (up to 10 characters.)
Shop Name	The name of your shop (up to 30 characters).
Street Address	Your shop's address (up to 30 characters).
Zip/City/State	The city, state, zip code of your shop.
Phone	Your shop's phone number.
Fax	Your shop's fax number.
License 1	Entry box for free-form entry of a license number. (For example, Bureau of Automotive Repair.)

Field	Description
License 2	Second entry box for free-form entry of a license number. (For example, Environmental Protection Agency.)
Slogan	A slogan for your shop that you would like to have included on printed reports. This slogan prints under the shop address and phone number.
Comment	Any comments that you would like to include on printed reports. These comments print on the bottom of the page.
Manager Name	The name of the shop manager. (*Does not print on reports*.)
Manager Title	The title of the shop manager ("Manager," "General Manager," etc.) (*Does not print on reports*.)

3 Select **Done** to save your entries and exit.

Default Settings

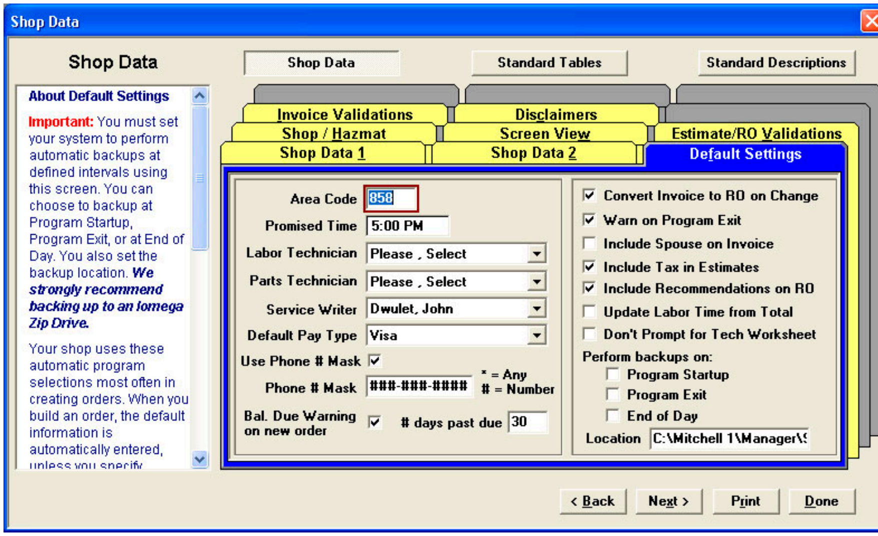
Default Settings are the entries that your shop uses most often in creating orders in Manager. When you build a Manager order, the default information is automatically entered but can normally be overwritten if necessary.

NOTE: Defaults are used to save time by entering common choices into orders for you automatically. Any default setting can be overwritten at the time of order preparation.

To enter/edit Default Settings:

1 Select **Default Settings** in the Shop Data dialog box.

The Default Settings panel displays.



Default Settings

2 Enter/edit data as necessary. The panel contains the following data fields:

Field	Description
Area Code	The area code you want to have automatically entered into phone number fields.
Promised Time	The default promised vehicle pick-up time.
Labor Technician	The default (most commonly used) repair technician.
Parts Tech.	The default technician for parts sales.
Service Writer	The default (most commonly used) service writer.
Income Acct.	The default accounting class for income accounts.
Use Phone # Mask	Allows you to enter a phone number mask (see Phone # Mask description below).
Phone # Mask	The Phone # Mask field allows you to specify the pattern of characters that are entered into phone number fields. Phone masks also expedite entry of phone numbers in Manager by pre-entering hyphens.

Field	Description
	A “#” entered in a phone mask indicates that only a number can be entered; An “*” indicates that any keyboard character can be used. Typical masks might be ###-###-###, or (###) ###-###. For example, with the default area code set to 619 and the mask set to ###-###-####, a phone number input field will appear as: 619-___-____.
Bal. Due Warning...	To enable the balance due warning, click on the Balance Due Warning check box and then enter the number of days past due. This configures Manager to issue a warning every time a new order is created for a customer who has a past due balance.
Warn on Program Exit	Turns on the “Exit” confirmation warning every time you exit the program.
Include Spouse on Invoice	Check to include spouse's name on printed invoices (where applicable).
Include Tax in Estimates	Check to include taxes in estimates by default.
Include Recommend-ations on RO	Check to include recommendations on Repair Orders.
Update Labor Time from Total	Enabling this option tells the program to change the labor time if a user types in a new dollar amount for a labor item in the Order Item Entry - Labor dialog box.
Don't Prompt for Technician Worksheet	This option allows you to choose not to print, or be prompted to print, a Technician Worksheet whenever you print a repair order. If you deselect this option, you will need to select Tech Worksheet from the Options screen to print the Technician Worksheet.
Perform backup on:	Allows you to specify how often Manager should perform automatic backups of your database.
Location	The location in which backup files are saved in a \BACKUP subdirectory.

3 Select **Done** to save your entries and exit.

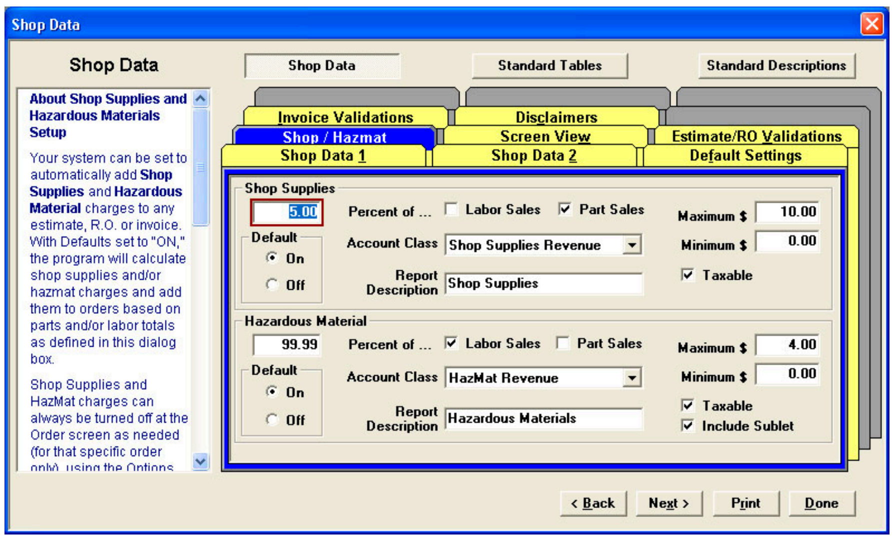
Shop/Hazmat

Charges for shop supplies and hazardous materials can be automatically calculated and added to the order. The rates for these charges are entered and maintained in the Shop/Hazmat panel of the Shop Data dialog box.

To enter/edit Shop/Hazardous Materials Costs:

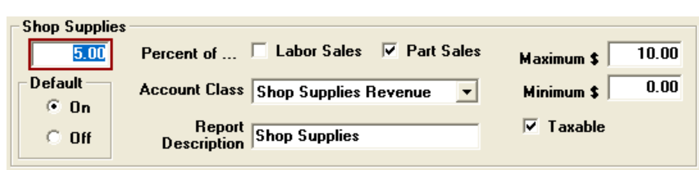
1 Select **Shop/Hazmat** in the Shop Data dialog box.

The Shop/Hazmat panel displays.



Shop/Hazardous Materials

2 Enter/edit shop supply costs as necessary in the Shop Supplies portion of the dialog box.

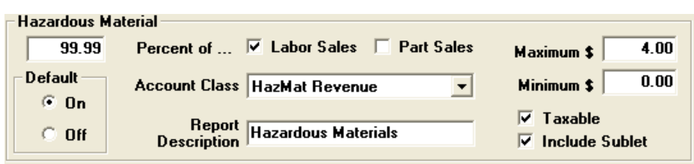


Shop Supplies

This portion of the dialog box contains the following fields:

Field	Description
Shop Supplies Percent Entry Field	Enter the percentage of parts or labor cost at which Shop Supplies should be extended on the order. Enter the percentage as a whole number. In other words, enter 10 (not .10) to apply a 10% charge.
Percent of...	Choose between Labor Sales or Parts Sales as your basis for the Shop Supplies charge.
Taxable	Select if the shop supplies charge is taxable. (Will be taxed at part tax rate.)
Default (option button)	Select if the shop supplies charge should be applied as default.
Maximum	The maximum dollar amount allowable for shop supplies.
Minimum	The minimum dollar amount allowable for shop supplies.
Account Class	The accounting class for shop supplies.
Report Desc	The description of the shop supply charge, as you want it to print on the order.

3 Enter/edit shop Hazardous Materials costs as necessary in the Hazardous Material portion of the dialog box.



Hazardous Materials

This portion of the dialog box contains the following fields:

Field	Description
Hazardous Material Percent Entry Field	Enter the percentage of parts or labor cost at which hazardous materials should be extended on the order. Enter the percentage as a whole number. In other words, enter 10 (not .10) to apply a 10% charge.
Percent of	Choose between Labor Sales or Parts Sales as your basis for the hazardous materials charge.
Taxable (option button)	Select if the hazardous materials charge is taxable. (Will be taxed at labor rate).
Include Sublet	Check to include hazardous materials charges for sublet operations.
Default (option button)	Select if the hazardous materials charge should be applied as default.
Maximum	The maximum dollar amount allowable for hazardous materials.
Minimum	The minimum dollar amount allowable for hazardous materials.
Account Class	The accounting class for hazardous materials.
Report Desc	The description of the hazardous materials charge, as you want it to print on the order.

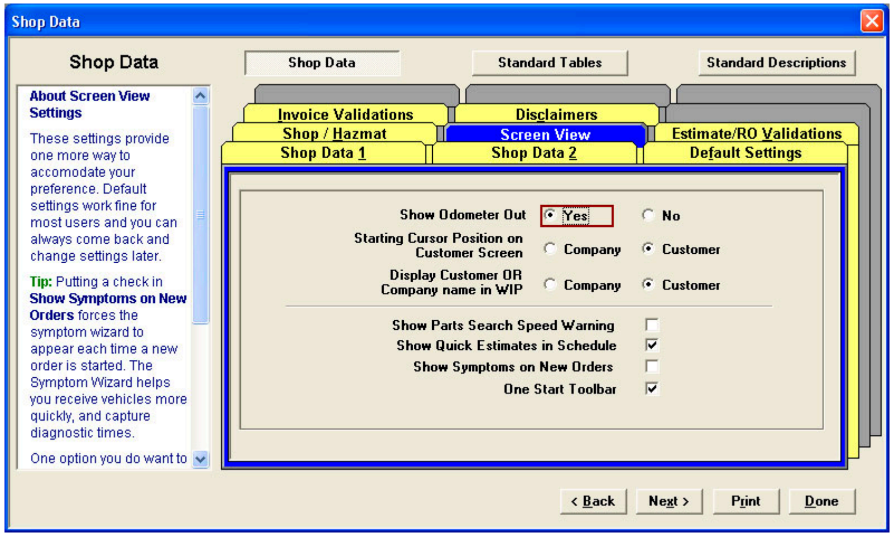
4 Select **Done** to save your entries and exit.

Screen View

The Screen View panel of the Shop Data dialog box is where you set defaults for the cursor position in the Customer screen and specify if you wish to include a field for Out Odometer (required by law in some states) in the Vehicle display.

To change Default Screen View settings:

1 Select **Screen View** in the Shop Data dialog box. The Screen View panel displays.



Screen View

2 Toggle settings as desired. The Default Screen View dialog box contains the following settings:

Setting	Description
Show Odometer Out	Governs whether the Odometer Out field (the vehicle's odometer reading when it leaves the shop) displays on the Vehicle screen. Some states require that this reading is recorded.
Cursor Position	Determines whether the default cursor position in the Customer screen will be in the Company field or in the Customer field. You should choose the position that best represents the majority of your patrons. If most of your customers are individuals (not businesses), you should chose customer.
Display Customers OR Company name in WIP	This setting allows you to specify whether the Company Name or Customer name appears in the Customer field in the Work In Progress grid in orders where a company is specified.

Setting	Description
Show Parts Search Speed Warning	Indicates whether the warning that a parts search in the Parts/Inventory List will take more than a minute is enabled.
Show Quick Estimates in Schedule	Indicates whether quick estimates should be displayed in the schedule.
Show Symptoms on New Order	Choose this setting to display the Symptoms dialog box every time you start a new order.
One Start Toolbar	Check this box to display the **One Start Toolbar**. The One Start Toolbar replaces the Estimate, Order, and Invoice icons with the Start icon. Clicking the icon opens the Customer List for Start Order dialog box, which allows you to look up a customer by Name, Phone Number, or License number, or start a new customer.

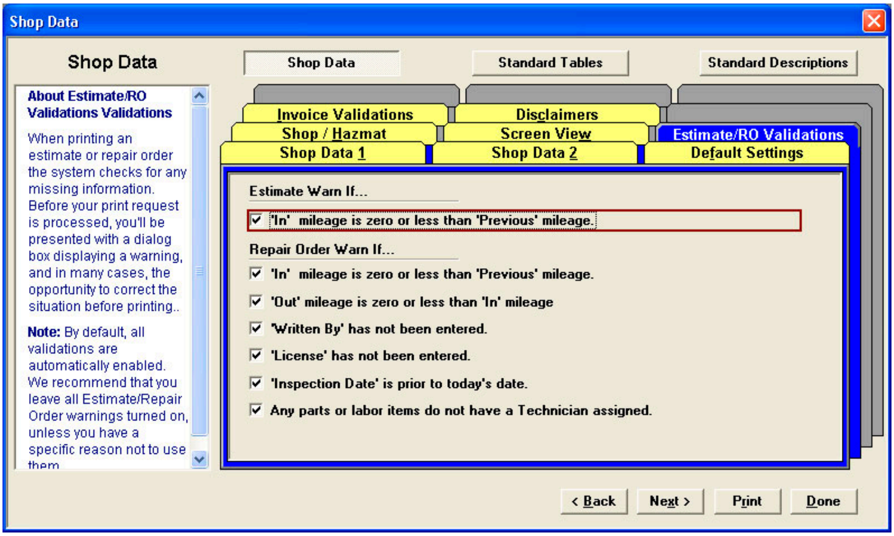
3 Select **Done** to save your entries and exit.

Estimate/Repair Order Validations

Before you can print an estimate or repair order, the system checks for missing information. All checks for missing information must be completed before you are able to print. The Estimate/Repair Order Validations dialog box is where you will select/deselect the individual checks that you want the system to conduct before printing an estimate or repair order.

To change Estimate/Repair Order Validation settings:

1 Select **Estimate/RO Validations** from the Shop Data dialog box (which is available from the Setup menu).



Estimate/RO Validations

The Estimate/RO Validations panel displays. The function of each setting is clearly explained in its respective title.

2 Toggle warnings as desired.

3 Select **Done** to save your entries and exit.

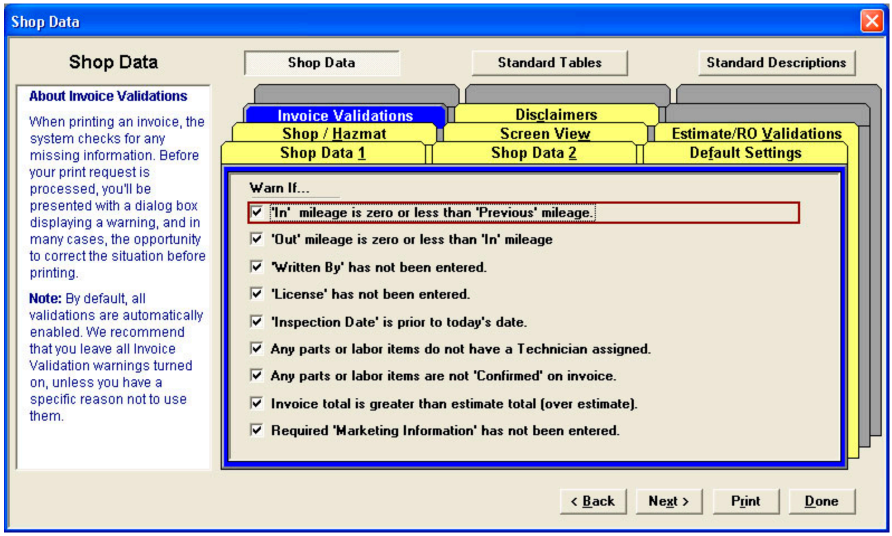
Invoice Validations

The Invoice Validations panel is where you will select/deselect the individual checks that you want the system to conduct before printing an invoice.

To change Invoice Validation settings:

1 Select **Invoice Validations** from the Shop Data dialog box (which is available from the Setup menu).

The Invoice Validations panel displays.



Invoice Validations

The function of each setting is clearly explained in its respective title.

2 Toggle settings as desired.

3 Select **Done** to save your entries and exit.

Disclaimer Setup

The Disclaimer Setup panel is where you enter standard disclaimer information for estimates, repair orders, invoices, and counter sales. These disclaimers will automatically appear at the bottom of your printed orders (unless print footer is turned off in Reports/Printers dialog box).

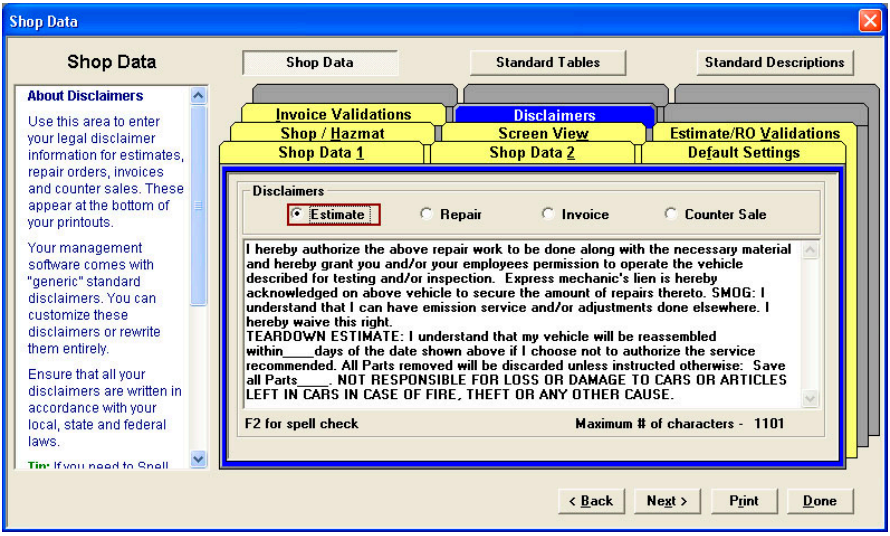
NOTE: The maximum size of the disclaimer varies depending upon the type of order (Estimate, Repair Order, etc.). The maximum number of characters allowed is displayed in the lower left portion of the dialog box.

A standard set of disclaimers is provided with your program. You can customize these disclaimers, or re-write them entirely, if necessary, to fit your unique business requirements.

To edit a Disclaimer:

1 Select **Disclaimers** in the Shop Data dialog box.

The Disclaimers dialog box displays.



Disclaimer Setup

2 Select the option button for the disclaimer you wish to edit (Estimate, Repair, Invoice, or Counter Sale).

The text of the current disclaimer displays.

3 Edit the disclaimer text, as necessary. Disclaimer text cannot exceed 801 characters.

NOTE: You can initiate a spell check of the disclaimer text by pressing [F2].

Select a different radio button to edit another disclaimer, if necessary.

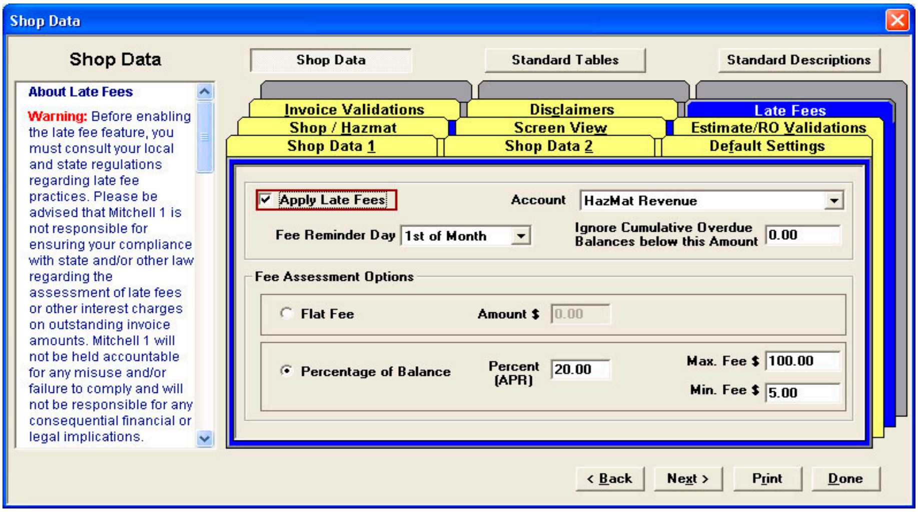
OR

Click **Done** to save your changes and exit disclaimer setup.

Late Fees

Use the Late Fee area to charge your customers who are 30 days or more past due on their invoice balance. You have the option to charge a flat fee for each 30 days they are overdue or charge an Annual Percentage Rate (APR), calculated on the balance that is overdue. Your local and/or state laws may dictate which option you can choose and the maximum you may charge your overdue customers.

Enabling Late Fees The Late Fees panel in Shop Data Setup is where you enable/disable the late fees function. To enable Late Fees, check the Apply Late Fees checkbox and then setup the Late fees options described below.



Late Fees Setup

WARNING: Before enabling the late fee feature, you must consult your local and state regulations regarding late fee practices. Please be advised that Mitchell 1 is not responsible for ensuring your compliance with state and/or other law regarding the assessment of late fees or other interest charges on outstanding invoice amounts. Mitchell 1 will not be held accountable for any misuse and/or failure to comply and will not be responsible for any consequential financial or legal implications. Mitchell 1 strongly recommends consulting legal counsel to ensure your practices are in accordance with state and/or other laws regarding late fee disclaimers and the pursuit of customer acknowledgement of potential late fees at the time of estimate, RO, or invoice.

Option	Description
Apply Late Fees	Enables Late Fee tracking in your facility.
Account	The account to which late fees revenue will be applied.

Option	Description
Fee Reminder Day	Choose between the 1st and the 15th of the month for the day in which the fee reminder message will appear when the program is opened. Note: It the program is not opened on the selected day, the reminder will appear on the following day in which the program is opened.
Fee Assessment Options	Choose Flat Fee and enter a dollar amount to charge a flat dollar amount to all late (over 30 days) accounts. Choose Percentage of Balance to apply a calculation to the overdue account. The rate will be determined by multiplying the Percent (APR) field by 30/365. You may also "cap" the fee by specifying a Max. Fee $ and specify a minimum late charge by specifying a Min. Fee $. **Important: It is Essential for you to consult your local and state laws as they may regulate your methods of charging late fees.**

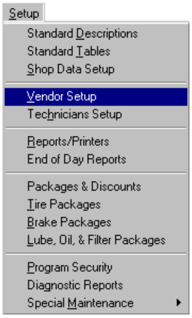
Recommendation: Update your disclaimer section to warn your customers of the possibility of late fees, should they owe a balance 30 days past the invoice post date.

Assessing Late Fees Late fees must be applied individually using the Utilities/Late Fees Assessment menu selection. Refer to Late Fees Assessment in Chapter 4, Utilities, for details.

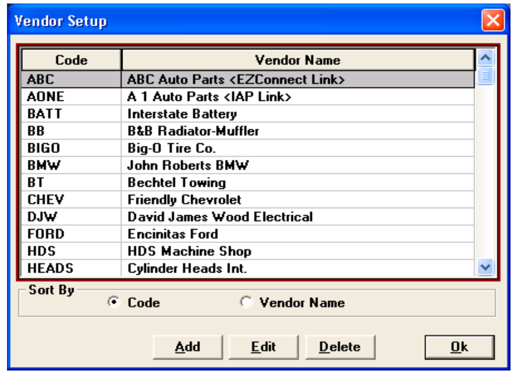
Late fees may be disabled for an individual customer in the Customer Status dialog box.

Vendor Setup

The Vendor Setup selection from the Setup menu opens the Vendor Setup dialog box. Vendors are used in Manager to create and track purchase orders. Vendor information is also useful in identifying a Vendor on Warranties, Returns, and Core charges.



You can add or delete Vendors, or edit Vendor information in this dialog box.



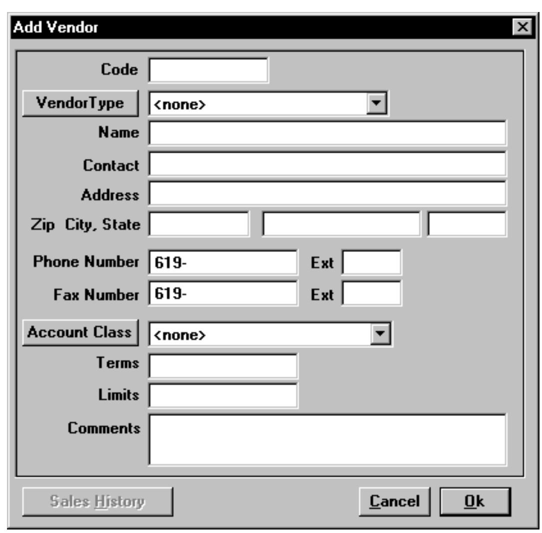
Vendor Setup Examples

NOTE: Use the Sort By options to choose between sorting by Vendor Code or Vendor Name.

To add a New Vendor:

1 Select **Add**.

The Add Vendor dialog box displays.



Add Vendor

2 Enter vendor information into the appropriate data fields. The Add Vendor dialog box contains the following fields.

Field	Description
Code	A short (up to eight characters) identification of the Vendor for use in pull-down choice lists.
Vendor Type	The type of business that the vendor operates. Vendor Type is selected from the pull-down choice list. If the type of vendor is not available in the list, select the Vendor Type button to add, edit, or delete vendor types. Vendor Type can be up to 30 characters in length.
Name	Name of the vendor's business.
Contact	Primary contact at the vendor's business.
Address	Vendor's street address.
Zip, City, State	Vendor's zip code, city, and state.
Phone/Ext.	Vendor's phone number and extension.
Fax/Ext.	Vendor's fax number and extension. Manager will automatically enter this number when faxing your vendor.
Account Class	The default accounting class that you wish purchases from the vendor to be charged to. This accounting class can be overwritten on individual parts purchased.
Terms	Financing terms applied by the vendor (for example, 30 days net).
Limits	Charge limit for vendor (for example, $1,000).
Comments	Miscellaneous comments about vendor.

3 After all entries have been completed, select **OK**.

The new vendor is added to the Vendor List.

To edit Vendor Information:

1 In the Vendor Setup dialog box, highlight the Vendor's name whose information you wish to edit.

2 Select **Edit**.

The Edit Vendor dialog box appears with the current Vendor information displayed.

3 Edit vendor settings as necessary (refer to the previous section for field descriptions).

4 Select **OK**.

To delete a Vendor:

1 In the Vendor Setup dialog box, highlight the Vendor you want to delete.

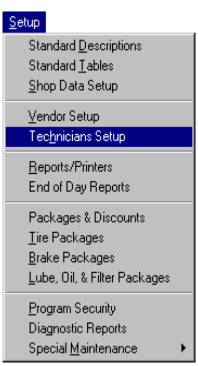
2 Select **Delete**.

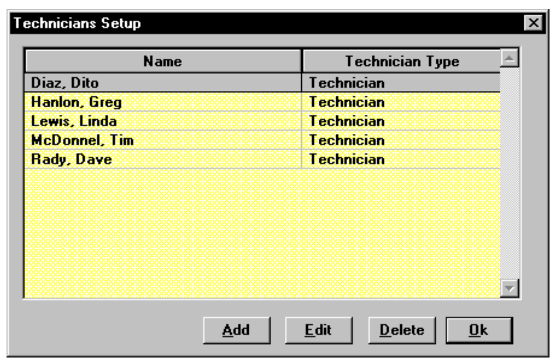
A dialog box asks that you confirm your deletion.

3 Select **Yes**. The Vendor is removed from the system.

Technicians Setup

The Technicians Setup menu selection opens the Technicians Setup dialog box. From this dialog box you can Add, Edit, or Delete technician administrative information.



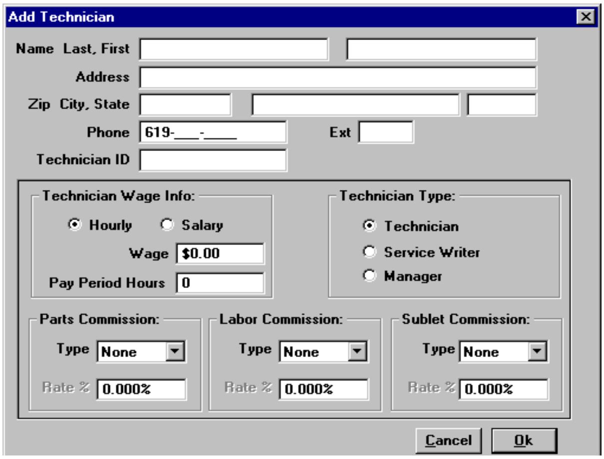


Technician's Setup

To add a Technician:

1 Click the **Add** button to display the Add Technician dialog box.

2 Enter Technician information in the appropriate data fields.



Add Technician

The Add Technician dialog box contains the following fields:

Field	Description
Name	Technician's name.
Address	Technician's home address.
City, State, Zip	Technician's city, state, and zip code (use the two-letter code for state).
Phone	Technician's home phone number with space for extension, if applicable.
Technician ID	Identification number for Technician.
Technician Wage Info	Hourly or Salary wage and the number of hours in a normal pay period (for example, 80 hrs. for two weeks).
Technician Type	Technician, Service Writer, or Manager.
Parts Commission Info	The type and rate of technician's commission on parts (percentage of profit or sale of parts).
Labor Commission Info	The type and rate of technician's commission on labor (percentage of profit or sale of labor).

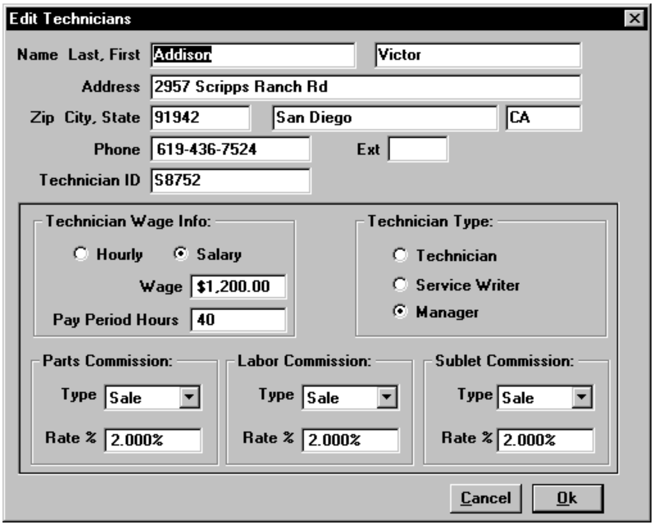
Field	Description
Sublet Commission Info	The type and rate of technician's commission on sublet operations (percentage of profit or sale of sublet operations).

3 Click **OK** to save your entries and return to the Technician Setup dialog box.

To edit Technician information:

1 From the Technician Setup dialog, select Edit.

The Edit Technician dialog box displays.



Edit Technician

2 Make changes to the technician's profile, as necessary.

3 Click **OK** to save changes.

To delete a Technician:

1 In the Technician Setup dialog box, highlight the Technician you want to delete.

2 Select **Delete**.

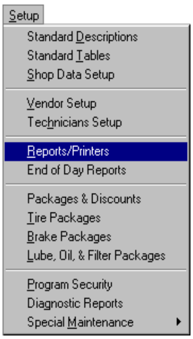
A dialog box asks that you confirm your deletion.

3 Select **Yes**.

The Technician is removed from the system.

NOTE: Deleted Technicians will still show up under Reports for historical purposes.

Reports/Printers



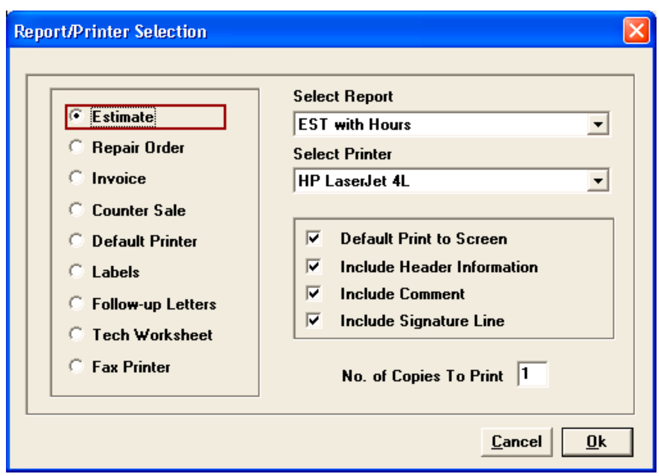
The Reports/Printers menu selection (available from the Setup menu) displays a dialog box in which you can set defaults for report formats and printer output.

For each of the four types of orders (Estimate, Repair Order, Invoice, and Counter Sale), you can select a Report and a Printer. The **Alternate Printer** selection allows you to specify a printer for miscellaneous reports such as Technician Worksheet and Receipts. The **Fax** selection allows you to select a Fax printer driver.

To select Reports/Printers:

1 Select Reports/Printers from the Setup menu.

The Report/Printer Selection dialog box appears.



Report/Printer Selection

2 Click on the option button for the type of document for which you desire to select a report and/or printer.

The fields of the dialog box dynamically change to display your current selections. The following fields are available:

Field/Option	Description
Select Report	Select from a pull-down list the Report form for the type of document (Estimate, Report Order, Invoice, Counter Sale, Alternate Printer, Fax Printer) you are working with.
Select Printer	Select a printer from the list of available printers. ***NOTE***: Printers are set up in the Windows Control Panel. Refer to your Windows documentation, if necessary, for instructions on setting up additional printers.
No. of Copies to Print	The number of copies of the selected report type to be printed.
Default Print to Screen	Defaults to a screen print rather than sending directly to the printer.
Include Header Info.	Includes Header Information, including Slogan, at the top of the printed report. Header Information is entered in the Shop Data 1 panel of Shop Data Setup. Slogan is entered in the Shop Data 2 panel of Shop Data Setup.
Include Comment	Includes Comment beneath the Order totals portion of the report, just above the Disclaimer. Comment is entered in the Shop Data 2 panel of Shop Data Setup.
Include Signature	Includes the Authorization Signature and Footer information (Technician name, page #, and Report Name) at the bottom of the printed report.

3 Make any desired changes.

4 Select **OK** to save your changes and close the dialog box.

Your changes will be in effect the next time you print.

Note on Technician's Worksheet: Choose Tech Worksheet as your Report Type to display a number of different print report options including whether or not to display technician hours and dollars.

Fax Printer Selection

If you would like to fax reports from Manager, you can select a properly installed fax printer driver in the Reports/Printers dialog box.

To select a fax printer:

1 Select **Reports/Printers** from the Setup menu.

The Report/Printer Selection dialog box appears.

2 Select the **Fax Printer** option button.

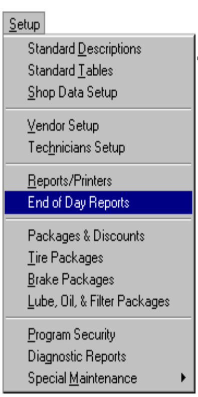
3 Select a fax printer from the Select Printer list. Refer to your fax modem documentation, if necessary, if a fax printer does not appear in the list.

4 Choose **OK** to save your fax printer selection and close the dialog box.

The next time you fax, you will print to the newly specified fax printer.

End Of Day Reporting

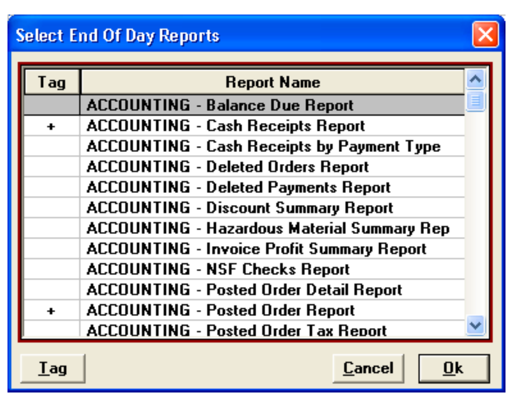
End of day reporting allows you to designate reports to be printed when you exit the program at the end of the day or over any other desired time period (e.g. weekly, monthly). End of day reporting is a two-step process: first you must designate those reports you want to include in your report batch, then you run the reports.



To set up end of day reporting:

1 Select **End of Day Reports** from the Setup menu.

The End of Day Reports dialog box displays available End of Day Reports.



Select End of Day Reports

2 Click on a report name that you want to add to your end of day report run, and click **Tag**.

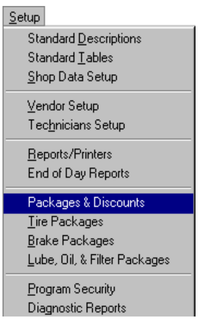
A "+" appears in the Tag column, indicating that the report has been selected as part of the end of day report run.

3 Repeat step 2 for all reports you want to include in your end of day report run.

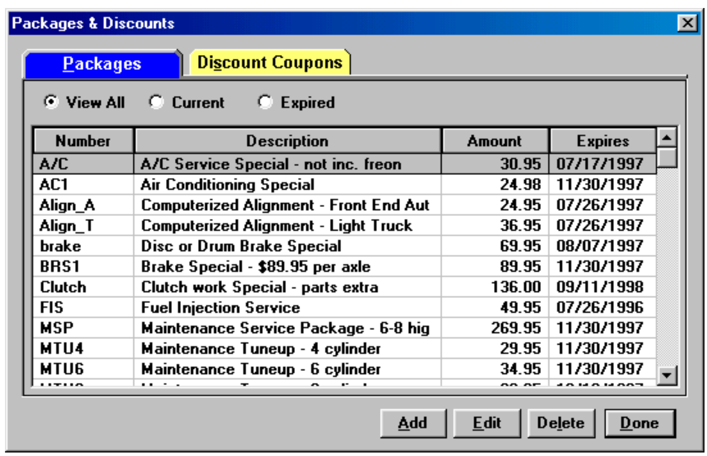
4 When finished defining End of Day Reports, select **OK** to close the dialog box.

NOTE: Refer to Chapter 10, "Reporting," for details on running End of Day Reports.

Packages and Discounts



The Packages and Discounts dialog box is where you Add, Edit, and Delete Packages and Discount Coupons. This dialog box is opened by choosing button from the repair lines button bar in the Order panel. You can choose to work with packages by choosing the Packages tab, or discount coupons by clicking on the Discount Coupons tab.



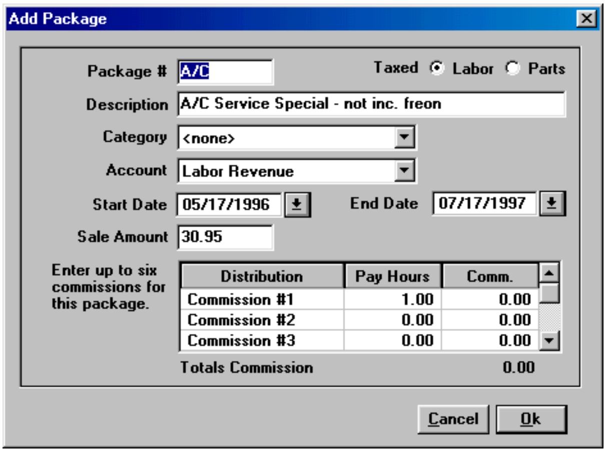
Packages and Discounts Setup

- **Packages** are parts and labor operations which are grouped together and sold for a (usually discounted) single price.
- **Discount Coupons** apply a flat dollar amount or percentage discount to the parts or labor on an order.

Three option buttons allow you to select views:

- **View All** displays current, future, and expired packages/coupons.
- **Current** displays only those packages/coupons which are currently valid.
- **Expired** displays packages/coupons which have passed their expiration date.

Adding a Package: Packages are parts and labor operations which are grouped together and sold for a (usually discounted) single price. The Add/Edit Package dialog box is opened by selecting **Add** (to add a new package), or by clicking your mouse pointer on a package and selecting **Edit** (to edit an existing package) in the Packages panel of the Packages & Discounts dialog box.



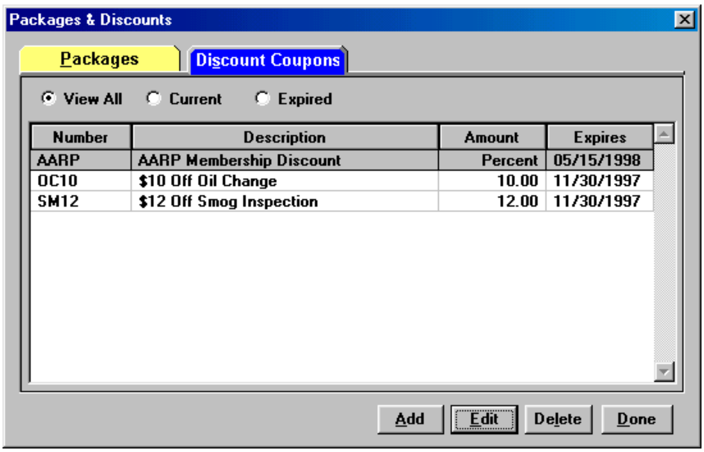
Add/Edit Package

The Add/Edit Packages dialog box contains the following fields/selections:

Field/Selection	Description
Package #	Type in a unique set of up to eight (8) characters for the package.
Taxed as	Choose whether the Package will be taxed as Labor or Parts.
Description	Enter a description (up to 50 characters) for the package that will appear in the Promotions grid and in the repair lines when added to an order.
Category	Choose a Category for the package.
Account	Choose an Account for the package.
Start Date	Type or select the date at which the package will begin.

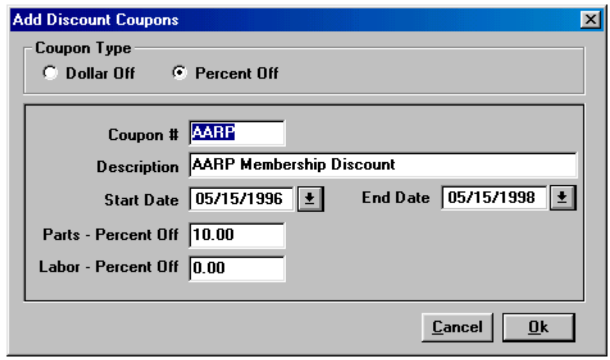
Field/Selection	Description
End Date	Type or select the date at which the package will be completed.
Sale Amount	The amount that will be charged the customer.
Commission Grid	Enter up to six pay hour increments and/or commission amounts. These commissions can be assigned to technician(s) when the package is attached to an order.

Add/Edit Discount Coupons Discount Coupons apply a flat dollar amount or percentage discount to the parts or labor on an order. Discount Coupons are set up in the Add/Edit Discount Coupons dialog box.



Discount Coupons

The Add/Edit Discount Coupons dialog box is opened by selecting **Add** (to add a new coupon), or by clicking your mouse pointer on a coupon and selecting **Edit** (to edit an existing coupon) in the Packages & Discounts dialog box. If editing a coupon, the current values and selections are displayed.



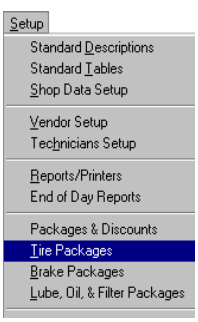
Add/Edit Discount Coupons

Once in the Discount Coupons dialog box, you make the necessary changes/entries and then select **Ok** to save. The Discount Coupons dialog box contains the following fields/selections:

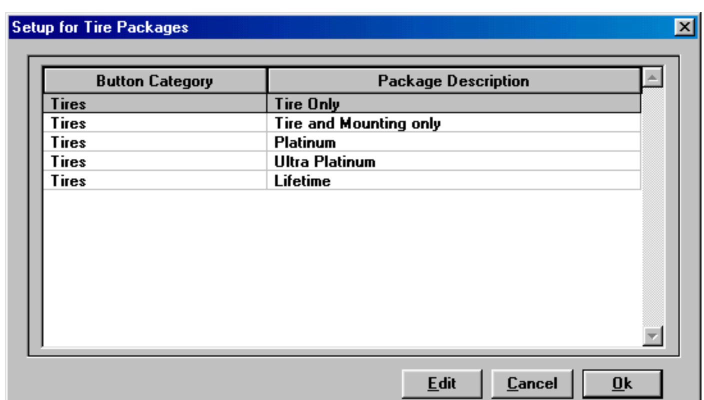
Field/Selection	Description
Coupon Type	
- Dollar Off	Indicates that the coupon will apply a flat dollar discount to an order.
- Percent Off	Indicates that the coupon will apply a discount as a percentage of the sales amount.
Coupon #	The coupon control number, if any. (Can be up to eight digits.)
Description	A description of the coupon. For example, "$10 off Tune-up and Lube." (Can be up to 50 characters.)
Start Date	The date that the coupon will begin to be in effect.
End Date	The date that the coupon will expire.

Field/Selection	Description
Parts Dollar/Percent Off	This field is where you enter a parts discount dollar amount or percentage depending upon whether you selected "Dollar Off" or "Percent Off" for Coupon Type. A percentage discount is entered as a whole number, not as a decimal. For example, a Parts Percent Off value of 10.00 equals 10% off all parts on the order.
Labor Dollar/Percent Off	This field is where you enter a labor discount dollar amount or percentage depending upon whether you selected "Dollar Off" or "Percent Off" for Coupon Type. A percentage discount is entered as a whole number, not as a decimal. For example, a Labor Percent Off value of 10.00 equals 10% off all labor charges on the order.

Tire Packages



Tire Packages are groupings of tires and additional parts and labor operations to create packages of varying levels.

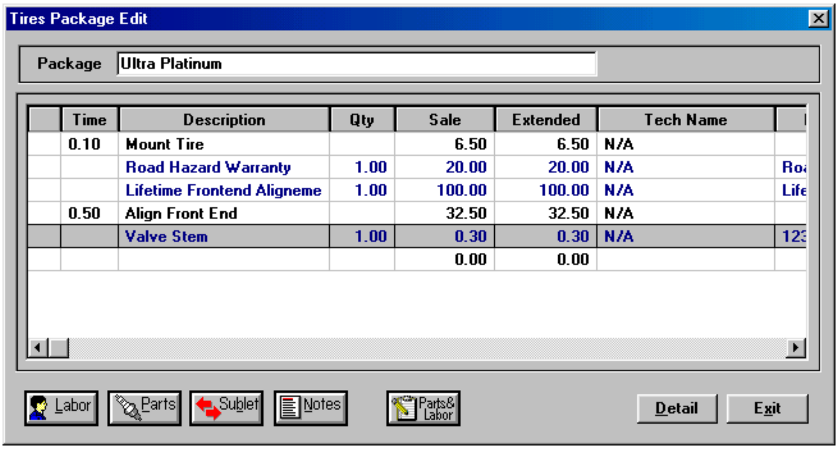


Setup for Tire Packages

Manager comes equipped with sample packages for **Tire Only**, **Tire and Mounting only**, **Platinum**, **Ultra Platinum**, and **Lifetime** packages. You can edit these packages as desired.

UPGRADE NOTE: If you are upgrading from a previous software version of Manager Plus/Manager you must run Import Jobs from the Utilities menu to get the sample tire packages. Refer to "Import Jobs" in Chapter 4, "Utilities," for details.

To add or edit a Tire Package, select Tire Packages from the Setup menu and then **Add/Edit** in the Tire Packages Edit dialog box.

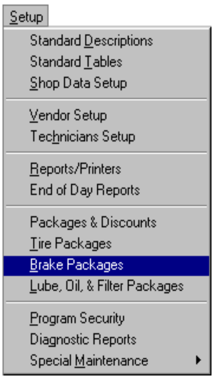


Tire Package Edit

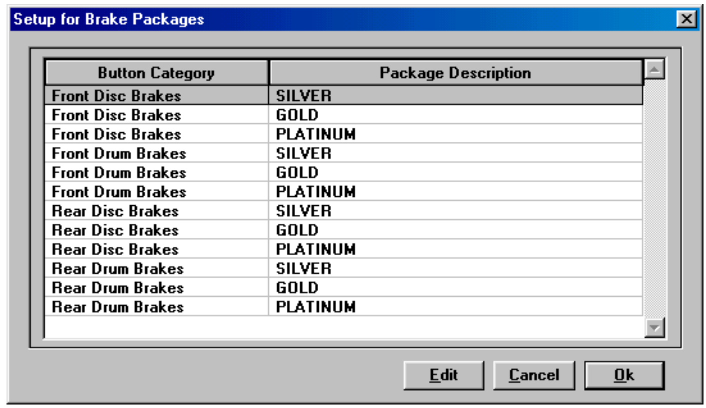
The Repair Lines buttons at the bottom of the display allow you to add parts and labor items to the package. These buttons, and their underlying functions, are the same as used in adding Parts and Labor operations to Manager Orders. Refer to "Building Repair Lines" in Chapter 6 for details.

NOTE: You do not add the actual tires to the package here. All that is added here are labor items and accessories, e.g. Valve Stems. The tires are added when the package is added to the order. Tire Packages are applied to orders via the Promotions icon in the Order screen as described in Chapter 13, "Marketing."

Brake Packages

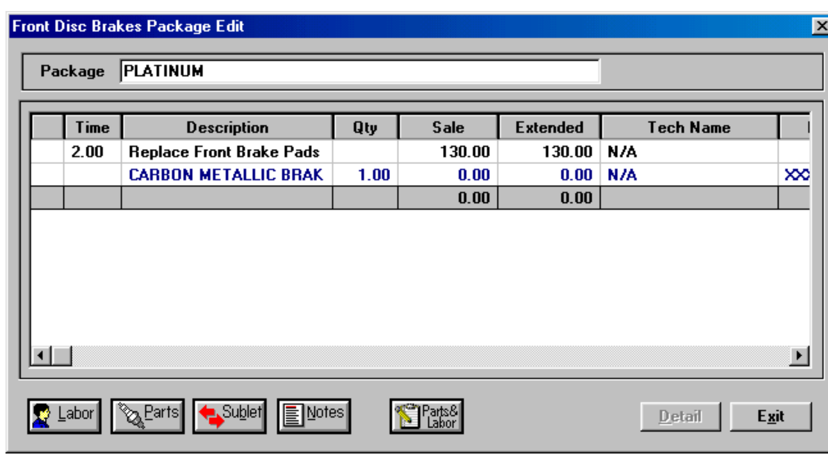


Brake Packages are groupings of brake part and labor operations to create packages of brakes and services of varying levels to offer to customers.



Setup for Brake Packages

To add or edit a Brake Package, select Brake Packages from the Setup menu and then **Add/Edit** in the Packages Setup dialog box.



Brakes Package Edit

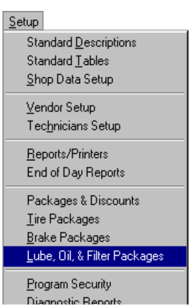
Manager comes equipped with sample packages for Silver, Gold, and Platinum in combination with Front and Rear Drum and Disc brakes. You can edit these packages as desired.

UPGRADE NOTE: If you are upgrading from a previous software version of Manager Plus/Manager you must run Import Jobs from the Utilities menu to get the sample brake packages. Refer to “Import Jobs” in Chapter 4, “Utilities,” for details.

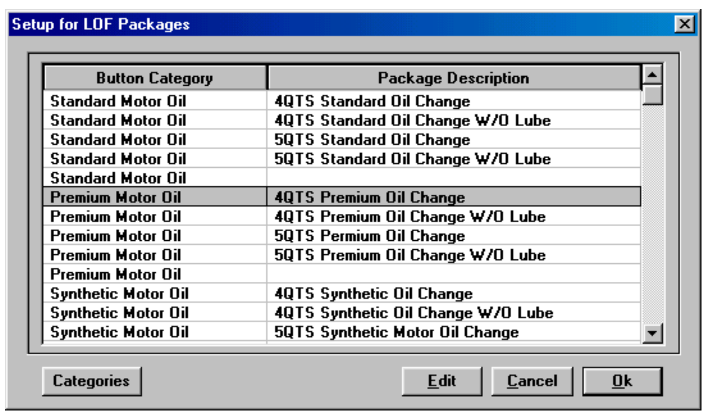
The Repair Lines buttons at the bottom of the display allow you to add parts and labor items to the package. These buttons, and their underlying functions, are the same as used in adding Parts and Labor operations to Manager Orders. Refer to “Building Repair Lines” in Chapter Six for details.

Brake Packages are applied to orders via the Promotions icon in the Order screen as described in Chapter 13, “Marketing.”

Lube, Oil, and Filter Packages

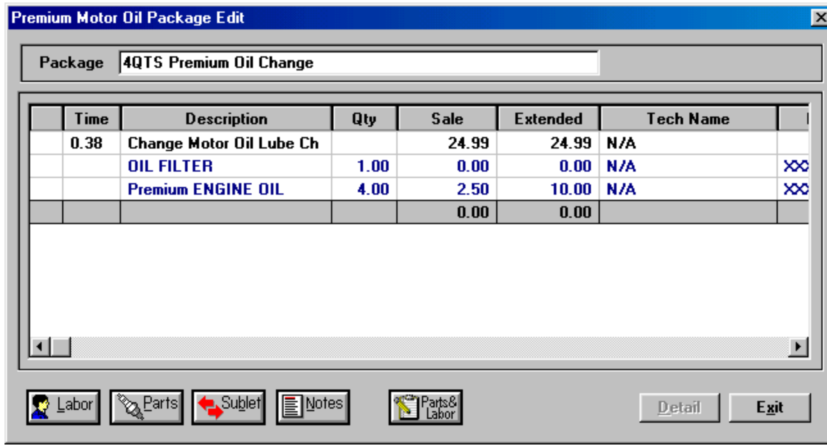


LOF Packages are groupings of LOF fluids, parts, and labor operations to create pre-made packages.



Setup for LOF Packages

To edit an LOF Package, select Lube, Oil & Filter Packages from the Setup menu, pick the package and then Edit in the Packages Setup dialog box.



LOF Package Edit

Manager comes equipped with sample packages for Standard, Premium, Synthetic, and Blended motor oils in combination with four and five quart quantities and lube service. You can edit these packages as needed.

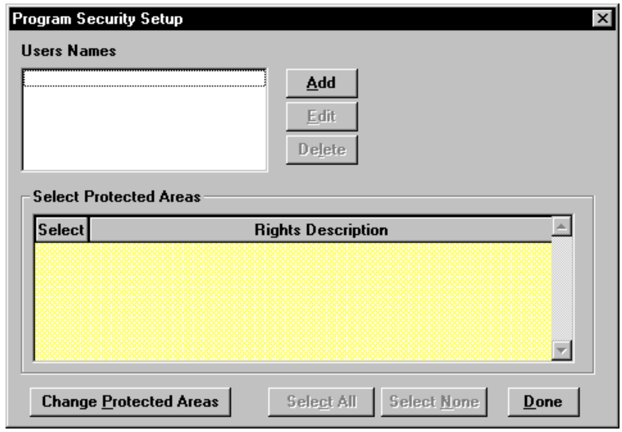
UPGRADE NOTE: If you are upgrading from a previous software version of Manager you must run Import Jobs from the Utilities menu to get the sample brake packages. Refer to “Import Jobs” in Chapter 4, “Utilities,” for details.

The Repair Lines buttons at the bottom of the display allow you to add parts and labor items to the package. These buttons, and their underlying functions, are the same as used in adding Parts and Labor operations to Manager Orders. Refer to “Building Repair Lines” in Chapter Six for details.

LOF Packages are applied to orders via the Promotions icon in the Order screen as described in Chapter 13, “Marketing.”

Program Security

The Program Security menu selection opens the Program Security Setup dialog box. In this dialog box, a designated system administrator can administer user access to sensitive program functions.



Program Security Setup

Refer to Chapter 5, “Security” for complete details on program security.

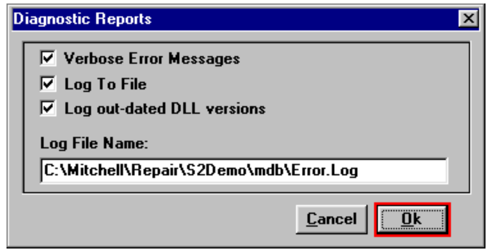
Diagnostic Reports

The Diagnostic Reports menu selection opens the Diagnostic Reports dialog box. In this dialog box you are able to enable logging of errors to a file on your computer's hard drive. This error log can be examined by technical support personnel to determine trends and troubleshoot problems.

To set up Error Logging:

1 Select Diagnostic Reports from the Setup menu.

The Diagnostic Reports dialog box displays.



The dialog box should appear as shown above, with all selection boxes checked and the default log file name already entered.

NOTE: It is recommended that you don't change the default settings.

The following settings are available:

Setting	Description
Verbose Error Message	This option tells the program to include the program line number and other information in the error logging file to be used for customer support purposes.
Log to File	Enables file logging.
Log out-dated DLL version	This setting writes an entry into the error log file if an out-dated Dynamic Link Library (DLL) file is encountered when the program is started. This information can be especially helpful to technical support personnel in troubleshooting conflicts caused by other software programs.
Log File Name	The full path and file name of the Log File. Normally you will not need to change this location.

2 Make any necessary changes. An “x” appears in the check box next to selected options.

3 Select **OK** to accept the options and close the dialog box.

Special Maintenance

When you select Special Maintenance from the Setup menu, the Special Maintenance submenu displays. This menu allows options for setting your starting invoice number, resetting last used pointers, changing your grid line colors and removing history records.

NOTE: You must be at the Home screen to access the Special Maintenance submenu. To get to the front screen, select the In Progress icon from the Work In Progress Screen (click the In Progress icon twice from any other screen) until the Manager front screen image displays.

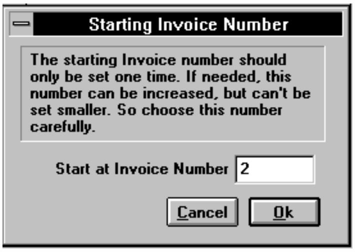
Set Starting Invoice The Set Starting Invoice command displays the Starting Invoice Number dialog box in which you can enter a new starting invoice number. Once you have entered this starting invoice number, your future invoices will number sequentially from that number upwards.

NOTE: You should exercise care in choosing a starting invoice number. You can increase the number later, but you can never decrease it.

To set a new Starting Invoice Number:

1. Select Special Maintenance from the Setup menu, then select Set Starting Invoice from the submenu.

   The Starting Invoice Number dialog box appears.



Set Starting Invoice

2. Enter a new minimum invoice number. For example, if you enter 100, the next invoice number will be 101.
3. Select **OK** to save the new number.

   Your future invoices will number sequentially from that number upwards.

Reset Lastused Pointers Selecting Reset Lastused Pointers from the Special Maintenance submenu causes the system to reset all system pointers (Estimate #, Repair Order #, etc.). This feature would normally only be used in the case of an import to your database, a backup that was restored, or in the case of a corrupted database.

To reset Lastused Pointers:

1 Select **Special Maintenance** from the Setup menu, then select Reset Lastused Pointers.

A warning box appears.

2 Select **OK** to reset the pointers.

Grid Line Colors The Grid Line Colors dialog box allows you to specify the colors of line items as they appear in the Work-In-Progress grid and the Order (Estimate, Quick Estimate, Repair Order, etc.) grids. You can also change the background color of the Work-In-Progress screen and other screens that use grids.

Grid Line Colors is selected from the Special Maintenance submenu, which is a Setup Menu selection.

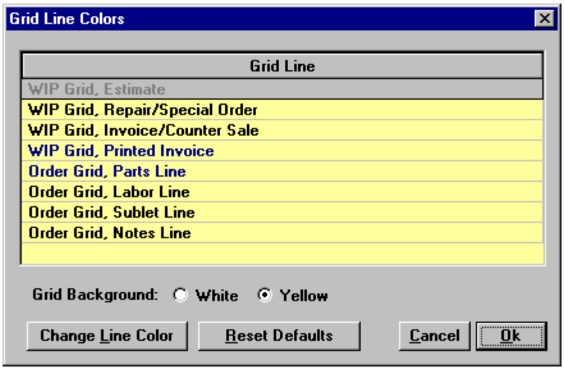
To change a grid line color:

1 Select **Special Maintenance** from the Inventory menu.

The Special Maintenance submenu displays.

2 Select **Grid Line Colors** from the Special Maintenance submenu.

The Grid Line Colors dialog box displays. Each type of grid line item displays in its current color.



Grid Line Colors

3 Click your mouse pointer on the grid line item for which you would like to change color.

4 Select **Change Line Color**.

The text color of the selected grid line item changes automatically, displaying the new color.

5 Continue clicking the **Change Line Color** button until the desired color is achieved.

6 Repeat steps 3-5 for as many grid line items as desired.

7 Select a different Grid Background color, if desired (choices are White or Yellow). This changes the background color in the Work-In-Progress screen and other dialog boxes that use grids.

8 Click **OK** to save your changes and close the dialog box.

Remove History Records The Remove History Records dialog box allows you to permanently remove specified history records from your program database. Remove History Records is selected from the Special Maintenance submenu, which is a Setup menu selection.

To Remove History Records:

1 Select **Remove History Records** from the Special Maintenance submenu, which is a Setup menu selection.

The Remove History Records submenu displays.

Remove History Records

2 Type, or select from the pull-down calendar, the invoice date before which you want to remove history records.

3 Select **Remove Customer/Vehicles not serviced** to permanently remove customer and vehicle records for those customers who haven't had service since the history record removal date.

4 Select **Create Log file of deleted records** if you want Manager to create a log file of Customers/Vehicles that are deleted.

5 Select **OK** to begin the deletion process.

After several moments of processing, a dialog box informs you how many History records (and customer and vehicle records, if applicable) will be deleted.

6 Select **Yes** to continue.

A message box informs you that the History record removal process is complete. You are informed of the full file and path name of the History log file, if you selected the Create Log file of deleted records option in step #4. You can access this text file by opening it in any word processor.

7 Select **OK**.

The Remove History Records dialog box closes.

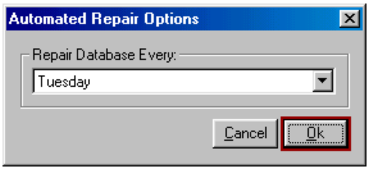
Posted Invoice Accounting Transfer This menu selection is reserved for a future release of Manager.

Setup Automated Database Repair The Setup Automated Database Repair selection allows you to specify a day of the week for compacting and repairing your database. This feature, provided primarily for network users, is recommended to repair potential damage to the database caused by multiple users writing to a shared database on a regular basis.

To Setup Automated Database Repair:

1 From the Setup menu, choose **Special Maintenance/Setup Automated Database Repair**.

The Automated Repair Options dialog box displays.



Automated Repair Options

2 Pick a day of the week from the pull-down and click **OK**.

The first time the program is opened on the designated day of the week, the Repair/Compact utility automatically runs.

Summary

This chapter detailed the procedures necessary to set up information about your shop and employees, standard descriptions, and rate tables that are essential for Manager processing.

Chapter 4
Utilities

Overview

Each order (Estimate, Repair Order, or Invoice) can be thought of as a collection of information about your shop and its technicians, the customer, the vehicle, and a calculation of the cost of the parts and labor elements of the repair. Although some of this information cannot be entered until the order is created, other information already resides in the database, from which it can be readily accessed. The more information you have in your database the easier order preparation becomes. The program provides the tools for you to efficiently maintain your database.

The Utilities menu provides options for creating parts kits and canned jobs and entering customers and vehicles into your database. The chapter also describes some handy utilities accessed via this menu that can help you in expediting the order process.

Before You Begin

Before you can perform the activities described in this chapter, you must already have the program installed and running on your computer. If you have not done so, go back and follow the installation instructions in Chapter 2, “Getting Started.” You must also have configured the lists, rates, and descriptions for your shop as described in Chapter 3, “Shop Setup.”

Your Manager Database

When you create an Order, you will need to know what parts to use and their cost, and the amount of labor time that will be required. To accomplish this, you will need to build a database of parts that your shop uses on a daily basis. You will want to have **Part Kits** set up of parts that are frequently used in combination with one another. You will want to have **Canned Jobs** set up of parts and labor operations required for frequently performed jobs such as Alignments. You will want to set up **Tire**, **Brake**, and **LOF** packages. You will want to have detailed information about your **Customers** and their **Vehicles**. Although the program allows you to enter this information while creating the order, it is desirable to have as much information available, as possible, before the customer arrives.

How Much Setup to Begin With?

It is highly recommended that you work through the setup instructions in the *Putting Manager to Work* workbook that comes with Manager/Manager Plus before attempting to use the program in a *live* shop environment. It is also recommended that you take the time to enter as many of your current customers and their vehicles as possible into your database.

How much advance setup and routine database maintenance you do is a management decision of your shop. Although the program provides the tools, the quality of the database is ultimately your responsibility.

The Utilities Menu

Part Kits, Canned Jobs, and Customer and Vehicle information are all entered in dialog boxes accessed from the Utilities menu. The following sections describe the procedures for working in these database input dialog boxes. The Utilities menu also offers options for quickly finding a customer or history record and Late Fees Assessment.

Find Customer

The Find Customer utility allows you to quickly locate a customer record from anywhere in the program. Using Find Customer, you can search the database for a customer based upon phone number, license number, last name, or company name. In fact, you can look up a customer based upon partial information such as the first couple of letters of a last name or digits of a license plate number.

For example, you might make out the first couple of digits of a customer's license plate as he drives into your shop. By selecting Find Customer and typing in the license plate number, you can select a customer and vehicle for your order in seconds. The order will be well underway by the time the customer gets to the counter (where she will be pleasantly surprised to be greeted by name!).

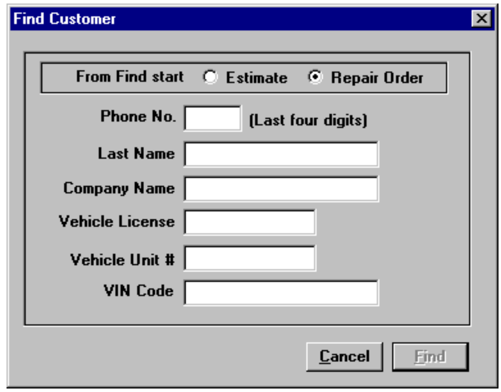
To find a customer:

1 Select **Find Customer** from the **Utilities** menu.

OR

Press **[F3]**.

The Find Customer dialog box appears.



Find Customer

2 Choose whether you want to start an Estimate or a Repair Order in the **From Find start** control group.

3 Input known information. To conduct a search, you need to input one or more digits in any field except for Phone No., in which you must input at least 3 digits. However, the more information you enter, the higher the probability of an exact match.

4 Select **Find** to begin your search.

There are two possible outcomes to your search, you can:

- *get an exact match*, in which case the Customer Screen will display the customer and vehicle information.

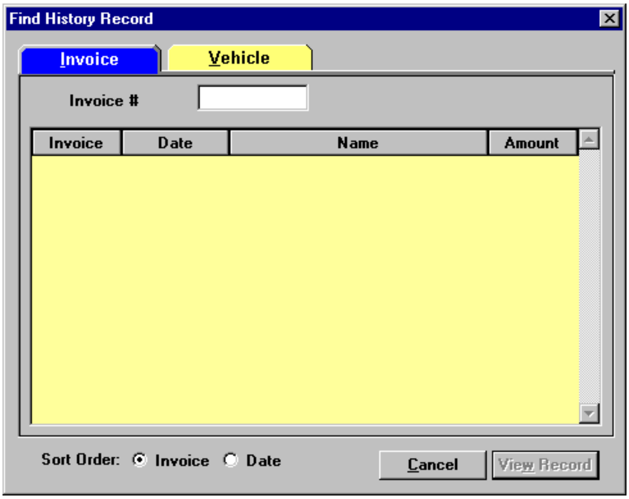
OR

- *have more than one matching customer record*. In this case, a secondary panel allows you to choose from among the matching records.

Find History Record

The Find History Record dialog box allows you to quickly locate a history record from anywhere in the program. Using the **Find History Record** command, you can quickly search the Manager database for the history record for a given invoice based upon the invoice number, or alternately, you can search the database for all history records for a selected vehicle.

The Find History Record dialog box is opened by selecting Find History Record from the Utilities menu or by pressing [F4].



Find History Record

Refer to Chapter 9, “History,” beginning on page 235 for complete details on working in program history.

Batch Payments

The Batch Payments dialog box allows you to quickly apply a payment, or a set of payments, to posted invoices. You also may delete late fees in this dialog box. You would normally make batch payments to the posted invoices of a customer with an in-house credit account (for example, a fleet customer).

- The dialog box is opened by selecting Batch Payment from the Utilities menu.

OR

- By pressing **[F5]** while in any screen.

Refer to “Batch Payments” on page 244 for comprehensive instructions on applying batch payments to posted invoices.

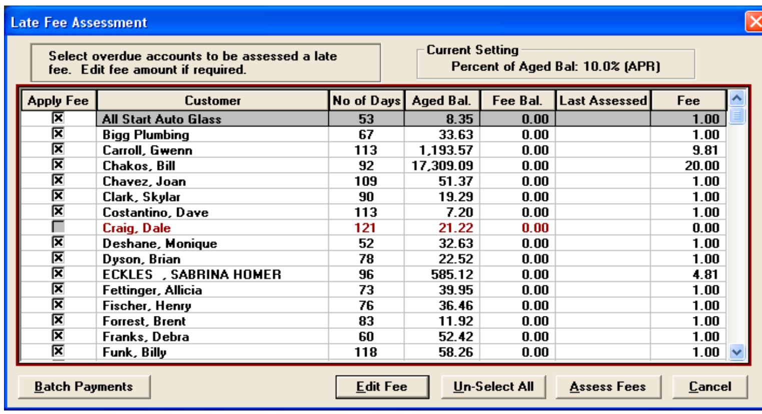
Late Fee Assessment

Late Fee Assessment allows you to assess late fees to overdue accounts. Before you can assess Late Fees, you must enable Late Fees in Late Fees Setup.

Important: It is ***essential*** for you to consult your local and state laws as they may regulate your methods of charging late fees.

To Assess Late Fees:

1 Open the Late Fee Assessment dialog box by choosing **Utilities/Late Fee Assessment** or choosing **Late Fee Assessment** from the **End of Day Reports**.



Late Fee Assessment

2 By default, all overdue accounts are selected for Late Fee Assessment. You may remove a customer from the fee assessment list by de-selecting his check box. The following options are available:

Option	Description
Batch Payments	Opens the Batch Payments dialog box for the selected customer.
Edit Fee	Allows you to change the amount of the fee for the selected customer.
Un-Select All	Click this button to clear the currently selected Apply Fee boxes.
Assess Fees	Once you have selected the customers for which you'd like to apply fees, click this button to apply the fees.

Option	Description
Cancel	Click this button to close the dialog box without applying late fees.

Color Coding The Grid area of the Late Fee Assessment dialog box uses color-coding to flag certain conditions.

- The line for any customer with a credit balance will be displayed in **Green** font.
- The line for any customer with more than 121-days overdue will be displayed in **Red** font. The customer will also be exempted from late fee assessment although you can override this by clicking on his Apply Fee check box.
- When any user-edit has been made to a late fee, the cell will be highlighted in **Blue**.

Exempting a Customer from Late Fees Late fees may be disabled for an individual customer in the Customer Status dialog box.

Deleting a Late Fee You may delete a late fee in the Batch Payments dialog box. Choose Batch Payments from the Utility menu, select a customer and then choose Delete Fee. The fee is removed.

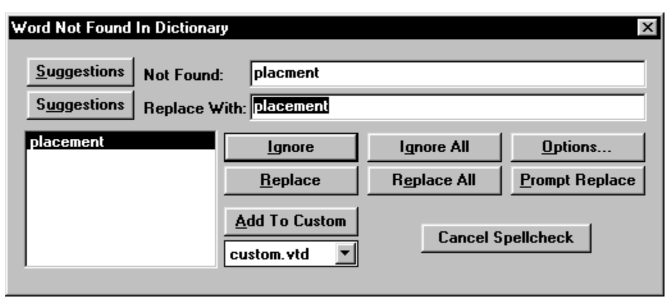
Spell Check

While working in any text entry box, pressing the **[F2]** function key initiates a spell check of the words in the box.

To initiate a spell check:

1 With your cursor in any text entry box, press **[F2]**.

The Word not Found in Dictionary dialog box displays for words not located in the program dictionary.



Spell Check

2 Use the available options to make any necessary corrections.

3 A dialog box informs you when the spelling check is complete.

Parts List

(Manager Users) The Parts List is where you enter and edit parts information and where you search for and choose parts to be transferred to orders. (Manager Plus Users) The Inventory List replaces the Parts List but the functionality is essentially the same. Refer to Chapter 11, “Inventory,” beginning on page 257 for details on adding and choosing parts in the Inventory List.

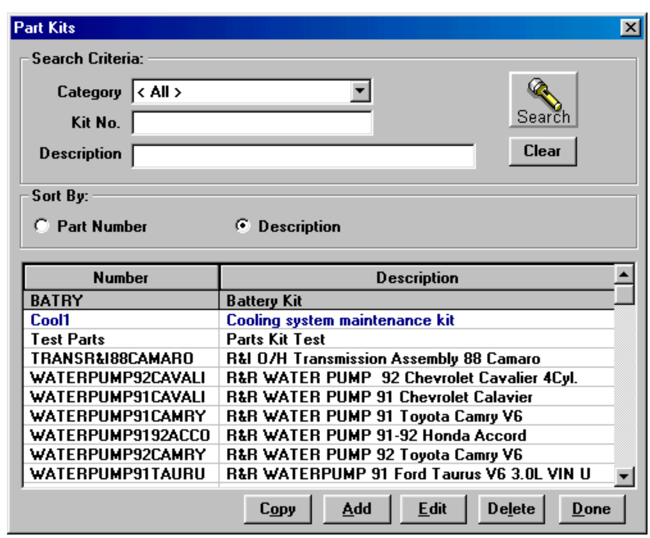
Part Kits

Part Kits save you time when entering data into orders by grouping together parts which are frequently used in combination with one another (for example, the parts which you would use for a brake job). The Part Kits dialog box is where you add part kits in the Manager database.

To open the Part Kits dialog box:

- Select **Part Kits** from the Utilities menu.

The Part Kits dialog box displays.



Parts Kits

The Part Kits dialog box is designed to allow you to Add, Edit, or Remove a parts kit from the database.

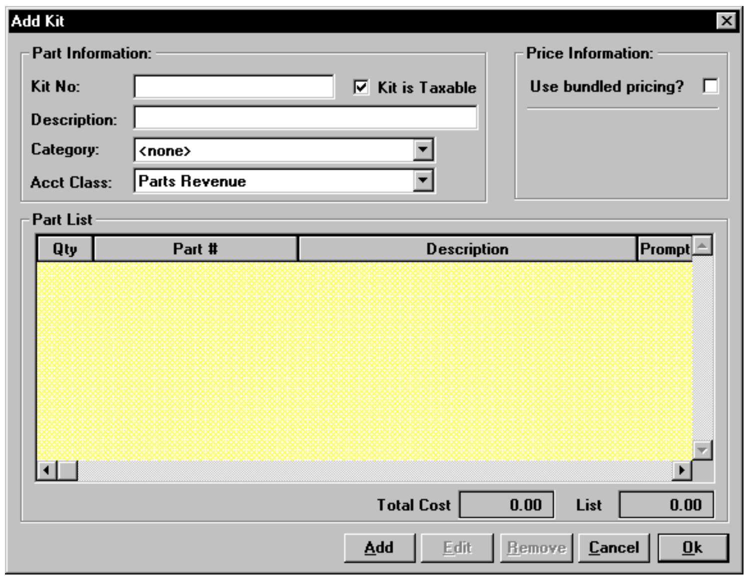
Adding a New Part Kit Parts Kits are added in the Add Kit dialog box.

To add a Part Kit:

1 Select the **Add** button.

The Add Kit dialog box appears with the cursor in the Kit # field.

2 Type in a unique **Kit No**. (up to 20 characters in length).



Add Kit

3 Select/deselect that the kit is taxable.

4 Type in a **Description** for the kit.

5 Select a **Category**.

6 Select an **Acct. Class**.

7 Select **Use bundled pricing** in the Price Information section of the screen, if desired.

Bundled pricing means that the individual parts in the kit will be listed and priced on the order at a single (bundled) price, rather than individually listing each price of the components. If you choose to use bundled pricing, an entry box appears to allow you to put in a List Price.

NOTE: If you choose not to use bundled pricing, the parts will be listed and priced on the order as individual components.Enabling bundled pricing also disables the “Prompt on Use” function.

8 Enter a bundled List Price, if necessary.

9 Select **Add** to add a part to your Part kit. The Inventory List dialog box appears.

10 Type, or select from a pull-down list, identifying information for the part (as known):

- Category
- Part #
- Description

11 Select the **Search** icon.

The Inventory List displays the parts which match your request.

12 Highlight the part to add to the kit.

13 Select **Transfer**.

14 You are returned to the Add Kit dialog box. The new part is added to your kit list.

15 Repeat steps 10 through 14, as necessary to add additional parts to your kit.

To remove a part from your kit, highlight the part and select **Remove**.

Editing an Existing Parts Kit You may have a need to make a change to an existing parts kit. As with adding a new kit, this is accomplished in the Part Kits dialog box. This procedure details the steps for editing a parts kit.

To edit an existing part kit:

1 Select **Part Kits** from the Utilities menu.

The Part Kits dialog box appears.

2 Type, or select from a pull-down list, identifying information for the kit (as known):

- **Category**
- **Kit #**
- **Description**

3 Select the **Search** icon.

The Kits List displays the kits which match your request.

4 Select the kit you wish to edit by clicking on it with your mouse pointer.

5 Select **Edit**.

The Edit Kits dialog box appears with the information from the selected part number displayed in the appropriate fields. The data fields are identical to those in the Add Kit dialog box described earlier in the chapter.

6 Make any changes necessary.

7 Select **OK**.

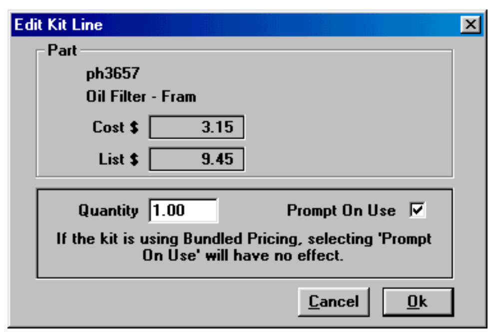
Your edits are saved and you are returned to the Parts List dialog box.

Editing a Parts Kit Line Item Sometimes you will have a need to include a quantity of more than one of an item in a kit, or prompt a user before including a specific item with a kit. In these instances, you will work in the Edit Kit Line dialog box.

To edit a Kit Line:

1 In the Add/Edit Kit dialog box, with the desired line item selected, click **Edit**.

The Edit Kit Line dialog box displays.

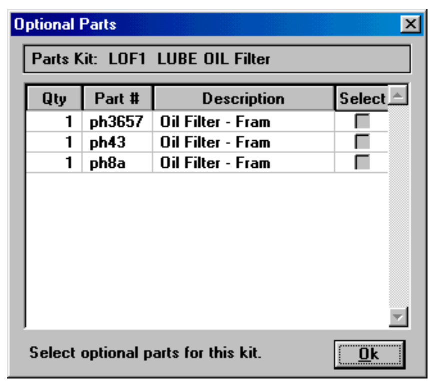


Edit Kit Line

2 Make desired edits and click **OK**. Two fields are available for editing:

Field	Description
Quantity	Quantity of the item to be included in the kit.

Field	Description
Prompt On Use	Click this check box to enable a special dialog box that prompts the user before including the part(s) on an order. You might select Prompt On Use for parts that are used sometimes, but not always, with the kit. Another use for this feature would be instances where it is desirable that the user have options when creating an order. For example, your shop might carry several different types of oil filters. Rather than set up individual parts kits for each type of filter, you could set up one kit including each of the filters with Prompt On Use selected. The user would then be able to specify which filter to use when the order is created as in the example below.



Optional Parts on Order Example

This dialog box displays when the Kit is transferred to the Order. You can then specify which type of oil filter (in the example given) to use for the Order.

Deleting a Part Kit As a general housekeeping function, you will want to regularly delete part kits which are obsolete or for some reason unneeded.

To delete a part kit:

1 Select **Part Kits** from the Utilities menu.

The Part Kits dialog box appears.

2 Type, or select from a pull-down list, identifying information for the part (as known):

- **Category**
- **Kit #**
- **Description**

3 Select the **Search** icon.

The Kits List displays the kit(s) which match your request.

4 Select the kit to delete by clicking on it with your mouse pointer.

5 Select **Delete**.

A dialog box asks you to confirm your deletion.

6 Select **Yes**.

The kit is removed from the database.

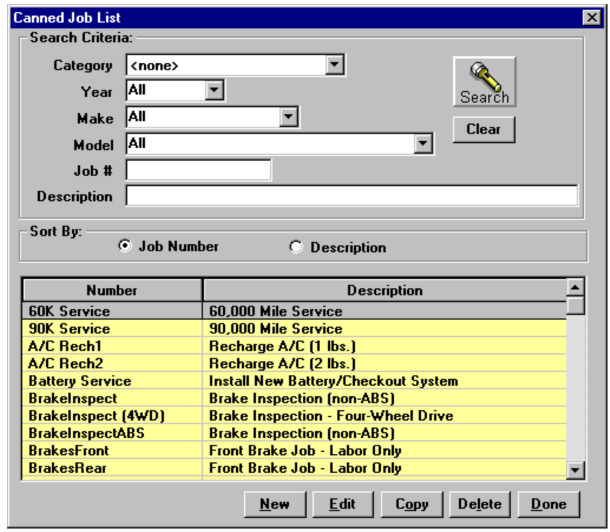
Canned Jobs

Canned jobs save you time in entering data into orders by grouping together parts and labor operations which are frequently used in combination with one another (for example, the parts and labor operations you would use to perform a tune-up). The Canned Job List is where you create canned jobs.

To open the Canned Job List:

- Select Canned Jobs from the Utilities menu.

The Canned Job List displays.



Canned Job List

The Canned Job List dialog box allows you to Add, Copy, Edit, or Delete a canned job from the database.

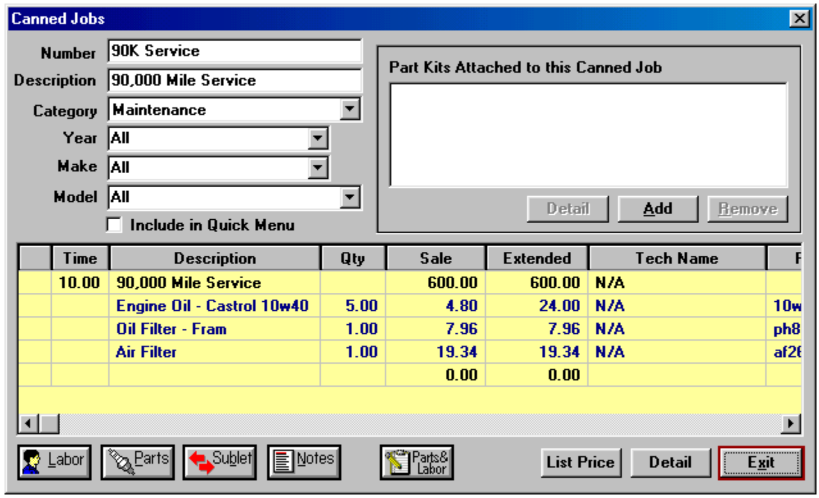
NOTE: It is recommended to use parts from your Parts/Inventory List when building Canned Jobs.That way, if the part information changes, all the Canned Jobs using that part will be automatically updated, simplifying the update process.

Adding a New Canned Job

To add a Canned Job:

1 In the Canned Job List, select the **Add** button.

The Canned Job dialog box appears with the cursor in the Number field.



Canned Job Dialog Box

2 Type in a unique **Canned Job Number** (up to 20 characters in length).

3 Type in a unique Description (up to 50 characters).

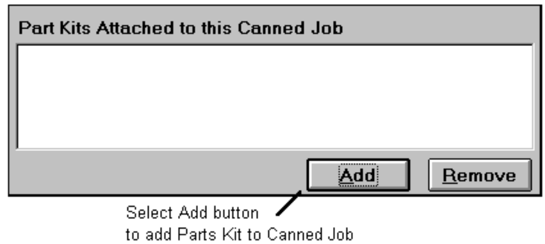
4 Select a **Category** for your Canned Job.

5 Select **Vehicle Year, Make**, and **Model** from the pull-down lists.

NOTE: You can select All for Year, Make, and/or Model, if desired. Doing so will make the canned job available for all entries in that category. For example, if you selected 1994 Acura and All for Models, your canned job would be associated with all 1994 Acuras.

6 Click on **Include in Quick Menu** to include the Canned Job on the Quick Menu. Using the Quick Menu, you can access up to ten Canned Jobs by right clicking on the last line of an order.

7 Select **Add** in the Part Kits Attached to this Canned Job box if you want to add a Part Kit to your canned job. Skip to step 10 if not.



Select Add

Selecting Add opens the Part Kits dialog box. You are able to add an existing kit to your canned job, or create a new parts kit.

8 To add an existing kit, set up kit search criteria (Category, Kit #, and Description) and select **Search**.

The results of your kit search are displayed.

9 Highlight the name of the kit you wish to add to your canned job.

10 Select **Transfer**.

The selected kit is transferred to your canned job.

NOTE: Refer to the section on Parts Kit earlier in the chapter for instructions on adding a new part kit.

11 Add Labor, Parts, Sublet items, Notes, and Estimating items as necessary by selecting the appropriate icons from the lower button bar.

12 Select **Exit** to close the Canned Jobs dialog box and return to the Canned Job List. Your new canned job is added to the list.

NOTE: Use the **Labor** button (new labor item) or **Detail** button (existing item) to set non-standard labor rates, technician pay hours, or fixed commission. Use the List Price button to get a rollup (list price) for the job. Refer to Chapter 6, “Orders” for specific instructions on adding Labor, Parts, Sublet Operations, and Notes to orders. The procedures for adding these repair line items to Canned Jobs are identical.

Copying an Existing Canned Job Rather than creating a canned job from scratch, you can save time by copying an existing canned job and simply changing those data fields that are different. For example, a canned job for an oil change for a

Ford Mustang might be identical to a canned job for an oil change for a Ford Probe. Rather than enter both jobs twice, it would be less time-consuming to enter the job once, copy it, and change the vehicle.

To copy an existing canned job:

1. Select **Canned Jobs** from the Utilities menu.

   The Canned Job List dialog box appears.

2. Type, or select from a pull-down list, identifying information for the part (as known):

   - **Category**
   - **Year**
   - **Make**
   - **Model**
   - **Job#**
   - **Description**

3. Select the **Search** icon.

   The Canned Job List displays the jobs which match your request.

4. Select the **Canned Job** you wish to edit by clicking on it with your mouse pointer.

5. Select **Copy**.

   A dialog box asks you to enter a new job number.

6. Type in a unique job number (up to 20 digits).
7. Select **OK**.

   The Canned Job List dialog box appears with the new canned job number added.

8. Edit the new canned job, as necessary. Refer to the Editing an Existing Canned Job procedure in the following section for details.

Editing an Existing Canned Job You may need to make a change to an existing canned job you have just copied, as explained above, or may need to change a canned job for some other reason. This procedure details the steps for editing an existing Canned Job.

To edit an existing canned job:

1. Select **Canned Jobs** from the Utilities menu to display the Canned Job List.
2. Type, or select from a pull-down list, identifying information for the part (as known):

   - **Category**
   - **Year**
   - **Make**

- **Model**
- **Job#**
- **Description**

3 Select the **Search** icon. The Canned Job List displays the canned job(s) which match your request.

4 Select the **Canned Job** you wish to edit by clicking on it with your mouse pointer.

5 Select **Edit**.

The Canned Jobs dialog box appears with the information from the selected job displayed in the appropriate fields. The data fields are identical to those in the Canned Jobs dialog box described earlier in this section.

NOTE: Refer to the Add Canned Jobs section for specific instructions on completing the data fields in the Canned Jobs dialog box.

6 Make any changes necessary.

Select **OK**.

Your edits are saved and you are returned to the Canned Job List dialog box.

Deleting a Canned Job As a general housekeeping function, you will want to regularly delete canned jobs which are obsolete or for some reason unneeded.

To delete a canned job:

1 Select **Canned Job** from the Utilities menu.

The Canned Job List dialog box appears.

2 Type, or select from a pull-down list, identifying information for the canned job (as known):

- **Category**
- **Year**
- **Make**
- **Model**
- **Job#**
- **Description**

3 Select the **Search** icon.

The Canned Job List displays the part(s) which match your request.

4 Select the canned job you wish to delete by clicking on it with your mouse pointer.

5 Select **Delete**.

A dialog box asks you to confirm your deletion.

6 Select **Yes**.

The canned job is removed from the database.

Importing and Exporting Promotional Packages

Manager has the ability to export and import the packages available as Promotions. These include the Tire, Brakes, and LOF packages, but do *NOT* include regular canned jobs. Multiple location chains can use the feature to standardize a promotional price structure. The feature can also be used to backup promotions information.

IMPORTANT UPGRADE NOTE: If you are upgrading from a previous version of Manager, you *must* run the Import Jobs procedure to load the Tire, Brakes and LOF packages that come with the system.

Exporting Promotions Packages are exported by selecting Export Packages from the Utilities menu. This creates a file that contains all of the Promotions packages. The file is placed in the Manager database directory.

The default location for this file is either **C:\MITCHELL 1\MANAGER\SERIES(x)\EXPORT** \ or **C:\MITCHELL\REPAIR\SERIES(x)\EXPORT**. The file name is CANJOB.DAT.

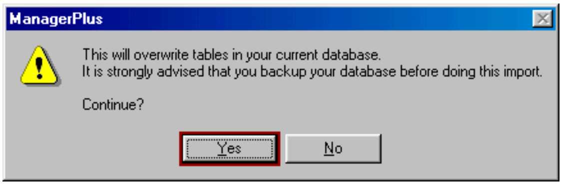
Importing Importing of Promotions Packages is performed as described in the following procedure. The import file (the file obtained from the export procedure) first needs to be copied to the Import directory located beneath the Manager database directory and then the jobs need to be imported into Manager via the Import Jobs command from the Utility menu.

To import Promotions Packages:

1 Copy CANJOB.DAT to the Import directory (usually **C:\MITCHELL 1\MANAGER\SERIES(x)\IMPORT**) or **C:\MITCHELL\REPAIR\SERIES(x)\IMPORT**.

2 Select **Import Packages** from the **Utilities** menu.

You are asked to confirm your request.



Database Backed Up?

It is highly recommended that you back up your database. If you did not backup your database before starting this procedure, it is recommended that you cancel and do so.

NOTE: The import process is a complete replacement operation. When importing, all the current Option Specific Promotions Packages that are marked as imported are removed from the system.

3 Click Yes. The Promotions packages are overwritten with the new packages.

This procedure does not effect canned jobs created from the normal Canned Job screen.

Customer Screen

The Customer Screen allows you to add a customer to the database, delete a customer from the database, or edit a customer's attributes.

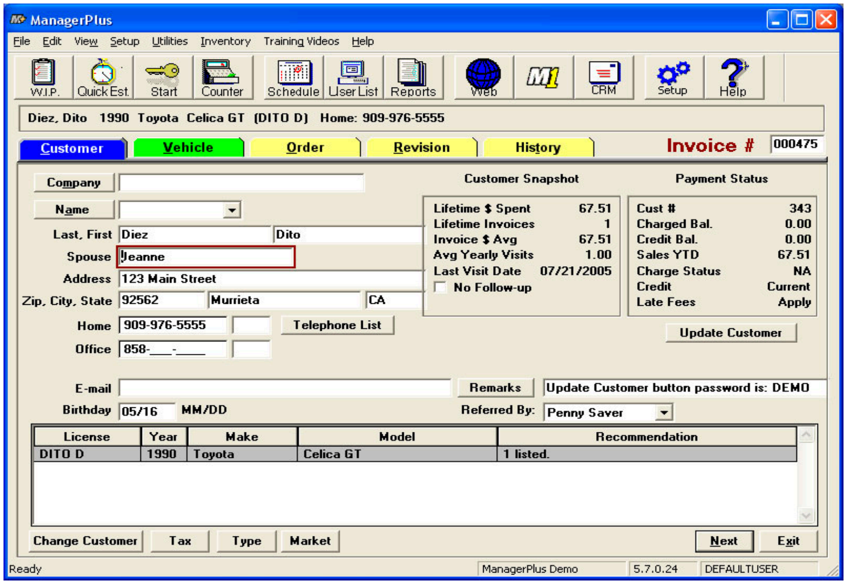
NOTE: Normally, you will enter new customers into the database while you are in the process of creating orders. Access the Customer screen via the Utilities menu when you need to enter/edit groups of customers, in the same manner as when you are entering your existing customers as part of your initial setup.

The Customer Screen works in conjunction with the Vehicle Screen so that when a customer is added, you can switch to the Vehicle Screen to add vehicles to the customer record. Similarly, when you edit an existing customer record, and switch to the Vehicle Screen, the customer's vehicles display.

To open the Customer Screen:

- Select **Customer Screen** from the Utilities menu.

The Customer Screen displays.



Customer Screen

To add a new Customer:

1 In the Customer Screen, enter available customer information. The following sections describe the various data entry fields and additional data entry options.

2 Press Enter to enter the customer information and switch to the Vehicle Screen where you can enter vehicle(s) for the customer.

OR

- Select the **Vehicle** thumb-tab to switch to the Vehicle Screen where you can enter one or more vehicles for the customer.

OR

- Select the **Exit** button (lower-right corner of your display) to exit to the Work in Progress screen.

The following sections describe the various data entry fields and data entry options.

The Customer Screen features **Thumb-Tabs** which dynamically change your display so that you can view or input different types of information; **Buttons**, which bring up additional, related dialog boxes, and **Editable Fields** into which you can enter and edit customer information. Finally, the Customer Screen contains status boxes in which you can view **Credit History** and **Vehicle Information**.

Customer Screen Thumb Tabs The thumb-tabs in the Customer Screen act like the tabs in a notebook. Selecting a tab causes your display to dynamically alter to display different, but related information. For example, if you enter customer information and then click on the Vehicle tab, you are taken to the Vehicle panel where you can enter one or more vehicles for that customer. Click on the thumb-tab for Customer, and you are returned to the Customer Screen with the vehicle(s) entered in the vehicle box at the bottom of the display.

Thumb-Tab	Description
Customer	Opens the Customer Screen. This is the display in which you enter/edit customer information.
Vehicle	Switches your display to the Vehicle view allowing you to enter/edit Vehicle(s) associated with a particular customer.
History	Switches your display to History, where you can view historical information about the customer, and/or his vehicles.

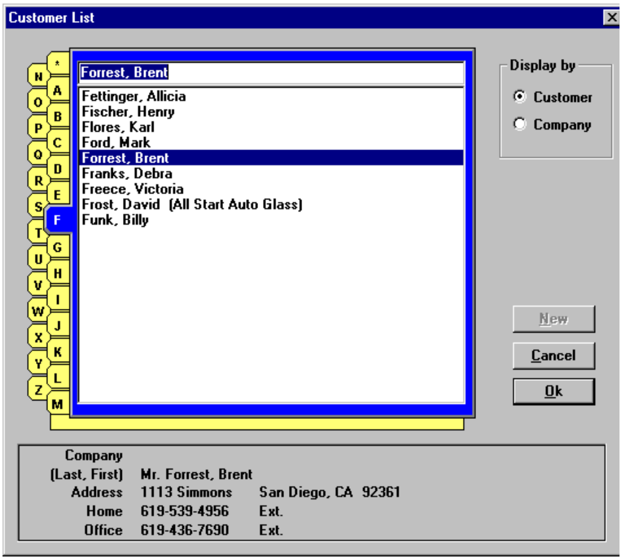
Customer Marketing Fields Just below the Administrative Data are fields for Customer Retention Marketing (CRM) purposes.

Marketing Fields.

Field	Description
E-mail	Field for customer's email address. **Note:** this field *must* be filled if you plan to do email marketing.
Birthday	Customer's birthday.
Remarks	Provides space to add free-form comments to the customer's record
Referred By	Select the referral source for the customer.
Referral Lookup	If "Friend" is selected as the referral source, the Referral Lookup button displays, allowing you to pull up the record of the referring customer.
Referred by:	Select the referral source for the customer.

Customer Screen Buttons Buttons are available in the Customer Screen which allow you to make additional selections or enter information into your customer record. Each of these buttons is described in the following table.

Button	Description
Company	Brings up the Customer List with the Company display selected. Clicking your mouse pointer on a letter on the left side causes the screen to display those companies whose names begin with that letter. Highlighting the Company name and selecting OK returns you to the Customer Screen, with the Company name and vehicle(s) entered into the appropriate fields.
Name	Brings up the Customer List with the Customer display selected. Clicking your mouse pointer on a letter on the left side causes the screen to display those customers whose names begin with that letter. Highlighting the Customer name and selecting OK returns you to the Customer Screen, with the Customer's name and vehicle(s) entered into the appropriate fields.



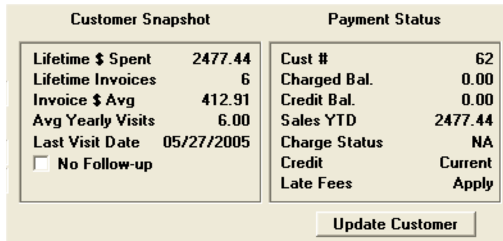
Customer List

Button	Description
Remarks	Brings up a text entry box allowing you to add remarks to the customer record.
Telephone	Brings up the Telephone List, where you can select which numbers appear on your Customer Screen display.
New	Clears out any customer/vehicle information that is displayed, allowing you to enter another customer.
Tax	Allows you to overwrite the shop default tax rate for a particular customer.
Type	Brings up the Customer Type List in which you can change the shop defaults for parts discount and labor rate. This is also the dialog box in which you enter a Resale License Number for resellers.
Market	Allows you to enter/access marketing information about the customer. Refer to Chapter 13, “Marketing,” for details.

Customer Screen Data Entry Fields The Customer Screen features a number of fields in which you can enter, and edit, information. Each of these fields is described below.

Field	Description
Company	The name of the Company, if applicable.
Name	A title (e.g. Mr., Ms., etc.) selected from a pull-down list.
Last, First	Fields for entry of the customer's last and first names.
Spouse	First name of the spouse.
Address, City, State, Zip	Customer's address information.

Customer Credit Status Box The Customer Credit Status Box in the upper-right corner of the Customer screen provides information about the credit status and history for the customer.



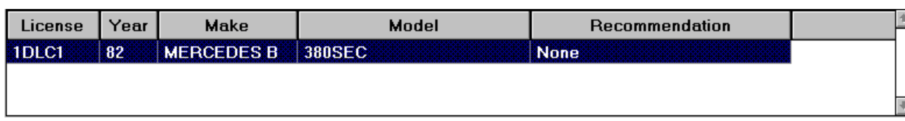
Customer Credit Status Box

The fields of the Customer Credit Status Box are defined below.

Field	Description
Lifetime $ Spent	Total expenditures by customer.
Lifetime Invoices	The total number of invoices for the customer.
Invoice $ Avg.	Average invoice value for the customer.
Avg. Yearly Visits	Average visits by customer per year.
Last Visit Date	The date of the last customer service at your facility.
No Follow up	Select this check box to exclude customer from followup and CRM activity.
Cust #	The Customer Number
Charged Balance	Dollar amount owed on posted orders.
Credit Balance	Some form of overpayment (a deposit, for example).
Sales (YTD)	Year-to-date sales for the current customer.
Sales (Total)	Total sales for the current customer.
Charge Status	Indicates if the customer is approved to charge.
Credit Status	Indicates if the customer is current, or past due.

Field	Description
Update Customer	Opens the Update Customer dialog box, in which you can update the customer's credit and charge information. Access to this dialog box can be password protected (*highly recommended*). ShopKey only recommends updating customer balance here if balance has been transferred from another system. Use Payment functions for maintaining customer balances.

Customer Vehicle Status Grid The Vehicle section in the lower part of the Customer Screen provides information about the Customer's vehicle(s).



Customer Vehicle Status Grid

The rows of this grid provide status information about a Customer's vehicle(s). When you enter a new customer, the grid is empty. As you add vehicles for the customer, the rows of the grid are filled with vehicle information.

The fields of the Customer Vehicle Status grid are defined below.

Field	Description
License	Vehicle license number.
Year	Vehicle year of manufacture.
Make	Vehicle make.
Model	Vehicle model.
Recommendation	Service/repair recommendation entered during a previous visit.

Vehicle Screen

Once you have finished adding a customer, you will normally want to add one or more vehicle(s).You may also need to delete a vehicle from a customer record. These activities are accomplished in the Vehicle screen.

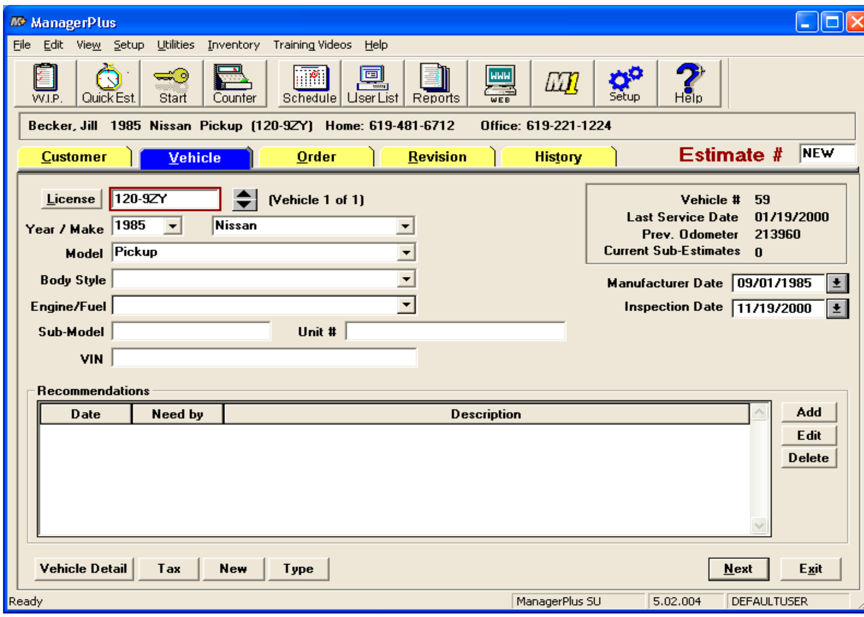
To open the Vehicle screen:

- Click your mouse pointer on the **Vehicle** thumb-tab from the Customer screen after entering customer information. This associates the vehicle you are about to enter with the customer you entered.

OR

- Select **Vehicle Screen** from the Utilities menu. This creates a new vehicle record to which you can later associate a customer.

The Vehicle Screen displays.



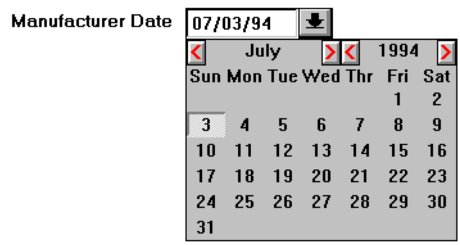
Vehicle Screen

Entering and deleting Vehicle(s)

To enter a new Vehicle:

1. In the Vehicle Screen, enter a license number.
2. Select Year, Make, and Model from the pull-down lists.
3. (Optional) Enter Sub/Model (for example, 4 Door, Conv., etc.) for extra identification, if desired, and Unit # (an identifying number such as Cab #, Fleet #, etc.).

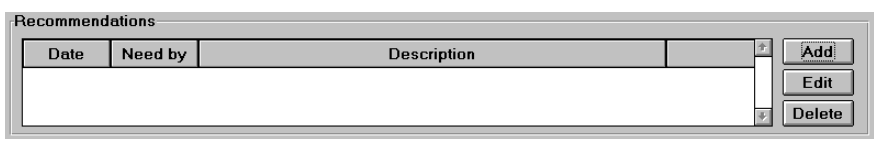
4 (Optional) Type in, or select from the pull-down calendar, a Manufacturer Date. This is the date of manufacture for the vehicle.



Pull-Down Calendar

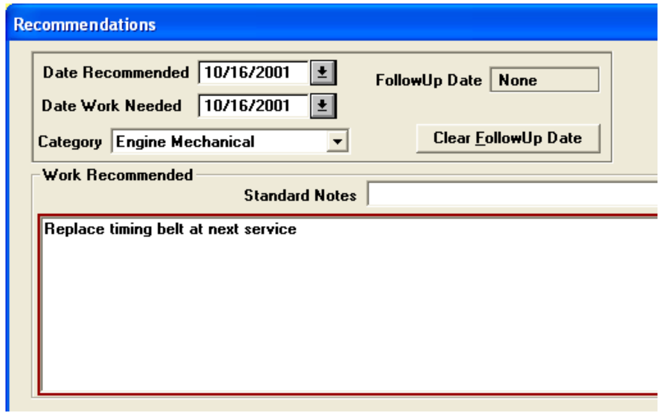
5 (Optional) Type in, or select from the pull-down calendar, an Inspection Date. You can use this field to enter the date that the vehicle is due for a regular inspection of some sort (for example, a Smog Inspection).

6 Select **Add** in the Recommendations grid, if necessary, to add recommendations to the customer/vehicle record.



Recommendations Grid

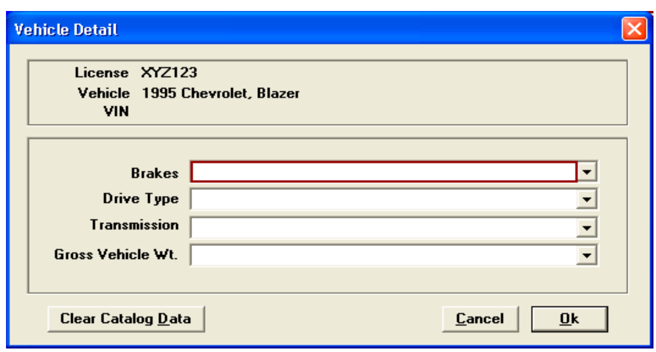
The Recommendations dialog box appears.



Recommendations

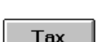
7 Type in any recommendations to be viewed at the next customer visit. Select **OK** to save and close the Recommendations dialog box.

8 Select the **Vehicle Detail** button to open the Vehicle Detail dialog box, if necessary. Open this dialog box if you wish to attach the engine type, brakes, drive type, transmission type, and/or vehicle weight to the vehicle record.



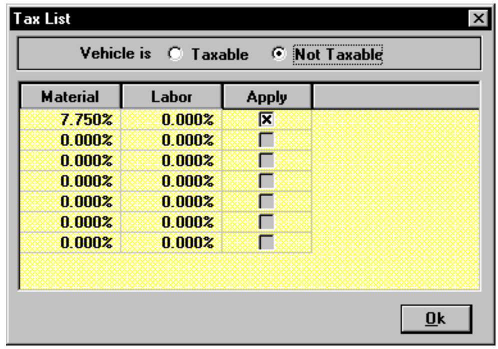
Vehicle Detail

9 Type, or select from pull-down lists, required information. Select **OK** to close the dialog box. Use the **Clear Catalog Data** button, to clear Vehicle information that has been imported from a supported parts catalog.



10 Select the Tax button to change the tax rate from the default, if necessary.

The Tax List appears.

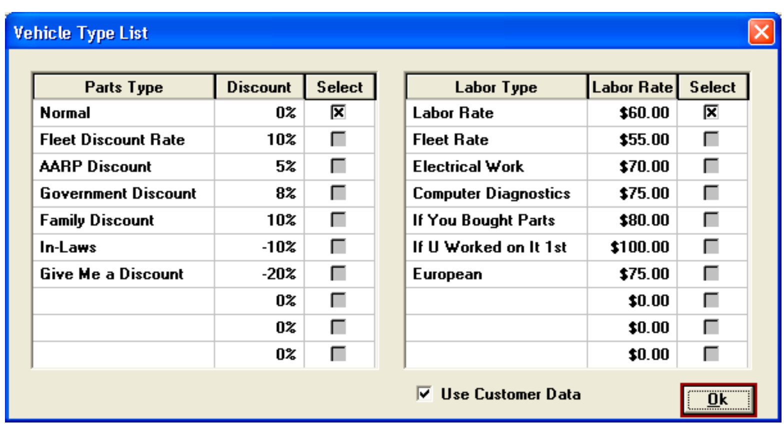


Tax List

11 Select/Deselect tax rates by clicking your mouse pointer in the appropriate Apply box(es). Select **OK** when tax changes are complete.

You have now completed entries to the vehicle screen.

12 Select **Type** if you want to choose a parts discount and shop labor rate for a vehicle. By default, these rates are the rates selected for the customer in the Customer Type List. Use the Vehicle Type List for instances in which you may have individual labor rates or parts discounts for different vehicles for the same customer. (For example, you might want to have special rates for an exotic or high-performance vehicle, etc.)



Vehicle Type List

- **To select a Parts Type/Discount:** Click your mouse pointer in one of the boxes in the Select field and click Ok. This will be the discount that will be applied to the vehicle.
- **To select a Labor Type/Rate:** Click your mouse pointer in one of the boxes in the Select field and click Ok. This will be the labor rate that will be applied to the vehicle.
- **To restore a Vehicle's rates to the Defaults:** Click the Use Customer Data checkbox at the bottom of the dialog box to restore the Customer Defaults for the Vehicle.

13 Select **Exit**, or any other system function, to exit the Vehicle Screen. Your Vehicle Screen input will be saved.

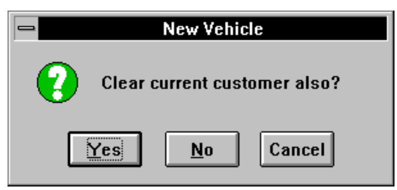
OR

Select any other menu item, icon, or thumb tab option to switch to a different program function. Your vehicle input will be added to the customer record in the database.

To add additional vehicles to a customer record:

1 After you have finished inputting information for the current vehicle, select **New**.

A dialog box asks if you wish to clear the current customer.



Clear Customer?

2 Select **No** because you are adding additional vehicles to the same customer.

The Vehicle Screen is cleared.

3 Type in a unique License number and complete the remaining fields as detailed in the previous procedure.

4 Select **Exit**, or any other system function, to exit the Vehicle Screen. Your Vehicle Screen input will be saved.

OR

Select any other menu item, icon, or thumb tab option to change to a different panel. Your vehicle input will be saved.

To delete a vehicle:

1 In the Vehicle Screen, with the vehicle you wish to delete selected, select **Remove Vehicle** from the Edit menu.

A message asks that you confirm the deletion.

Remove Vehicle?

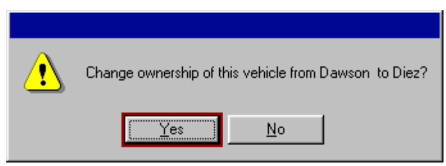
2 Select **Yes** to permanently remove the vehicle from your database.

To change a vehicle's ownership:

1 In the Vehicle Screen, with the vehicle you want to change ownership on selected, click the **Change Ownership** button.

2 Pick a new customer from the Customer List.

You are prompted to confirm your action.



Change Ownership?

3 Click **Yes** to assign the vehicle to a different owner.

End Of Day Reports

End Of Day reporting allows you to designate reports to be printed when you exit Manager at the end of the shift, end of the day or over any other desired time period (e.g. weekly, monthly). The End Of Day selection from the Utilities menu initiates the end of day reporting process.

NOTE: The reports to be included in the End Of Day report run are designated in end of day report setup. Refer to Chapter 3, “Shop Setup” for details on report setup and Chapter 10, “Reporting” for details on running End of Day Reports.

Summary

This chapter began with a description of program utilities followed by a discussion of the steps required to create parts kits, and canned jobs. The screens and dialog boxes in which customer and vehicle information are recorded were described as well. The following chapter describes the procedures for setting up and administering the program security function.

Chapter 5
Security

Overview

The program offers password protected access to certain system functions. This chapter describes the steps required to designate system functions as protected and then the steps required to define user access to protected functions. The chapter concludes with a description of how the user enters a password to access a protected function.

How Manager Security Works

A single user, usually designated the system administrator, must define which system functions should be protected and then define which users should have access to protected functions.

Program security works via password protection. When you attempt to work in a protected dialog box, or perform a protected function, the program requires that you enter a password. If you correctly enter a valid password, you are allowed to continue. If not, you are not allowed to perform that function.

What this means is that, unlike many other security-protected programs, you don't need to log on when you start to work, or when you take over from another user at a work station. The security system design eliminates the risk that one user will forget to log out creating an opportunity for unauthorized users to access sensitive functions.

Setting Up Protected Functions

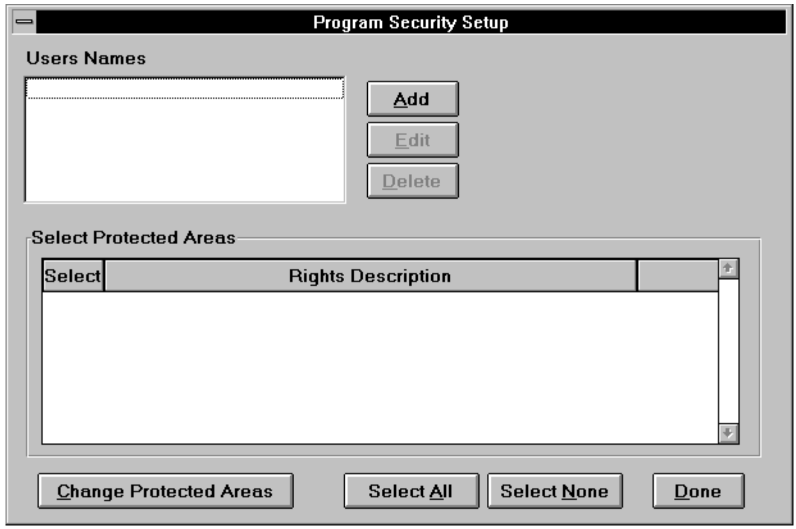
The program is shipped without security enabled. It is up to the designated system administrator to determine which, if any, functions to protect and who in your shop should be allowed to access protected functions.

Program Security is opened from the Setup menu.

To open Program Security:

- Select **Program Security** from the Setup menu.

The Program Security Setup dialog box appears.



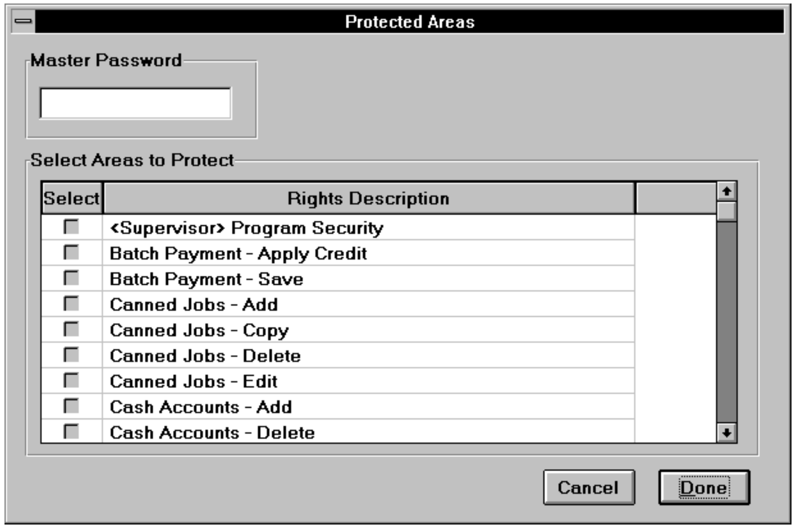
Program Security Setup

The first step in creating password protection for your shop is setting up protected areas.

To set up protected areas:

1 In the Program Security Setup dialog box, select **Change Protected Areas**.

The Protected Areas dialog box appears.



Protected Areas

The Protected Areas dialog box is comprised of three working areas. These areas are described below.

Field	Description
Master Password	The password that is used by the designated system administrator to access all areas of the system.
Select	The check boxes determine which functional areas a user will be able to access.
Rights Description	A description of the dialog box, or system function, to which protection can be applied.

2 Enter a **Master Password**.

This password will allow access to all areas of the system. If you are the person who is responsible for managing the security of the system, you will want to be the only person who knows the Master Password. If someone else will be responsible for administration of security in your shop, that person should enter the Master Password.

NOTE: Write down your password and keep it in a safe place. If you forget your password you will need to call technical support for a new master password.

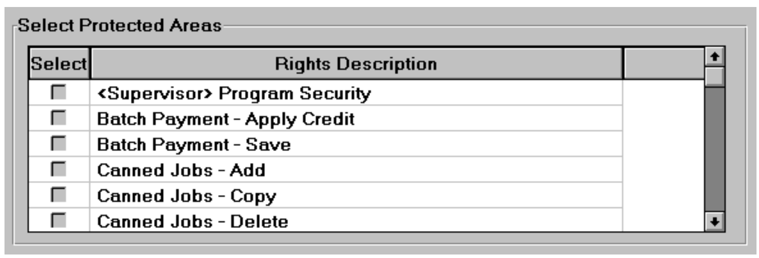
3 Select areas to be protected by clicking your mouse pointer in the box next to the desired area in the “Select” area.

The protected areas that you choose is a management decision of your shop that should reflect the need to control access to sensitive system functions such as customer payments, tax rates, etc.

NOTE: You must choose <Supervisor> Program Security as a protected area to prevent any system user from being able to change security access.

4 Choose **Done** when finished designating areas to be protected.

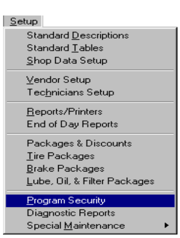
You are returned to the Program Security Setup dialog box. The dialog boxes and system functions that you have designated to be protected now appear in the Select Protected Areas of the dialog box.



Select Protected Areas Section

You are now ready to add users and to designate which protected functions each will be allowed to access.

User Setup



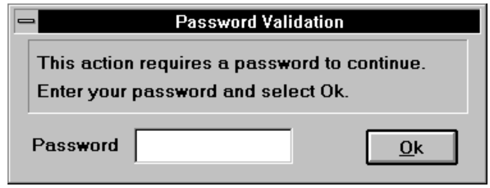
Individual users are added, and deleted, and their access to protected system functions are defined, in the Program Security Setup dialog box. These users are different than, and should not be confused with, the users set up in the User List for Display Preferences.

NOTE: Any time that you exit the Program Security Setup dialog box after designating the <Supervisor> Program Security function as protected, you will need to use your master password to get back into Program Security Setup.

To enter Program Security after it has been protected:

1 Select **Program Security** from the Setup menu.

The Password Validation dialog box requires that you enter a password.

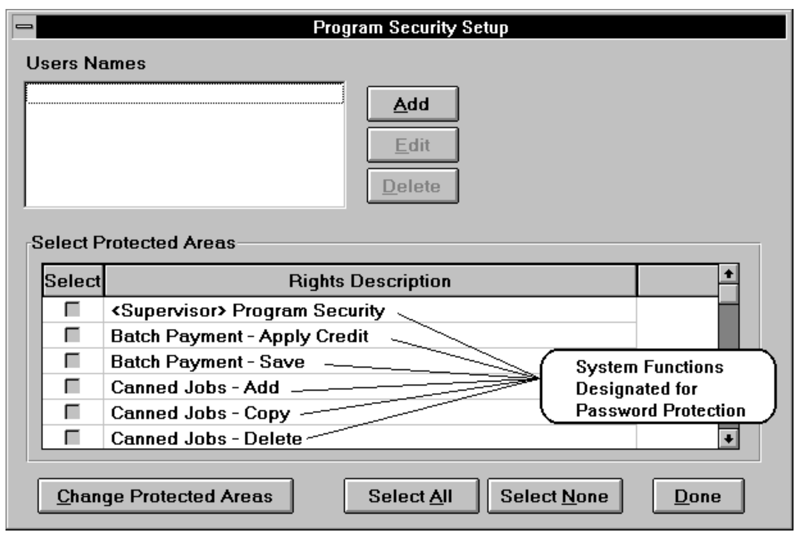


Validate Password

2 Enter the master password that you designated when you set up the protected areas (refer to previous section, if necessary).

3 Select **OK**.

The Program Security Setup dialog box appears.



Program Security Setup

The system functions that have been designated as protected display in the Select Protected Areas portion of the dialog box.

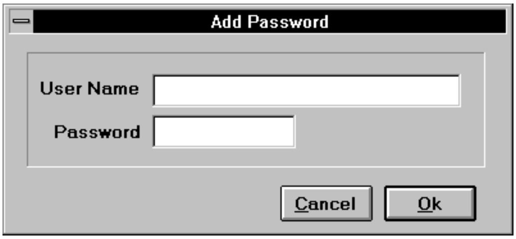
Adding Users

Once you have defined the areas of the system that you would like to password protect, the next step is to add users and provide them with passwords.

To add a user:

1 In the Program Security Setup dialog box, select **Add**.

The Add Password dialog box appears.



Add Password

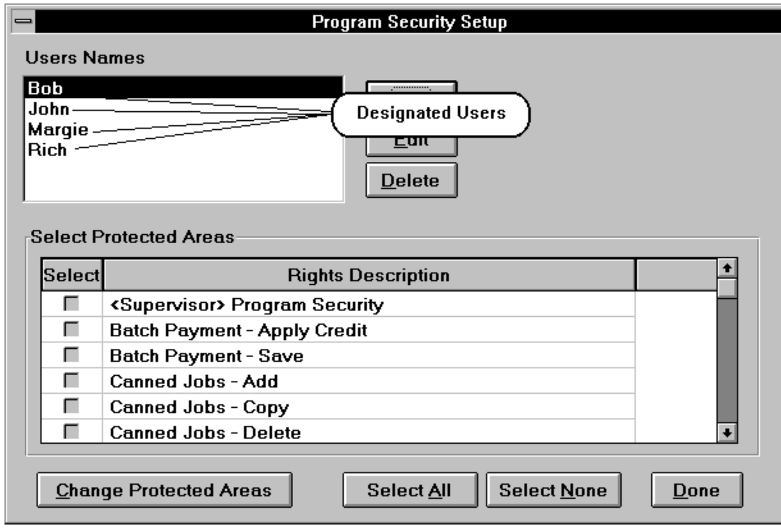
2 Enter a user name (up to 30 characters).

3 Enter a password (up to 8 characters).

NOTE: Make sure to record all passwords so that they can be provided to the users.

4 Select **OK**.

You are returned to the Program Security Setup dialog box with the name of the newly entered user displayed in the Users Name portion of the display. Repeat the above steps as many times as necessary until all users have been added to the Users Names list.



Users' Names

Defining User Access

Once all users are added, the next step is to define which of the protected functions each user will be allowed to access. Over time, you may need to edit a user's name and/or password, or delete a user from the program security system.

Setting up Users Security access for each system user must be individually defined.

To define user security access:

1 Click your mouse pointer on the name of the user.

The user's name is highlighted.

2 Click your mouse pointer on the box beside the name of each protected area that you wish the user to be able to access. An "x" in the box appears indicating that it has been selected.

You can also use the Select All button to select all protected functions for a given user or the Select None button to clear all selections and start over.

Use the scrollbar on the right-hand side of the Rights Description box to view additional protected areas, as necessary.

3 Repeat steps 1 and 2 above to define security for additional users until password protection for all system users has been defined.

4 Select **Done** when finished.

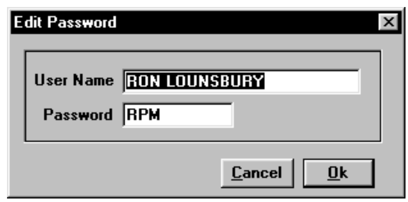
Editing a User's Name/Password

Periodically, as a security precaution, you will want to change user passwords. You may also have a need to change a user's name. The Edit command in the Program Security Setup dialog box is where you change user's passwords.

To edit a user's name and/or password:

1 In the Program Security Setup dialog box, select **Edit**.

The Edit Password dialog box displays.



Edit Password

2 Overtype the User Name and/or Password as desired.

3 Select **OK** to save and return to the Program Security dialog box.

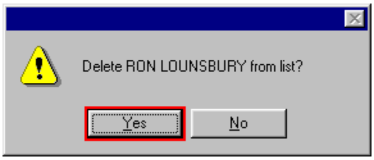
Deleting a User

Once a user no longer requires access to the system, you will want to remove his security access.

To remove a user's security access:

1 In the Program Security Setup dialog box select **Delete**.

A dialog box asks that you confirm your deletion.



Confirm Delete

2 Select **Yes**.

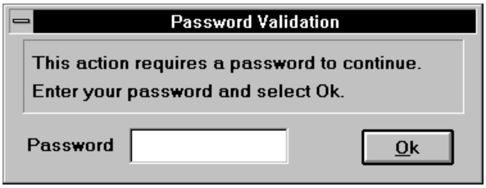
The user is removed from the Users Name list. That user will no longer be able to access any of the protected system functions.

Accessing Protected Functions

This section describes the steps required for users to access protected functions. Program security works via password protection. When you attempt to work in a protected dialog box, or perform a protected function, the program requires that you enter a password. If you correctly provide a valid password, you are allowed to continue. If not, you are not allowed to perform that function.

Program Security works differently for some functions than it does for others. Sometimes protection is enabled when you try to enter a certain screen or dialog box; at other times, you are able to get into the screen or dialog box, but are not able to use a designated function or are not able to save once you have finished. In any case, the procedure for supplying your password to the system to gain access to a protected function is the same.

When you attempt to perform the protected activity, the Password Validation dialog box displays.



Validate Password

To access a protected function:

1 Enter your password.

2 Select **OK**.

You are allowed to continue.

Summary

This chapter described the steps required to set up and administer the password protection feature of the program. It concluded with a discussion of user access to protected system functions.

Chapter 6
Orders

Overview

This chapter details the steps you will follow to create Quick Estimates, Counter Sales, Estimates, Repair Orders, and Invoices. The chapter concludes with a discussion of the Work In Progress (W.I.P.) screen.

Before You Begin

Before you can perform the activities described in this chapter, you must already have the program installed and running on your computer. If you have not already done so, complete the installation instructions in Chapter 2, "Getting Started." You must also have configured the lists, rates, and descriptions for your shop as described in Chapter 3, "Shop Setup."

Order Lifecycle

An order typically starts out as an estimate of the cost of parts and labor to perform a repair or vehicle maintenance service. You can choose to start from a **Quick Estimate**, a bare-bones quote, or you can create a regular **Estimate**. If the customer agrees to the Estimate, it is converted to a **Repair Order**, and printed for the customer to sign as acceptance of the work to be performed. Once the work is completed, the order is converted to an **Invoice—**a request for payment.

As estimates, repair orders, and invoices use exactly the same data, and look the same in the program, they are generically referred to as "orders" throughout this chapter. The terms estimate, repair order, and invoice actually are more indicative of order *status* than order *type*. In fact, it is not necessary to begin with an estimate; you can start with a repair order, or even an invoice.

For example, a regular customer might drive his car into your shop for his bi-monthly oil change. He doesn't need an estimate—he knows how much it is going to cost. You don't need a repair order—you know he's not going to dispute the charges. So you do the work and create an invoice when you're done. The program offers the flexibility to adapt to your needs.

This chapter, however, is structured to follow the more conventional scenario of estimate leading to repair order leading to invoice.

Quick Estimate

The Quick Estimate panel allows you to create a quick quote using a bare minimum of information. This screen is particularly useful in situations where you may not get the sale, for example, a phone call from a customer who is calling several shops for the lowest price on a job. In this case, you would create a quick estimate so that you can quickly quote a price. If the customer decides to accept the job, the quick estimate can be easily converted into a regular estimate.

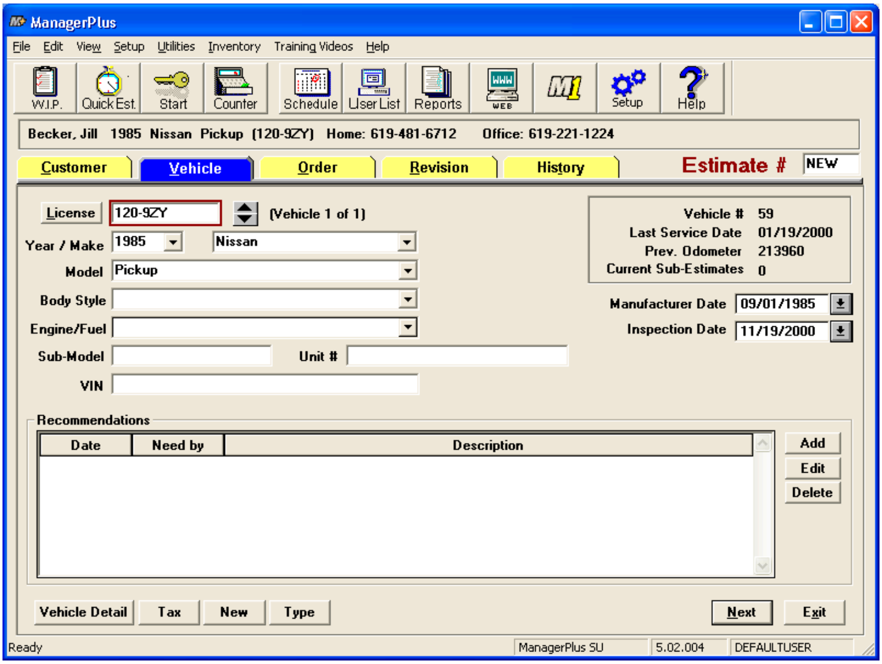
To create a Quick Estimate:

1 Select Quick Estimate from the toolbar.

OR

Select Quick Estimate from the View menu.

The Quick Estimate Panel displays.



Quick Estimate - Select Vehicle

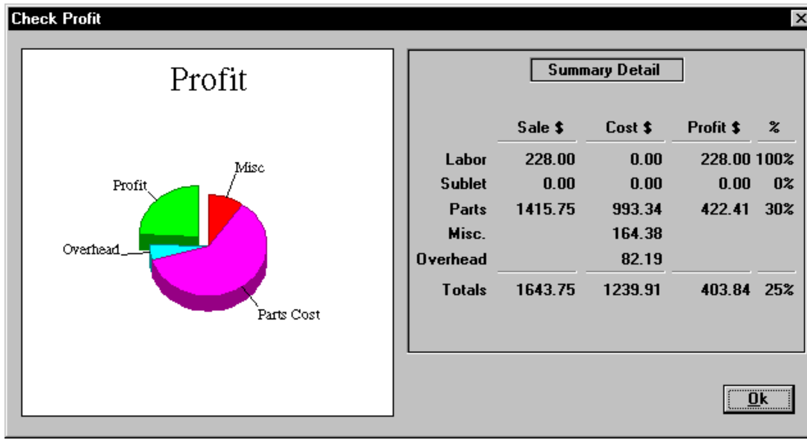
2 Select a Service Writer from the pull-down menu in the Written By field.

3 Select a Year, Make, and Model.

4 Add repair lines using the dialog boxes accessed via the Repair Line buttons.

NOTE: The tools accessed via the Repair Line Buttons are discussed in detail later in the chapter.

5 Check the profit margin on your Quick Estimate, if desired, by selecting the **Check Profit** button. The Profit Wizard displays.



Check Profit

The Profit Wizard provides you with a graphical representation of your profit margin on the estimate in the form of a pie chart and a summary of the profit detail in the form of the Summary Detail matrix. The cost elements of the profitability calculation displayed in the Profit Wizard are described below:

Cost Element	Description
Labor Cost	The estimated cost of labor as a percentage of the order total.
Sublet Cost	The estimated cost of sublet operations as a percentage of the order total.
Parts Cost	The estimated cost of parts as a percentage of the order total.
Misc.	Miscellaneous Overhead is a fixed percentage of order total.
Overhead	Overhead is a fixed percentage of order total.

NOTE: Labor and Parts markups and overhead percentages are applied in the MarkUp selection in the Shop Data Setup submenu in the Setup menu.

6 Select **Convert to Estimate** to convert your quick estimate into a regular estimate. You are taken to the Customer Screen.

OR

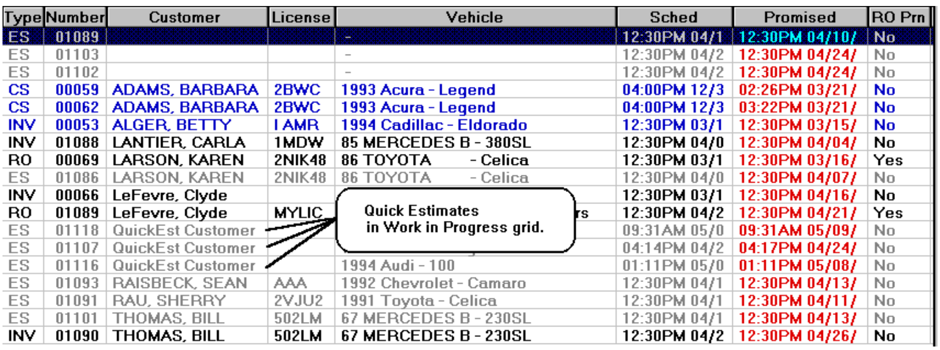
- Select **Cancel** to cancel your quick estimate. You are returned to the Work in Progress screen.

  OR

- Select **Parts Ordering** to conduct a price check on the parts or place an order.

  OR

- Select **Exit** to save your quick estimate and return to the Work in Progress screen. The unnamed quick estimate appears in the W.I.P. screen as displayed below.



Type	Number	Customer	License	Vehicle	Sched	Promised	RO Prn
ES	01089			-	12:30PM 04/1	12:30PM 04/10/	No
ES	01103			-	12:30PM 04/2	12:30PM 04/24/	No
ES	01102			-	12:30PM 04/2	12:30PM 04/24/	No
CS	00059	ADAMS, BARBARA	2BWC	1993 Acura - Legend	04:00PM 12/3	02:26PM 03/21/	No
CS	00062	ADAMS, BARBARA	2BWC	1993 Acura - Legend	04:00PM 12/3	03:22PM 03/21/	No
INV	00053	ALGER, BETTY	I AMR	1994 Cadillac - Eldorado	12:30PM 03/1	12:30PM 03/15/	No
INV	01088	LANTIER, CARLA	1MDW	85 MERCEDES B - 380SL	12:30PM 04/0	12:30PM 04/04/	No
RO	00069	LARSON, KAREN	2NIK48	86 TOYOTA - Celica	12:30PM 03/1	12:30PM 03/16/	Yes
ES	01086	LARSON, KAREN	2NIK48	86 TOYOTA - Celica	12:30PM 04/0	12:30PM 04/07/	No
INV	00066	LeFevre, Clyde			12:30PM 03/1	12:30PM 04/16/	No
RO	01089	LeFevre, Clyde	MYLIC	rs	12:30PM 04/2	12:30PM 04/21/	Yes
ES	01118	QuickEst Customer			09:31AM 05/0	09:31AM 05/09/	No
ES	01107	QuickEst Customer			04:14PM 04/2	04:17PM 04/24/	No
ES	01116	QuickEst Customer		1994 Audi - 100	01:11PM 05/0	01:11PM 05/08/	No
ES	01093	RAISBECK, SEAN	AAA	1992 Chevrolet - Camaro	12:30PM 04/1	12:30PM 04/13/	No
ES	01091	RAU, SHERRY	2VJU2	1991 Toyota - Celica	12:30PM 04/1	12:30PM 04/11/	No
ES	01101	THOMAS, BILL	502LM	67 MERCEDES B - 230SL	12:30PM 04/1	12:30PM 04/13/	No
INV	01090	THOMAS, BILL	502LM	67 MERCEDES B - 230SL	12:30PM 04/2	12:30PM 04/26/	No

Quick Estimates in W. I. P. Grid

Selecting a quick estimate from the Work in Progress screen converts it into a regular estimate.

Estimates, Repair Orders, and Invoices

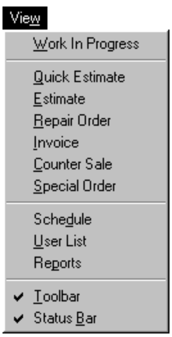
As described earlier in the chapter, the order generation process normally begins with an **Estimate—**a customer request for a quote of the cost and time required to make a repair, or provide a maintenance service. If the customer agrees to the estimate, it is converted to a **Repair Order**, and printed for the customer to sign. This is considered to be an agreement to the terms of the work to be performed. Once the work is completed, the order is converted to an **Invoice—**a request for payment.

The dialog boxes used to complete an estimate, repair order, or an invoice are essentially the same. Rather than representing different *types* of orders, the terms estimate, repair order, and invoice are more indicative of order *status*—the stages that an order progresses through as it moves through the system. This section will therefore begin with a discussion of the Panels used in creating the order and then conclude with a discussion of the process of converting an estimate to a repair order to an invoice.

Order Entry Panels

Selecting the Estimate, Repair Order, or Invoice icons from the button bar, or selecting any of these functions from the View menu, brings up the Order Entry Panels.

Alternatively, if you are working in the One Start toolbar mode, you can choose the Start icon to begin the order.



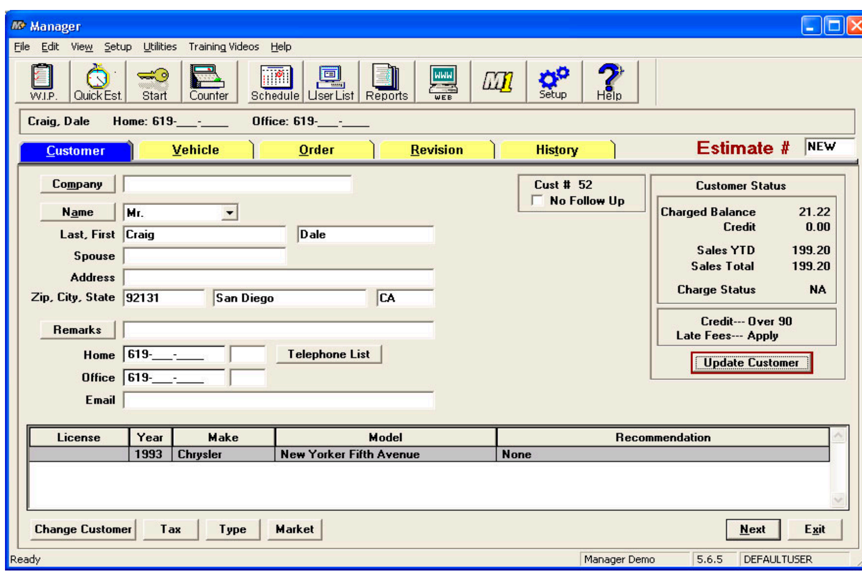
To begin an order:

- Select the **Estimate**, **Repair Order**, or **Invoice** icon from the button bar.

OR

- Select the **Start** icon if operating in the One Start toolbar mode.

The Customer Screen, the first of the Order Entry panels displays.



Order Entry Panels

There are five Order Entry panels. Selecting any of the tabs at the top of the Order Entry display causes a new panel, with related information, to come to the forefront of the display.

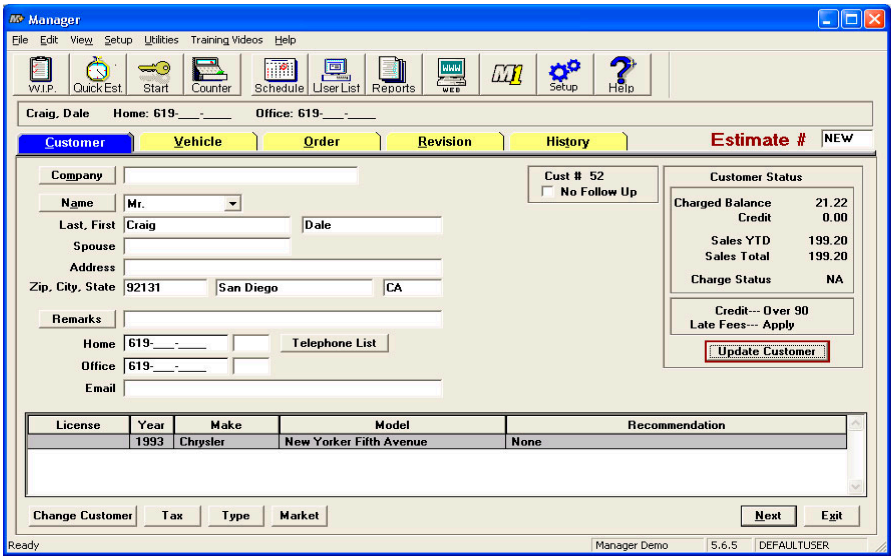
Thumb Tabs

The five panels are:

Panel Name	Function
Customer	Enter information about the customer, or if a business, about the company.
Vehicle	Add, change, or delete vehicles from the customer record.
Order	Create parts and labor repair lines for the order and perform other tasks (print order, convert order status, check profit, etc.).
Revision	Prepare up to nine individual estimates for additional work which can be selectively applied to the order.
History	View order history for the current vehicle or for all of a customer's vehicles.

Customer Panel

The Customer panel is where you enter customer information into the order. You can select a current customer from the Customer List, or you can add a new customer to the order and at the same time add that customer to the Customer List.



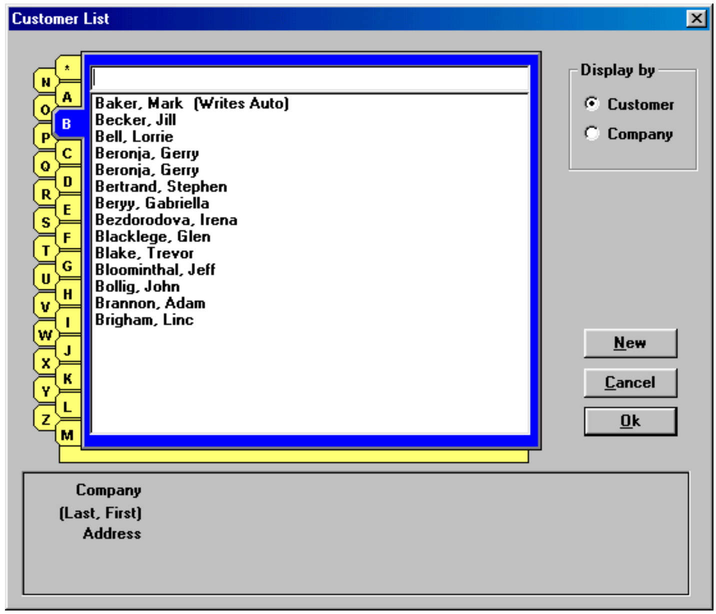
Customer Panel

This is the panel that will be displayed first when you create a new Estimate, Repair Order, or Invoice.

To select an existing customer:

1 In the Customer panel, select **Name** to select a customer, or **Company** to select a business customer.

The Customer List displays.



Customer List

NOTE: You can toggle the list between Customer and Company by selecting the appropriate button in the Display by box.

2 Click your mouse pointer on the tab with the first letter of the desired name along the left side of the list.

3 Highlight the appropriate Customer/Company name.

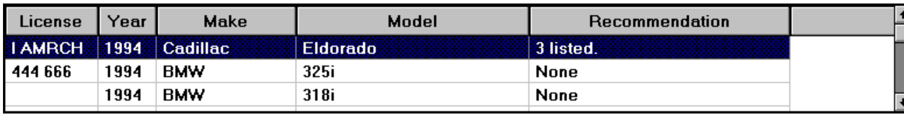
4 Select **OK**.

You are returned to the Customer panel with the Customer/Company information transferred to your order.

5 Add any additional information to the customer record.

NOTE: Chapter 4, “Utilities” contains detailed instructions on available options and on completing the fields of the Customer panel.

6 If the customer has more than one vehicle, highlight the desired vehicle in the Vehicle Selection box.



License	Year	Make	Model	Recommendation
I AMRCH	1994	Cadillac	Eldorado	3 listed.
444 666	1994	BMW	325i	None
	1994	BMW	318i	None

Vehicle Selection Box

7 Select **Next** to continue the order at the Vehicle panel.

OR

Select **Exit**. A dialog box asks if you would like to save Customer Information. Choose **Yes** to save.

To create a new customer:

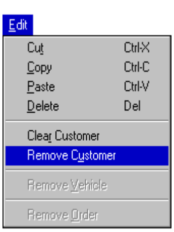
1 Complete the data fields in the Customer Screen.

NOTE: Chapter 4, “Utilities” contains detailed instructions on available options and on completing the fields of the Customer panel.

2 Select **Next** to add the customer to the order and to the customer database. You are taken to the Vehicle screen.

The next time the customer visits your shop, you can pull his name from the Customer List.

To delete an existing customer:



1 In the Customer Panel, select the **Name** button to bring up the Customer List, or the Company button to bring up the Customer List with companies listed.

2 Select the customer/company you wish to remove from the list.

3 Select **OK**.

You are returned to the Customer panel with information from the selected customer/company entered in the appropriate fields.

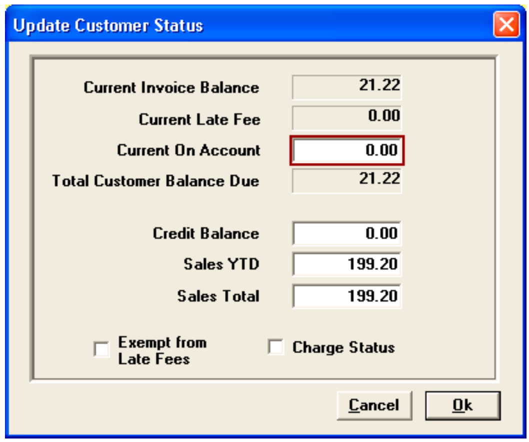
4 Select **Remove Customer** from the Edit menu.

You are asked to confirm your deletion.

5 Select **Yes** to remove the Customer from the database.

Customer Status The Customer Status area of the Customer Panel displays payment and credit status for the selected customer. Choose the Update Customer button to open the **Update Customer Status** dialog box.

Note: By Default, the Update Customer Status dialog box is password protected. Refer to Chapter 5 Security for details on working with password protection.



Customer Status

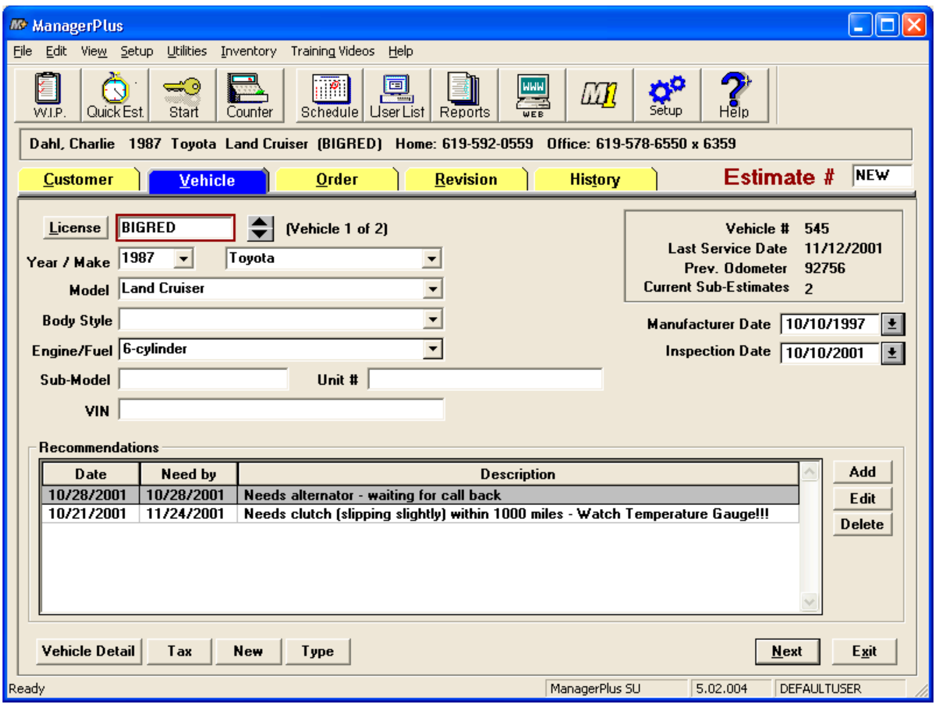
The dialog box contains the following fields:

Field	Description
Charged Balance	The unpaid balance of customer charges.
Sales YTD	Sales for the current year.
Sales Total	Total (cumulative) recorded sales for the customer.
Exempt from Late Fees	Check this box to exempt the customer from late fee assessment.
Charge Status	Flags customer as eligible/ineligible for credit privileges.

Note: Access to the Update Customer Status dialog box can be password protected. Because of the sensitive nature of the data that can be modified in this dialog box, it is highly recommended that access to this dialog box be limited to authorized personnel only. Refer to Chapter 5, Program Security for details.

Vehicle Panel

Once you have either added a new customer, or selected a current customer, you will work in the Vehicle screen. If you have just added a new customer, you will need to add a vehicle(s) to the customer record. Procedures for entering vehicle information, along with a description of fields, are provided in Chapter 4, "Utilities."



Vehicle Panel

The following options are available in the Vehicle panel.

Option	Description
Add	Opens the Recommendations dialog box, allowing you to add a recommendation to the customer record.
Edit	Opens the Recommendations dialog box, allowing you to edit an existing recommendation.
Delete	Removes a recommendation.
Vehicle Detail	Opens the Vehicle Detail dialog box, in which you can add, or edit, the Brakes, Drive Type, Transmission, and Gross Vehicle Wt. information.
Tax	Opens the Tax List, in which you select the tax rate(s) to apply to the order.
New	Clears the vehicle information from the screen. A second dialog box asks if you wish to clear the current customer also.
Next	Closes the Vehicle panel and switches you to the Order panel.
Exit	Closes the Vehicle panel, returning you to the Work In Progress grid.

Recommendations The Recommendations dialog box allows you to add reminder text to the vehicle record. This information will be displayed in the Vehicle screen as a reminder of repairs, or maintenance activity, that have been noted, but not yet performed.

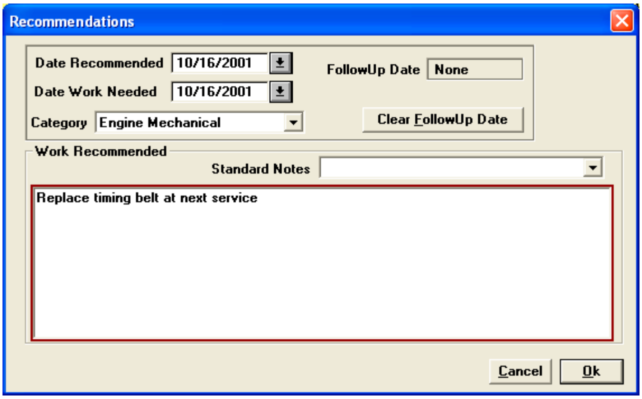
To open the Recommendations dialog box:

- Select **Add**, in the Vehicle screen, to add a new recommendation.

OR

- Select **Edit** in the Vehicle screen to edit an existing recommendation.

The Recommendations dialog box appears.



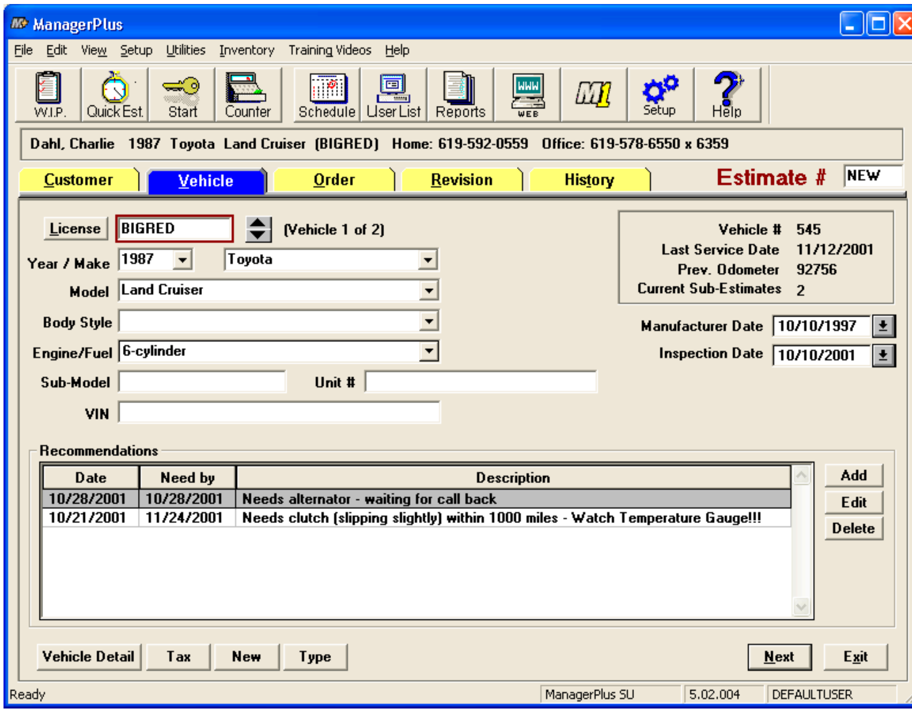
Recommendations

The Recommendations dialog box contains the following fields:

Field	Description
Date Recommended	The date that the repair was recommended to the customer.
Date Work Needed	The date that the repair work should be performed by.
Category	The Category of the selected repair
Standard Notes	Attach a Standard Note to the Recommendation.

Order Panel

Once customer and vehicle information has been entered, it is time to create the order. The Order panel is where the parts and labor repair lines, the heart of the order, are created.



Order Panel

To complete the Order:

1. Add/select the Customer and Vehicle as described in the previous section and choose the Order Tab to display the Order Panel.

   Customer and Vehicle information are displayed between the repair line buttons and the repair line display.
2. Select a service writer from the Written By pull-down choice list.
3. Change the Promised time, if necessary.
4. Change the Promised date from the current date, if necessary. Overtype the current date or select a new date from the popup calendar, as you prefer.

5 Type in a Hat #, and/or Ref #, in accordance with your shop's policy for identifying customer vehicles.

6 Enter the incoming odometer reading in the In field.

7 Add repair lines using the dialog boxes accessed from the Repair Lines Button Bar.

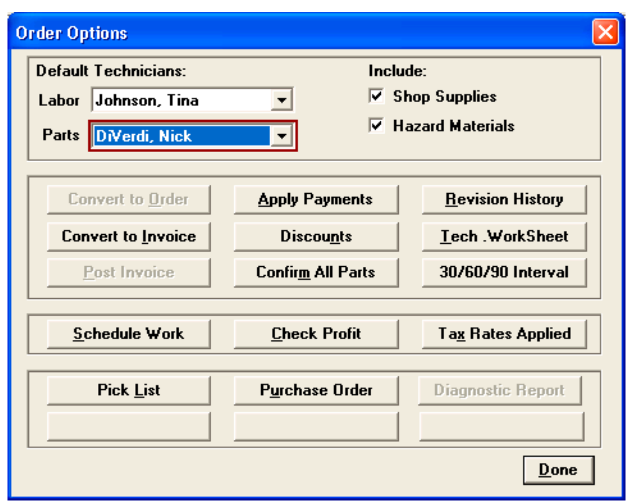
Repair Line Buttons

Refer to the "Building Repair Lines" section later in the chapter for detailed instructions on creating repair lines.

Once your repair lines have been built, your Order is complete. Although you can start an Order as a Repair Order, or an Invoice, most orders begin as an Estimate. Once the customer agrees to the work to be performed, the Estimate is converted to a Repair Order. Once the repairs are complete, the Repair Order is converted to an Invoice.

The Order Options dialog box provides options for changing the status of your order as well as a number of other functions.

8 Select **Options**, if necessary, to open the Order Options dialog box.



Order Options

The options available in this dialog box are briefly described below.

Option	Description
Convert to Order	Converts an estimate into a repair order.
Convert to Invoice	Converts an estimate, or a repair order, into an invoice.
Post Invoice	Allows you to post an invoice without posting payment, or to charge a residual balance to the customer's account.
Apply Payments	Opens the Apply Payments dialog box, where you can apply payments to an invoice.
Discounts	Opens the Add/Edit Discount dialog box in which you can change the parts and/or labor discount on the order. These discounts will display as a line item in the order grid.
Confirm all Parts	Confirms all parts on the invoice as having been used on the order.
Revision History	Opens the Revision History dialog box where you can view the date, authorization, and reason for any order revisions.
Tech. WorkSheet	Select to print a Technician Worksheet for the order.
30/60/90 Interval	Opens the Service Maintenance Interval dialog box which allows you to view service maintenance information and, if desired, transfer that information in the form of a canned job to the order. This dialog box is described at the end of this chapter.
Schedule Work	Opens the Schedule Work dialog box, in which you can put the job on the shop calendar. Scheduling is described in Chapter 8, “Work in Progress.”
Check Profit	Opens the Profit Wizard, a graphical representation of order profitability. The Profit Wizard is described earlier in this chapter.
Pick List	(ManagerPlus only) Select to generate a Pick List for the parts on the order.
Purchase Order	(ManagerPlus only) Select to generate a Purchase Order for the parts on the order.

9 Select **Done** to close the Order Options dialog box.

10 Select **Exit** to close the Order panel.

The new order displays in the Work-In-Progress screen.

Building Repair Lines

The Repair Lines Button Bar provides options for adding parts, labor, and notes to your order.

Repair Line Buttons

The buttons available are briefly described below.

Button	Function
Labor	Add labor hours and cost to the order.
Parts	Opens the Order item entry dialog box in which you can enter parts into your order.
Sublet	Add subcontracted parts and labor to the order.
Notes	Select a prepared note or add a unique note to order.
Canned Jobs	Opens the Canned Jobs dialog box where you can transfer canned jobs to the order.
Parts Kits	Opens the Part Kits dialog box from which you can transfer parts kits to the order.
Promotions	Opens the Promotions dialog box in which you Add, Edit, and Delete Packages and Discount Coupons or transfer them to an Order.
Symptoms	Opens the Symptoms Reported by Customer dialog box. Use this dialog box to record symptoms of poor vehicle performance reported by the customer.

Button	Function
30/60/90 Maintenance	Opens the Scheduled Maintenance Service Intervals dialog box. This screen allows you to view service maintenance information and, if desired, transfer that information in the form of a canned job to the order.
Repair	Connects you to OnDemand5 Repair, if installed. Year/Make/Model information, if available, is automatically passed over.
Parts and Labor	Connects you to OnDemand5 Estimator from which you can import parts and labor information (prices and times) into your orders.

The following sections detail procedures for adding repair lines to your order.

Labor Selecting the Labor repair line button opens the Order item entry - LABOR dialog box. You use this dialog box to add labor hours, and calculated cost to your orders.

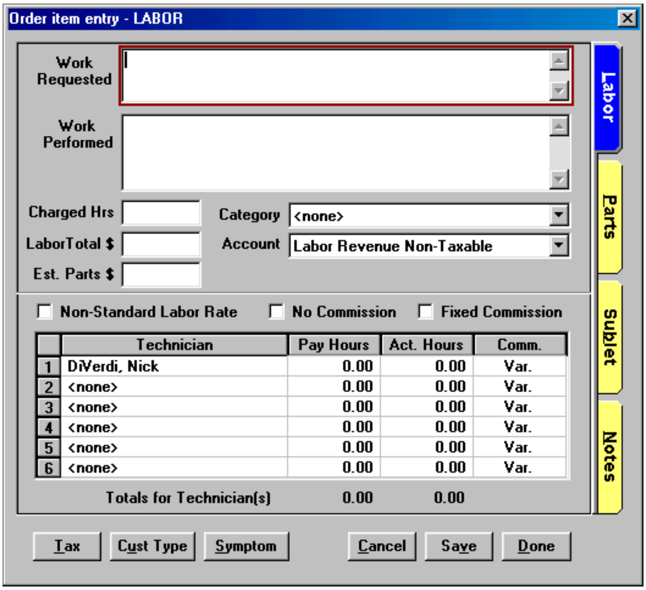
To add Labor to your Order:

1. Select **Labor** from the repair line button bar.

   The Order item entry - LABOR dialog box displays.
2. Enter a description of the labor item in the Work Requested box.
3. Enter hours to be charged in the Charged Hrs. field.

   OR

Enter a dollar amount in the Labor Total field.



Order Item Entry - Labor

The other field will automatically calculate at your shop's default labor rate as soon as you make another entry/selection. Click the **Non-Standard Labor Rate** check box if you want to de-link the labor hours and labor dollars, overriding them with non-calculated values.

4 Add an estimate of parts amount in the Est. Parts $ field if you want to add a rough estimate of parts cost to your order rather than actually adding parts and their cost.

NOTE: Normally you will want to add parts, and their associated cost, through the Add Parts and Inventory List dialog boxes described in the following section.

5 Select a **Category**.

6 Select an **Account**.

7 Change the Pay Hours and/or Actual Hours amount(s) in the Technician Detail box.

8 Select **Tax**, if necessary, to change from the default tax rate for this labor item.

9 Select **Cust Type**, if necessary, to change the labor rate for this line item from the Shop/Customer default.

10 Select **Save** to save your input and clear the panel so that you can enter an additional labor line item.

OR

Select **Done** to save your labor entry and return to the Order panel.

The new labor entry will appear in the repair lines.

Parts Selecting the Parts repair line button opens the Order item entry- PARTS dialog box. There are two ways that you can approach the task of adding parts to your orders. You can:

- Type parts information directly into the Order item entry-PARTS dialog box. This has the effect of adding the parts information to your order without using information *from* your database and without saving any information *to* your database.

OR

- Select part(s) that have already been entered into your database from the Inventory List. You can enter the part directly to your order if you know the part number or select the part from the Inventory List if you don't know the part number.

To add Parts information to your order:

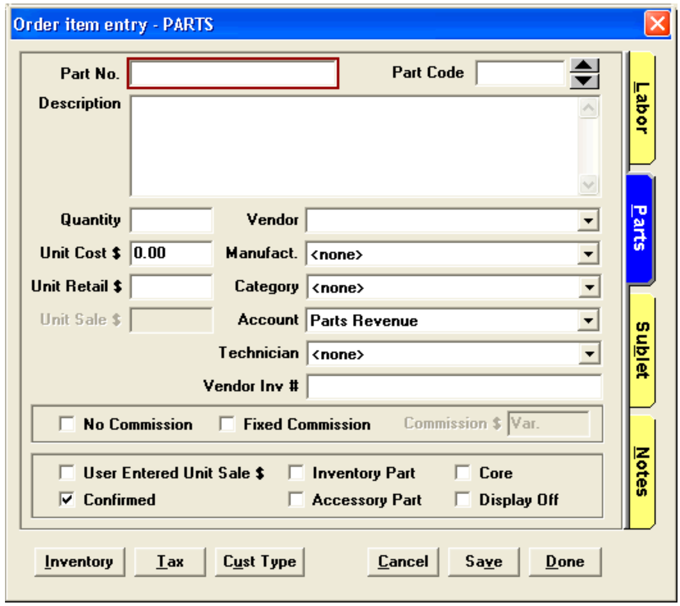
NOTE: Follow this procedure to enter parts information into your order for a part that is not in your Inventory List.

1. Select **Parts** from the repair line button bar.

   The Order item entry-PARTS dialog box displays.

2. Enter a part number (up to 20 characters) in the Part No. field.
3. Select a part type from the Part Type pull-down choice list. The Description field fills in automatically.

4 Complete the remaining fields and check boxes of the Order item entry-PARTS dialog box.



Order Item Entry - Parts

The fields and check boxes are described in the following table.

Field	Description
Qty.	The number of units of the item that will be used on the order.
Unit Cost $	The cost of each individual item.
Unit Retail $	The cost of each unit multiplied by the shop markup.
Unit Sale $	The unit retail amount less customer discount—if applicable. This amount can also be manually overwritten, as necessary, if the Fixed Unit Sale Amount check box (see below) is selected.
Manufacturer	The manufacturer of the item selected from a pull-down choice list.
Vendor	The vendor of the item selected from a pull-down choice list.

Field	Description
Category	The parts category of the item selected from a pull-down choice list.
Account	The general ledger account name of the item selected from a pull-down choice list.
Technician	The technician who is to be associated with the sale of the item selected from a pull-down choice list.
Vendor Invoice #	The number of the Vendor Invoice under which the parts were delivered.
Fixed Unit Sale Amount	Select this check box to manually overwrite the calculated sale amount. Once selected, enter the desired sale amount in the Unit Sale $ field.
No Commission	When selected, indicates that no commission is to be paid on the part sale.
Fixed Commission	Indicates that a fixed commission, rather than a commission calculated on the sale price, is to be paid on the sale of the part. When selected, the Commission $ field becomes enabled, allowing you to apply a commission dollar amount.
Part Confirmed On Invoice	Tags the part as having been used on the order.
Inventory Part	Select this field when you have entered part information that you want to use to create an inventory item record. A confirmation message asks, 'Do you want to create a new entry in Inventory?' Select Yes to create a new inventory item record with the information you have entered in the Order item entry - PARTS dialog box.
Accessory Part	Designates that the part is an accessory to be used in combination with another specified part.
Core	Designates that the part is a core (refund) item.
Display Off	Turns the Unit Cost $ field off for the Order item entry - Parts dialog box.

5 Select **Tax**, if necessary, to change from the default tax rate for this part.

6 Select **Cust Type**, if necessary, to change the labor rate for this line item from the Shop/Customer default.

7 Select **Save** to save your input and clear the panel so that you can add additional parts to your order.

OR

Select **Done** to save your parts input and return to the Order panel.

The new part entry appears in the repair lines.

To transfer a part from the Inventory List to your order (when you know the part number):

NOTE: Follow this procedure to transfer parts information into your order for an existing part that you have a number for.

1 Select **Parts** from the repair line button bar. The Order item entry- PARTS dialog box displays.

2 Type the part number in the Part No. field.

The remaining fields of the dialog box fill in with information about the part.

3 Make changes to the part data, if necessary.

4 Select **Tax**, if necessary, to change from the default tax rate for this part.

5 Select **Cust Type**, if necessary, to change the discount rate for this line item from the Shop/Customer default.

6 Select **Save** to save your input and clear the panel so that you can add additional parts to your order.

OR

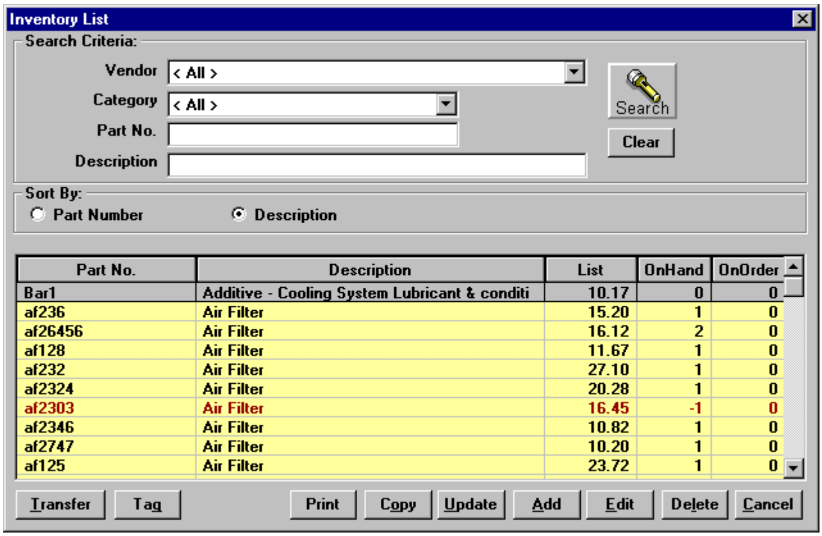
Select **Done** to save your parts input and return to the Order panel.

The new part entry appears in the repair lines.

To transfer a part from the Inventory List to your order (when you don't know the part number):

1 Select **Parts** from the repair line button bar. The Order item entry- PARTS dialog box displays.

2 Choose the **Inventory** button in the lower left corner of the display (choose the Parts List button if working in Manager). The Inventory List (Parts List for Manager users) dialog box displays.



Inventory List

NOTE: This is the same screen as the Inventory List dialog box used to add, edit, and delete parts from the parts database as described in Chapter 11. The only difference is that a Transfer button now appears in the dialog box allowing you to transfer parts to your order.

3 Type, or select from a pull-down list, identifying information for the part (as known):

- **Category**
- **Part #**
- **Description**

NOTE: You can use wildcards to conduct a search on partial information. For example, “AF%” in the Part Number field will find all part numbers starting with AF. As another example, “%OIL” will generate all part numbers with OIL in it.

4 Select the **Search** icon.

The Inventory List displays the parts which match your request.

5 Highlight the part you want to add to the order.

6 Select **Transfer**. Or use the **Tag** button to select multiple parts, then choose **Transfer**.

You are returned to the Order Item Entry-PARTS dialog box with the information from the selected part entered into the appropriate fields.

7 Edit any data fields, if necessary.

8 Select **Tax**, if necessary, to change from the default tax rate for this part.

9 Select **Cust Type**, if necessary, to change the labor rate for this line item from the Shop/Customer default.

10 Select **Save** to save your input and clear the panel so that you can add additional parts to your order.

OR

Select **Done** to save your parts input and return to the Order panel.

The new part entry appears in the repair lines. If you tagged multiple parts, the Parts dialog box displays until the transfer queue is empty.

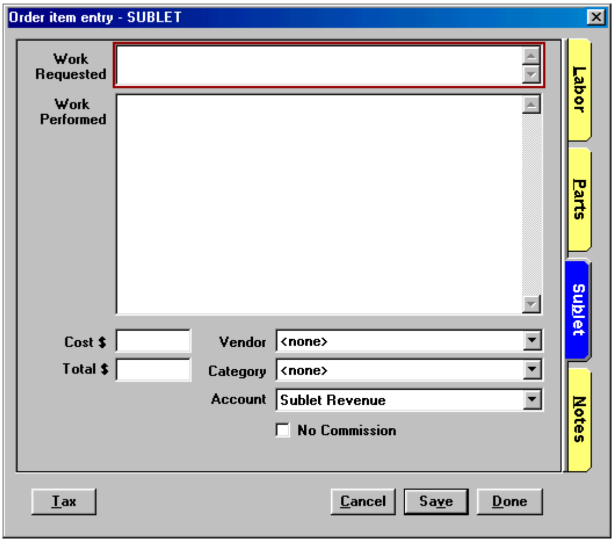
Sublet Selecting the Sublet repair line button opens the Order item entry- SUBLET dialog box.

Use this dialog box to add a repair line for subcontracted operations.

To add a sublet operation:

1 Select **Sublet** from the repair line button bar.

The Order item entry-SUBLET dialog box displays.



Order Item Entry - SUBLET

2. Add a description of Work Requested. This is a required field.
3. Add a description of Work Performed, if necessary.
4. Select **Vendor**, **Category**, and **Account** from the pull-down list.
5. Click the **No Commission** check box to not include any commission on the sublet item.
6. Enter **Cost $**.

   The Total $ calculates automatically based upon the mark-up you entered during setup.

NOTE: You can change the Total $ amount simply by overtyping it with any amount you choose.

7. Select **Tax** if you need to add tax to the Sublet item.
8. Select **Save** to save your input and clear the panel so that you can add additional sublet operations to your order.

   OR

   Select **Done** to save your sublet input and return to the Order panel.

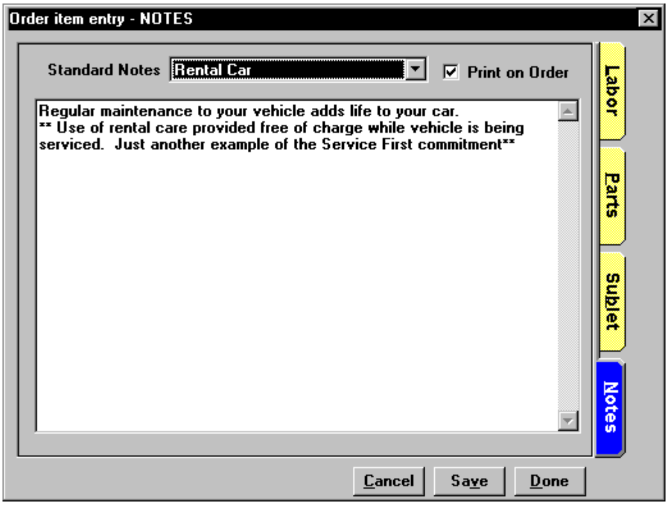
The new sublet entry appears in the repair lines.

NOTE: Selecting the Notes repair line button opens the Order item entry- NOTES dialog box. Use this dialog box to add notes, either standard, or customized, to your order.

To add a note to your repair lines:

1 Select **Notes** from the repair line button bar.

The Order item entry- NOTES dialog box displays.



Order Item Entry - NOTES

2 Select a standard note from the Standard Notes pull-down choice list. The text of the standard note appears in the large text entry box below.

OR

Type your own custom note in the large text entry box.

3 Click **Print on Order** if you want the description text to print on the order.

NOTE: You can conduct a spell check on the text of the note by pressing [F2].

4 Select **Save** to save your input and clear the panel so that you can add additional notes to your repair lines.

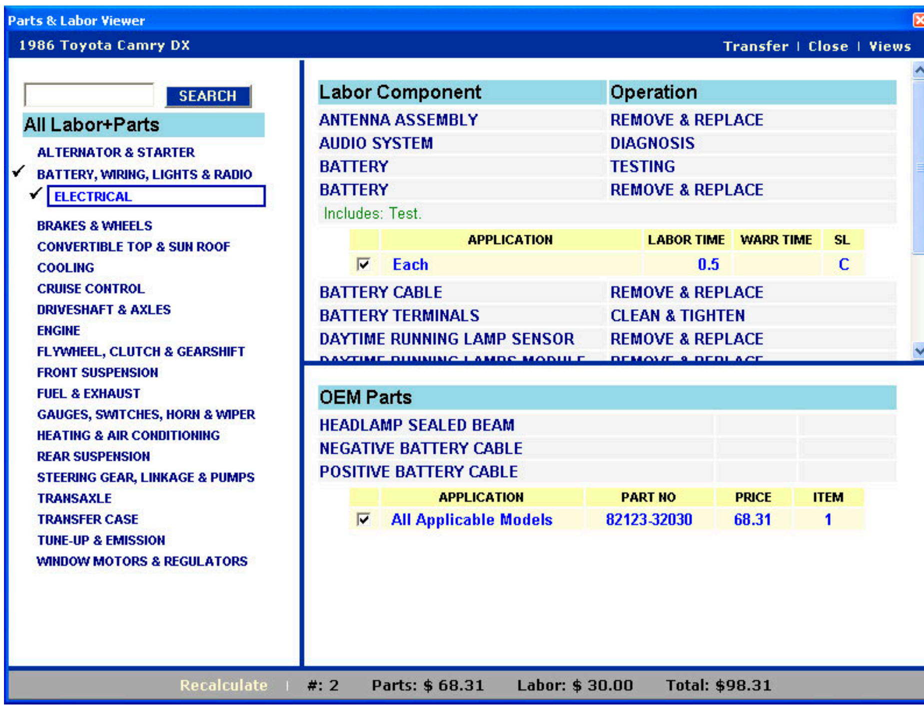
OR

Select **Done** to save your input and return to the Order panel.

The note appears in the repair lines.

Estimating The Parts and Labor icon opens the OnDemand5 Estimator program. This feature allows subscribers to transfer labor times and component prices from this industry-standard information source directly into their orders.

If you are a subscriber to Estimator, the Estimator splitter window displays. (As shown in the following figure.)



OnDemand 5 Estimator Splitter Window

The splitter window is where you begin your search for parts and labor information. Refer to Chapter 7, “Parts and Labor Interface” for instructions.

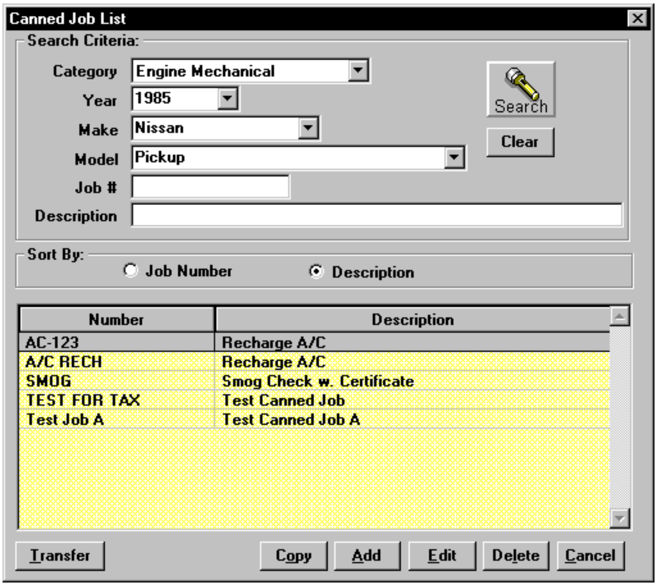
If you are not currently a subscriber, a dialog box provides ordering information. Call the displayed phone number for pricing and availability information on the Estimating module.

Canned Jobs Selecting the Canned Jobs repair line button opens the Canned Job List. You use this dialog box to transfer an existing canned job to your order.

To transfer a canned job to your order:

1 Select **Canned Jobs** from the repair line button bar.

The Canned Job List displays.



Canned Job List

2 Set up search criteria for locating the desired canned job.

NOTE: If you have selected a vehicle, year, make, and model information appears in the appropriate Search Criteria fields. You can use the Clear button, if desired, to Clear current vehicle information.

Aside from year, make, model, the following search fields are available:

Field	Description
Category	The category, or component grouping of jobs types, within which you wish to conduct your search.
Job #	Enter as many characters of the job number as desired. The program will locate all canned jobs that begin with matching characters.

Field	Description
Description	Enter as many characters of the canned job description as desired. Manager locates all canned jobs that begin with matching characters. You could enter “Brake,” for example, for a search of the canned jobs for Brakes or %Brake to find jobs with “Brake” anywhere in the description.

3 Select the **Search** icon.

The Canned Job List displays the canned jobs which match your request.

4 Highlight the canned job you wish to add to the order.

5 Select **Transfer**.

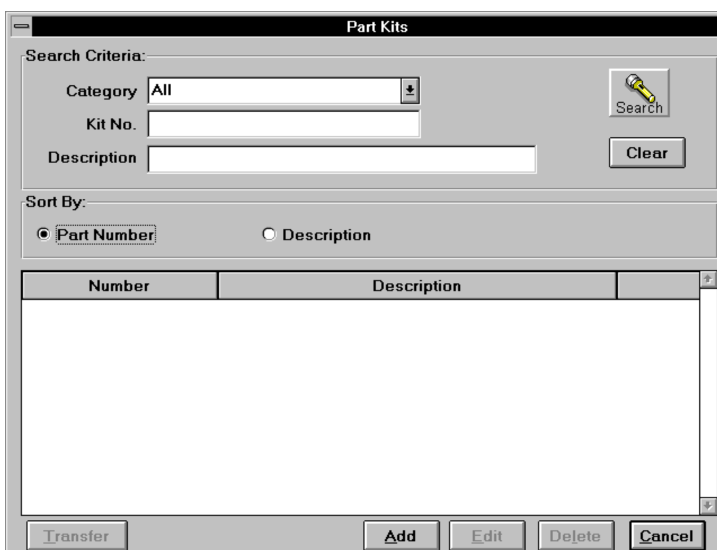
You are returned to the Order dialog box with the repair lines from the canned job added to your order.

Part Kits Selecting the Parts Kits repair line button opens the Part Kits List. You use this dialog box to transfer an existing parts kit to your order.

To transfer a parts kit to your order:

1 Select **Parts Kits** from the repair line button bar.

The Part Kits List displays.



Parts Kits List

2 Set up search criteria for locating the desired parts kit(s).

The following search fields are available:

Field	Description
Category	The category, or component grouping of kit types, within which you wish to conduct your search.
Kit No.	Enter as many characters of the kit number as desired. The program locates all parts kits that begin with matching characters.
Description	Enter as many characters of the kit description as desired. The program locates all parts kits that begin with matching characters.

NOTE: You can use the Clear button, if desired, to clear current entries in the Category, Kit No., and Description fields.

3 Select the **Search** icon.

The Part Kits list displays the parts kits which match your request.

NOTE: You are also able to add a new parts kit to your Parts Kits List to add to your order, if necessary. Refer to the procedure on adding parts kits in Chapter 4, "Utilities" for instructions.

4 Highlight the parts kit you wish to add to the order.

5 Select **Transfer**.

You are returned to the Order dialog box with the repair lines from the parts kit added to your order.

Copying Repair Lines You can copy line items from an Order, Canned Job or Parts Kit and then paste it into another Order, Canned Job or Parts Kit. Simply highlight the lines to be copied and press Ctrl + C (to copy the lines to your computer's "clipboard") and then click in the grid area of the Order, Canned Job or Parts Kit you want to paste to and press Ctrl + V to paste.

Removing Order Items You can remove any item from an order simply by clicking on it and pressing the Delete key. The repair line is removed and all totals are adjusted automatically.

Special Orders

Special Orders are provided to allow for an extra measure of tracking of orders to be completed in the future. The most common use for special orders are instances where you have the parts in stock to complete some, but not all, of the repairs on an order. What you can do is remove the order item(s) from the current order and use them to initiate a new special order.

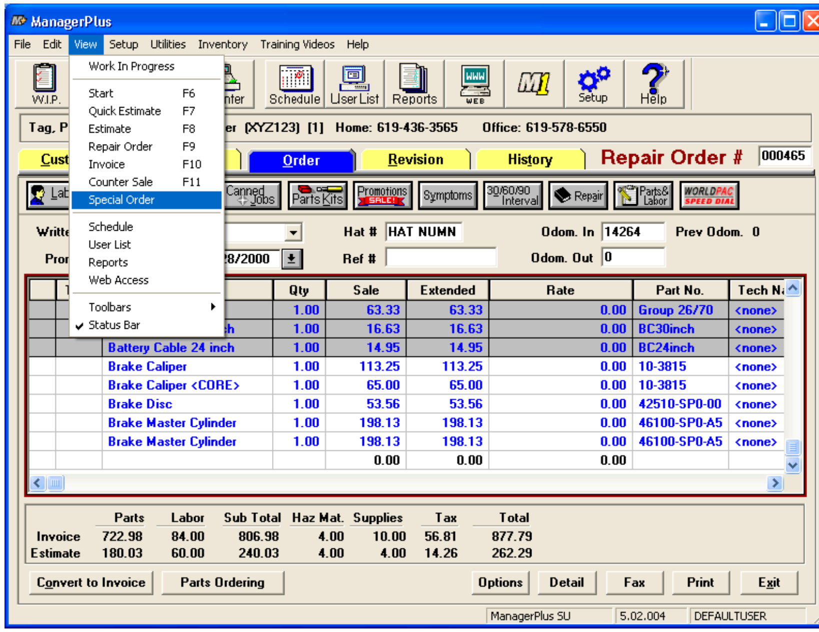
For example, let's suppose that you have an order for an air conditioning recharge, cooling system flush and check, and replacement of a door handle. You have the parts in stock to do the first two jobs but the door handle needs to be ordered from the manufacturer. You could create a special order for the door handle as described in the procedure below.

To create a Special Order:

1 In the Order panel of the estimate or repair order, highlight the repair line(s) to be transferred.

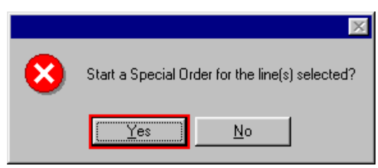
NOTE: Normally, you wouldn't create a special order from an invoice. However, if you do create a special order from an invoice, you cannot transfer parts that have been confirmed on an invoice to a special order. You must first unconfirm the parts in Parts Detail before transferring.

2 Choose **Special Order** from the View menu.



Special Order Selection

A message box asks if you want to start a Special Order for the selected repair line(s).



Start Special Order

3 Choose **Yes**.

4 The parts are removed from the original order and used to create a new order. Customer and Vehicle information are automatically entered.

ManagerPlus User's only - You probably will need to create a Pick List and then Purchase Order for the Special Order parts. Complete the steps below if you need to create a pick list.

5 Select the **Options** button.

The Order Options dialog box displays.

6 Select **Pick List**.

The Special Order parts appear in the Order Pick List dialog box. You can now convert the Pick List into a Purchase Order, if desired. Refer to Chapter 12, "Purchase Orders," for details.

Changing Order Status/Revision

Once the repair lines for an order have been constructed, the heart of the order is complete—you now have created an itemized, totalled summary of the work to be performed. There are still a number of activities that must take place, however, before the order can be closed and completed.

As was discussed earlier in this chapter, the program offers you the flexibility to start out at any of the three stages of order status: estimate, repair order, or invoice. Most of the time, however, you will start out with an estimate—a request for a quotation of the time and cost required to perform a repair or maintenance activity.

Once the customer agrees to the service required, the estimate is converted to a repair order and printed for the customer to sign as acceptance of the terms of the service. Once the repair order has been signed, the next step is to go to work.

Invariably, as you begin to create orders you will need to revise your original estimates to reflect additional work. To accommodate this need, the program allows you to create up to nine sub-estimates that can be selectively attached to your order. The system even offers the versatility to perform "what-if" analysis of the cost of the order with various sub-estimate combinations.

Once work is complete, the order is converted to an invoice—a request for payment.

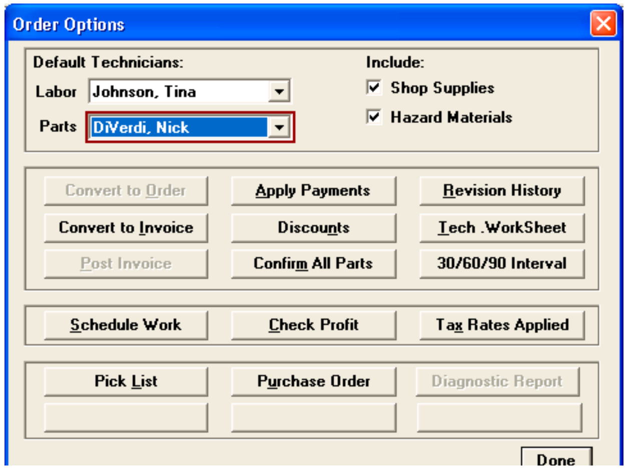
The following sections describe the procedures for converting an estimate to an order, and then converting the order to an invoice. Also described are the procedures for preparing sub-estimates and attaching them to your order.

Converting an Estimate to a Repair Order Once the estimate is complete and the customer has agreed on the work to be performed, the estimate is normally converted to a repair order and printed for the customer to sign.

To convert an Estimate to a Repair Order:

1 In the Order panel, select **Options**.

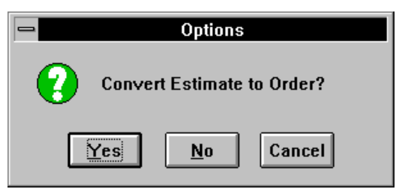
The Order Options dialog box appears.



Order Options

2 Select **Convert to Order**.

You are asked to confirm the conversion.



Confirm Estimate to Order Conversion

3 Select **Yes**.

You are returned to the Order Panel with the order status changed to repair order. This is indicated by the designation Repair Order #, rather than Estimate #, in the upper right-hand corner of the display.

4 Select the **Print** button, in the lower right-hand corner of your display, to print your repair order.

Converting an Estimate or Repair Order to an Invoice Once the repair has been completed, the estimate or repair order is normally converted to an invoice—a request for payment. It is not necessary for an estimate to be converted to a repair order before it is converted to an invoice.

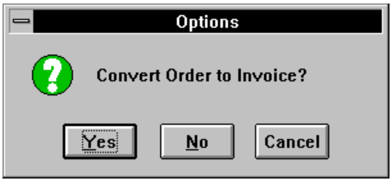
To convert an Estimate or Repair Order to an Invoice:

1 In the Order panel, select **Options**.

The Order Options dialog box appears.

2 Select **Convert to Invoice**.

A dialog box asks that you confirm the conversion.



Confirm Conversion to Invoice

3 Select **Yes**.

A dialog box asks if you wish to confirm all parts on your invoice.

Confirm All Parts

Confirming all parts means that all parts on the order were used and should be included in the invoice total. Confirming parts also removes the parts from inventory.

4 Select **Yes** to confirm all parts.

OR

No to not confirm the parts on this invoice.

You are returned to the Order Panel with the order status changed to invoice. This is indicated by the designation Invoice #, in the upper right-hand corner of the display.

5 Select the **Print** button, in the lower right-hand corner of your display, to print your invoice, if desired.

NOTE When parts or labor items are added to an invoice, it is converted back to a repair order. This allows the parts to be approved/confirmed on the order.

Order Revisions Once work has begun, you may discover the need for additional repair work. These repairs may be a part of the originally estimated repair that was undetectable at the time that the original order was created. Or you may discover the need for repair or maintenance work that is totally unrelated to the original order. In any case, you need to estimate the additional time and cost of these repairs so that your customer can make an informed decision.

To accommodate this need, the program allows you to create up to nine sub-estimates that can be attached to your order. The program even offers the versatility to perform "what-if" analysis of the cost of the order with various sub-estimate combinations.

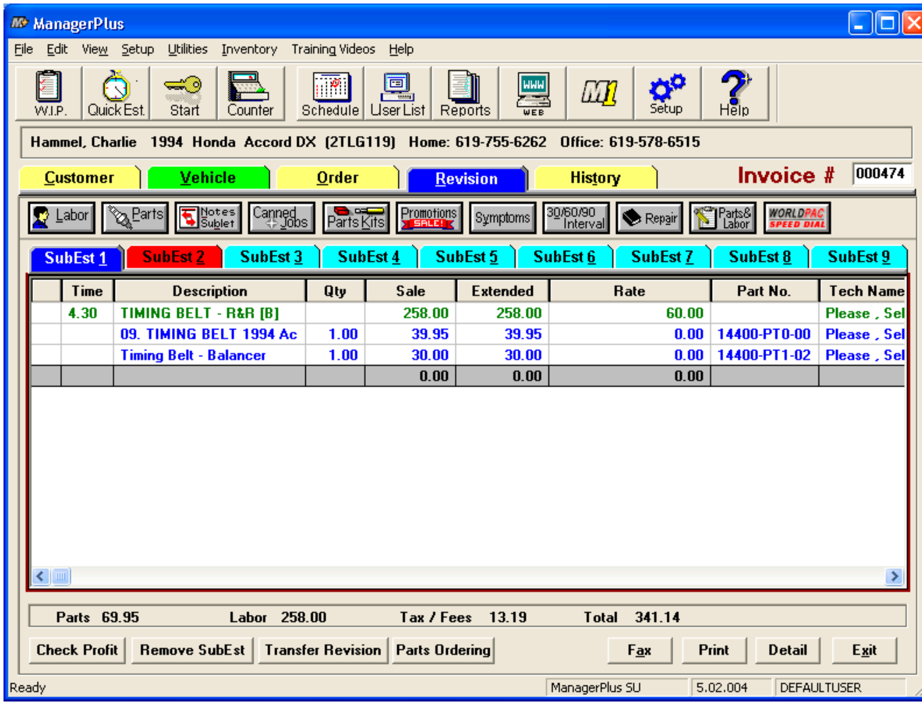
For example, while performing a repair, you may find that a vehicle needs five additional repairs ranging in importance from minor to critical. You can create five individual sub-estimates before you call the customer. While the customer is on the phone, you can quote him prices for all combinations of the five repairs. Once he has agreed to some, or all, of the repairs, simply transfer them to the order.

So revising an order is basically a two step process. First you create the sub-estimate(s). The second step is to selectively apply the revision(s) to the order.

To create a Sub-Estimate:

1. Select the **Revision** tab in the Order Screen.

The Revision Panel displays.



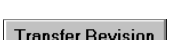
Revision Panel

2 Using the Repair Line Button Bar, add parts and labor to create repair lines just like you would for any regular order. (Refer to the descriptions of the dialog boxes accessed via the individual repair line buttons earlier in the chapter.)

3 Click your mouse pointer of the SubEst 2 tab and repeat step #2. Repeat for as many revisions as you wish to complete. You may notice that the SubEst tabs change colors to reflect the status of a sub-estimate. Blue represents the current order, light blue represents an empty sub-estimate, and red represents a sub-estimate (not currently open) which has completed repair lines.

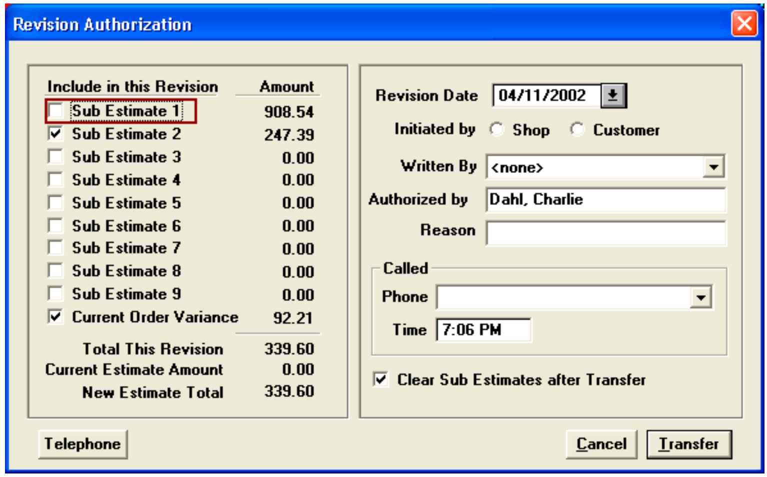
Once your sub-estimates are complete, Manager affords the opportunity to perform “what-if” analysis to look at various repair/pricing scenarios and then to selectively apply them to the open order.

To attach Sub-Estimates to an open order:



1 After all sub-estimates are complete, select **Transfer Revision**.

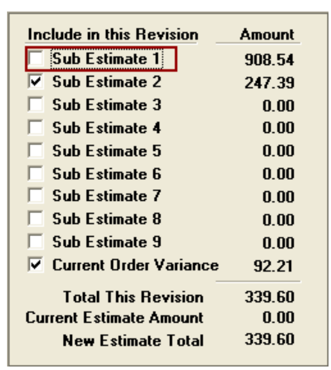
The Revision Authorization dialog box displays.



Revision Authorization

2 Select the revision(s) you want to include in the order.

The **Include in this Revision** fields are where you select revisions for inclusion in your order.

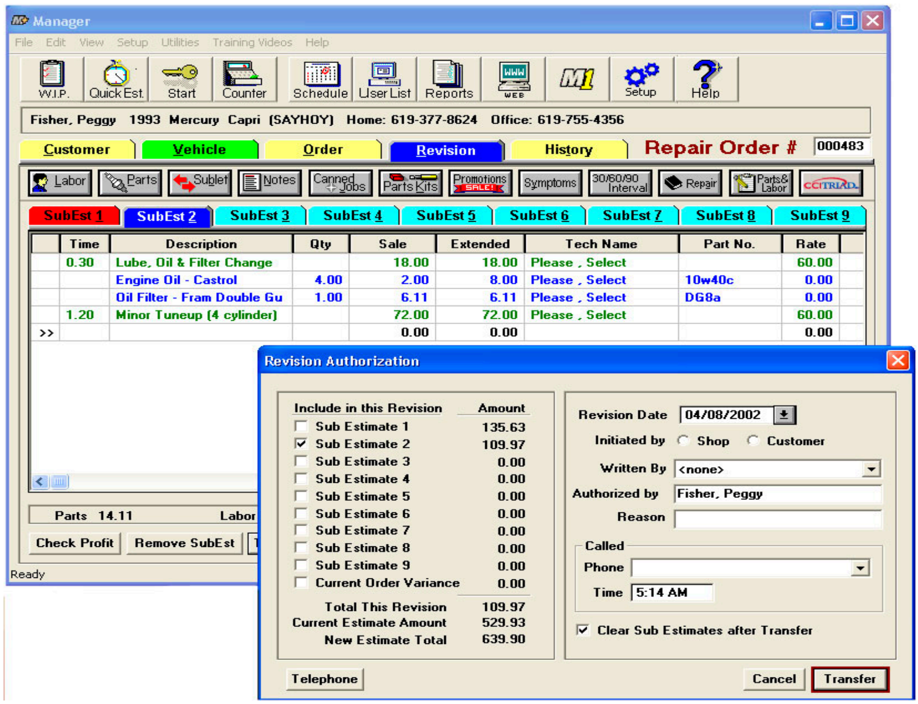


Include in This Revision

Select/deselect revisions by clicking your mouse pointer in the selection box next to the revision. The Revision Amount and the New Total Estimate Amount dynamically change with each new combination of revisions.

Current Order Variance Current Order Variance is the calculation between the approved estimate amount (when the Repair Order was printed) and the current Repair Order/Invoice total. A variance will be present if parts, labor, or other items were added or removed from the printed Repair Order or if parts pricing was updated upon receipt. The approval process for a revision takes this variance into account and, if checked, updates the approved estimate amount when the transfer is completed.

You may also find it helpful to move around the Revision Authorization box so that you can look at the detail of the individual sub-estimates. A Revision Authorization box staggered against the Sub-Estimate panel is displayed below.



Staggered Revision Auth./SubEst Panels

Once you have staggered the panels in this fashion, you are able to switch between sub-estimates by selecting the desired SubEst tab. This can be an especially helpful capability when talking on the phone with a customer and explaining the detail of each of the sub-estimates.

3 Complete/edit the remaining fields of the Revision Authorization panel. These fields are:

Field	Description
Revision Date	Fills in automatically with the date that the revision is created. Change the date, if necessary, by selecting a new date from the pull-down choice list.
Initiated by	Choose Shop or Customer as desired.
Written by	Choose a Service Writer from the pull-down choice list.
Authorized by	Defaults to the customer name. Change by overtyping as necessary.
Reason	Reason for the revision.
Phone (Called)	Phone number at which the customer was reached to approve the revision.
Time (Called)	Time that the revision was created/approved. This field defaults to the time that the Revision Authorization dialog box was opened.
Current Order Variance	The calculation between the approved estimate amount and the current Repair Order/Invoice total. (See page 197 for details).
Clear Sub Estimates after Transfer	Removes the sub-estimates after they have been transferred to the order.

NOTE: Only those sub-estimates that are transferred to the order are removed.

4 Select **Transfer**.

The selected sub-estimate(s) are transferred to the order.

NOTE: If there are recommendations for the Vehicle an additional dialog box displays, allowing you to delete any recommendations addressed by the current revision.

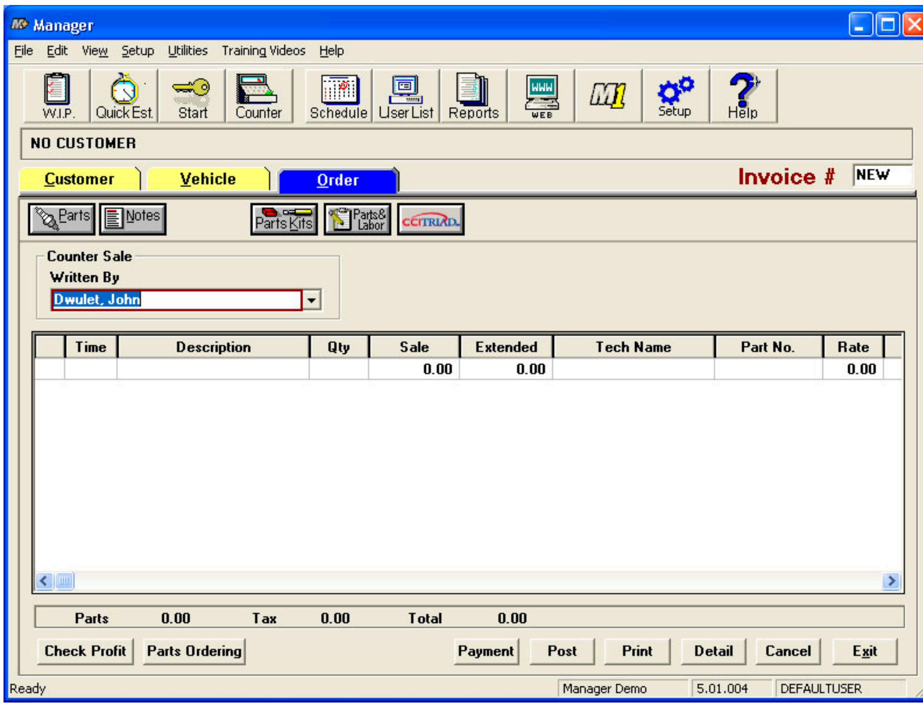
Counter Sales

The Counter Sales selection allows for quick and easy creation of the counter sale order. The program offers tremendous flexibility in handling counter sales. How much, or how little, information you enter is up to you and the policy of your shop.

To generate a Counter Sale order:

1 Select the **Counter** button from the button bar.

The Counter panel displays.



Counter Sale Panels

2 (Optional) Select the Customer and/or Vehicle panel tabs to input customer/vehicle information. Use of these panels is described earlier in this chapter.

3 Add Parts, Notes, or Part Kits using the repair line buttons. Use of the dialog boxes accessed via these buttons is described earlier in this chapter.

4 Click Check Profit to check your profit margin and/or Parts Ordering to do a vendor price check or order parts.

5 Select the **Print** button to print a Counter Sale Invoice.

6 Once the customer has paid for the order, select **Payment** to apply payment. If you apply payment in full, you will be asked if you wish to post the invoice.

Post Invoice?

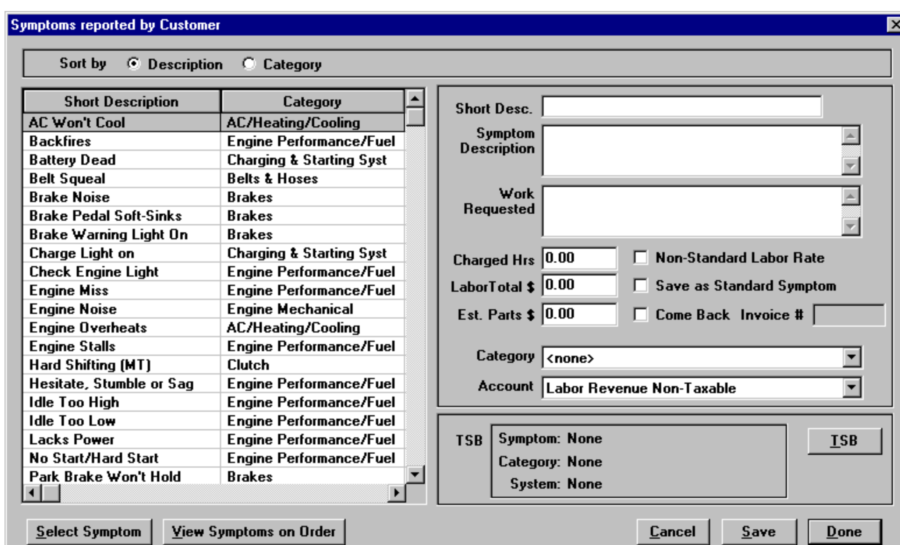
Posting the invoice closes the order out of Work in Progress and creates a history record of the transaction.

7 Select **Yes** to post the invoice.

The counter sale is now complete.

Symptoms

Use the Symptoms dialog box to record symptoms of poor performance reported by the customer. You can also add labor to the order. The dialog box is opened by choosing the Symptoms icon in the Order screen.



Symptoms Reported by Customer

You can choose to run the program in a symptom-driven fashion by selecting **Show Symptoms on New Orders** in the Screen View dialog box (page 83). Doing this configures the program so that the Symptoms reported by Customer dialog box displays every time you start a new order.

The Symptoms reported by Customer dialog box contains the following fields/options:

Field/option	Description
Short Description	Standard (short) name for the symptom. You can type a symptom in or select one from the grid, in which case the remaining fields of the dialog box fill in automatically. Standard Symptoms are maintained in Shop Data Setup.
Symptom Description	Extended description of the symptom.
Work Requested	Work recommended by shop to correct the symptom.
Charged Hours	Labor hours to be charged for the diagnosis/repair. These hours will be added to the order.
Labor Total $	Labor $ as calculated by Charged Hours extended at your shop rate. This dollar amount will be added to the order.
Non-Standard Labor Rate	Click this box to disable the automatic calculation of hours/dollars. You can then change hours without changing dollars and vice-versa.
Save as Standard Symptom	Check this box to save the current symptom as a Standard Symptom. You are then able to apply the symptom to subsequent orders.
Come Back/Invoice Number	Click Come Back to enter an Invoice number from original invoice in the event of a customer come back. (This field is used for reference purposes only.)
Est. Parts $	Estimated Parts cost. (Note: This cost is not added to the order.)
Category/ Account	The Category and Account for the Labor $ amount.

Click the **TSB** button to open a dialog box that allows you to look up TSBs in OnDemand5 if installed. This dialog box is described in the following section.

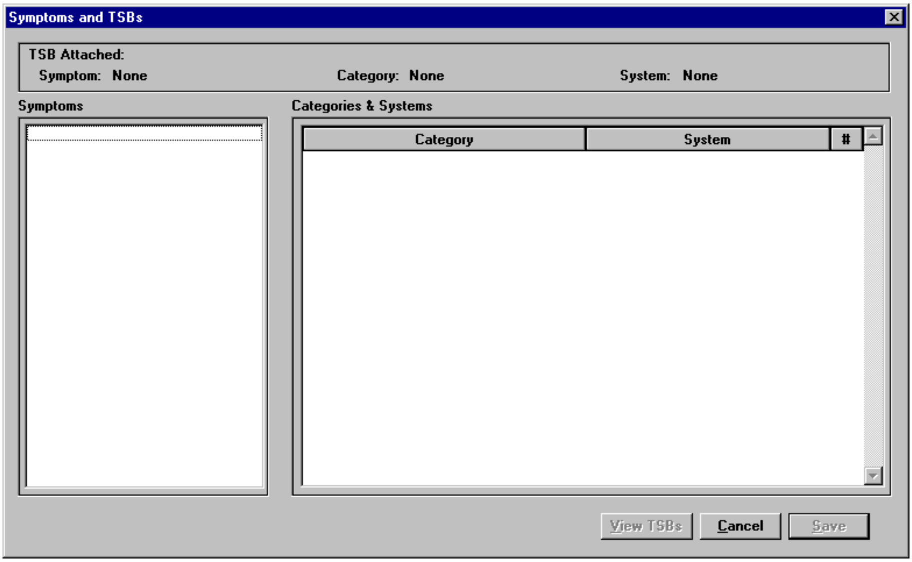
TSB

The TSB link within the Symptoms Reported by Customer dialog box opens the Symptoms and TSBs dialog box. You can use this dialog box to perform a search of TSBs based on customer-reported symptoms and then link out to OnDemand5 (if installed) directly to the desired TSB.

To Search TSBs in Manager:

1 In the Symptoms Reported by Customer dialog box, click the **TSB** button.

The Symptoms and TSBs dialog box displays.



Symptoms and TSBs

2 Pick a **Symptom** in the Symptoms grid.

Available TSBs for the selected vehicle display in the Category and System grid.

3 Pick a **Category/System**.

OnDemand5 is launched (if not already running) and opens to the selected TSB.

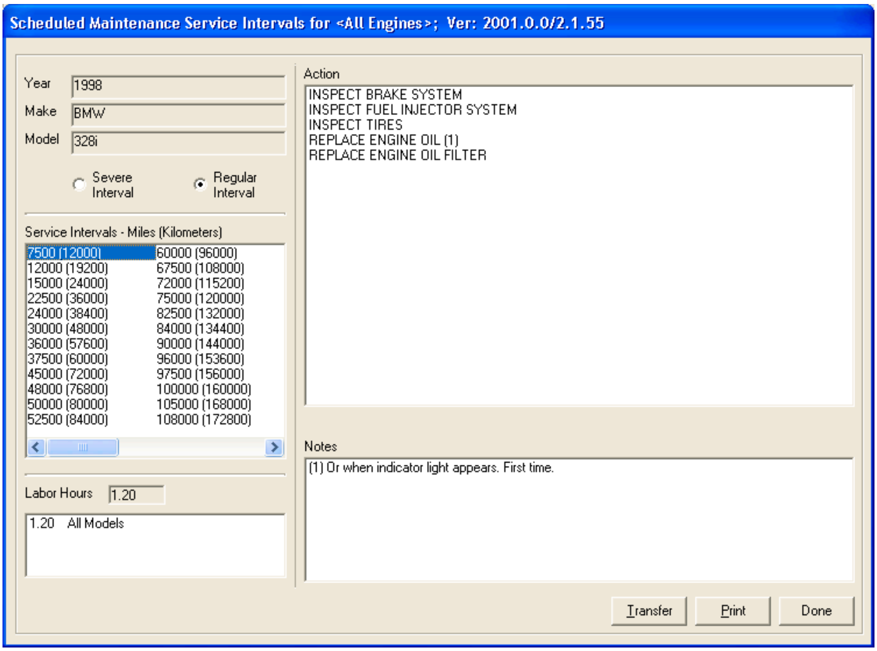
Maintenance Service Interval (30/60/90) Database

Choosing **30/60/90 Interval** from the Order screen opens the Scheduled Maintenance Service Intervals screen. This screen allows you to view service maintenance information and, if desired, transfer that information in the form of a canned job to the order.

To add Maintenance Service Interval information:

1 In the Order screen, click **30/60/90 Interval**.

The Maintenance Service Interval screen displays.



Maintenance Service Interval

NOTE You will be prompted to select an Engine for some models.

Option buttons below the vehicle information allow you to toggle between **Severe** and **Regular Interval** service information. The next scheduled maintenance interval (mileage) is highlighted in the first column of the display and scheduled replacement and inspection items are listed in the **Replace**, **Inspect**, and **Notes** fields. You can pick a different mileage interval, if desired, to view service information for a different maintenance interval.

2 Choose the **Print** button to print the information or the **Transfer** button to transfer a canned job for the selected scheduled maintenance to the order.

NOTE Some scheduled service intervals are too large to transfer to the order. When this happens, you will get a warning message. The Scheduled Services information will have to be manually printed for the technician.

Summary

In this chapter, you learned how to create Orders. You learned how to enter Customer, Vehicle, and Order information and how to create revisions to the order. You also learned to create Quick Estimates and Counter Sales.

The following chapter describes OnDemand5 Estimator and its interface with the Manager program.

Chapter 7
Parts and Labor Interface

Overview

The interface with OnDemand5 Estimator is a value-added software enhancement available to all Manager users who have also purchased Estimator.

Estimator makes it possible for you to import parts and labor estimating information from the Parts and Labor CD into your Manager orders. Using Parts and Labor's Parts Locator feature, you can process a search request of dealerships for selected parts.

NOTE: The description of the Parts and Labor interface supplied in this chapter is accurate as of the time of printing this User's Guide. However, Estimator is a continually improving software program. Because of timing considerations, there may be features in the estimating program that differ from those described in this chapter. Refer to your estimating software User's Guide for the most current instructions on working with the system.

Before You Begin

To access parts and labor information from Estimator, you must first have the program installed on your computer and have the current version of the Estimating CD inserted in your CD-ROM drive. To use Parts Locator, you must have a properly configured modem. Refer to your estimating software User's Guide for details.

Using Parts and Labor

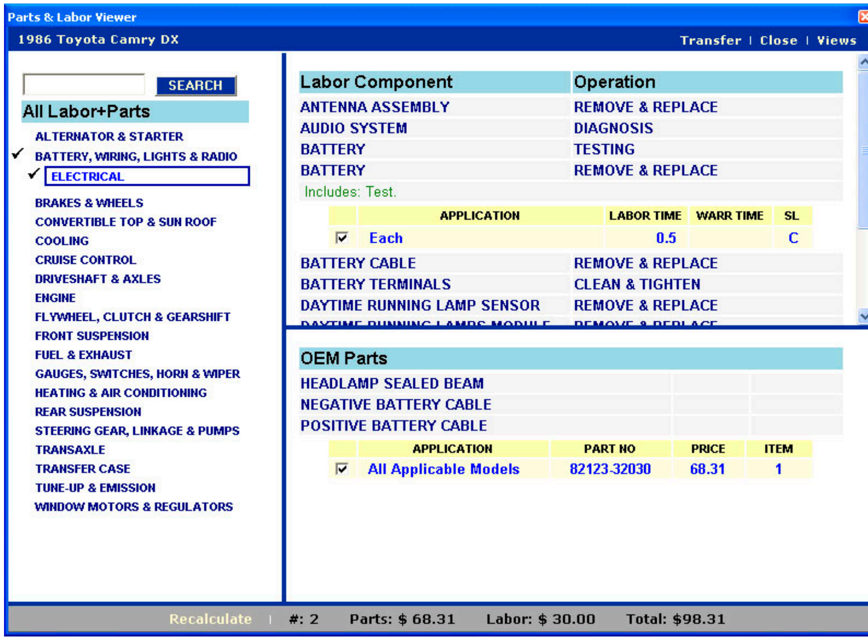
Before accessing estimating information, you must be in the Order panel of an order in which you have already specified the year, make, and model of the vehicle.

To add parts and labor items from Parts and Labor to your order:

1 Select the **Parts & Labor** button in an order in which you have specified a vehicle.

The Parts & Labor viewer displays.

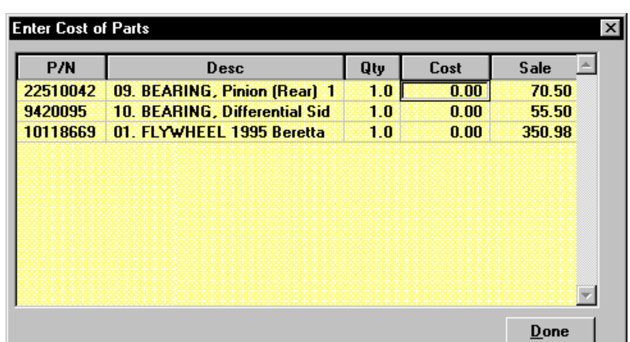
2 Choose parts and labor items to be added to your order.



Splitter Window

3 Click **Transfer**.

If you have selected parts in Parts and Labor (not just labor items), the Enter Cost of Parts dialog box displays.



Enter Cost of Parts

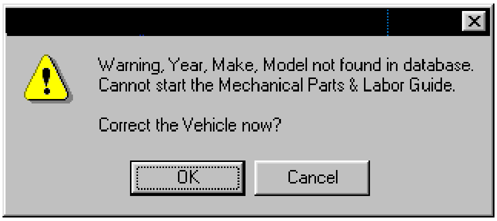
This dialog box allows you to enter a cost for the parts. This cost is used by the program in profitability calculations.

4 Enter a cost for each of the parts and click **Done**.

Parts and Labor is closed and the Parts/Labor items are added to the repair lines of your order.

Vehicle not Defined

If you select the Parts and Labor button before specifying vehicle information, the following error message appears:



Undefined Vehicle Message

You will also get this message, or a similar message, if the vehicle you've selected is not in the Parts and Labor database. If this happens, go back to the Vehicle screen and reselect the vehicle.

Summary

In this chapter, you learned how to copy parts and labor information from Parts and Labor into your Manager orders. Because of timing considerations, different versions of the Estimator product may be slightly different than described in this chapter. Refer to the user guide that came with your estimating software for detailed instructions.

Chapter 8
Work In Progress

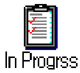
Overview

This chapter describes the options available in the Work In Progress (W.I.P.) screen and how its view can be customized for individual users. Also described, in detail, are the options for making payments, scheduling, and viewing scheduled work in the program.

The Work in Progress Screen

The Work in Progress screen is where you access open orders. In addition to being able to select any open order to work in, you can also easily access the other areas of the system. As such, this is likely the screen you will most often be working in when you are not working with an open order.

The rows of the Work in Progress screen list your shop's open orders. You select an order by highlighting it with your mouse pointer, or by moving the highlight bar up and down with your arrow keys.

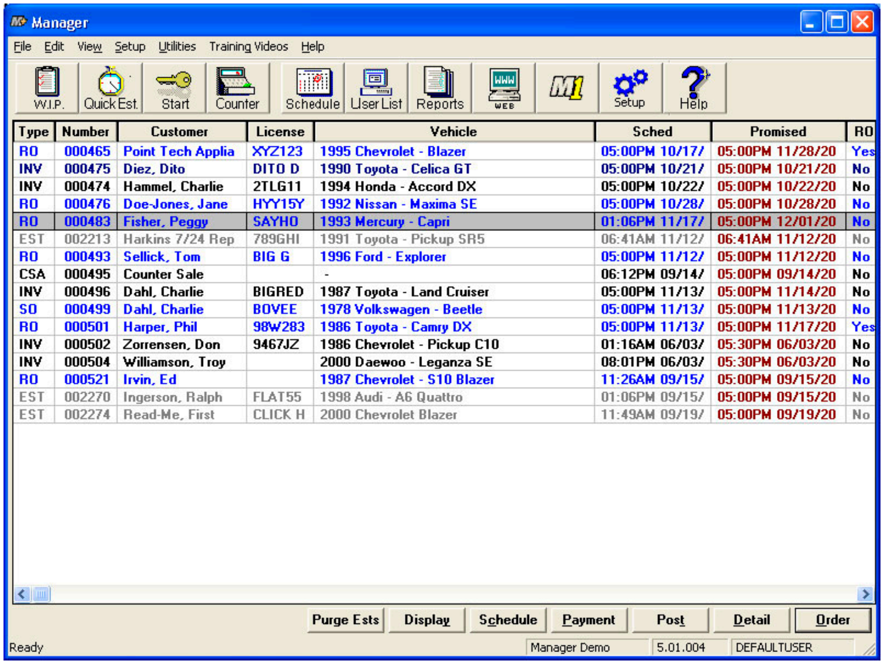


To access the Work in Progress screen:

- Select the **In Progress** button from the button bar.

The rows of the Work in Progress screen list your shop's open orders. You select an order by highlighting it with your mouse pointer, or by moving the highlight bar up and down with your arrow keys.

The Work in Progress screen displays.



Work in Progress Screen

Options

The buttons along the bottom of the Work in Progress screen provide a number of options for working with open orders. These options are described briefly below, and in detail in the following sections of this chapter.

Work in Progress Button Options

Button	Description
Purge Ests	Opens a dialog box in which you can purge all estimates older than a specified date.

Button	Description
Display	Opens the Status Display Preferences dialog box, in which you can select the types of records that display in the WIP grid, their sort order, and conduct a word search in WIP.
Scheduler	Opens the Schedule Work dialog box, in which you can change the assigned schedule time and date for the work to be performed.
Payment	Opens the Apply Payments dialog box, in which you can apply a payment to an order.
Post	Allows you to post an invoice, moving the order from Work in Progress into Order History.
Detail	Opens the Work in Progress Detail dialog box which contains status information about the customer and vehicle and allows for entering, or changing, the Status, Location, Hat Number, and Completion Time for the vehicle.
Order	Opens the Order panel for the vehicle.

Colors

To ease identification, orders displayed in the Work in Progress Screen, by default, are color coded as follows:

Color	Order Type
Gray	Estimate, Counter Sale
Black	Repair Order, Special Order
Blue	Invoice

You can change these settings in the Grid Line Settings dialog box, selected from the Special Maintenance submenu. Refer to Chapter 3, “Shop Setup” for details.

Red Flagging In addition to color-coding types of orders, the program also highlights entries in some data fields in red, indicating a condition that may require attention. This type of exception highlighting is commonly known as “red flagging.”

The system automatically red flags orders whose promised date is prior to the current date. For example, if an order was promised to be completed by February 6 and the current date is February 7, the date in the promised field appears in red.

You can also red flag certain vehicle location and status designations. Refer to Chapter 3, “Shop Setup” for details.

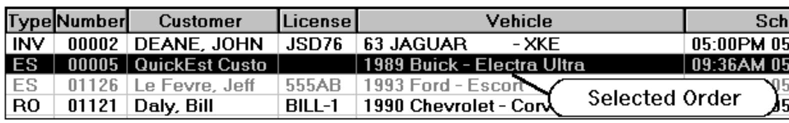
Opening an Order

To open an existing order, you go to the W.I.P. screen.

To open an order from the Work in Progress screen:

1 Click your mouse pointer in any cell on the row of the order you wish to access in the order grid.

The entire row is highlighted.



Order Selected in W. I. P. Grid

2 Select **Order**.

OR

Double-click your left mouse button on the order.

You are taken to the Order panel for the selected order.

Removing an Order

Normally, orders are removed from Work in Progress when the order is completed and the invoice is posted. However, estimates do not always turn into actual jobs, and repair orders occasionally get cancelled without any work being performed. These orders will remain in the Work In Progress Grid until you delete them. As a general housekeeping function, you will want to regularly remove orders that are no longer needed.

To remove an order you must first open it, then remove it by selecting Remove from the Edit menu.

NOTE: Exercise caution in removing orders from Work in Progress. Once an order is removed, it cannot be retrieved.

To remove an Order:

1 Click your mouse pointer in any cell on the row of the order you wish to access in the order grid.

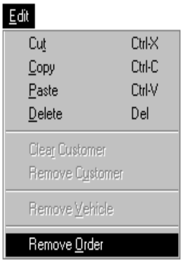
The entire row is highlighted.

2 Select **Order**.

OR

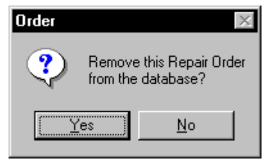
Double-click your left mouse button.

The selected order opens.



3 Select **Remove Order** from the Edit menu.

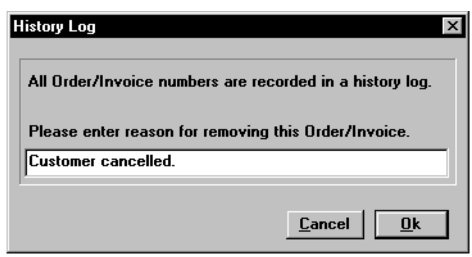
A dialog box asks that you confirm your request.



Remove Order?

4 Select **Yes**.

If the order is an estimate, or quick estimate, it is removed and you are returned to the Work in Progress grid. If the order is a repair order or invoice, an additional dialog box prompts you to enter a reason.

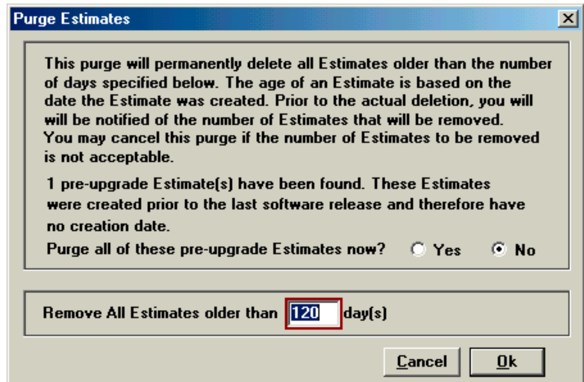


Remove Reason

5 Enter a reason and choose **OK** to remove the order.

Purging Estimates

Selecting Purge Ests. in the Work in Progress screen initiates a procedure to delete any estimates created before a specified number of days. Use this procedure to clean up old estimates in your Work in Progress screen.



Purge Estimates

Text within the dialog box details the procedure. Just specify the number of days, click the **Yes** option button and click **OK**.

Schedule

Scheduling is done in the **Schedule** screen, where you can work with scheduled orders displayed by day, or by month, and in the **Schedule Work** dialog box, where you can edit the system-assigned order completion time and date.

When an order is created, the system automatically schedules it for completion that day. You can change the scheduled date and time as desired. You can also add non-order generated items to the schedule.

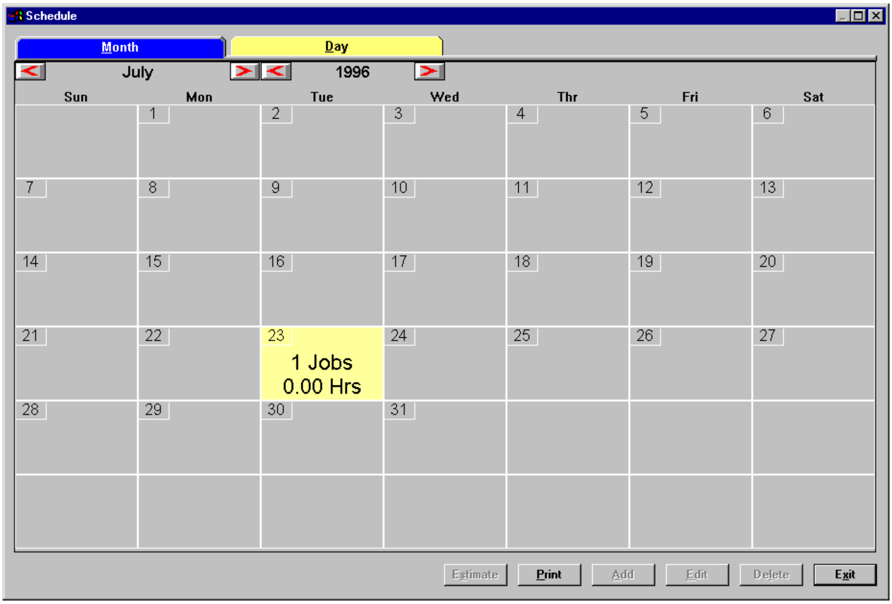
Schedule Screen

The Schedule screen is comprised of two panels: one showing scheduled orders by day, and the other displaying scheduled orders by month. The Schedule screen is opened by selecting the Schedule icon from the toolbar.

To open the Schedule screen:

- Select Schedule from the toolbar.

The Schedule screen opens.



Schedule (Month View)

NOTE: The Schedule screen automatically opens to the date and view that it was in when last used.

Month View The Month view of the schedule provides summary information (number and total hours) on the jobs scheduled for each day. You can use this panel to provide an assessment of your shop's overall work flow for the month.

You can use the forwards and backwards buttons to change the month and year of your schedule view.

Forwards and Backwards Buttons

You can switch to the Schedule Day view by selecting the Day thumb-tab or by double-clicking on the desired day with your mouse pointer.

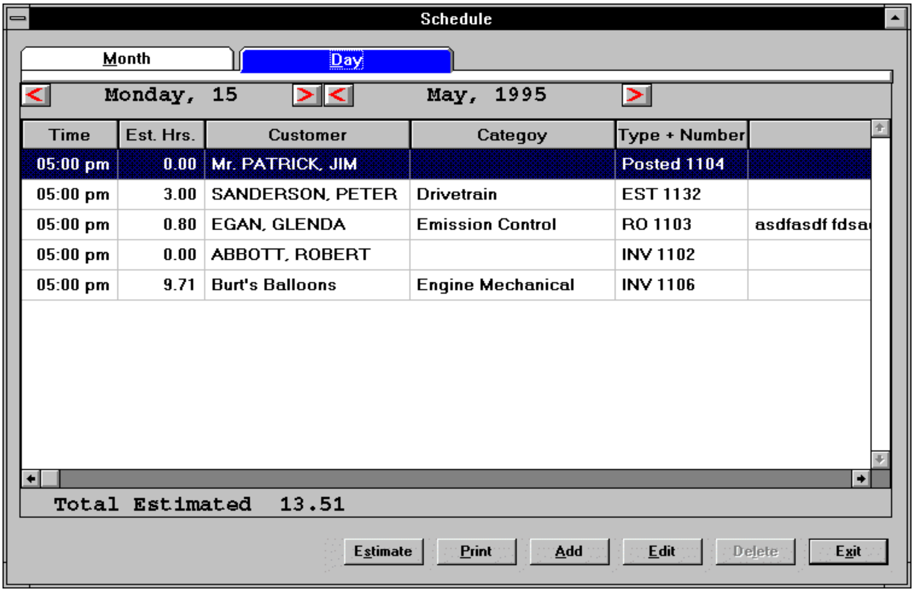
To switch to the Schedule Day view:

- With the desired date highlighted, select the Day thumb-tab at the top of your display.

OR

- Double-click your mouse pointer on the desired date.

The Schedule screen switches into the Schedule Day View.



Schedule (Day View)

Schedule Day View The Day view of the Schedule screen provides details on the jobs for each day.

You can page forward and backwards between days, and months, using the forwards and backwards buttons.

Forwards and Backwards Buttons

The schedule grid contains the following fields:

Field	Description
Time	The time the order was promised for completion.
Est. Hrs.	An estimate of the number of hours required to complete the repair.
Customer	The Customer, or Company, requesting the repair(s).
Category	The category of the repair work.
Type + Number	The order type or status. Possible Types would include: Scheduled (non-order schedule item), Estimate, Order, Invoice, Posted (Invoice).
Notes	Room for the free-form entry of notes into the record.

The Day view of the Schedule screen also contains a number of button options.

These options are briefly described below:

Button	Description
Estimate	Opens a selected order to the Order panel.
Add	Opens the Schedule Work dialog box, allowing for the addition of a scheduled item.
Edit	Opens the Schedule Work dialog box with the data from the selected item displayed. You are able to freely edit any of the fields in the dialog box.
Delete	Allows for removal of a schedule item that wasn't created by an actual order (non-order item).
Exit	Closes the Schedule screen.

To add an item to the Schedule:

1 In the Schedule Day panel, select **Add**.

The Schedule Work dialog box appears with empty data fields.

NOTE: Use the Add command only to add a non-order item to the schedule. For example, to reserve a block of time for a major, but unconfirmed, repair. When the actual order is generated, it should be scheduled into the reserved time block and the original scheduled item should be deleted.

2 Complete the data fields (described in the following section, "Schedule Work Dialog Box").

3 Select **OK** to save your entries and exit.

To edit an item in the Schedule:

1 In the Schedule Day panel, with the desired schedule item selected, choose **Edit**.

The Schedule Work dialog box appears with data from the selected item displayed in the appropriate fields.

2 Edit the data fields (described in the following section).

3 Select **OK** to save your entries and exit.

Schedule Work Dialog Box

As discussed earlier, all orders are automatically scheduled at their time of creation. The Schedule Work dialog box allows you to reschedule the order as necessary. This dialog box can be accessed via the Scheduler button in the Work in Progress screen, by using the Add or Edit buttons from within the Schedule dialog box, or from within the Order Options dialog box.

To reschedule an order:

1 Using your mouse or arrow keys, highlight the row of the order you wish to access in the Work in Progress screen.

The entire row is highlighted.

2 Select **Scheduler**.

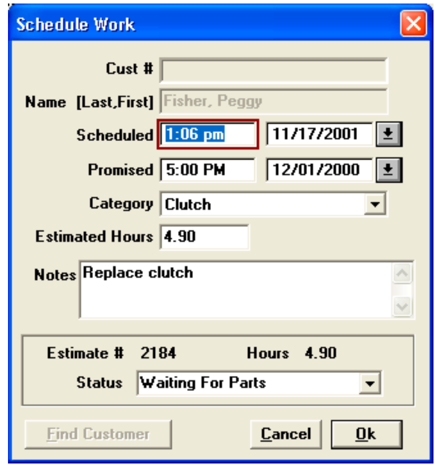
OR

From within the Schedule dialog box, select **Add** to add a new order, or select a current order and select **Edit**.

OR

From within the Order panel, select **Options** and then **Schedule Work**.

The Schedule Work dialog box appears.



Schedule Work

3 Edit the fields of the dialog box as desired. The Schedule Work dialog box contains the following fields:

Field	Description
Name	Customer's name.
Scheduled	The time and date the work is scheduled to be completed. When the order is created, the program automatically enters the time you created the order, and the current date. The Scheduled time and date can be overwritten as necessary.
Promised	The time and date the completed order has been promised to the customer. When the order is created, the program automatically enters the default time that you entered during setup (for example, 5:00 pm), and the current date. The Promised time and/or date can be overwritten.
Category	The Category of the repair work. ***Note***: This field is for schedule reference only. It does not overwrite the Categories assigned to parts and/or labor operations.

Field	Description
Estimated Hours	The number of hours the order is scheduled to take. Again, this number is for schedule reference only and does not affect the actual number of hours used in calculating the total cost of the order.
Notes	Any notes that you wish to add to the schedule.
Estimate #	The original Estimate number.
Hours	The hours of the Order.
Status	The status of the vehicle repair as selected from a pull-down choice list.
Find Customer	Opens the Customer List so that you can pick an existing customer. **Important Note:** ***When adding an item to the schedule:*** If the customer *has been to your shop before:* it is highly recommended that you use the Find Customer feature to locate the customer. This is the easiest way to enter a customer and it prevents adding the same customer twice. Type in as much of the customer's name as you know in the Name (Last,First) field and click Find Customer. The Customer List displays matches to your request. Choose the customer from the list. ***If it is a first-time customer:*** type in the Last and First names.

4 Select **OK** to save your edits and close the dialog box.

Payment

The Payment selection from the Work In Progress screen or the Order Options dialog box brings up the Apply Payments dialog box. You can use this dialog box to make a full or partial payment on an order or to split payments between two payment types.

Applying Payment in Full

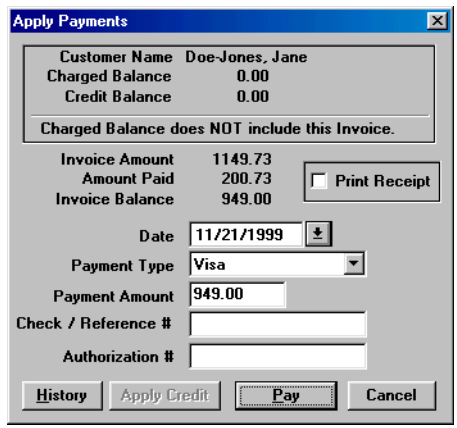
Most of the time, when you need to make a payment, it will be to pay off the entire balance of the invoice.

To make payment in full on a repair order or invoice:

1 With the order highlighted in the Work in Progress grid, select **Payment**.

NOTE: You can also open the Apply Payments dialog box from within the Order Options dialog box.

The Apply Payments dialog box appears.



Apply Payments

2 Complete the fields of the dialog box:

Field/Option	Description
Date	Current date fills in automatically—change if necessary.
Payment Type	Choose a payment type—cash, check, or charge (American Express, Visa, etc.).
Payment Amount	The total due fills in automatically—overtype if necessary.
Check/ Reference #	Fill in check number, if applicable.
Authorization #	The credit card authorization number—enter if applicable.

Field/Option	Description
History	Opens the Payment History dialog box, in which you can view a history of payments for the current invoice or for the current customer.
Apply Credit	Allows you to apply a credit, if available, to the current invoice.
Pay	Select Pay to make a payment and remain in the Apply Payments dialog box. Use this command if you wish to split payment between two Payment Types (for example, Cash and Visa). After clicking on Pay, if there is a balance due, the program will ask if you wish to "Post Additional Payments Now?".
	You will remain in the dialog box where you can make additional payments as necessary. Refer to the "Splitting Payments" section later in the chapter for details on splitting payments between payment types.
Done	Select Done when you are finished working in the Apply Payments dialog box.

3 Select **Done**.

If you have paid less than the full invoice amount, a message box asks if you want to post additional payments.

4 Select **Yes** to post additional payments.

Once the invoice has been paid in full, a dialog box asks if you want to post the invoice. Posting an invoice closes the invoice record from Work In Progress into Vehicle History.

NOTE: Posting an Invoice should not be confused with posting payment. When you post a payment, you are merely applying payment towards the unpaid balance on the order. When you post an invoice, you are closing the order. The record is closed out of Work In Progress and a history record is created.

Post Invoice?

5 Select **Yes** to Post the Invoice.

Applying a Partial Payment

Occasionally, you may need to make a partial payment on an order, as in the case of a customer leaving a deposit.

To make a partial payment:

1 With the order highlighted in the Work in Progress grid, select **Payment**.

The Apply Payments dialog box appears.

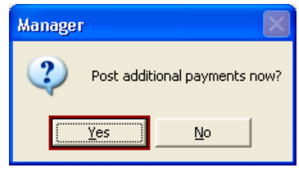
NOTE: You can also open the Apply Payments dialog box from within the Order Options dialog box.

2 Overtype the total in the Payment Amount field with the amount you wish to pay.

3 Complete the remaining fields of the dialog box.

4 Select **Pay**.

A message box asks if you want to post additional payments.



Post Additional Payments?

5 Choose **No**.

The new invoice balance will be reflected the next time you open the Apply Payments dialog box.

Splitting Payment Types

Occasionally, you may need to split a payment between two payment types. An example of this situation might be an instance where a customer desires to pay part of an invoice in cash and part of it by credit card. The following procedure details the steps that would be undertaken to accomplish this task.

To split payment of an order between payment types:

1 With the order highlighted in the Work in Progress grid, select **Payment**.

The Apply Payments dialog box appears.

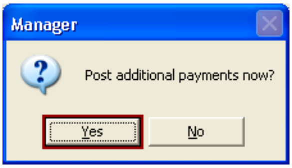
NOTE: You can also open the Apply Payments dialog box from within the Order Options dialog box.

2 Select **Payment Type**.

3 Overtype the total in the Payment Amount field with the amount to be applied by the first payment type.

4 Select **Pay**.

The payment is posted and the outstanding balance reduced. A message box asks if you wish to post additional payments.



Post Additional Payments?

5 Select **Yes**.

The Apply Payments dialog box displays again.

6 Repeat Steps 2-5 as many times as necessary to post additional payments.

7 Select **No** in the Post additional payments now message box when all payments have been posted.

OR

Select **Done** in the Apply Payments dialog box to post payment of the remaining balance in full. An additional message box asks if you wish to post the remaining balance of the invoice.

8 Select **Yes** to post the remaining balance for the invoice.

A message asks if you want to post the invoice.

9 Select **Yes** to post the invoice.

OR

Choose **No** if leaving the remaining balance unpaid.

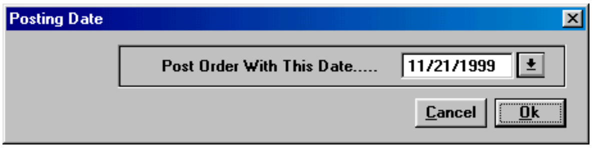
Posting an Unpaid Invoice

In addition to posting a paid invoice, you are also able to post an unpaid invoice by charging the balance to a house credit account. Doing so creates an account receivable for which the customer can later be billed.

To post an unpaid invoice:

1 With the order highlighted in the Work in Progress grid, select **Post**.

The Posting Date dialog box displays the current date in the **Post Order With This Date....** field.

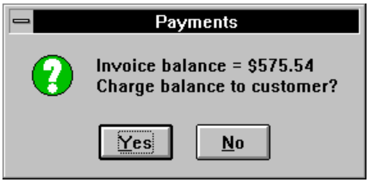


Posting Date

2 Enter or select a new date if desired.

NOTE: The capability to change the posting date is provided primarily for instances where you unpost an invoice and then re-post the invoice on a later date. Normally you will not change this date.

A dialog box asks if you wish to charge the remaining balance to the customer.



Charge Balance to Customer?

3 Select **Yes** to post the invoice.

The invoice record is closed from Work in Progress into Vehicle History. An account payable is created for which the customer can later be billed. Refer to “Batch Payments” in Chapter 9, “History” for details on making payments on posted orders.

Work In Progress Detail

The Work in Progress Detail dialog box provides summarized information about a single, selected order. The information fields are the same as in the Work in Progress screen. You are able to update Vehicle Status and Location, Hat No., and Completion Time/Date in this dialog box.

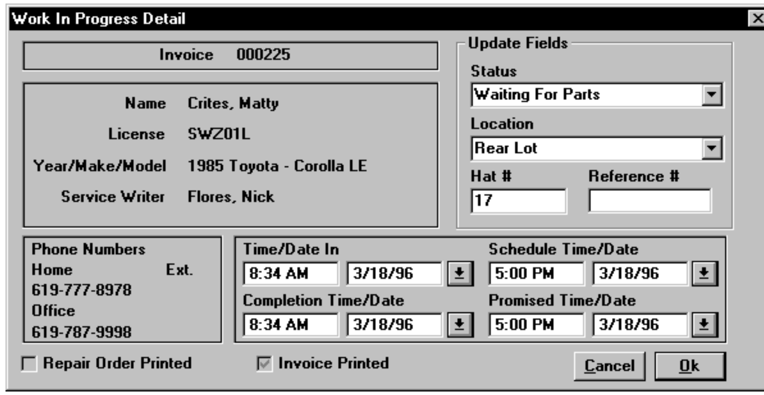
To open the Work in Progress Detail dialog box:

- With the desired order highlighted in the Work in Progress grid, select **Detail**.

OR

- Right-click your mouse pointer on any WIP item.

The Work in Progress Detail dialog box displays.



Work In Progress Detail

The Work In Progress Detail dialog box contains administrative information about the customer and his vehicle, the service writer, the scheduled and promised time, and the time that the vehicle arrived in the shop. In addition, the Work In Progress Detail dialog box contains the following fields that can be edited.

Field	Description
Status	Choose from available status designations (for example Waiting For Parts, or Completed) or type in a status designation.
Location	Choose from available shop locations (for example, Rack #1, or Paint Shop) or enter a location designation.
Hat No.	The Hat, or Tag number, or other identifier.
Reference #	Identifying number that you add to the order in the Order screen or Work In Progress Detail dialog box. You can use this field for any purpose you like (Cab #, for example).
Phone Numbers	Customer's home and office phone numbers (if available).

Field	Description
Time/Date In	Enter the time and date that the car entered the shop.
Completion Time/Date	Enter the time and date that the work is expected to be completed.
Schedule Time/Date	The time and date that the work is scheduled to be completed.
Promised Time/Date	The time and date that the work is promised to be completed.
Repair Order Printed	Box is checked if Repair Order has been printed.
Invoice Printed	Box is checked if Invoice has been printed.

Customizing your Screen View

The program offers the ability to customize the look of your screens to fit the individual needs of system users. You are able to specify which records (Estimates/Repair Orders/Invoices/Counter Sales) are displayed in the Work In Progress screen as well as choose a sort order based on a number of criteria. You can look up a record in W.I.P. based upon a specified word or character string. You can also change the size and placement of the columns in the W.I.P. screen and certain other order entry screens.

Status Display Preferences

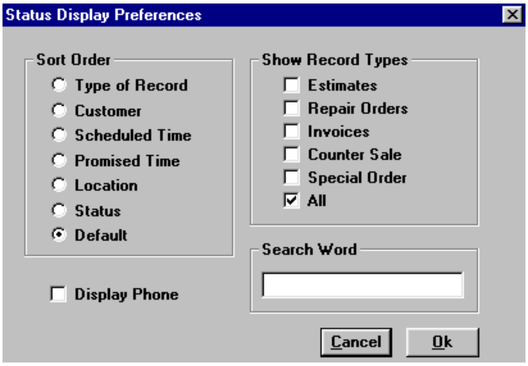
Selecting the Display button in Work In Progress opens the Status Display Preferences dialog box. These settings are user-specific, that is, they remain in effect for the currently selected user until a different user logs on to the system or different preferences are specified.

You can use this dialog box to choose a Sort Order for the Records viewed in the Work In Progress grid and to choose which types of records to display.

To change your Work In Progress screen display preferences:

1 Select the **Display** button in Work In Progress.

The Status Display Preferences dialog box displays.



Status Display Preferences

2 Choose a sort order in the Sort Order box, if desired.

Sort Order

NOTE: The default sort order is by Order # (oldest order first, based upon creation date).

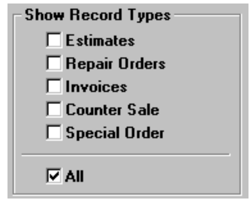
The Work In Progress screen sorts in ascending alphanumeric sequence (for example 1, 2, 3 ..., or a, b, c ...).

3 Click the **Display Phone** setting, if desired to display customer phone numbers in the Work In Progress and Order screens (800x600 resolution, or greater, required).

4 Choose which types of records (Estimates/Repair Orders/Invoices/Counter Sales) you wish to display, if desired, in the Show Record Types dialog box.

OR

Select **All** to select all record types.



Show Record Types

NOTE: The default is to display all record types.

5 Select **OK** to save your Work In Progress screen display preferences.

The Work In Progress screen reflects your saved preferences. These settings are valid every time the specified user uses the system. Refer to the "User List" section later in the chapter for details.

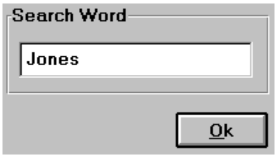
Word Search The Status Display Preferences box also allows you to search for a record in the Work In Progress screen based on a word or other character string. You are able to conduct a word search on any entry in the following data fields:

- Customer Name
- License Number
- Status
- Location
- Year/Make/Model

You can search for a part of a word (for instance, a search on "JO" would result in selection of "JONES"). You can also use the "%" character as a "wild card," substituting it for an unknown character or group of characters. For example, "SM%TH," or even, "S%H" will yield "SMITH." Just remember that the more characters that you substitute for, the higher your probability of unwanted matches to your search.

To conduct a word search:

1 In the Status Display Preferences dialog box, in the Search Word text entry box, type the word or character string on which you wish to conduct your search.



Search Word

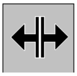
2 Select **OK**.

The Work In Progress grid displays the records which match your search criteria.

Sizing/ Rearranging Columns

The Work In Progress and certain other screens allow you to customize the width and positioning of the displayed grids. These settings will remain in effect for the currently selected User (refer to the “User List” section later in the chapter) until different column width and position choices are made.

To resize a column's width:

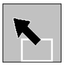


1 Move your mouse pointer directly over the right edge of the column heading of the column you wish to resize. The mouse pointer will change its shape as shown to the left.

2 Holding down your left mouse button, drag the column border to increase or decrease the column width, as necessary. When the column width is the desired size, release the mouse button.

To rearrange a column's location in the grid:

1 First, select the column you want to move by clicking on the column heading to highlight it.



2 Hold down the Shift key with your mouse pointer directly over the heading of the column that you wish to move, press, and hold down your left mouse button.

Your mouse pointer changes to the pointer shape shown to the left.

3 Move the mouse pointer arrow to the grid location to which you wish to move the column.

4 Release the mouse button.

The column is moved to its new location.

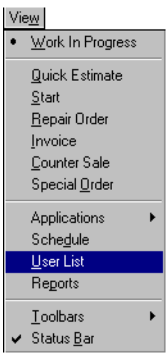
User List

As described above, the program offers the ability to customize the look of your screens to fit the individual needs of system users. The User List offers users the ability to save these custom view settings.

To open the User List:

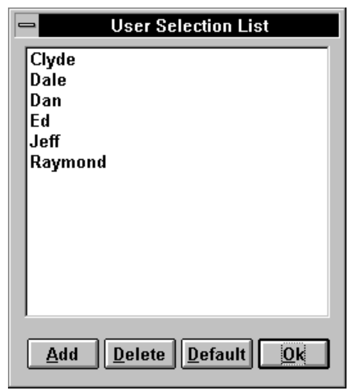
- Select the **User List** Button.

OR



- Select **User List** from the View menu.

The User Selection List dialog box displays the users from your shop.



User Selection List

The User List is where you select the current user of the system. You should always select a user, normally yourself, before beginning to work in the program. That way, any screen view settings that you change during the course of your session are saved for you the next time you use the system.

The following screen view settings are controlled by the user:

- **Display for Work-In-Progress Grid** - The sizing and placement of columns in the Work-In-Progress grid.
- **Display Sort/Filter for Work-In-Progress Grid** - The types of orders (Estimates, Repair Orders, Counter Sales, etc.) that are displayed, and their sort order, in the Work In Progress grid. These settings are selected in the Status Display Preferences dialog box described earlier in the chapter.

- **Display for Order Grid** - The sizing and placement of columns in the Order grids (Estimate, Repair Order, Special Order, etc.).
- **Last Four Orders List** - The File menu lists the last four orders that the user worked on for quick retrieval.
- **Schedule Position and Size** - The program "remembers" the screen position and size of the schedule when the selected user last worked with it.
- **Inventory List Sort Order** - The sort order (by Part Number or by Description) that the Inventory List is initially sorted by.
- **History Screen Display** - Determines whether the history screen will initially display by Customer or by Vehicle.

To select the current user:

1 Click your mouse pointer on the desired name to highlight.

2 Select **OK**.

The User Selection List closes and your screen view changes to reflect the attributes of the selected user. Any changes made to screen view settings (as described in the previous sections) will be saved as part of the selected user's profile.

You are also able to add and delete users in the User Selection List and to change the screen view back to default values.

To add a user:

1 In the User Selection List, select **Add**.

You are prompted to enter a user name.

Enter User Name

2 Enter the user name.

3 Select **OK**.

The new user is added to the User Selection List.

To delete a user:

1 In the User Selection List, with the user you wish to delete selected, choose **Delete**.

You are asked to confirm your deletion.

2 Select **Yes**.

The user is removed from the User Selection List.

To restore a user's view to default values:

1 In the User Selection List, with the user whose view you wish to restore to default values selected, choose **Default**. Restoring a user's view returns the screen view settings to the original state.

You are asked to confirm your request.

2 Select **Yes**.

Your screen view settings are returned to their original state.

Summary

This chapter described the options available in the Work In Progress screen and how its view can be customized for individual users. Also described, in detail, were the options available for scheduling, and looking at scheduled orders.

Chapter 9
History

Overview

Once an order is closed by posting the invoice, a history record is created. This record contains all of the pertinent information about the service that was performed as well as providing a history of all payments. If the invoice has not been paid, an account receivable is created. The customer balance is tracked in history until it has been satisfied. the batch payment facility makes applying payment to a group of posted invoices a breeze.

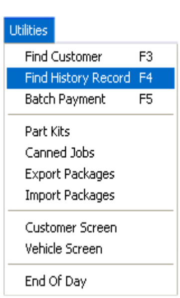
This chapter details the options available for working with historical records and for making batch payments.

Find History Record

The Find History Record allows you to quickly locate a history record from anywhere in the system. Using the Find History Record command, you can quickly search the database for the history record for a given invoice based upon the invoice number, or alternatively, you can search the database for all history records for a selected vehicle.

History Search (by Invoice number)

The Find History Record selection allows you to quickly find a history record based upon an invoice number. This capability is particularly useful in locating posted invoices in order to make payments.



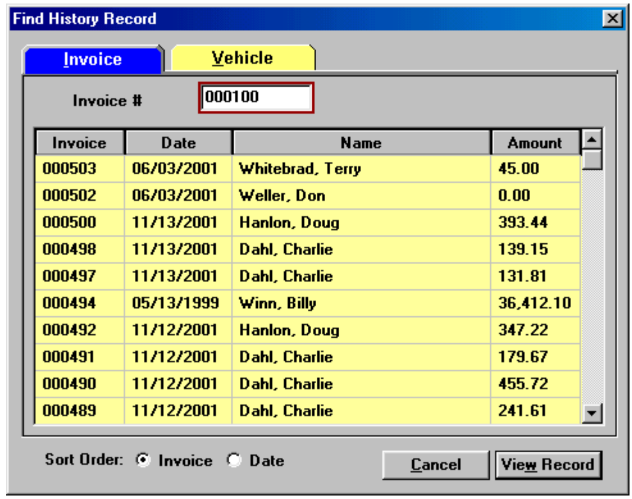
To find a history record based on an invoice number:

1 Select **Find History Record** from the **Utilities** menu.

OR

Press **[F4]**.

The Find History Record dialog box appears. Depending upon the previous selection, the Invoice or Vehicle Panel displays.



Find History Record (Invoice Panel)

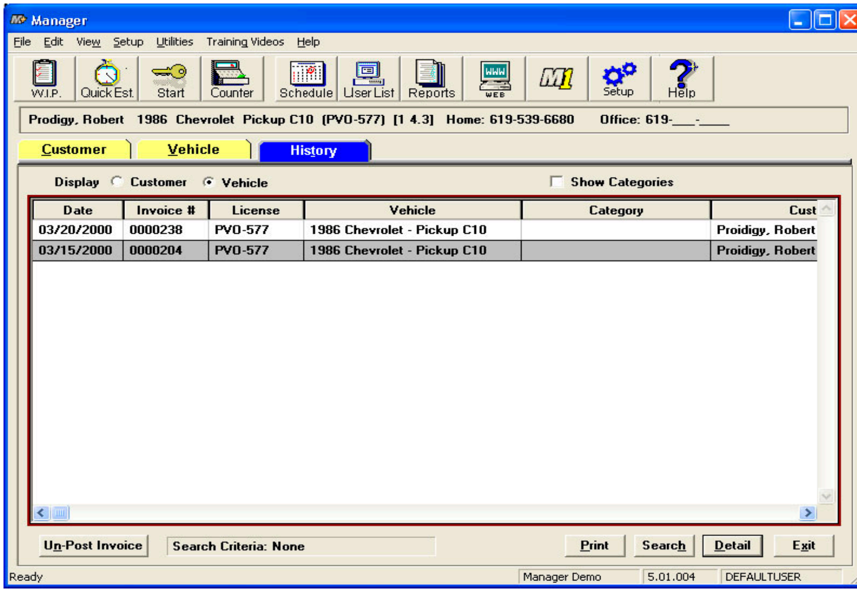
2 Type the invoice number in the Invoice No. field and press **Enter**.

NOTE: You do not need to enter the 0's, if any, at the front of the invoice number.

OR

Highlight the invoice record for which you wish to view the history record and select View Record. Use your scroll bar to view additional invoice records, if necessary.

The History Screen displays the historical record(s) for the vehicle with the selected invoice number highlighted.



History Screen

History Search (by Vehicle)

The Find History Record selection allows you to quickly find a history record for a specified vehicle type.

The program offers you the ability to search for history records based upon vehicle information (for example, 1993 Honda Accord LX) and/or for history records containing certain types of repairs (for example, Transmission Rebuild). This powerful capability is especially useful when used in conjunction with the copy and paste capability to create repair lines for a new order from the repair lines of a history order. This capability is described later in the chapter.

To find a History Record based upon Vehicle Information:

1 Select **Find History Record** from the Utilities menu.

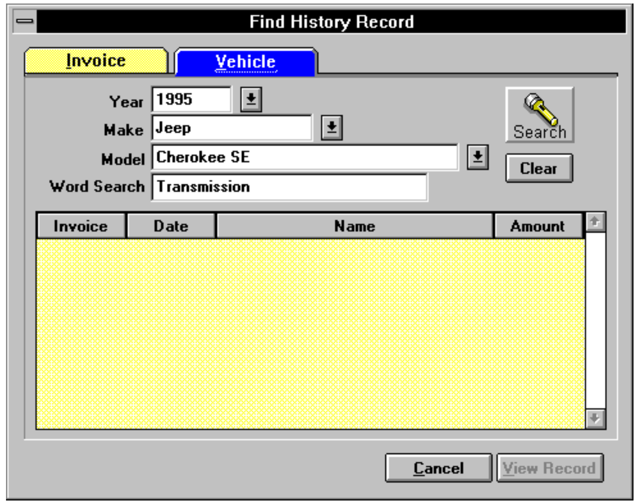
OR

Press **F4**.

The Find History Record dialog box appears.

2 Select the **Vehicle** tab if not already selected.

The Vehicle panel of the Find History Record dialog box displays.



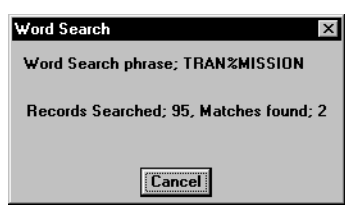
Find History Record (Vehicle Panel)

3 Select, as known, Vehicle **Year**, **Make**, and **Model**.

AND/OR

Enter the text you wish to search for in the Word Search field (Battery, Oil Change, etc.). You can search on a part of a word (for instance, a search on “BAT” can result in a selection of “BATTERY.” You can also use the “%” character as a “wild card,” substituting it for an unknown character or group of characters. For example, “BATT%RY,” or even, “B%Y” will yield “BATTERY.” Just remember that the more characters that you substitute for, the higher your probability of unwanted matches to your search request.

4 Select **Search**. A dialog box informs you of the progress of your search.

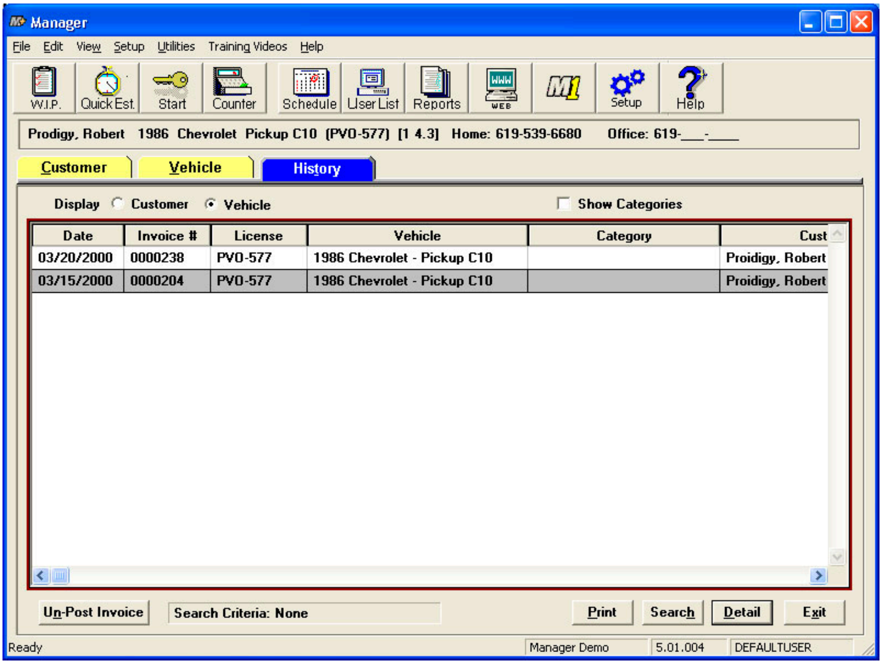


Search Progress

After a moments processing, the grid area displays any match(es) to your search request.

5 Highlight the desired History Record and select **View Record**.

The History screen displays the history records for the selected Customer or Vehicle.



History Screen

History Screen

This screen allows you to access all of the History records (closed Invoices) for a given vehicle or customer. The grid displays all of the history records for the customer or vehicle depending upon your display selection.

Option	Description
Display for: (option button)	Choose between displaying all history records for the current customer, or for just a single vehicle.
Un-Post Invoice	Allows you to re-open an invoice into Work-In-Progress.

Option	Description
Search	Allows you to search the Part Number and Description fields of the history records displayed in the History panel.
Detail	Opens the History Detail dialog box.

Un-Post Invoice You must unpost an invoice if there are any changes that need to be made to the posted invoice other than payments. The Un-Post Invoice command closes the history record and re-opens the invoice into Work-In-Progress. Any unpaid balance is returned to the invoice and removed from Accounts Receivable.

To Un-Post an Invoice:

1 With the desired invoice highlighted, select **Un-Post Invoice**.

A dialog box asks that you confirm your request.

Un-post Invoice?

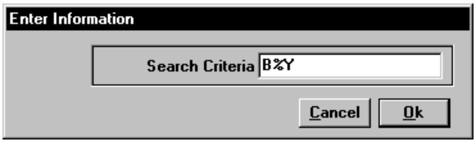
2 Choose **Yes** to un-post the invoice.

Search The Search Criteria field allows you to enter a text string on which the program will search the Part Number and Description fields of the history records displayed in the History Panel. Once you have conducted your search, only those history record(s) which match your request are displayed in the History Panel.

To initiate a History Panel word search:

1 In the History Panel, select **Search**.

The Enter Information dialog box displays.



Enter Information

2 Enter the text you wish to search for (Battery, Oil Change, etc.). You can search on a part of a word (for instance, a search on "BAT" can result in a selection of "BATTERY." You can also use the "%" character as a "wild card," substituting it for an unknown character or group of characters. For example, "BATT%RY," or even, "B%R" will yield "BATTERY." Just remember that the more characters that you substitute for, the higher your probability of unwanted matches to your search request.

3 Select **OK**.

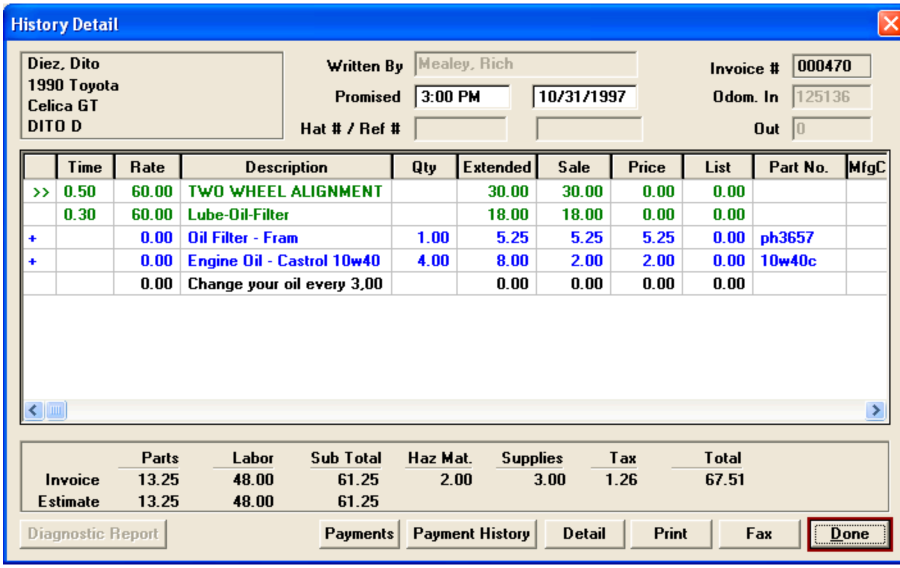
4 You are returned to the History Panel, with only those history records matching your request displayed.

History Detail Dialog Box The History Detail dialog box allows you to view comprehensive information about the invoice including parts and labor detail, along with payment history.

To open the History Detail dialog box:

- With the desired invoice highlighted, select **Detail**.

The History Detail dialog box displays.



History Detail

Aside from allowing you to view detailed invoice information, the History Detail dialog box provides the following options:

Option	Description
Payments	Allows you to view a history of payments, apply a payment to an unpaid balance, and to post payment(s).
Payment History	Opens the Payment History dialog box, allowing you to view all payments for the selected Invoice or Customer.
Detail	Allows you to view detail about the selected repair line.
Print	Sends a copy of the invoice to the printer.
Fax	Allows you to fax using the Faxman driver.
Done	Returns you to the History panel.

Copying Repair Lines from a History Record One exciting aspect of the vehicle history capability is that you can copy information from a history order to a current order.

For example, while preparing an estimate for an engine rebuild on a '68 Chevy Pickup, you may recall that you prepared a similar estimate in the past. Rather than having to put together the estimate from scratch, you can copy repair lines from the historical order and paste them into the new order. Your parts, labor, and tax rates are automatically updated to current values.

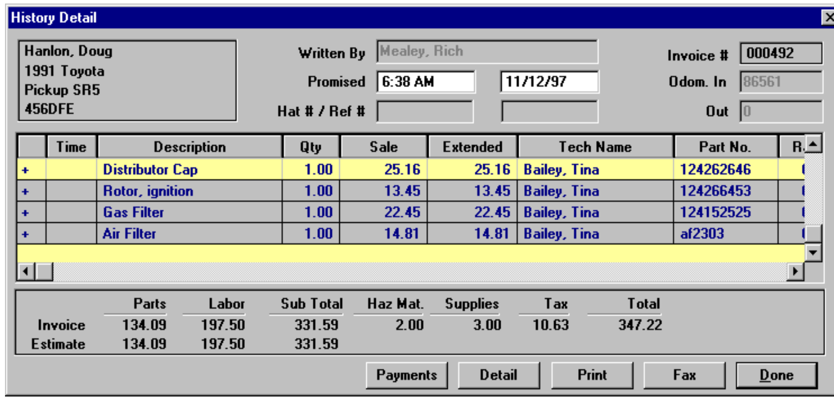
As another example, you may have a regular customer who comes in every three thousand miles for an Oil Change/Lube Job. Once you have begun the order, and selected her name in the Customer panel, simply click on the History tab to view her history records, open a history record for a previous Oil Change/Lube Job, copy the repair lines, and paste them into your current order. Your order is complete without you ever having to look up a part, labor item, or canned job.

To copy repair lines from a history record:

NOTE: This procedure details one method of copying information from a history record into an estimate. Actually, there are a number of different ways that copying and pasting can be employed within the program. And you aren't limited to copying from history—you can also copy from one open order into another, from a canned job into an order, etc. In any case, the procedure is essentially the same as described below.

1. Locate the history record from which you wish to copy repair lines. Refer to Find History Record (By Vehicle), if necessary.
2. Select Detail to open the History Detail dialog box.
3. Highlight the line items you want to copy.

Highlight cells by moving your mouse pointer to a cell in the first row in the range of rows you wish to copy and, holding your left mouse button down, dragging the mouse pointer to a cell in the last row in the range.



History Detail

Release the mouse button. The rows are highlighted as shown in the figure above.

4 Press **Ctrl** + **C** to copy the repair lines.

5 Select the **In Progress** icon to open Work In Progress.

6 Open the Order you wish to paste into.

7 Select **Paste** from the Edit menu.

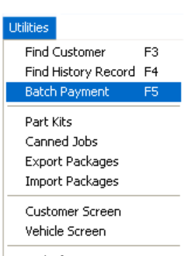
OR

Press **Ctrl** + **V** to paste the selected repair lines.

A dialog box asks if you wish to update your parts cost from inventory.

8 Select **Yes.** The repair lines are added to your order.

Batch Payments



The **Batch Payments** dialog box allows you to quickly apply a payment, or a set of payments, to invoices. You would normally make batch payments to the posted orders of a customer with an in-house credit account (for example, a fleet customer).

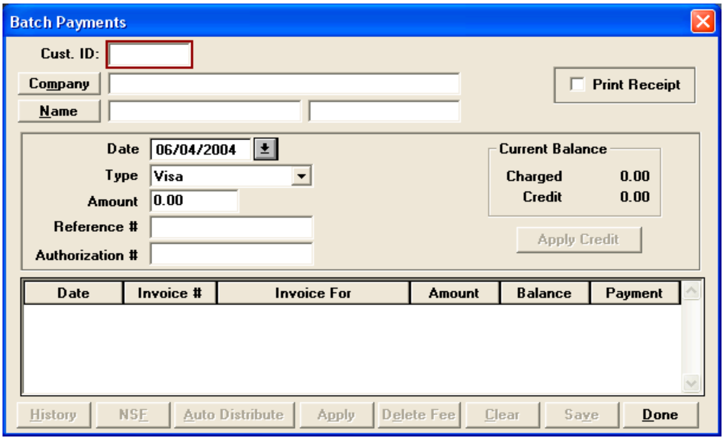
To apply a batch payment:

1 Select **Batch Payment** from the Utilities menu.

OR

Press **[F5]** while in any program screen.

The Batch Payments dialog box appears.



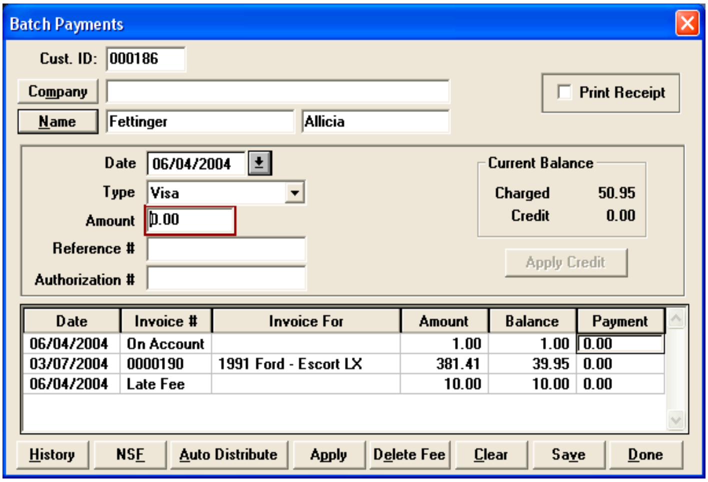
Batch Payments (empty)

The fields of the screen are initially empty, as displayed in the previous figure.

2 Select the **Name** or **Company** button to open the Customer List to select a customer.

3 Select a customer from the Customer List.

The Batch Payments dialog box displays all of the invoices for the customer with unpaid balances.



Batch Payments (w/ customer selected)

The current date is automatically entered in the Date field and the default payment type is automatically entered in the Type field. You can select a different date or payment type from the pull-down choice lists if necessary.

4 Choose **Print Receipt**, if you would like to print a receipt of the payment.

5 Enter the amount of the payment in the Amount field.

NOTE: You can skip this step if you plan to Auto Distribute payment in full (refer to Step #7).

6 Enter the Reference # and/or the Authorization #, as necessary.

7 Apply the payments to the posted invoices. There are two ways you can do this. You can:

- Choose **Auto Distribute** to distribute payment among invoices.

OR

- Apply payments to the invoices individually.

Each of the payment methods are described in the following sections.

8 Click the **Delete Fee** button to delete late fees for the selected customer.

9 Select **Save** to save your batch payment(s) while still remaining in the Batch Payments dialog box.

OR

Select **Done** to save your batch payment(s) and exit the dialog box.

Auto Distribute Automatic distribution is the easiest way to apply a payment to an invoice, or a group of invoices. Once you have entered a payment amount, simply select Auto Distribute to apply that amount beginning with the oldest invoice and working forward chronologically through the posted invoices. If you wish to automatically distribute a payment in full, you don't need to enter anything in the Amount field—simply selecting Auto Distribute automatically sets up payment in full for all invoices.

For example, if you had three invoices totalling $987.57, and auto distributed payment in full, the payment amount would be disbursed in such a way as to satisfy the balances for all three invoices as shown.

Date	Invoice #	License	Amount	Balance	Payment	
06/22/95	000000	On Account	0.00	0.00	0.00	
06/22/95	001137	2BYL432	71.89	71.89	71.89	
06/22/95	001138	2BYL432	225.69	225.69	225.69	Paid in Full
06/22/95	001139	2BYL432	689.99	689.99	689.99	

Payment in Full Auto-Distributed

As an example of a partial payment, if you had three invoices totalling $987.57, and auto distributed a payment of $500.00, the payment amount would be disbursed in such a way as to satisfy the balances on the first two invoices and partially satisfy the balance on the third as shown in the following figure.

Date	Invoice #	License	Amount	Balance	Payment	
06/22/95	000000	On Account	0.00	0.00	0.00	
06/22/95	001137	2BYL432	71.89	71.89	71.89	
06/22/95	001138	2BYL432	225.69	225.69	225.69	Paid in Full
06/22/95	001139	2BYL432	689.99	689.99	202.42	Paid in Part

Partial Payment Auto-Distributed

Apply Payments You can choose to apply payments to invoices on an individual basis using the Apply button.

To apply payments individually:

1 In the Batch Payments dialog box, enter the total payment amount in the Amount field.

NOTE: You MUST enter an Amount in this field or no payments will be applied.

2 Enter the payment for each invoice in the appropriate cell in the Payment column.

OR

Click the **Apply** button, repeatedly as necessary, to automatically enter payments for each invoice.

NOTE: If at any time you wish to clear all payment amounts, select the **Clear** button.

3 Select **Save** when done.

The payments are applied to the designated invoices.

NOTE: The sum total of the payments entered in the Payment column in the grid cannot exceed the total payment amount entered in the Amount field. If you attempt to apply individual invoice payments which are in excess of the total payment amount, an error message appears and you will not be allowed to continue. You are also unable to apply an individual invoice payment in excess of the amount due.

NSF Funds

The Non-Sufficient Funds (NSF) function allows you to debit a customer's outstanding balance for the amount of the returned item. The following procedure describes how to process a returned check.

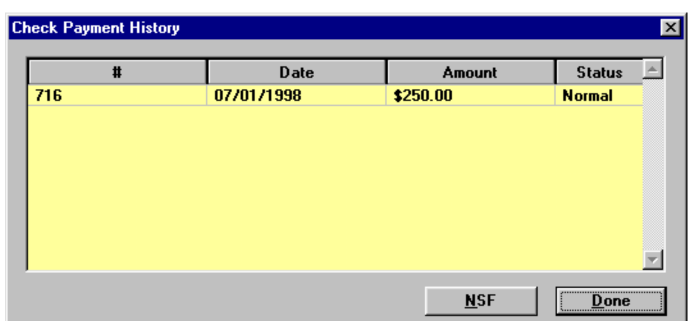
To process an NSF check:

1 Press **[F5]** to open the Batch Payments dialog box.

Find the customer using the Company or Name button, once in the 'rolodex' highlight the company or customer name and click on the **OK** button.

You are returned to the Batch Payments dialog box.

2 Click the **NSF** button to open the Check Payment History dialog box.



Check Payment History

The Check Payment History displays all check payments made by this customer.

3 Highlight the line that corresponds with the returned check, and click on the **NSF** button.

You are prompted to confirm your request.

OK to mark as NSF?

4 Click **OK**.

5 Exit the batch payment function. The amount of the NSF item is now included in the customer balance.

Deleting a Payment

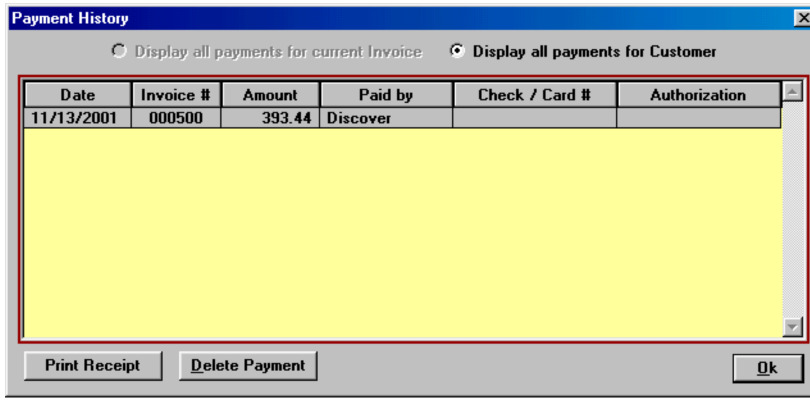
You can delete a prior payment in Manager.

NOTE: It is highly recommended that you password-protect this dialog box. Refer to Chapter 5 for details.

To delete a payment:

1 In either the Apply Payments or Batch Payment [F5] dialog box, choose **History**.

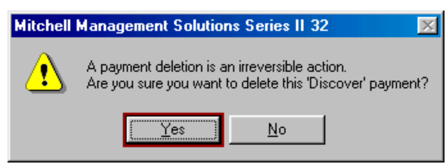
The Payments History dialog box displays a history of payments for the order, or customer, as applicable.



Payment History

2 Select the Payment and click the **Delete Payment** button.

A dialog box cautions that the deletion cannot be reversed.



Warning

3 Click **Yes** to remove the payment.

Summary

This chapter detailed the options available for working with history records and for making batch payments on posted invoices.

Chapter 10
Reporting

Overview

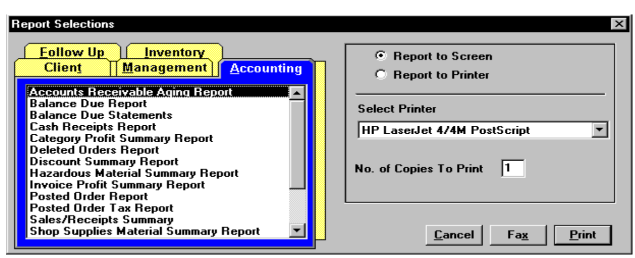
A report is a collection of information formatted for printing. Reports can be printed to the screen for viewing, or sent to the printer for hard-copy output. Manager reports take many forms. Printed estimates, repair orders, and invoices are some examples of reports which have already been described in this User's Guide. Other types of reports include management reports which provide information to help you intelligently manage your shop; accounting reports which help you track accounts receivable and which provide insight into shop profitability; and follow-up letters and postcards designed to help you maintain customer satisfaction and create opportunities for additional business.

Printing Reports

The Reports button allows access to the Report Selections dialog box.

To open the Report Selection dialog box:

1 Select **Reports** from the far right end of the button bar. The Report Selections dialog box displays.



Report Selections

2 Select the thumb-tab which represents the type of report you want to work with.

The dialog box dynamically alters to display the selection of reports available in the selected report classification.

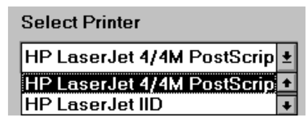
3 Click your mouse pointer on the desired report.

4 Choose **Report to Screen** to view a copy of the report on your computer monitor.

OR

Choose **Report to Printer**, to send a copy of the report to the printer.

5 Select a printer, if necessary, from the pull-down choice list.



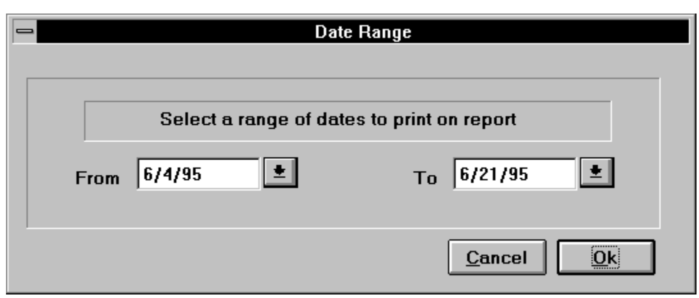
Select Printer

NOTE: The program automatically selects the printer that you have selected as your Windows default printer. Normally, you will not have to change this selection.

6 Overtype, if necessary, the "1" in the No. of Copies To Print field with the desired number of copies.

7 Select **Print**.

An additional dialog box appears for many reports, asking for additional information. Most of the time you will be required to provide a range of dates for the records you wish to include in your report as displayed below.



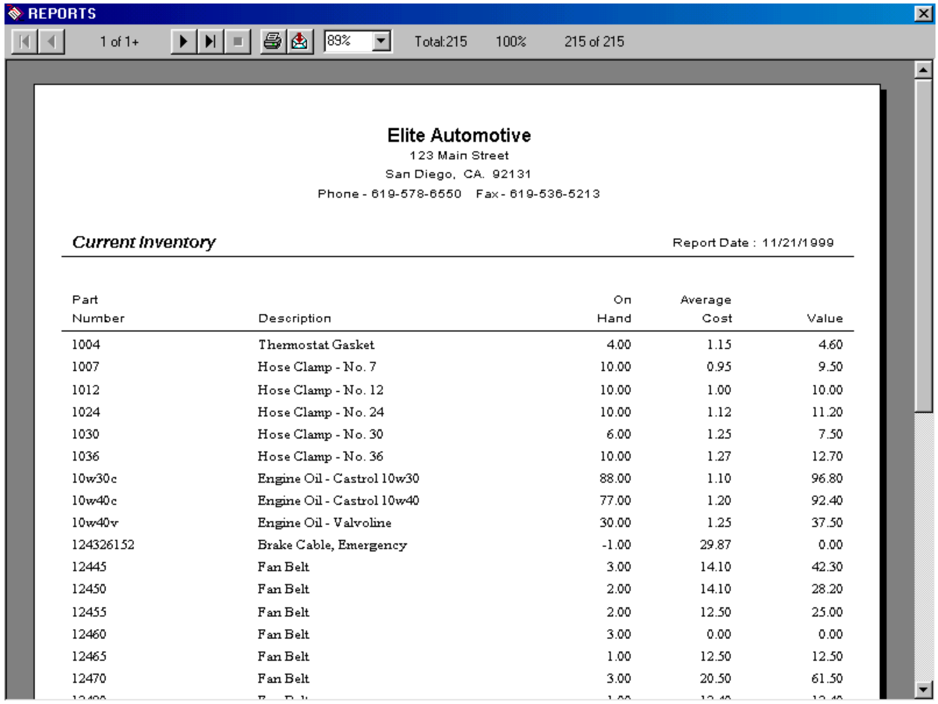
Date Range

You may also be asked to provide additional criteria for record selection.

8 Provide record selection criteria, if applicable.

9 Select **OK**.

The report is sent to the screen, or the printer, depending upon your selection.



Elite Automotive
123 Main Street
San Diego, CA. 92131
Phone - 619-578-6550 Fax - 619-536-5213

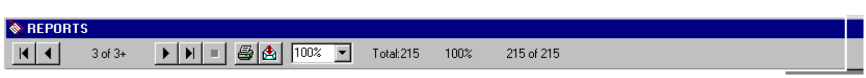
Current Inventory Report Date : 11/21/1999

Part Number	Description	On Hand	Average Cost	Value
1004	Thermostat Gasket	4.00	1.15	4.60
1007	Hose Clamp - No. 7	10.00	0.95	9.50
1012	Hose Clamp - No. 12	10.00	1.00	10.00
1024	Hose Clamp - No. 24	10.00	1.12	11.20
1030	Hose Clamp - No. 30	6.00	1.25	7.50
1036	Hose Clamp - No. 36	10.00	1.27	12.70
10w30c	Engine Oil - Castrol 10w30	88.00	1.10	96.80
10w40c	Engine Oil - Castrol 10w40	77.00	1.20	92.40
10w40v	Engine Oil - Valvoline	30.00	1.25	37.50
124326152	Brake Cable, Emergency	-1.00	29.87	0.00
12445	Fan Belt	3.00	14.10	42.30
12450	Fan Belt	2.00	14.10	28.20
12455	Fan Belt	2.00	12.50	25.00
12460	Fan Belt	3.00	0.00	0.00
12465	Fan Belt	1.00	12.50	12.50
12470	Fan Belt	3.00	20.50	61.50

Report (printer to screen) Example

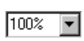
Screen Reports

If you choose to print your report to the screen, a number of status indicators and viewing options are available along the top of your display.



Print Options

The available options are described below:

Option	Description
	Displays the first page of the report.
	Moves the screen display back a single page.
	Moves the screen display forward a single page.
	Displays the last page of the report.
	Not currently available. Reserved for future releases.
	Prints the current report.
	Not currently available. Reserved for future releases.
	Allows you to zoom in or out on the report window.

Faxing Reports

You can fax any of the reports by selecting the Fax button in the Report Selections dialog box. Refer to the section on faxing in Chapter 2, “Getting Started,” for details on faxing.

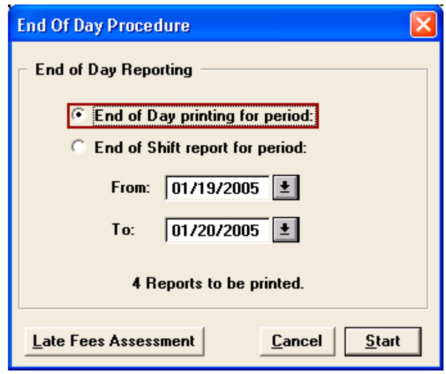
End Of Day Reports

End Of Day reporting allows you to designate reports to be printed when you exit Manager at the end of the day or over any other desired time period (e.g. weekly, monthly). The End Of Day selection from the Utilities menu initiates the end of day reporting process.

NOTE: The reports to be included in the End Of Day report run are designated in end of day report setup. Refer to Chapter 3, “Shop Setup” for details.

To run End Of Day reports:

1 Select **End Of Day** from the Utilities menu. The End Of Day Procedure dialog box displays.



End of Day Procedure

The top part of the dialog box displays the processing period for the End Of Day reports. You can specify the From and To date range with the pull down menus.

The lower portion of the dialog box displays the number of reports to be printed (as designated in End Of Day Reports Setup).

2 The top part of the dialog box displays the processing period for the end of day reports. Pick a different date range for the report print run, if desired. Alternatively, you may choose **End of Shift Report for period:** if you run multiple shifts in your facility and want reports for each shift. Just run the End of Shift Report at the end of each shift.

The lower portion of the dialog box displays the number of reports to be printed (as designated in End of Day Reports Setup) and provides a check box that allows you to Disable Report Printing.

3 Click on the **Start** button to send the end of day reports to the printer.

4 If desired, you may also launch the **Late Fees Assessment** routine by selecting the Late Fees Assessment button. Refer to Chapter 4 for details on Late Fees and Late Fee Assessment.

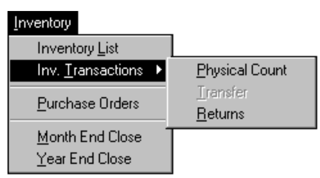
Summary

This chapter detailed the procedures for working with reports. Refer to Chapter 13, “Marketing” for procedures for working with mail-merge postcards and letters.

Chapter 11
Inventory

Overview

The Inventory menu provides options for creating and editing inventory records, conducting inventory transactions such as updating records of on-hand inventory, recording transfers, and recording parts returned to vendors. Month and Year End Close transactions are available as well.



Inventory Menu

The functions accessible from the Inventory menu are described in this chapter.

Inventory List

The Inventory List dialog box has two primary functions:

- The Inventory List is where you search for and choose inventory items to be transferred to orders. The procedures for selecting and transferring Inventory List items to orders is described in Chapter 6, “Orders.”

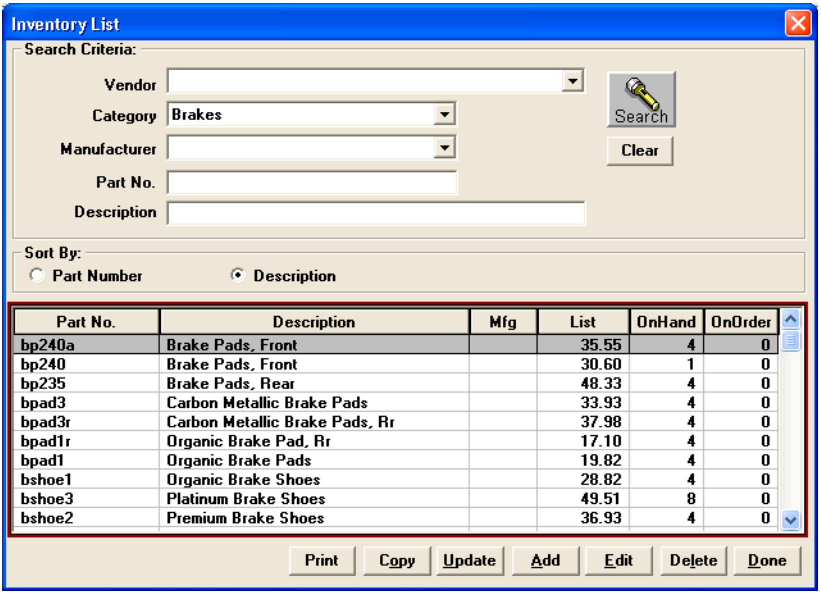
- The Inventory List is where you enter or edit inventory item information. Procedures for adding, editing, and deleting inventory items are detailed below. Additional sections describe procedures for setting up Alternate Parts, Attached Items, and Superseded Parts.

NOTE: The Inventory menu is available only to users of Manager Plus. For Manager users the **Parts List**, the equivalent of the **Inventory List**, is selected from the **Utilities** menu.

To open the Inventory List dialog box:

- Select **Inventory List** from the Inventory menu.

The Inventory List dialog box displays.



Inventory List

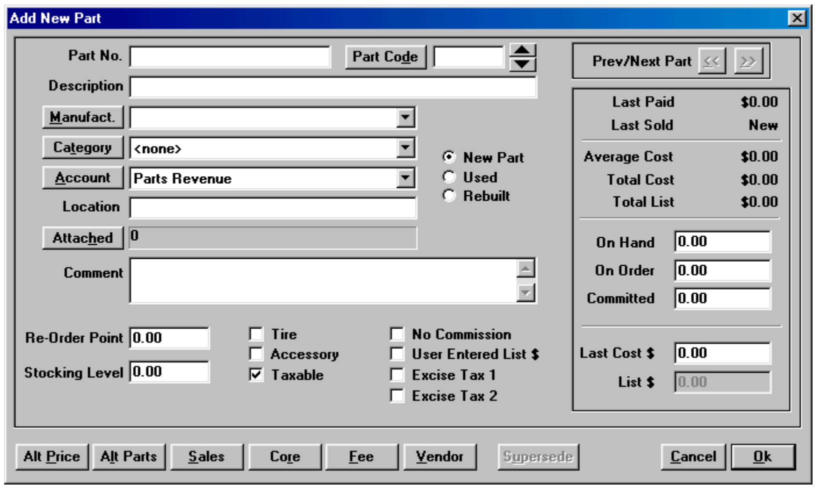
The Inventory List dialog box allows you to Add, Edit, Copy, or Delete an Inventory List item or Update Inventory List prices. Once you have parts in the grid (as displayed above), you can choose Print to print the listed parts.

Adding an Inventory Item

To add a part:

1 Select the **Add** button.

The Add New Part dialog box appears with the cursor in the Part # field.



Add New Part

2 Type in a Part Number (up to 20 characters in length).

3 Type in or choose a Part Code.

The Description field fills in automatically.

4 Select a **Manufacturer**. This is important for electronic parts ordering. Click on the button to open a dialog box in which you can add a manufacturer, if necessary.

5 Select a **Category**. Use the button to add a Category, if needed.

6 Select an **Account Class**. Use the button to add an Account Class, if necessary.

7 Type in a **Last Cost**.

The List price automatically fills in based upon the default shop discount. You can overwrite this price with a different price, if desired, by clicking the User Entered List $ check box and entering a price in the List field. This fixes the price at the designated amount and protects it from system-generated pricing updates.

8 Designate that the part is Taxable, an Accessory, and/or a Core, as necessary.

9 Apply an **Excise Tax**, if necessary.

10 Select **Attached** to choose an attached part, if necessary. Refer to the section on Attached Parts, on page 264, for details.

11 Select Alt Price to set up alternate pricing for the part, if necessary. Refer to the section on Alternate Pricing, on page 267, for details.

12 Select **Alt Parts** to set up alternate part number(s) for the part, if necessary. Refer to the section on Alternate Parts, on page 265, for details.

13 Select **OK** to save your new part.

The new part is added to the Manager database. You are returned to the Inventory list dialog box with your new part added to the Inventory list.

Editing an Existing Part

You may need to make a change to an existing part. As with adding a new part, this is accomplished in the Inventory List dialog box. This procedure details the steps for editing a part.

To edit an existing part:

1 Select **Inventory** list from the Inventory menu.

2 Type, or select from a pull-down list, identifying information for the part (as known):

- **Category**
- **Part #**
- **Description**

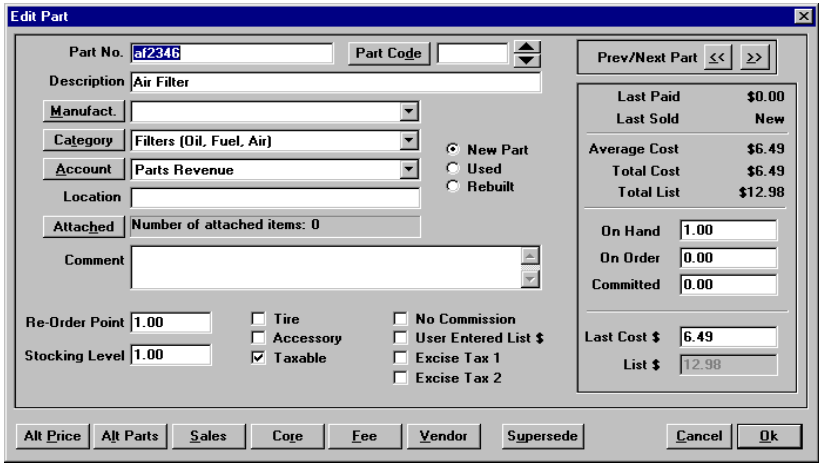
3 Select the **Search** icon.

The Inventory list displays the parts which match your request.

4 Select the Part you wish to edit by clicking on it with your mouse pointer.

5 Select **Edit**.

The Edit Part dialog box appears with the information from the selected part number displayed in the appropriate fields. The data fields are identical to those in the Add Part dialog box described earlier in this chapter.



Edit Part

6 Edit the individual fields of the dialog box, as necessary.

7 Select OK.

Your edits are saved and you are returned to the Inventory list dialog box.

Copying a Part

An easy way to create a new inventory item is to copy a similar existing item and simply change those fields that are different.

To copy an Inventory item:

1 In the grid of the Inventory List dialog box, click your mouse pointer on the part you wish to make a copy of.

The grid line for the part is highlighted.

2 Select **Copy**.

A dialog box asks you to confirm your request.

3 Select **Yes** to create a copy of the part record.

A copy of the part record appears in the Inventory List grid.

12354	RADIATOR HOSE	10.95
12354	Copy 1 of Part RADIATOR HOSE	10.95

Copied Part in Inventory Grid

4 Highlight the copied record.

5 Select **Edit**.

The Edit Part dialog box appears with information from the copied part displayed in the appropriate fields.

6 Change the Part Number and/or description and edit any other fields, as necessary.

7 Select **OK**.

Your new inventory item is now available for placement on Manager orders.

Inventory Update

The Inventory Update dialog box allows you to make list price percentage changes. Selections are available that allow you the flexibility to globally update all prices for all vendors, some prices for all vendors, or some prices for some vendors. The way you do this is to perform a query in the Inventory List and then use the Update button to open the Inventory Update dialog box.

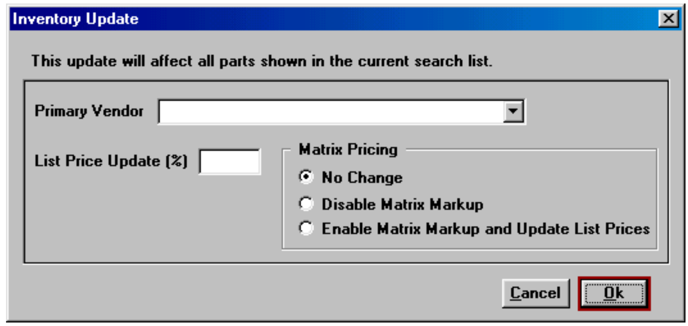
Updates made via the Inventory Update dialog box are only applied to those parts that are currently selected in the Inventory List dialog box.

To Update a Vendor's List Prices:

1 In the Inventory List dialog box, use the Search feature to look up all inventory items that you desire the price update to effect.

2 Choose the **Update** button.

The Inventory Update dialog box displays.



Inventory Update

3 Select a **Vendor** from the pull-down Primary Vendor list or select **All** from the list to update list prices for all Vendors.

4 Enter the whole number that represents the percent change that you wish to make in the List Price Update (%) field. For example, if you desire to increase prices by "5%", enter a "5", not a ".5" or a "0.5". Enter a negative number (-5) to reduce prices.

5 Choose your Matrix Pricing options. This allows the User Entered List price (set in the Add/Edit Part dialog box) to be set or reset. There are three choices:

- **No Change** - Leave user-entered price and settings unchanged.

- **Disable Matrix Markup** - Updates the user-entered list price (if available) with the new price. Updated user-entered list price remains in effect, overwriting the matrix pricing.

- **Enable Matrix Markup** - Overwrite any user-entered list prices with matrix calculated price.

6 Select **OK**.

A dialog box asks that you confirm your price change.

7 Select **Yes**.

The list price percentage change is made for all effected parts.

Deleting a Part

As a general housekeeping function, you will want to regularly delete parts which are obsolete or for some reason unneeded.

To delete a part:

1 Select **Inventory List** from the Inventory menu.

2 Type, or select from a pull-down list, identifying information for the part (as known):

- **Category**
- **Part #**
- **Description**

3 Select the **Search** icon.

The Inventory list displays the parts which match your request.

4 Select the Part you want to delete by clicking on it with your mouse pointer.

5 Select **Delete**.

A dialog box asks you to confirm your deletion.

6 Select **Yes**.

The part is removed from the database.

Attached Items

The program allows you to associate parts that are frequently used in combination with one another. For example, your shop might sell an A/C Receiver Drier that requires a set of O-Rings. By designating the O-Rings as an attached item, you can be reminded to include the O-Rings as part of every A/C Receiver Drier sale.

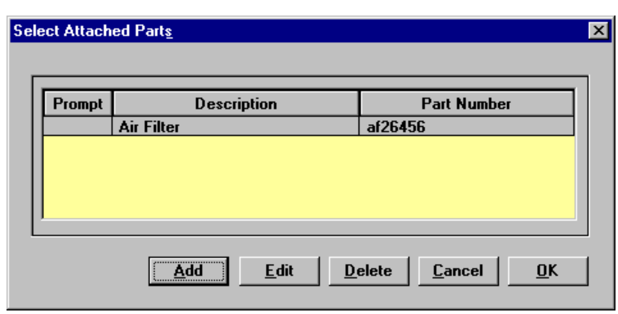
Attached parts can be thought of as having a parent/child relationship. The parent part, normally the larger of parts, is the one that will generate the prompt for parts that have been designated as attached items.

NOTE: You may only attach a single item to a parent part.

To associate an Attached Item:

1 In the Add or Edit Part dialog box for the parent part, select the **Attached** button.

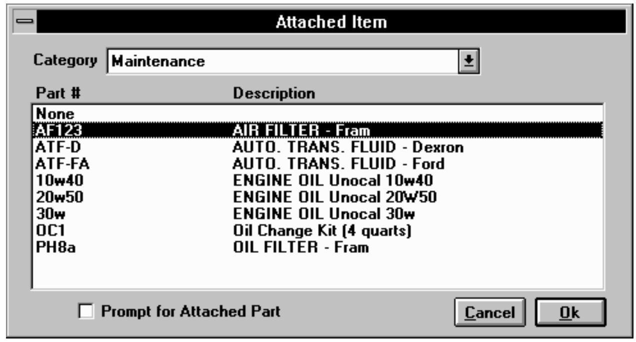
The Select Attached Parts dialog box displays currently attached items, if any.



Attached Item

2 Select **Add**.

The Attached Item dialog box displays the available items in the selected Category of the parent item.



Attached Item

3 Select a different Category, if necessary, from which you wish to choose a part from the pull-down choice list.

Parts available in the selected Category display.

4 Select the item you wish to attach.

5 Click in the Prompt for Attached Part check box, if you wish to be prompted for the attached part when the parent part is placed on an order.

6 Select **OK**.

You are returned to the Add/Edit Part dialog box, with the number of attached items displayed next to the Attached button.

Alternate Part Numbers

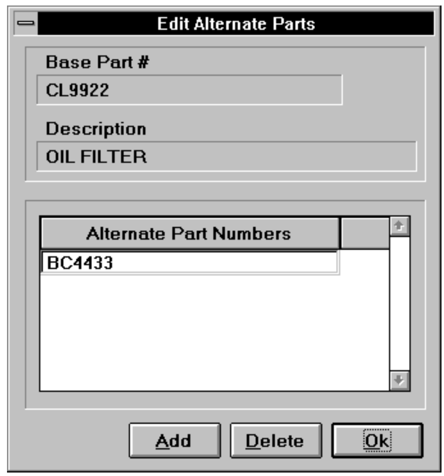
The program allows you to associate multiple part numbers to the same part. For example, you may normally carry AC-brand Oil Filters, but get in a one-time shipment of Fram filters. Since you don't plan on reordering Fram filters, you decide that you do not want to enter the Fram filter into your inventory list. What you can do, in this instance, is set up the Fram filter as an alternate part. Every time you use a Fram filter, the program will offer the opportunity to use the AC Oil Filter information from the Inventory list on the order.

To add an Alternate Part Number to an existing part:

NOTE: You can also add an alternate part number to a new part. The steps are identical to the steps in this procedure except that you will work in the Add Part dialog box.

1 In the Edit Part dialog box, select **Alt Parts**.

The Edit Alternate Parts dialog box displays.



Edit Alternate Parts

2 Select **Add**.

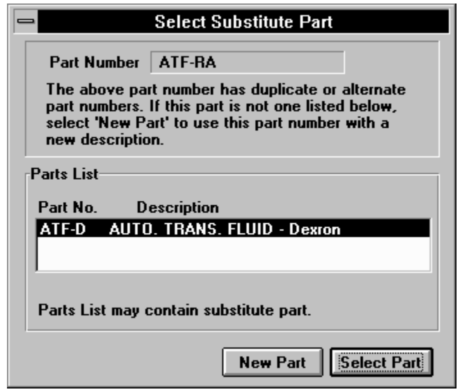
The first available cell in the grid is marked for text entry.

3 Enter an alternate part number.

4 Select **OK**.

The alternate part number is added.

Using Substitute Parts The next time that you enter the alternate part number in the Order item entry - PARTS dialog box, the Select Substitute Part dialog box appears.



Select Substitute Part

- Simply pick the correct duplicate or alternate part from the selection list and choose Select Part. The selected part is entered into the Order item entry - Parts dialog box.

OR

- Select **New Part** to use the base part number.

Alternate Price

Alternate pricing provides the opportunity to overwrite the system-generated discount structure for selected parts. This capability is especially useful for parts that are sold at a lower than normal mark-up.

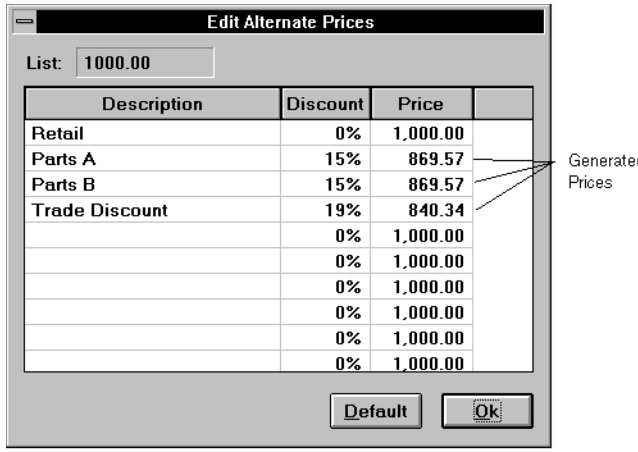
For example, let's say that due to market pressures you find that you can only sell a short-block rebuilt motor that costs you $900 for $1,000—a price well below your standard mark-up. A customer that receives a 15% discount would only be charged $869.57—$30.43 *less* than your cost. To avoid this unprofitable circumstance, you could use alternate pricing.

To establish alternate pricing on an existing part:

NOTE: You can also apply alternate pricing to a new part. The steps are identical to the steps in this procedure except that you will work in the Add Part dialog box.

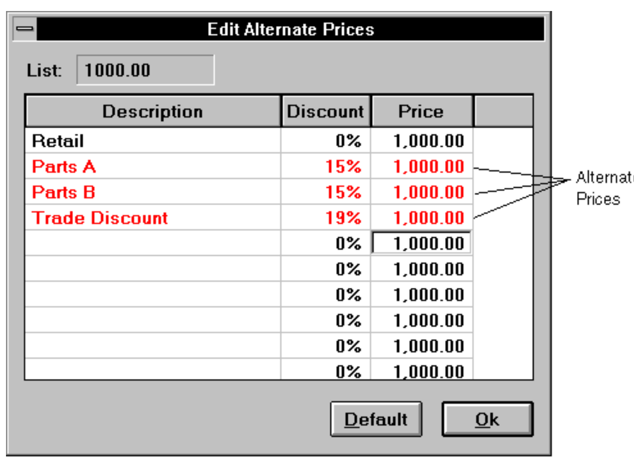
1 In the Edit Part dialog box, select **Alt Price**.

The Edit Alternate Prices dialog box displays.



Edit Alternate Pricing (before)

2 Overtype the system-generated prices (Price column) with new prices. In the example in the following figure, all discount prices have been overtyped with new prices of $1,000.00. The alternate prices appear in red.



Edit Alternate Pricing (after)

3 Select **OK** to save your changes. The alternate pricing will be used on all future orders.

OR

Select **Default** to restore the pricing to reflect the calculated discounts.

Supersede

Selecting Supersede in the Edit Part dialog box initiates a procedure to allow the creation of a part to supersede the current inventory item.

To supersede an inventory item:

1. Select a part from the Inventory List.
2. Choose **Edit** to display the Edit Part dialog box.
3. Choose **Supersede**.

   A dialog box explains that the procedure will allow the creation of a part to supersede the current part.
4. Choose **OK**.

   The Edit Part dialog box displays information from the previous part for the new part.
5. Enter a new part number. If you do not enter a new part number, the supersession will not take place.
6. Change any other fields or selections.
7. Select **OK** to save your superseded part number.

   A dialog box asks if you want to save the new part number.
8. Select **Yes** to create the new part number.

Inventory Balance

The inventory system provides on-hand balances of inventory items as well as requirements on inventory items. This information is then passed along to the Purchasing system for use in generating Purchase Orders. (Refer to Chapter 12, “Purchase Orders,” for details.)

To maintain an accurate ongoing inventory balance, the program must track the movement of parts into and out of the shop. The on-hand balance for a part is automatically increased every time purchased parts are received into the shop. The on-hand balance for a part is decremented every time parts are committed on a Repair Order or confirmed on a Purchase Order.

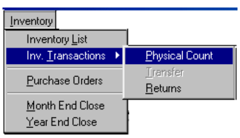
Below are general discussions on how parts are “committed” and “confirmed” in the program.

Committing Parts Parts on an order are committed when the Repair Order is printed or when a part is added to an order that has already been printed. Committing a part informs the inventory system that the part is required for a valid repair order. That way, the requirement for the part can be taken into consideration when creating a pick list of parts for a Purchase Order.

The theory behind committing parts by printing a Repair Order is that traditionally a signed Repair Order indicates customer agreement to the estimated repairs. Commitment of parts by printing a Repair Order indicates to the Inventory System that the parts on the order are not to be considered available inventory.

Confirming Parts Parts are confirmed when the Invoice is printed or when the user chooses to commit the parts by selecting Confirm All Parts in the Order Options dialog box. When a committed part quantity is confirmed, the confirmed quantity is subtracted from the on-hand balance in inventory.

The theory behind confirming parts by printing an Invoice is that the printing of the Invoice indicates that the repair work was performed and that the parts on the order were used.



Inventory Transactions

The Inventory Transactions submenu is selected from the Inventory menu. Three selections are available:

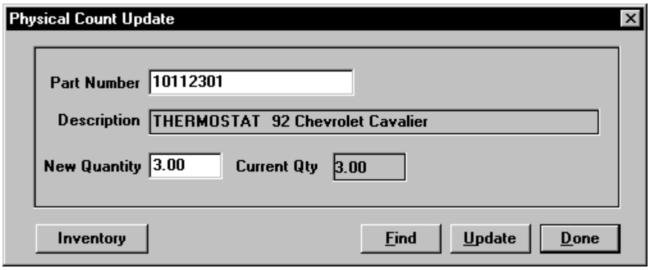
- Physical Count Update
- Transfer (not available in this release)
- Return Part to Vendor

Physical Count Update The Physical Count Update dialog box allows you to change the on-hand quantity of an inventory item. The Physical Count Update dialog box is available from the Inv. Transactions submenu, which is an Inventory menu selection.

To change the on-hand quantity of an Inventory item:

1 Select **Physical Count Update** from the Inv. Transactions submenu.

The Physical Count Update dialog box displays.



Physical Count Update

2 Enter the Part Number and select **Find.** (Skip to Step 5.)

OR

Enter a partial Part Number and select the Inventory button. The Inventory List displays with the partial part number entered in the Show Part Number field.

3 Choose **Search**.

The Inventory List displays the part number(s) that match your request.

4 Click on the desired part number and choose **Transfer**.

OR

Double-click on the part number.

You are returned to the Physical Count Update dialog box.

5 The fields in the dialog box fill in automatically. The New Quantity field displays a highlighted 0.00 and the Current Qty field displays the on-hand inventory.

Overtype the 0's in the New Quantity field with the correct item quantity.

6 Select **Update** to record your quantity adjustment.

7 Repeat this procedure to update additional inventory records as necessary.

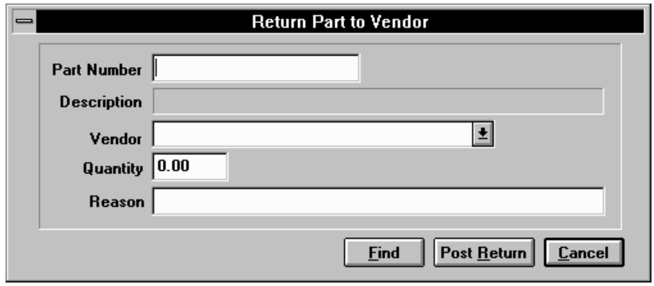
Transfer This feature is not available in this release of the program.

Return Part To Vendor The Return Part to Vendor dialog box allows you to reduce the on-hand quantity of an inventory item to account for parts that are returned to the Vendor. The Return selection is available from the Inv. Transactions submenu, which is an Inventory menu selection.

To adjust inventory levels for returned parts:

1 Select **Return Part to Vendor** from the Inv. Transactions submenu, an Inventory menu selection.

The Return Part to Vendor dialog box displays.

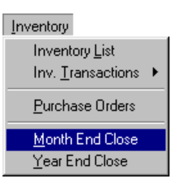


Return Part to Vendor

2. Enter the Part Number or enter a partial Part Number and select the Find button.

   The remaining fields in the dialog box fill in automatically. The Quantity field displays a highlighted 0.00.
3. Overtype the 0's in the Quantity field with the quantity to be returned and change any other fields, including the Vendor field, if necessary.
4. Type in a reason for the return.
5. Select **Post Return** to record your return quantity.
6. Repeat steps 2 through 5 to record additional returns as necessary.
7. When all transfers have been recorded, select **Cancel** to close the dialog box.

Month End Close



The Close Month dialog box allows you to close a month for accounting purposes. This totals sales and cost information for the current month and begins accumulation of the next month's totals.

To close an Accounting Month:

1. Select **Month End Close** from the Inventory menu.

The Close Month dialog box displays.

Close Month

2 A drop-down menu allows you to close any month up to the present. Choose the month you wish to close from the drop-down menu.

3 Select **OK** to close the accounting month.

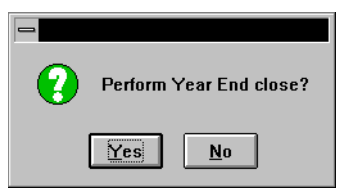
Year End Close

The Year End Close menu selection allows you to close a Year for accounting purposes. This totals sales and cost information for the current year and begins accumulation of the next year's totals. Year End Close is selected from the Inventory menu.

To close an Accounting Year:

1 Select **Year End Close** from the Inventory menu.

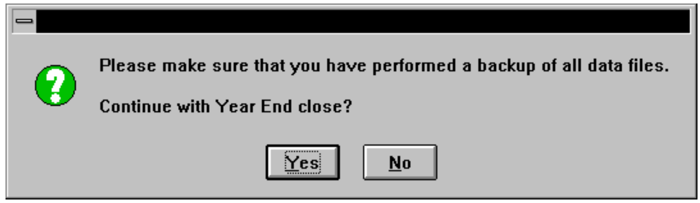
A dialog box asks if you want to Perform Year End Close.



Close Year

2 Select **Yes** to continue.

A second dialog box asks that you confirm that you have performed a backup of all data files.



Backup Files

3 Select **Yes** to close the year.

Summary

This chapter described the options available from the Inventory menu save for Purchase Orders, which is the subject of the following chapter.

Chapter 12
Purchase Orders

Introduction

This chapter describes the various options that are available for generating and working with purchase orders.

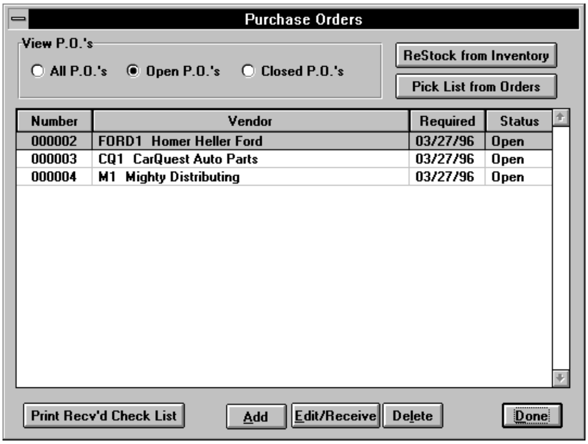
Purchase Orders Dialog Box

The Purchase Orders dialog box lists all open POs along with providing options for creating new purchase orders, viewing open purchase orders, and performing certain maintenance activities on open POs (Edit PO, Receive Parts, Delete PO). The Purchase Orders dialog box is opened from the Inventory menu.

To open the Purchase Orders dialog box:

- Select **Purchase Orders** from the Inventory menu.

The Purchase Orders dialog box displays.



Purchase Orders

Depending upon the view option that you have selected, the grid area of the Purchase Order dialog displays All POs, Open POs, or Closed POs.

A number of options for working with POs are available.

Option	Description
Restock from Inventory	Opens the Restock from Inventory dialog box in which you can generate a PO based upon parts with inventory levels that have dropped below a calculated restocking level.
Pick List from Orders	Generates a PO based upon the parts that are committed to open orders.
Print Recv'd Check List	Select to print preview (and print if desired) a check list of all of the parts on a selected PO.
Add	Opens the Purchase Order Worksheet, in which you can manually build a purchase order.
Edit/Receive	Select to edit items on the purchase order or to receive items to the PO.
Delete	Select to permanently remove a purchase order.
Done	Closes the Purchase Orders dialog box.

The options available in the Purchase Orders dialog box are discussed in detail in the following sections.

Restock From Inventory

Selecting Restock from Inventory in the Purchase Orders dialog box opens the ReStock from Inventory dialog box.

The ReStock from Inventory dialog box allows you to generate a Purchase Order based upon items with inventory levels that have dropped below a calculated re-order point. A part re-order is triggered if the re-order point is greater than or equal to on-hand quantity minus items committed to orders.

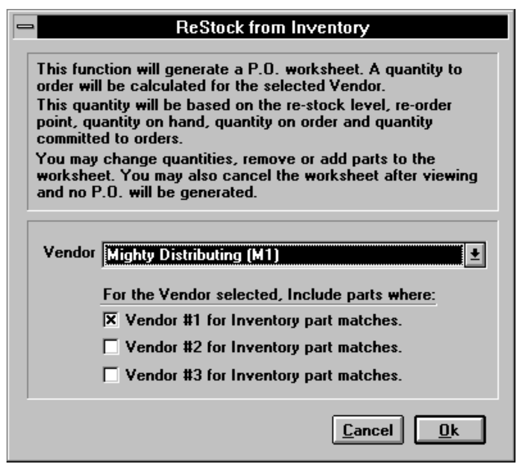
The ReStock from Inventory calculation is performed as follows:

Order Qty = Re-stock level - On-Hand Qty. - On-Order Qty.

To create a Purchase Order using the ReStock Function:

1 In the Purchase Orders dialog box, select **ReStock from Inventory**.

The ReStock from Inventory dialog box appears.



ReStock from Inventory

2 Select a **Vendor** from the pull-down choice list.

3 Click on each Vendor classification (Vendor #1, Vendor #2, Vendor #3) for which parts should be included.

For example, if you are generating a PO for Acme Parts Inc. and want to include all inventory items for which Acme has been designated Vendor #1, you would check the Vendor #1 box only.

4 Choose **OK**.

The Purchase Order Worksheet lists the parts and order quantities that match the ReStock from Inventory request. The Purchase Order Worksheet is the dialog box that you work in to complete the PO. Refer to “Purchase Order Worksheet” later in this chapter for details.

Pick List From Orders

The Order Pick List is generated whenever you request a pick list based upon open orders. This pick list can then be readily converted to a purchase order. There are two ways you can generate an Order Pick List:

- An Order Pick list can be generated for an individual order using the Pick List selection in the Order Options dialog box. When you choose this option, the program scans the current order for committed parts and builds the Pick List.

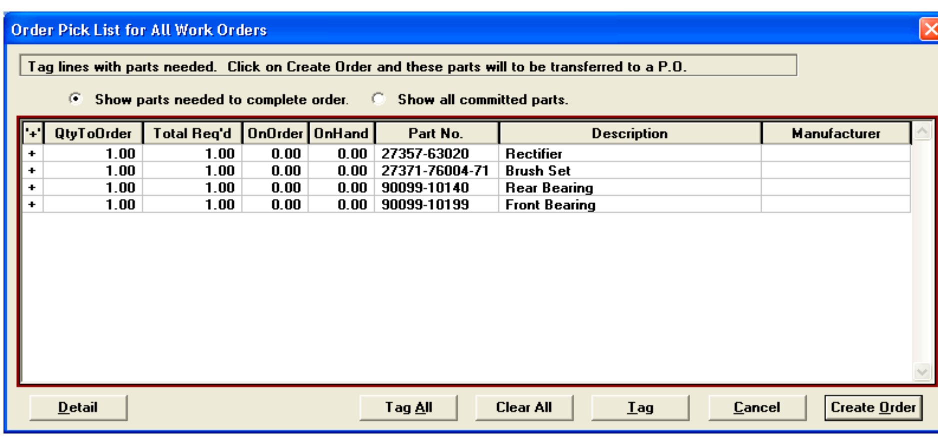
OR

- An Order Pick list can be generated for all open orders, using the Pick List from Orders option in the Purchase Orders dialog box. When you make this selection, the program scans all orders for committed parts and builds the Pick List.

To convert the Order Pick List to a Purchase Order:

1 Create a pick list using either of the two methods described above.

The Order Pick List dialog box displays.



Order Pick List

2 Select a **View** option.

View Options

Two options are available, you can choose to:

- **Show parts needed to complete order**. This is the default view. Choose this option if you wish to build your pick list with parts that do not have sufficient inventory available to fill the order(s).

OR

- **Show all committed parts**. Choose this option if you wish to look at all committed parts in building your purchase order even if the parts are already in inventory or on order.

NOTE: When you view all committed parts, the parts that are in stock or already on order appear in a different color.

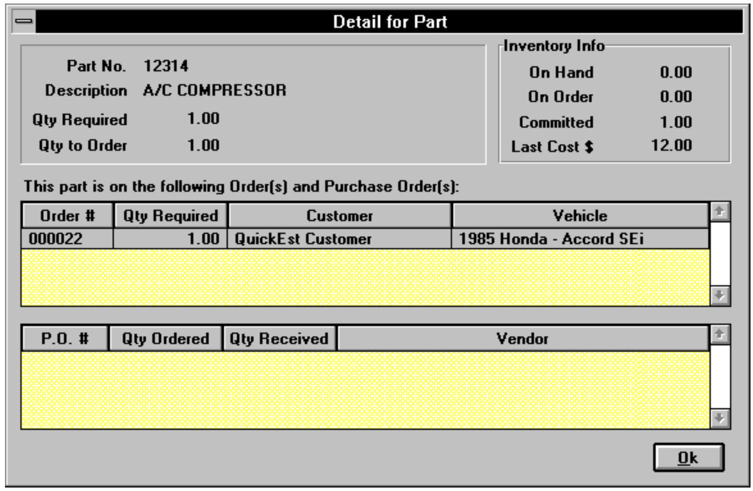
3 By default, all parts are tagged for inclusion in the purchase order. A “+” appears in the “+” Tag column of the grid for each part, indicating that the part has been selected for inclusion in the purchase order. You can deselect a part by clicking the Tag button (works as a toggle) or choose Clear All to clear all the parts.

NOTE: You can also double-click on a part to toggle the Tag setting.

4 Once you have the parts tagged that you want on the Purchase order, choose **OK**.

The Purchase Order Worksheet opens, with the part(s) you selected displayed in the worksheet grid. The Purchase Order Worksheet is the dialog box that you work in to complete the PO.

Detail for Part The Detail for Part dialog box allows you to view status information on a part listed in the Order Pick List dialog box. Detail for Part is opened by highlighting a part number and selecting Detail from within the Order Pick List.



Detail for Part

The top left portion of the dialog box lists the Part Number and description, quantity required, and quantity to order. The Inventory Info control group lists the quantity on hand, quantity on order, quantity committed to open orders, and the last cost.

Two grids are displayed in the dialog box:

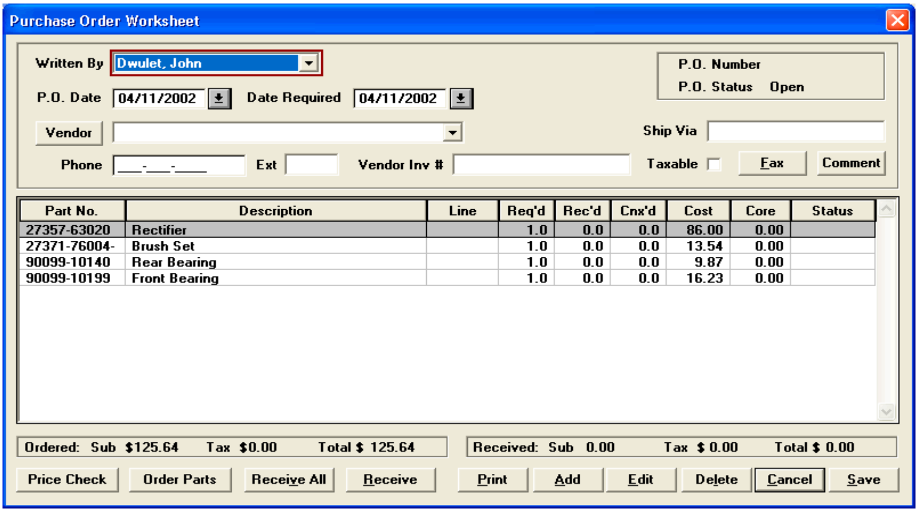
- The top grid displays detail on open orders on which the part is listed.
- The bottom grid displays detail on purchase orders on which the part is listed.

Purchase Order Worksheet

The Purchase Order Worksheet provides access to a wide range of options in working with newly generated purchase orders and editing and receiving parts to existing POs.

PO Creation

POs may be automatically generated, as in the case of orders created via the ReStock from Inventory, or the Pick List from Orders functions, or you can create a PO from scratch by selecting the Add button in the Purchase Orders dialog box. Regardless of the method used, you will be automatically taken to the Purchase Order Worksheet.



Purchase Order Worksheet

You can Add an item to the PO, Edit an existing item, or Delete an item in this dialog box. Options for receiving parts are also included.

The Purchase Order Worksheet contains the following fields:

Field	Description
Written By	Select Purchase Order writer from pull-down list.
P.O. Date	Current date is automatically entered. Select a new date, if necessary, from the pull-down calendar.
Date Required	Current date is automatically entered. Select a new date, if necessary, from the pull-down calendar.
Vendor	Select a Vendor from the pull-down choice list. Select the Vendor button to open Vendor Setup, in which you can add a Vendor, edit a Vendor's attributes, or delete a Vendor.
Phone/Ext	Phone Number/Extension.

Field	Description
Vendor Invoice Number	The Vendor's Invoice number. This number shows up on Purchase Order reports for tracking purposes.
P.O. Number	Automatically generated PO number.
P.O. Status	Indicates whether PO is opened or closed.
Ship Via	Text box for free-form entry of shipping information.
Taxable	Check if PO parts are taxable.

The Purchase Order Worksheet screen contains a number of buttons that provide access to additional options, or dialog boxes. The Purchase Order Worksheet contains the following options

Option	Description
Comment	Opens the Comment Lines for Purchase Order dialog box in which you can add free-form comments to be printed on the PO, or for internal use only. This dialog box is described later in the chapter.
Price Check	Conduct a price check on parts (Note: You must have a configured <Link> vendor, a valid Manufacturer line code, and the part number must be capitalized).
Order Parts	Initiates a Parts Order (Note: You must have a configured <Link> vendor, a valid Manufacturer line code, and the part number must be capitalized).
Receive/Receive All	Opens the Receive All Parts - Options dialog box which provides options for receiving parts into inventory.
Receive to R.O.	Opens the Receive and Confirm Part on Repair Order dialog box which allows you to receive an individual part and confirm its usage on an open repair order or orders. This dialog box is described later in the chapter.
Fax	Allows you to fax a copy of the PO to the vendor.
Print	Allows you to print, or print preview, the PO.

Option	Description
Add	Opens the Add Part to Purchase Order dialog box. This dialog box is described later in the chapter.
Edit	Opens the Edit/Receive Parts for Purchase Order dialog box. This dialog box is described later in the chapter.
Delete	Allows you to delete a selected item from the purchase order.
Done	Closes the Purchase Order Worksheet.

Once you have finished working in the Purchase Order Worksheet, select **Done** to save the Purchase Order. A Purchase Order number is automatically assigned.

Receiving Parts

The Purchase Order Worksheet is where you receive parts into the program. You can choose to Receive All parts, or to Receive Parts to a Repair Order.

Receive/Receive All Selecting Receive or Receive All in the Purchase Order Worksheet opens the Receive All Parts - Options dialog box.

Receive All Parts - Option

Click on a part and choose Receive to receive a single part or choose Receive All to receive all parts.

Two options are available:

- **Receive parts to Repair Orders when possible** - this option instructs the program to scan open repair orders for ordered items. When ordered parts are found, the Receive and Confirm Part on Repair Order dialog box (described later in this chapter) allows you to receive and confirm parts to a repair order.

- **Create an Inventory record for parts received that are not in Inventory** - this option instructs the system to create a new inventory record, using information from the purchase order, for those parts not currently in inventory. Do not select this option if there are parts on the order for which you do not wish to have an inventory record (e.g. supplies).

Make the appropriate selection(s) and choose **OK** to receive parts. Depending upon your selection(s), additional dialog boxes may display.

Receive Parts to a Repair Order This option instructs the program to scan open repair orders for ordered items. When ordered parts are found, the Receive and Confirm Part on Repair Order dialog box allows you to receive and confirm an individual part to a repair order.

To Receive and Confirm a Part on a Repair Order:

1 In the Purchase Order Worksheet grid, select the **Part Number** you want to receive and confirm.

2 Select **Receive.** In the Receive All Parts - Options dialog box, choose the **Receive Parts to appropriate Repair Orders when possible** setting.

The Receive and Confirm Part on Repair Order dialog box displays.

Receive and Confirm Part on Repair Order

The grid displays all open repair orders which have a requirement for the purchased item.

3 Double-click your mouse pointer in the selection box in the **Tag** field for each order for which you wish to receive and confirm parts.

OR

Choose order(s) with your mouse pointer, or up and down arrow keys, and select **Tag to Receive and Confirm**.

4 Select **OK**.

You are asked to confirm your request.

5 Select **Yes**.

The parts are received and confirmed on the applicable order(s).

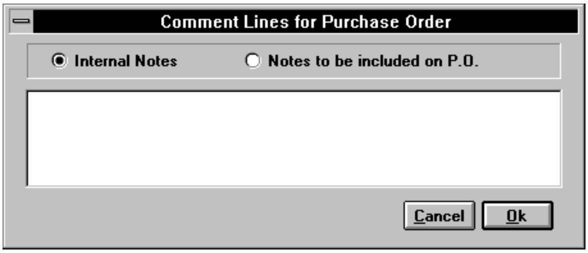
Comment Lines for Purchase Order

The Comment Lines for Purchase Order dialog box allows you to add comments to your purchase orders. You can also view and edit existing notes in this dialog box.

To add Comment Lines to a Purchase Order:

1 Select the **Comment** button in the Purchase Order Worksheet.

The Comment Lines for Purchase Order dialog box displays.



Comment Lines for Purchase Order

2 Choose whether **Internal Notes** (for use of your shop only) or **Notes to be included on PO** (printed on the purchase order).

3 Type in the text of your note.

4 Select **OK**.

The note is added to the PO.

Add/Edit Part on Purchase Order

This dialog box allows you to add an item to a Purchase Order or to edit a part that is already on a Purchase Order. You can also receive parts into inventory using this dialog box.

To add/edit a part on a Purchase Order:

1 Select **Add** in the Purchase Order Worksheet to add an item to a purchase order.

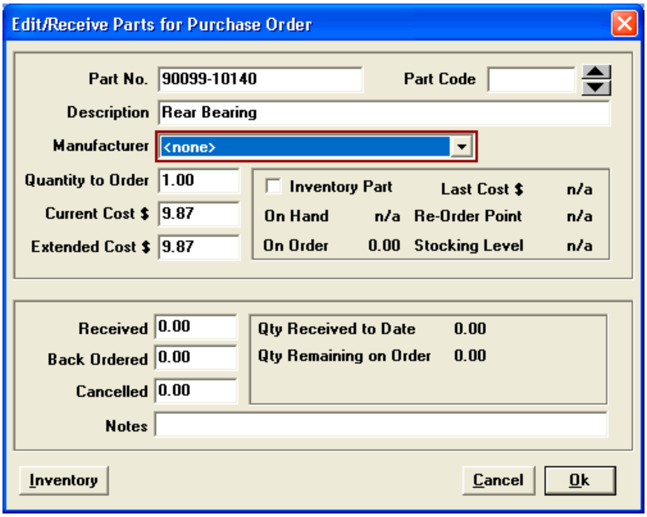
OR

Click your mouse pointer on an item and select **Edit** in the Purchase Order Worksheet to edit a purchase order item.

Depending upon your selection, the Add Part to Purchase Order or Edit/Receive Parts to Purchase Order dialog box displays.

The Add Part to Purchase Order and Edit/Receive Parts to Purchase Order are identical except that some fields in the dialog box may not be available depending upon whether you are adding or editing a part.

2 Enter/Edit information in the dialog box as necessary. Certain fields in the dialog box may not be available for editing depending on whether you are adding or editing a part.



Edit/Receive Parts for Purchase Order

The dialog box contains the following fields:

Field	Description
Part No.	The part number of the item.
Part Code	The part code of the item.
Description	The description of the item.
Qty. to Order	The order quantity of the item.
Current Cost	The current cost of the item.
Extended Cost	The extended cost of the item.
Inventory Part	Selecting this option while adding a part to a purchase order indicates that you would also like to add the part to your Inventory List.
Last Cost	The last cost at which you purchased the part.
On Hand	The quantity of the part that is in inventory.
On Order	The quantity of the part that is on order on all open POs (including the one with which you are currently working).
Re-Order Point	The point below which an order is indicated.
Stocking Level	The inventory level to which the order should build.
Received	The quantity that has been received on the PO.
Back Ordered	The quantity of the item that is on back order.
Cancelled	The quantity of the item that has been cancelled.
Notes	This field allows for the free-form entry of text (50 characters) for internal (shop) use. This text will not appear on the printed purchase order.
Qty Received	(To Date) Quantity of the item that has been received.
Qty Remaining	(On Order) Quantity of the item that has not been received.

3 The Inventory Button opens the Inventory List, allowing you to add an inventory item to your purchase order.

When you select an item from the Inventory List, the fields of the dialog box fill in automatically.

4. Select **OK** to accept your input.

Summary

This chapter described the various options that are available for generating and working with purchase orders.

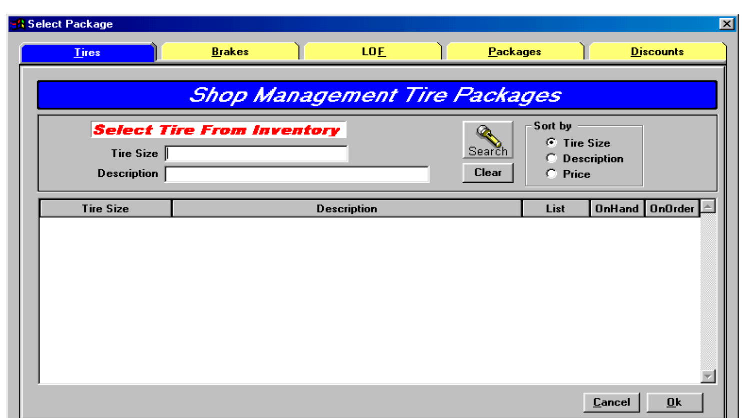
Chapter 13
Marketing

Introduction

Manager provides you with a number of ways to reach out to your customers. You can set up Promotions in the form of Packages (parts and labor operations grouped together and sold at a discounted price) and Discount Coupons (a flat dollar or percentage discount to the parts or labor on an order). Marketing Data can be gathered on your customers including referral information, customer work information, and customer personal information. The Mail Merge capability allows you to set up targeted mailings of post cards and letters to your customers.

Promotions

The Select Package dialog box provides options for adding packaged parts and labor operations to orders. This dialog box is opened by selecting the Promotions icon in the Order screen.



Promotions (Tires displayed)

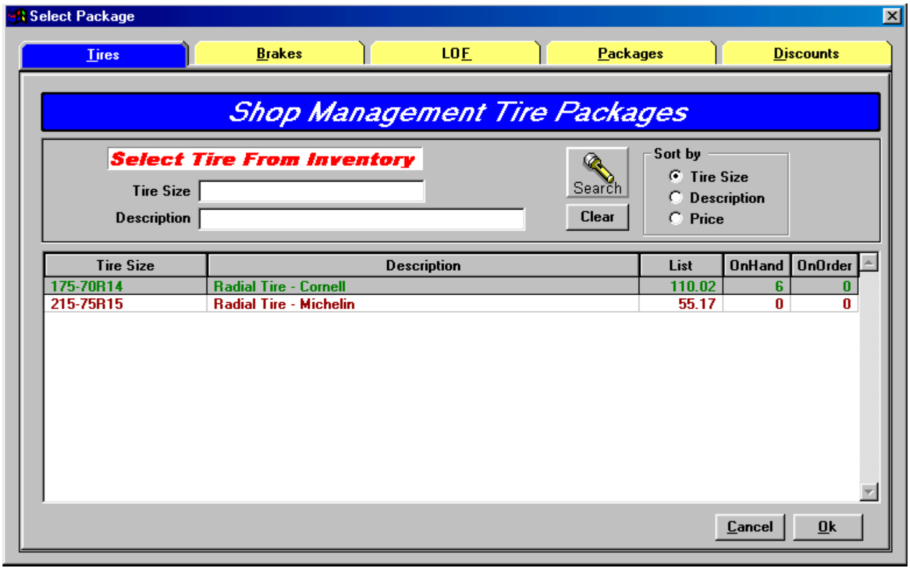
The tabs on this dialog box work like a card file. Click on any tab to move the selected panel to the forefront of the dialog box.

UPGRADE NOTE: If you are upgrading from a previous software version of Manager you must run Import Jobs from the Utilities menu to get the sample brake packages. Refer to "Import Jobs" in Chapter 4, "Utilities," for details.

The following sections describe each of the five panels.

Tires

The Tires panel of the Select Package dialog box allows you to add parts and labor packages for tire replacements.



Tires

You can sort the grid area by **Tire Size**, **Description**, or **Price**.

To add a tire replacement package:

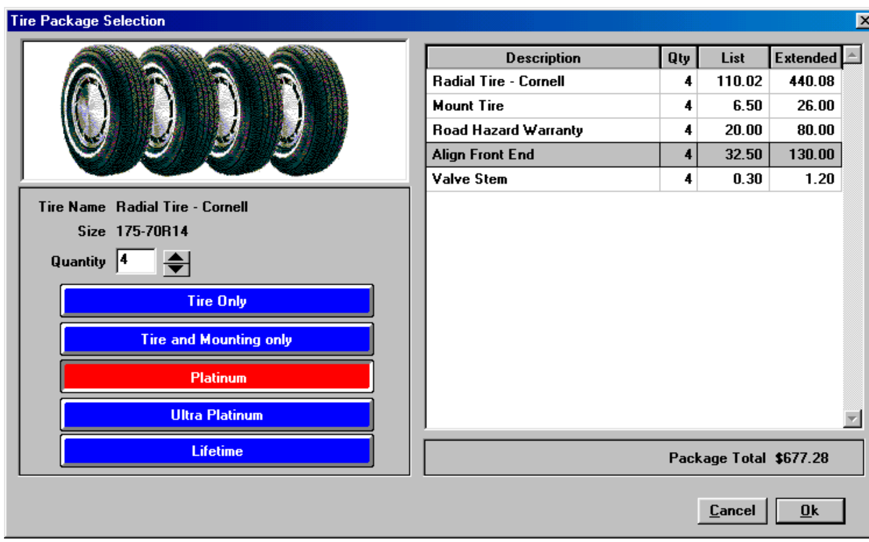
1 Open the Tires panel of the Select Package dialog box, if not already open.

2 Search Inventory for the desired Tire. To do this, just click on the **Search** button. To narrow your search by Tire Size or Description, enter a value into one of these fields and click Search.

Note on Searching for Tires: Tires are designated in the Add/Edit Part dialog box selected via the Add or Edit commands in the Inventory List. Only those items designated by a mark in the Tires check box in the Add/Edit Part dialog box will be located in a Tires search. See Add/Edit Part on page 259.

Double-click on the desired Tire or click the tire and choose OK.

3 The Tire Package Selection screen displays.



Tire Package Selection

4 Choose a **Quantity** of tires. (Note that the package pricing changes with the quantity selected.)

5 Pick a Package. Choices are **Tire Only**, **Tire and Mounting only**, **Platinum, Ultra Platinum,** or **Lifetime** package.

6 Click **OK** to add the package to the order

Brakes

The Brakes panel of the Select Package dialog box allows you to add parts and labor packages for brake servicing.

To add a brake servicing package:

1 Open the Brakes panel of the Select Package dialog box. (Select **Promotions** from the Order screen, and then choose the **Brakes** tab.)

The Brakes panel of the Select Package dialog box displays.

Select Package (Brakes)

2 Choose any combination of **Front** and **Rear Disc** and **Drum** Brakes.

3 Choose between **Silver, Gold**, and **Platinum** packages. Note that the package pricing changes with the package and brake combination selected.

4 Click the **OK** button to add the package to the order. A dialog box asks you to confirm your selection.

OR

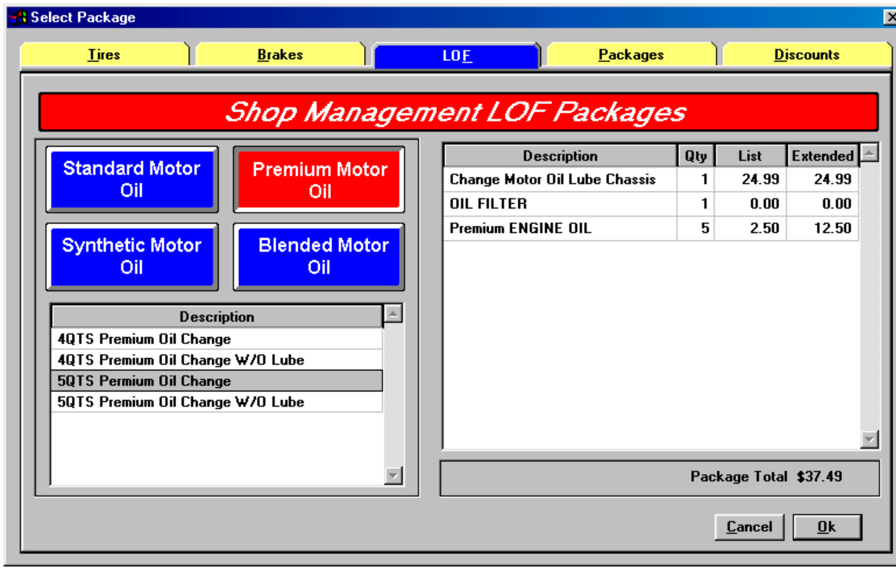
Click a different tab to switch to another of the Select Packages panels.

LOF

The LOF panel of the Select Package dialog box allows you to add Lube, Oil, and Filter packages.

To add an LOF package:

1 Open the LOF panel of the Select Package dialog box. (Select **Promotions** from the Order screen, and then choose the **LOF** tab.)



Select Package (LOF Tab)

2 Click on the Lube, Oil, and Filter package you want to add to the order.

3 Click the **OK** icon to add the package to the order

OR

Click a different tab to switch to another of the Select Packages panels.

Packages

Packages are parts and labor operations which are grouped together and sold for a (usually discounted) single price. The Packages tab allows you to add packages to orders.

Packages

To add a package to an order:

1. Open the Packages panel of the Select Package dialog box. (Select **Promotions** from the Order screen, and then choose the **Packages** tab.)
2. Choose the Package you want to add to the order.

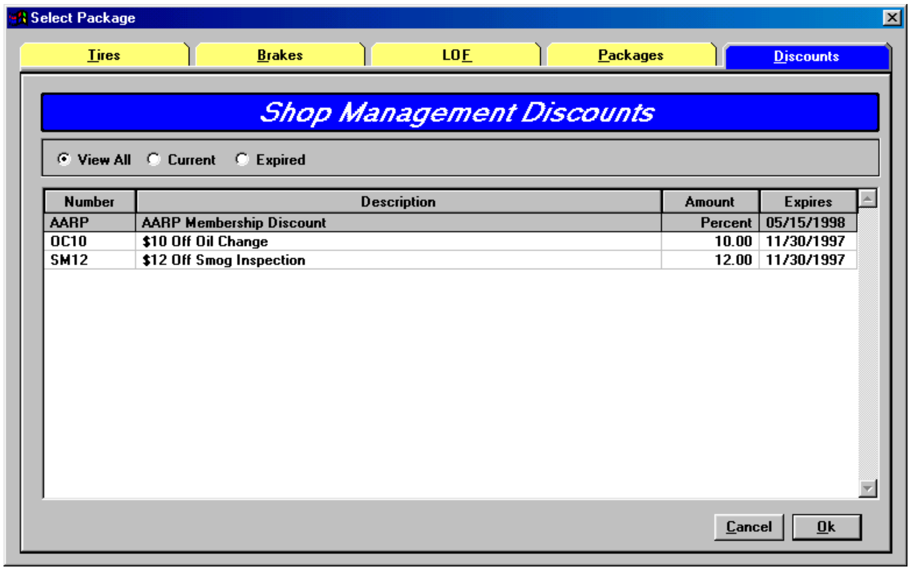
NOTE: You can use the View All, Current, or Expired option buttons at the top of the panel to filter the packages displayed.

3. Click **OK**.

   A dialog box asks you to confirm your selection.
4. Click **Yes** to add the Package to the order.

Discounts

Discount Coupons apply a flat dollar amount or percentage discount to the parts and/or labor on an order.



Discounts

To add a discount to an order

1. Open the Discounts panel of the Select Package dialog box. (Select **Discounts** from the Order screen, and then choose the **Packages** tab.)
2. Choose the Discount you want to add to the order.
3. Click **OK.‘**

NOTE: You can use the View All, Current, or Expired option buttons at the top of the panel to filter the packages displayed.

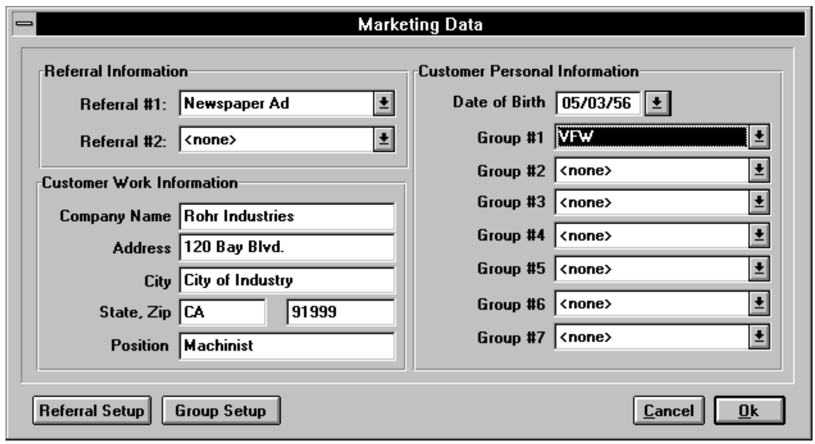
A dialog box asks you to confirm your selection.

Click **Yes** to add the discount to the order.

Marketing Data

The Marketing Data dialog box is where you collect information about your customers for use in selectively marketing your products and services. Presently, this data can be used for reference purposes only. It is anticipated that future releases of the program will provide a capability to target mailings and postcards based upon the marketing data collected in this dialog box.

The Marketing Data dialog box is opened by selecting the Market button in the Customer screen.



Marketing Data

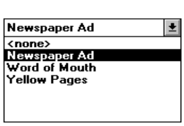
The Marketing Data Dialog box is divided into three sections:

- Referral Information
- Customer Work Information
- Customer Personal Information

Referral Information

The Referral Information portion of the dialog box is where you collect information about how the customer found out about your shop. You are able to select up to two referral sources for each customer.

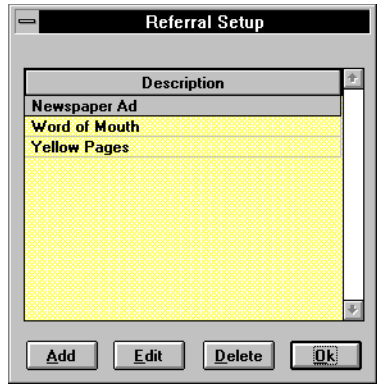
To enter a referral source:



1. Select a referral source from the Referral #1 pull-down choice list. The referral source becomes a part of the customer record.
2. Repeat for a second referral source, if desired.

Referral Setup The Referral Setup dialog box is where you maintain a choice list of referral sources for the Marketing Data dialog box. The choice list should include all regular sources of referral business (other shop, newspaper ad, etc.).

Select the **Referral Setup** button to open the Referral Setup dialog box.



Referral Setup

You can add, edit, and delete referral descriptions in this dialog box.

To add a Referral Description:

1 In the Referral Setup dialog box, select **Add**.

The Enter Information dialog box appears.

2 Type in a **Referral Description**.

3 Select **OK**.

The new Referral Description appears in the grid area of the Referral Setup dialog box.

To edit a Referral Description:

1 In the Referral Setup dialog box, click on the **Referral Description** you want to edit.

2 Select **Edit**.

The Enter Information dialog box displays the current Referral Description.

3 Overtype the current Description.

4 Select **OK** to save your change(s).

To delete a Referral Description:

1 In the Referral Setup dialog box, click on the **Referral Description** you wish to delete.

2 Select **Delete**. A dialog box directs you to confirm your deletion.

3 Select **Yes** to delete the Referral Description.

Customer Work Information

This is where you add or edit administrative information (Company Name, Address, etc.) about where the customer works. To add work information simply type the appropriate entries in the text entry fields. To edit a work information field, simply overtype the current entry with new information.

Customer Personal Information

You can enter customer's Date of Birth and select from among seven (7) Marketing Groups. These groups, set up in Group Setup, can be defined in any way that you might find useful.

Followup Letters and Postcards

Followup Letters and Postcards merge text that you set up in the Followup Postcards/Letters Setup dialog box with Customers/Vehicles selected from your Customer/Vehicle database.

- **Followup Postcards** can be used to maintain postal reminders, recommendations, and announcements to customers, such as “Thank You” postcards, etc. Follow-Up Postcards, are formatted to print out on a standard 3"x 5" card.
- **Followup Letters** are simple letters consisting of your shop's name and address, the customer's name and address, and text you enter in the FollowUp Letters Setup dialog box.

The program allows you to target those customers you most want to reach with pinpoint accuracy. For example, you could select only those customers who haven't had their brakes serviced in the last two years for a brake special. Or you could mail thank-you cards to all of the customers who visited your shop last week. These are only a couple of examples—literally thousands of targeting possibilities exist.

The following sections describe how to query the database for records to create a followup letter or a postcard.

Letters and Postcards Setup

Followup Letters and Postcards must be set up before you can process a mail-merge request. The Followup Postcards and Letters dialog box is opened by selecting Followup Postcards/Letters in the Standard Descriptions dialog box.

The procedure below assumes that your postcard, or letter, has already been set up. Refer to Chapter 3, “Shop Setup” for complete details on setting up postcards and letters.

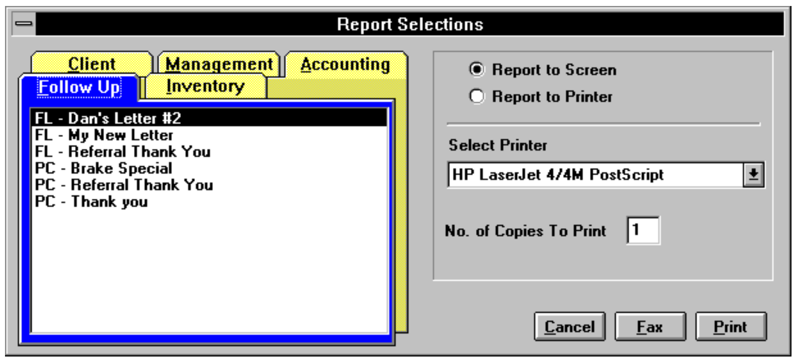
Creating a Followup Postcard or Letter

The following procedure describes the steps necessary to create a follow-up letter or postcard. The basic steps are that you select the Follow-up document (letter or postcard) in the Report Selections dialog box, then you select the records you want to work with in the Followup dialog box.

To create a Follow-up Postcard or Letter:

1 Select **Reports** from the Button Bar.

The Report Selections dialog box displays.



Follow Up Report Selections

2 Select the **Followup** tab to display available postcards, followup and mail merge letters.

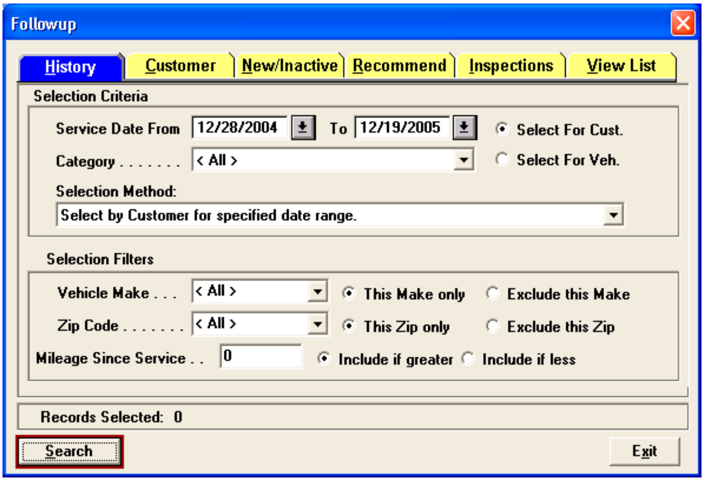
Available letters and postcards are displayed. Followup Letters are prefaced by the initials “FL,” Mail Merge letters are prefaced by the initials “MM,” and Postcards are prefaced by the initials “PC.”

3 Select the name of the Followup letter or Postcard you wish to use. (If you need to add a letter or postcard, refer to Follow-up Postcards and Letters Setup in Chapter 3, “Shop Setup.”)

4 (Optional) Select **Report to Screen** or **Report to Printer**, select a Printer, and/or specify the number of copies to print.

5 Select **Print**.

The Followup dialog box displays.



Followup Dialog Box - History

Followup Dialog Box

The Followup dialog box is where you determine which customers you will select for a mail-merge letter or postcard. The Followup dialog box displays automatically whenever you select a mail merge letter or postcard in the Follow Up Letters and Postcards dialog box and then choose to Print.

The Followup dialog box consists of five (5) panels:

- The **History** panel is where you select the types of customers that you want to include in a search of Order History.
- The **Customer** panel allows you to choose individual customers to add to your list.
- The **New/Inactive** panel allows you to to run queries to locate new customers or inactive customers.
- The **Recommend** panel allows you to choose customers for which there are recommendations for followup correspondence.
- The **Inspections** panel allows you to choose customers for which inspections are indicated for followup correspondence.
- The **View List** panel allows you to look at the results of the list that you have developed, remove customers if desired, and print your mail merge request.

History Panel The History panel is the first panel in the Followup dialog box to display when you select a letter or postcard in the Followup Letters and Postcards dialog box and then choose to Print. To conduct a history search, you set up search criteria and then choose Search.

To conduct a History search:

- Set up search criteria and select **Search**. The available search options are described below.

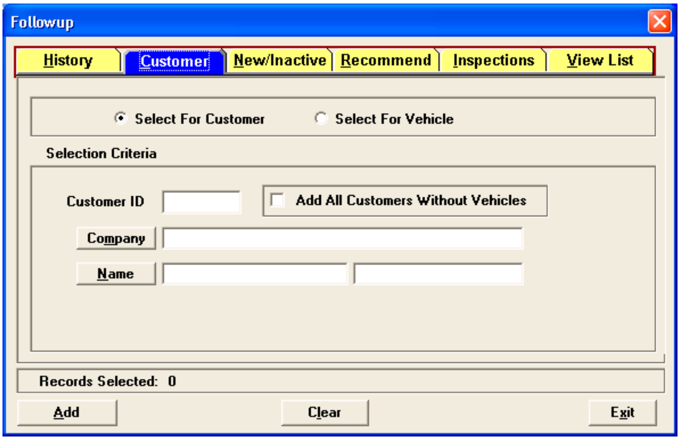
The View List panel displays the results of your search request.

The following search options are available:

Option	Description
Service Date From	Choose the range of service dates in vehicle history for which you wish to find Customers or Vehicles. Type or select a beginning range in the From field and an ending range in the To field.
Category	Select the Category of repairs from the pull-down choice list.
Select for Customer/ Vehicle	Choose whether you want to conduct a database search based upon Customer or Vehicle. Note that if you choose a Vehicle search you may generate multiple records for the same customer.
Selection Option Buttons	Allows you to choose records by Customer or by Vehicle.
Selection Method	Allows you to choose whether to include or exclude customers/vehicles in your search based upon the Selection Criteria you have entered above. Click the down arrow to display a list of options.
Vehicle Make	Choose the Make of vehicle you want to include in your search, or alternately, to exclude vehicles in your search. Option buttons to the right of the field allow you to choose “This Make Only” to conduct a search for a specified vehicle make *only*, or choose “Exclude this Make” to conduct a search for *all but* the selected vehicle make.

Option	Description
Zip Code	Type or choose the Zip Code you want to include in your search, or alternately, to exclude Zip Codes in your search. Choose the “This Zip Only” option button to conduct a search for customers/vehicles in the specified zip code *only*, or choose “Exclude this Zip” to conduct a search for customers/vehicles in *all but* the selected zip code.
Mileage Since Service	Type in the number of miles since the vehicle was last serviced. Manager performs a calculation based upon the date that the vehicle was last serviced, the odometer reading at the time, and the amount of time since the last service date. Choose the “Include if greater” option button to search for vehicles that have gone *more* than the specified number of miles since the last visit or choose “Include if less” to search for vehicles that have gone *less* than the specified number of miles since the last visit. For example, let's say that a customer visited the shop on January 1 with an odometer reading of 1,000 and again visited the shop three months later on March 1 with an odometer reading of 3,000. Manager calculates that the vehicle averages 1,000 miles a month. Nine months later, you conduct a history search for vehicles with greater than 10,000 miles since the last visit. Since the calculated mileage for the example vehicle is 9,000 (9 months times 1,000 miles/mo.), the example vehicle is excluded.

Customer Panel The Customer panel allows you to select individual customers or companies and add them to your mail merge list.

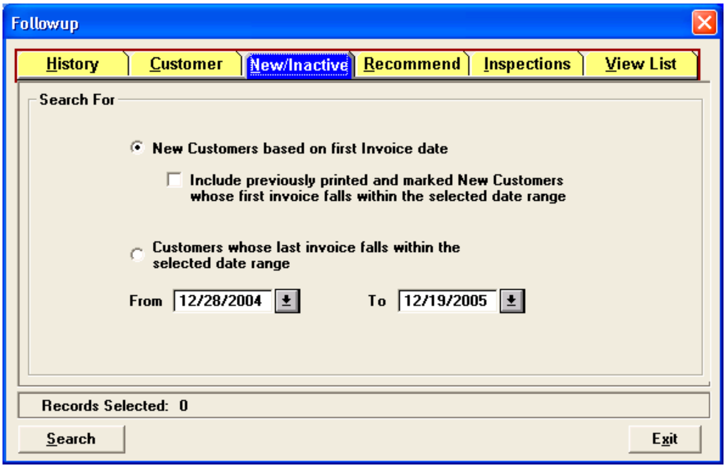


Followup Dialog Box - Customer

Simply type in the Customer ID, if known, or choose the **Company** or **Name** button to display the Customer/Company List from which you can make selections. Once you have made each selection, choose **Add**. A dialog box informs you that the customer has been added to the list. The Records Selected total increments by one.

Select **OK** to add the customer to the list. Once you have added all customers, select the **View List** tab to display the customers, and their vehicles, that you have selected.

New/Inactive Customer Panel The New/Inactive Customer Panel allows you to run queries to locate new customers or inactive customers.



Followup Dialog Box - New Inactive Customer

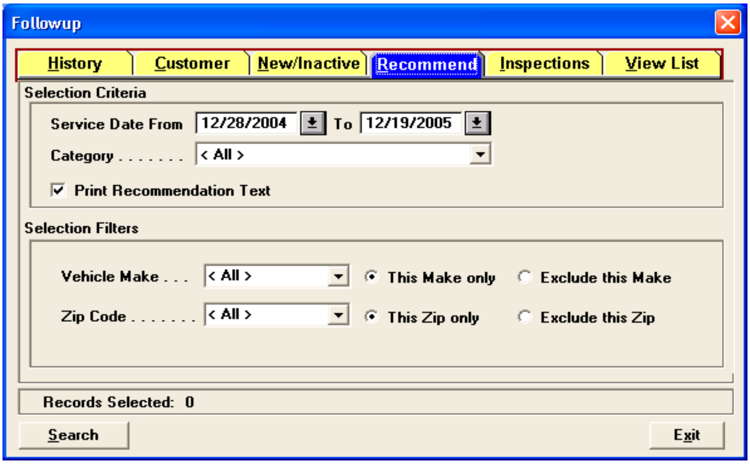
To find "New" customers:

- ·Choose the **New Customers based on first Invoice date** option and pick the date range in the bottom part of the dialog box. Click the **Include previously printed and marked New Customers whose first invoice falls within the selected date range** check box to include customers who have previously been included in a printed New Customer query. Leave this check box blank (unselected) to exclude customers within the date range that have been part of a previous print run. Click **Search** to locate the records of those customers you have defined as "New Customers"

To find "Inactive" customers:

- ·Choose the **Customers whose last invoice falls within the selected date range** option and select the date range in the bottom part of the dialog box. Click **Search** to locate the records of those customers you have defined as "Inactive."

Recommendations Panel The Recommendations panel allows you to select customers for which there are Recommendations to be added to your Followup List.



Followup Dialog Box - Recommendations

The following selection options are available:

Selection Criteria

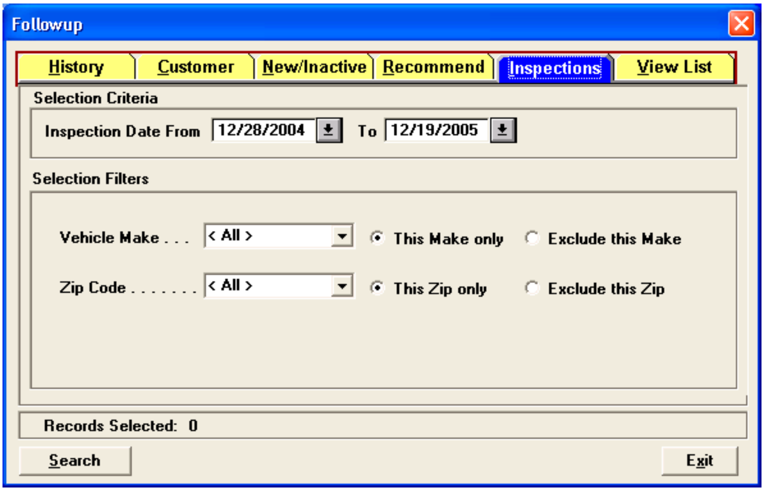
The fields in this area of the dialog box allow you to specify the Service Date—the range of service dates in vehicle history for which you wish to find Customer/Vehicle records with recommendations and the Category of repair work for which you wish to search. A check box allows you choose to print recommendation text.

Selection Filters

Selection filters allow you to include or exclude records based upon your choices of Vehicle Make or Zip Code. Use the option buttons to the right side of each selection field to include or exclude records based upon your selection.

Once your selection criteria is complete, select Search to scan the vehicle history file for matching records. The View List panel displays the results of your search.

Inspections Panel The Inspections panel allows you to select customers for which inspections have come due for follow up correspondence.



Followup Dialog Box - Inspections

The following selection options are available:

Selection Criteria

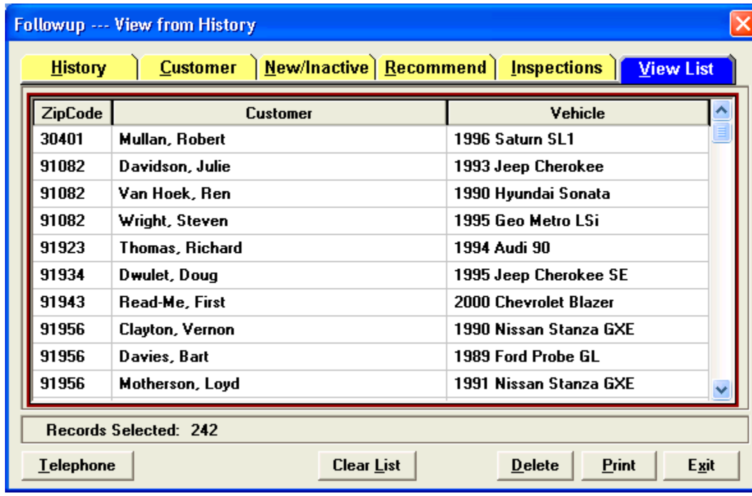
The fields in this area of the dialog box allow you to specify the Service Date -- the range of service dates in vehicle history for which you wish to find Customer/Vehicle records with inspection dates.

Selection Filters

Selection filters allow you to include or exclude records based upon your choices of Vehicle Make or Zip Code. Use the option buttons to the right side of each selection field to include or exclude records based upon your selection.

Once your selection criteria is complete, select Search to scan the vehicle history file for matching records. The View List panel displays the results of your search.

View List Panel The View List panel displays automatically as a result of a history search or whenever you select the View List tab in the Followup dialog box.



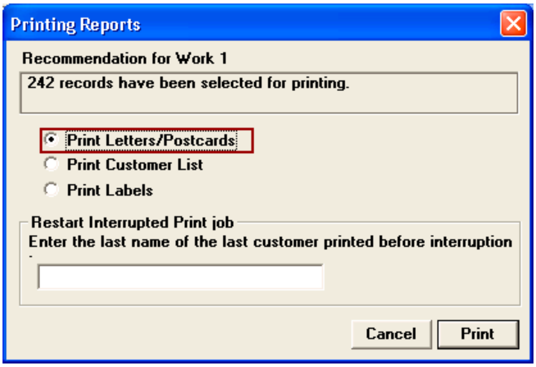
Followup Dialog Box - View List

The View List panel lists the customers that you have selected in the History, Customer, Recommend, and Inspections panels. The following options are available:

Option	Description
Telephone	Displays the Telephone number(s) of the selected customer.
Clear List	Clears the list, allowing you to generate a new list.
Delete	Deletes the selected customer from the View List.
Print	Selecting Print sends the postcard or letter request to the screen, or the printer, depending upon your choice in the Report Selections dialog box.

You can move back and forth between the View List and the History and Customer List panels to add additional customers to your list. Once you have finished, choose Print to process your request. If you are processing a request for a postcard, the Printing Postcards dialog box displays. If you are processing a request for a mail-merge letter, Microsoft Word opens allowing you to edit or print your letter.

Printing Reports/Postcards The Printing Reports/Postcards dialog box displays as the result of a Print request in the Followup Dialog Box.



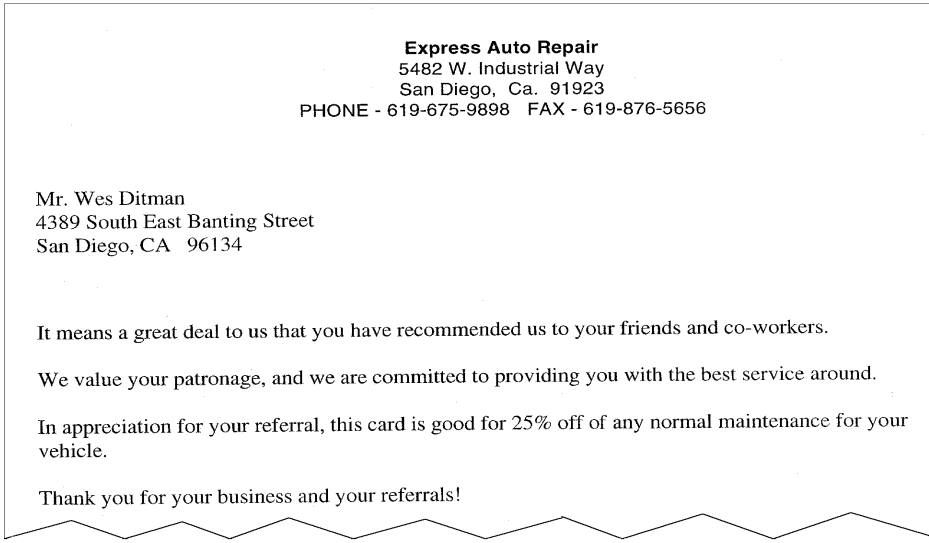
Printing Reports

- The **Print Letters/PostCards** and **Print Labels** settings allow you to print one side of the post card and then printing mailing labels for placement on the other side. (See Printing Mailing Labels for a procedure for printing mailing labels.)
- The **Print Customer List** selection allows you to print a list of all the customer records generated by your query. After this selection, the Sort Customer List dialog box allows you to sort the customer records for your printout.
- The **Restart Interrupted Print job** field allows you to restart a print run that has been aborted due to a printer problem or for some other reason. Simply enter the last name of the last customer to correctly print and the run will restart with the following customer.

EXAMPLE If you were printing a postcard run that was stopped at the post card for “Johnson” because the printer ran out of paper, you would enter “Johnson” in this field.

NOTE If you choose to print a **Customer List** you will be prompted to choose the sort order for your printout. Choose the order you’d like to sort on and click **Print**.

Once you have made your selections in this dialog box, select **OK** to begin your print run. The following figure displays a completed followup letter.



Express Auto Repair
5482 W. Industrial Way
San Diego, Ca. 91923
PHONE - 619-675-9898 FAX - 619-876-5656

Mr. Wes Ditman
4389 South East Banting Street
San Diego, CA 96134

It means a great deal to us that you have recommended us to your friends and co-workers.

We value your patronage, and we are committed to providing you with the best service around.

In appreciation for your referral, this card is good for 25% off of any normal maintenance for your vehicle.

Thank you for your business and your referrals!

Completed Followup Letter

Mail Merge Letters

The program's Mail Merge feature allows you to merge information from your database into a document you have created and formatted in Microsoft® Word.

NOTE: Mail merging in any program can be an inherently complicated task. The information in this section is provided to help you learn mail merge setup activity specific to the task of Mail Merging in Manager. This information does not replace the detailed information on mail merging that is provided in the *Microsoft Word User's Guide* and the Word online help system.

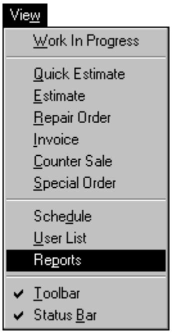
If you are not experienced in mail merging, it is *highly* recommended that you study these information sources *before* attempting to create a mail merge document.

To run mail-merge, you must have the following software installed on your computer:

- ShopKey Management System/Service Writer
- Microsoft Word 2000 or Office XP.

The following procedure describes the steps necessary to set up and run a mail-merge request.

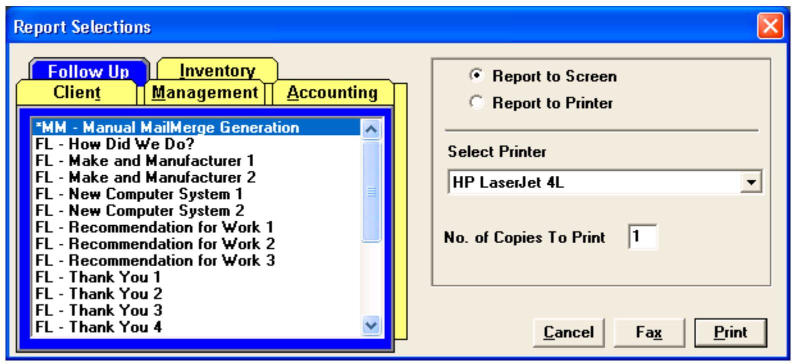
To create and print a mail-merge document:



1 Select **Reports** from the View menu.

The Report Selections dialog box displays.

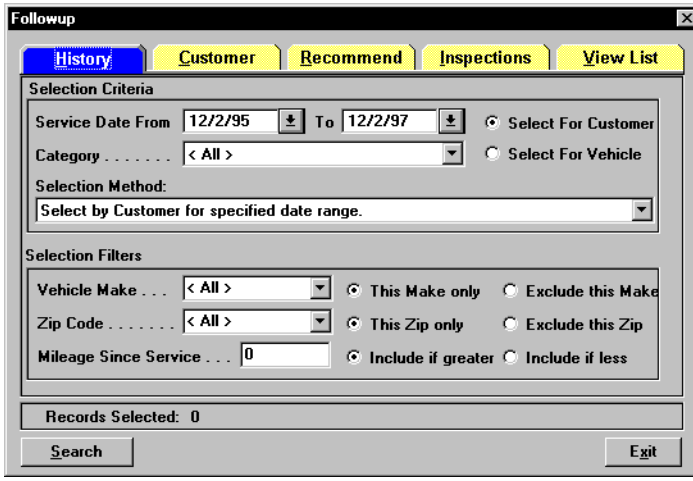
2 Select the **Follow Up** tab to display available postcards and letters.



Report Selections

3 Click on the ***MM Manual MailMerge Generation** selection and click **Print.**

The Followup dialog box displays.



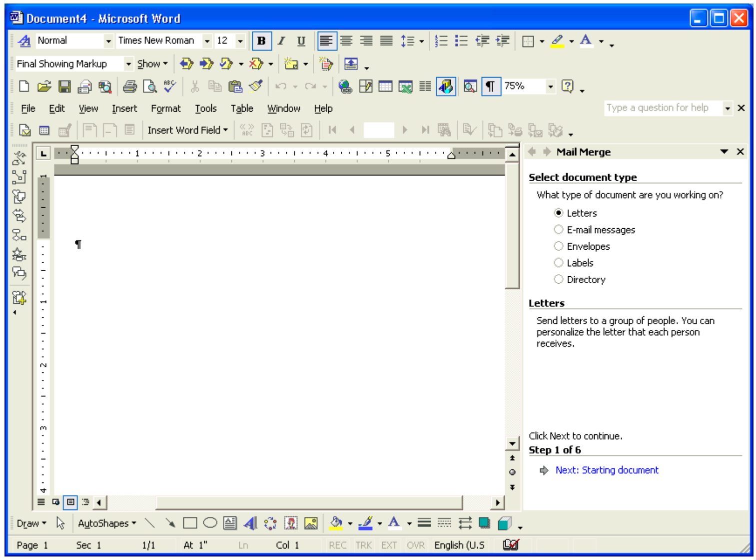
Followup

4 Perform a search to generate some records. Again, the only purpose of this request is to populate the database for you to generate a mail-merge document in WORD. The actual results of the search don't matter so long as some records are found. Refer to the Followup dialog box section earlier in this chapter, if necessary, for instructions on generating a followup request.

5 Open **WORD**.

Note: This procedure documents the mail merge process in Microsoft Word XP. The process in Windows 2000 is different, however, the database and table naming conventions will still be applicable. Please refer to your Word 2000 documentation for details in setting up a mail merge letter in Word 2000.

6 From the WORD Tools menu, select **Tools/Letters & Mailings/Mail Merge Wizard** to open the Mail Merge Helper dialog box.



Mail Merge Helper

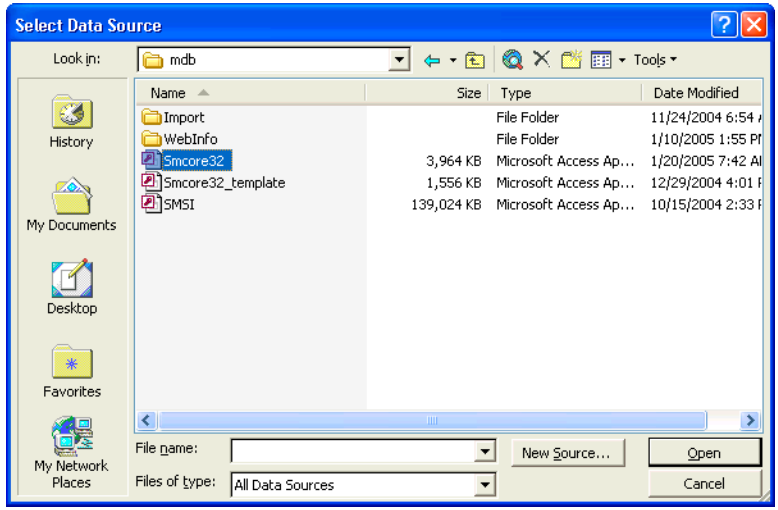
7 The Wizard provides instructions and options on the right side of the dialog box for setting up your letter. Follow the instructions to set up your letter. The Third Step requires that you select your recipients.

8 Select **Browse** from the **Use existing list option.**

You are prompted to select a data source.

Browse to the database directory:

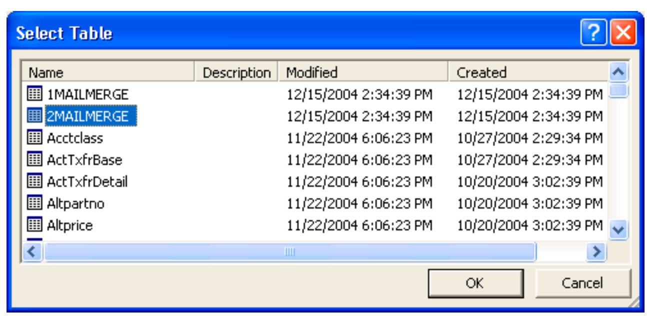
`C:\Mitchell1\Manager\S2x\mdb`



Select Data Source

9 Highlight SMCORE32 and click **Open**.

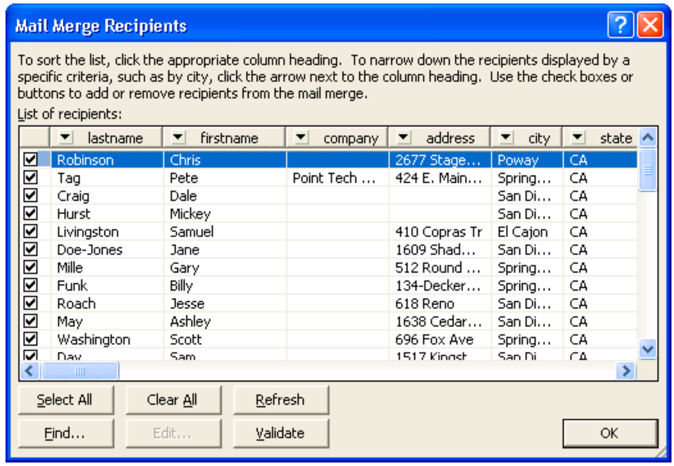
You are prompted to select a table.



Select Table

10 Select **2MailMerge**.

The Mail Merge Recipients dialog box displays.

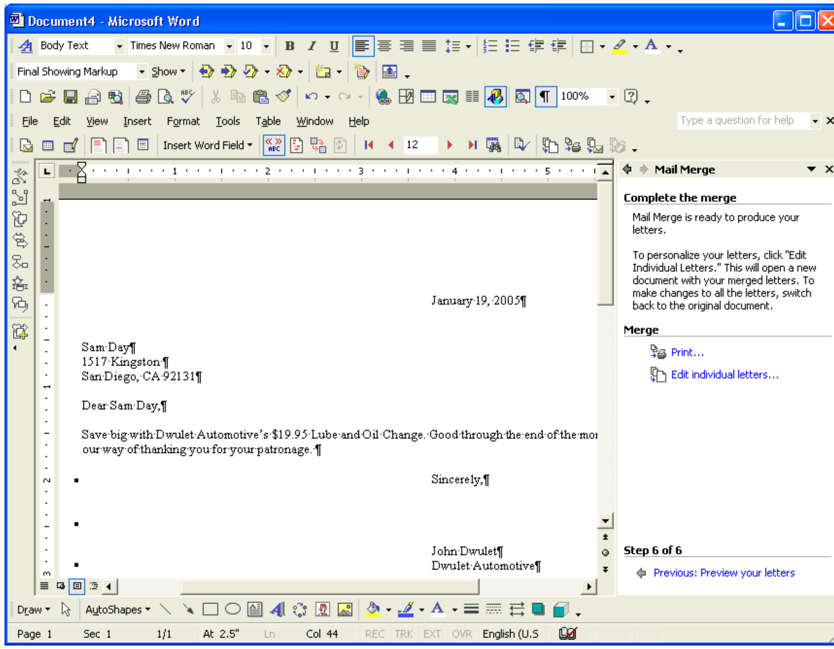


Mail Merge Recipients

11 You may modify your recipients list by deselecting recipients, if desired. Click **OK** when satisfied with your list.

12 Write your letter. You may personalize the letter by adding merge fields from the mail merge toolbar (refer to your Word documentation if necessary).

Once your letter is complete, choose **Next: Complete the Merge**.

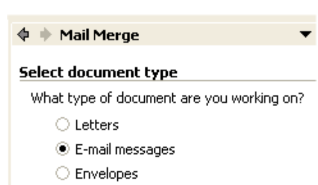


Completed Mail Merge Letter

13 Edit the individual letters, if desired and **Print** your letters.

Mail Merge eMails

You may also use Mail Merge to generate emails to your customers using Microsoft Word and Outlook. The process is very similar to the Mail Merge process described above, just choose E-Mail messages as your document type at the beginning of the process.

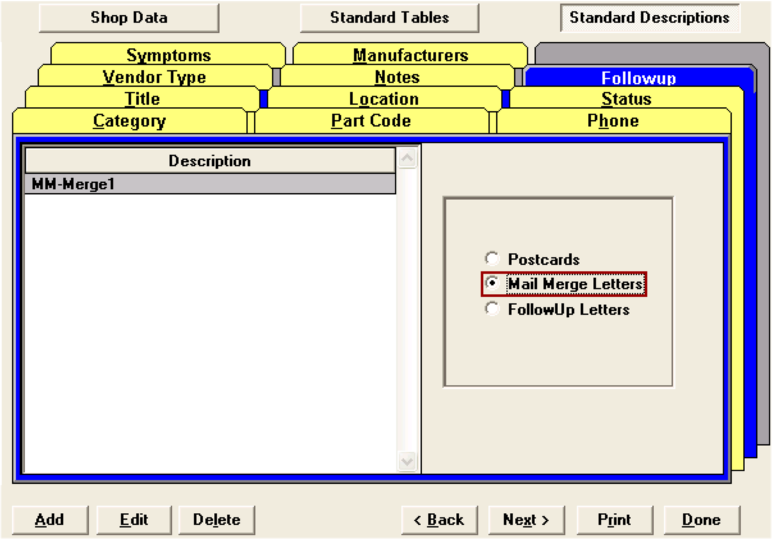


E-Mail Messages Document Type

Note: Only those customers with email addresses will be part of your Mail Merge eMailing. Customers without email addresses will be ignored.

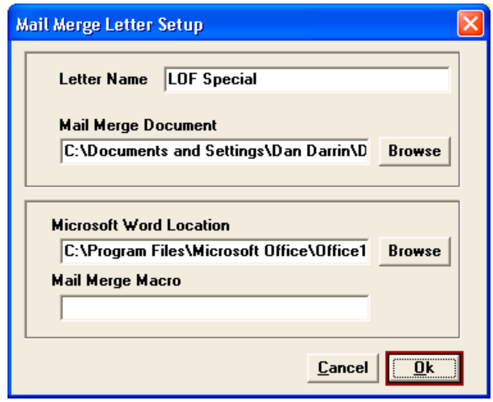
Saving and Re-Using Your Mail Merge Letter

Once you have set up your Mail Merge letter, you will probably want to save it for later re-use. Just save it to a convenient location on your hard drive, then in Management go to the **Followup** Tab, choose **Mail Merge** and then **Add**.



Followup

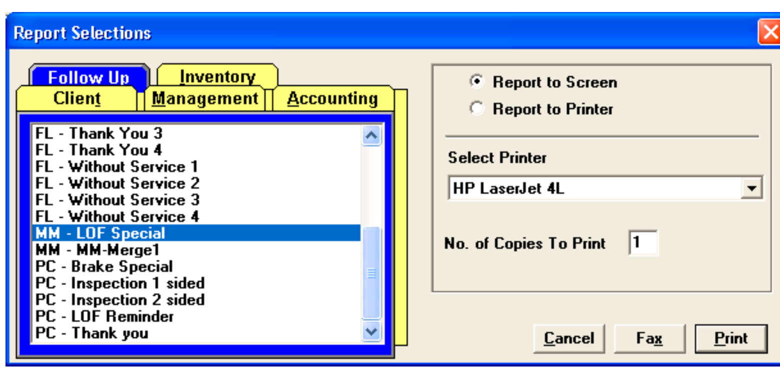
The Mail Merge Letter Setup dialog box displays.



Mail Merge Add

Type a **Letter Name** to identify the Mail Merge Letter in the Reports dialog box. Browse for the location of your saved letter and the location of Microsoft Word. Click **OK** when complete.

Re-Using a Saved Mail Merge Letter You can re-use a saved mail merge letter by selecting it in the Reports dialog box. Just click the name of the letter and then **Print**.



Selecting Saved Mail Merge Letter

You will then go through the process of selecting customer records for the letter, just like any other followup correspondence. Once you have completed that process and clicked **Print**, Word launches with your new customer list automatically entered into your letter.

Summary

This chapter described the many ways that the program offers to get to know your customers better and to reach out to promote your products and services.

Appendix A
Customer Service

Who to Call for Help

Manager Technical Support	1-888-724-6742
General Manager Information	1-888-724-6742
Technical Support E-mail	techsupport@mitchell1.com

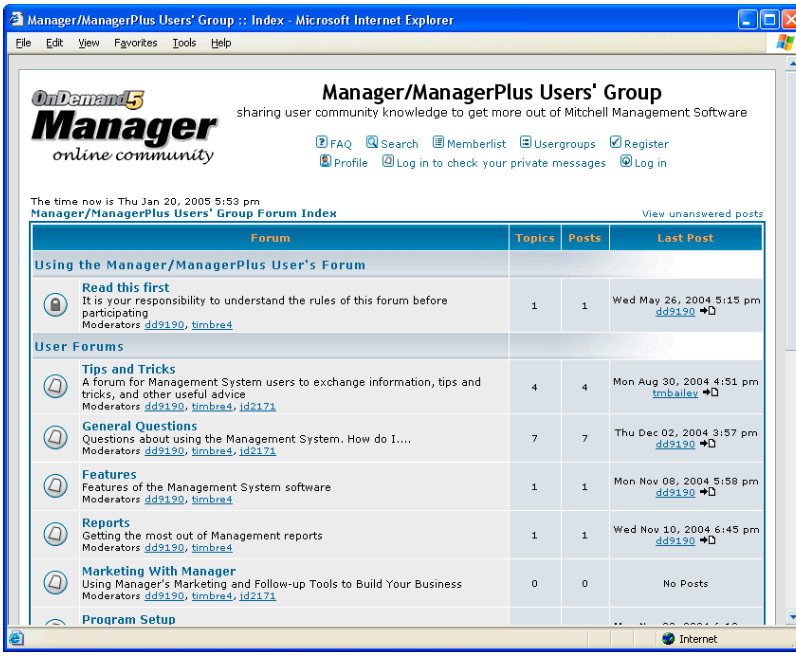
Internet Address: http://www.mitchell1.com

Support Website: http://www.mitchellsupport.com

Find your local Sales Rep: http://www.mitchellrep.com

Manager Forum

The Manager Forum is a discussion board available to Manager users and Mitchell 1 personnel for exchanging tips and information related to the Management software. The Forum may be accessed via the Web link in Manager and also via Premier Club for active subscribers.



Manager Forum

Questions & Answers

What do I do if I have a question about my account; billing status or other Mitchell 1 products?

Call us at 1-888-724-6742.

What do I do if I have a software or hardware problem?

If you have a software or hardware related problem (installation or configuration problems, error messages on the screen, etc.), please call us at 1-888-724-6742.

What do I do if I have a mechanical estimating labor time or part number problem?

Call us at 1-877-285-4310.

What do I do if I have suggestions for improving future releases of Mitchell 1's electronic products?

If there are certain topics or types of information that you would like to see covered, or any options or functions you would like us to improve, please fax us at 1-858-391-5266.

Hours of operation for customer service information:

Manager Support is available Monday through Friday, 6:30 A.M. to 4:30 P.M., Pacific Time. We are closed on weekends and major holidays.

Appendix B
Backup

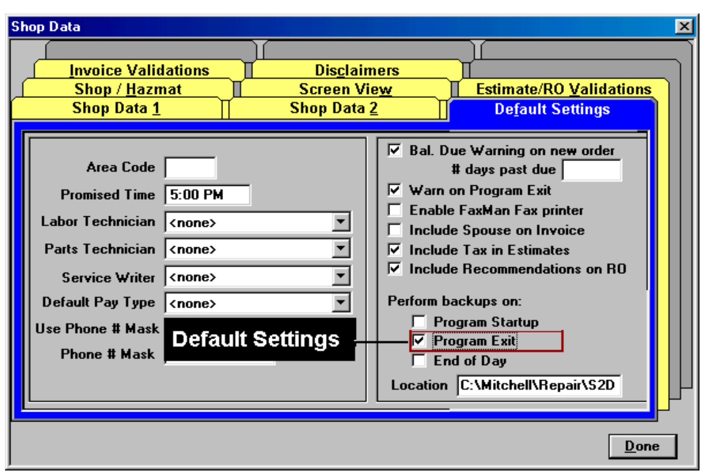
Overview

Backups protect against data loss due to a disk crash, fire, theft, software/hardware failure, accidental deletion, or power fluctuations. Periodic backups provide insurance against the inconvenience and high reconstructive costs associated with data loss.

Manager features Automatic Backups. This feature prompts you to automatically back up your data at pre-defined intervals (program startup, shut-down, or end of day) and then copies the files you need to restore your database to a location you specify.

Automatic Backups

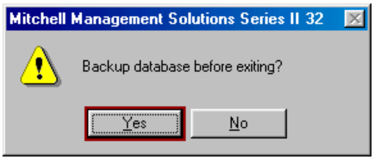
You can set up the program to perform automatic backups at a defined interval in the Default Settings panel of the Shop Data dialog box.



Default Settings

You can choose to backup at **Program Startup, Program Exit,** or at **End of Day**. You also set the backup location. See “How Backups Work” below for information on setting a backup location.

Once backups are enabled and a backup is indicated, a dialog box asks if you want to backup.



Backup Database?

Select **Yes** to begin the backup.

How Backups Work

The automated backup program creates a rotating set of seven (7) compressed .zip files; one for each time a backup is performed. These files can be used (normally with the help of Mitchell 1’s Technical Support department) to restore your database.

The files are saved in a \BACKUP directory in the directory you set in the Default Settings dialog box. The naming convention for the files is:

```
d[x].zip
```

Where [x] represents the day of the week the backup is performed (d1.zip = Sunday, d2.zip = Monday ... d7.zip = Saturday). When a new backup is created, the previous backup for that day of the week (if there is one) is overwritten.

The backup function is workstation specific. You can set each workstation to make its own backup copy of the database.

NOTE: Although you can back up your data to a different location on your hard drive, this is not recommended as this will not protect your data in the event of a hard drive failure. Mitchell 1 recommends that you always back up your data to an external source such as a ZIP drive, or to multiple workstations on a network, if operating in a multi-user environment.

Although there are a number of reliable external backup solutions, we recommend the Iomega™ ZIP drive as a dependable, easily configurable backup source that has been fully tested by our engineering staff.

Restoring Your Database

Manager stores backup files in a compressed .zip format. Third-party software is required to extract ("unzip") these files. PKZIP and WINZIP are two programs, available as shareware, that you can use to restore your database. You can download these programs from www.pkware.com or you can purchase from your local software retailer.

NOTE: Windows XP comes with its own zip software.

Contact Manager Technical Support if you need help restoring your database.

Multi-User Backups

If you are using a multi-user version of the program, each workstation can maintain its own copies of the backup files. Simply set the location to the workstation's hard drive (normally C:\). The backup will then be automatically be performed in a \BACKUP subdirectory on the workstation.

There is no limitation as to how many workstations you can back up to and as a general rule, the more backups you make, the higher your level of protection.

Files

Manager data files that must be backed up are contained in the directory:

C:\Mitchell 1\Manager\Series(x)\mdb\, or

C:\Mitchell 1\Manager\Series(x)\mdb\,

These files are automatically backed up by the autobackup program and are listed below for reference purposes only:

SMCORE32.MDB

LASTUSED.DAT

NOTE: This list represents the most current file structure. Refer to the Readme First document for any changes to the list.

Recommended System

Although there are a number of reliable external backup solutions, Mitchell recommends the Iomega ZIP® drive as a dependable, easily configurable, cost-effective backup source that has been fully tested by our engineering staff.

ZIP disks are small and portable, making them highly suitable for off-site storage. For an extra measure of protection, it is recommended that you store your backup disks in a fire-proof safe or take them home with you. This will protect you in the event of a fire or theft.

What is a Zip File?

Zip files contain other files that are archived into one compressed file. Zip files make it easy to group files and make transporting and copying these files faster.

How can I restore my database from a Zip file? If you elect to use the internal backup that creates Zip files, you will need to obtain a third party software package that can decompress the backed-up file. Recommended software packages are PKUNZIP® or Winzip®. Mitchell 1 can offer only limited support on either program.

NOTE: Windows XP comes with its own zip software.

Summary

This chapter provided a discussion of how to perform backups in the program.

Appendix C
Importing Data Into Manager

Overview

The Import Utility allows you to import Customer, Vehicle, and Vendor information from a correctly structured Microsoft Access 2000 database into Manager. The Database Creation Utility allows for easy entry of information in Manager.

Installation

The Import and Database Update utilities are installed via their own installation program. These utilities are *not* installed as part of the regular Manager installation.

To install the Import/Database Update Utilities:

1 Browse your Manager CD for the Update Utility. The file is located at:

`x:\utils\tools\import\setup.exe`

Where "x:\" is the location of your CD drive.

NOTE: You can browse your CD from the Installation screen or choose **Run** from the Windows **Start** menu.

2 Click **OK**. Follow the onscreen prompts to complete the installation. You will be given a choice of installing the Complete Import Utility Package or just the Manual Entry Utility. Mitchell 1 recommends that you install the complete package.

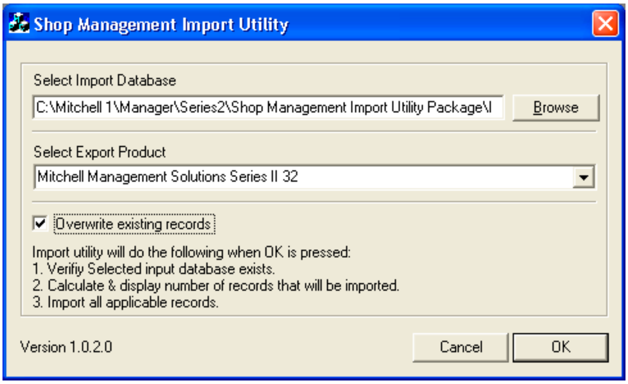
Importing Records Into Manager

The Shop Management Import Utility dialog box allows you to import Customer, Vehicle, and Vendor data into Manager. This information may be in the form of a properly structured Access 2000 database of information from another program or may be an import of data you input via the Database Creation Utility (page 331).

To Import Records into Manager:

1 Select **Start/Programs/Mitchell 1/Import Utility (or Program Group where you installed the utility)**.

The Shop Management Import Utility dialog box displays.



Shop Management Import Utility

2 Browse for the **Import Database**. If you have entered information via the Database Creation Utility, the database will be C:\Mitchell 1\Manager\Series2\Shop Management Import Utility Package\Import.mdb. If you are not using the Import.mdb database, it must be structured as specified in the Database Structure section on page 329.

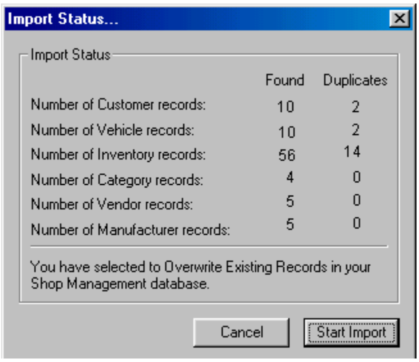
3 Select the **Export Product** from the pull-down list. This is the version of Manager you want to add records to.

4 Select the **Overwrite existing records** check box, if desired. If Overwrite is selected, all existing records that have a matching import record will be replaced, otherwise, duplicate records will be unaffected.

NOTE: Select Overwrite if you want to replace matching records in your Manager database. Leave this checkbox blank if you don't want to replace any records.

5 Click **OK**.

The Import Status dialog box displays the number of different types of records the import process will update.



Import Status

6 Click **Start Import** to begin the import process.

Database Structure

A properly structured Microsoft Access 2000 database is required for input using the Import Utility. The following tables detail the structure. A blank Import.mdb database is located at: C:\MITCHELL\REPAIR\Shop Management Import\Import.mdb

Vendors

Field	Type/Size	Required	Default	Notes
Code	Text [8]	Yes		This must be a unique field
Name	Text [31]	Yes		
Contact	Text [31]	No	Blank	
Address	Text [40]	No	Blank	
City	Text [25]	No	Blank	
State	Text [20]	No	Blank	
Zip	Text [10]	No	Blank	
Phone1	Text [15]	No	Blank	
Phone1Ext	Text [5]	No	Blank	
Phone2	Text [15]	No	Blank	
Phone2Ext	Text [5]	No	Blank	

Inventory

Field	Type/Size	Required	Default	Notes
PartNo	Text[20]	Yes		PartNo & PartDesc must be unique.
PartDesc	Text[50]	Yes		PartNo & PartDesc must be unique.
Cost	Double	No	0	
List	Double	No	0	
Taxable	Integer	No	0	Set to 1 to make inventory item taxable, non-taxable set to 0.
Category	Text[25]	No	Blank	Part Category. This will fill the Category table.
Comment	Memo	No	Blank	
MfgCode	Text[6]	No	Blank	This will fill the Manufacturer table.
MfgName	Text[30]	No	Blank	This will fill the Manufacturer table.
Tire	Integer	No	0	Must be 0 for not a tire item or 1 for tire inventory record.
TireSize	Text [20]	No	Blank	If the Tire field is set to 1, enter a tire size here.
OnHand	Double	No	0	
PartLocation	Text[30]	No	Blank	
VendorCode	Text[8]	No	Blank	Lookup for the Vendor Table.
RestockQty	Double	No	0	
OrderPoint	Double	No	0	
CoreCost	Double	No	0	
CoreSale	Double	No	0	

Customer

Title	Text [15]	No	Blank	This field must match what is in the CustTitle table, the current default values are as follows: Mr., Ms., Miss, Mrs., Dr., Rev., Sgt., Captain
FirstName	Text [20]	No		

LastName	Text [20]	*		
Spouse	Text [20]	No	Blank	
Company	Text [30]	*		
Address	Text [40]	No	Blank	
City	Text [25]	No	Blank	
State	Text [20]	No	Blank	
Zip	Text [10]	No	Blank	
EmailAddress	Text [50]	No	Blank	
Phone1	Text [15]			
Phone1ext	Text [5]			
Phone2	Text [15]			
Phone2ext	Text [5]			
Year	Text [4]	No	Blank	
Make	Text [14]	No	Blank	
Model	Text [40]	No	Blank	
License	Text [10]	No	Blank	
Odometer	Long	No	Blank	
Vin	Text [30]	No	Blank	

NOTE: Either the customer's LastName or the Company name must be filled in for a record to be imported.

A sample database is provided in a zip file (SAMPLE.ZIP) in the \UTILS\TOOLS\IMPORT\DOCS\ directory on your CD.

If you are manually populating the IMPORT.MDB file, the process may be easier if your source file is a comma delimited file and you use Access 2000 “Get External Data” function.

Using the Database Creation Utility

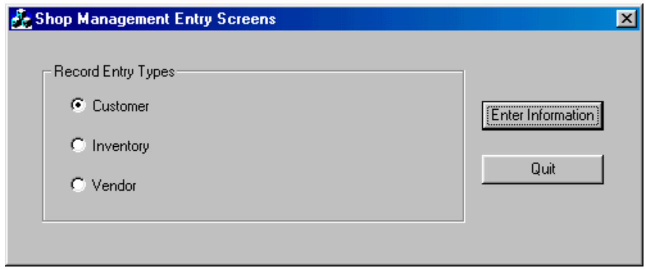
The Database Creation Utility allows you, or a data entry person, to quickly create a shop database or add information to your existing shop database. All information is saved to the Import.mdb database which can then be imported into Manager using the Database Import procedure described in the previous section.

Using the Database Creation Utility to add Information into Manager:

1 Select **Start/Programs/Mitchell Repair/Shop Management Entry Screens.Exe**.

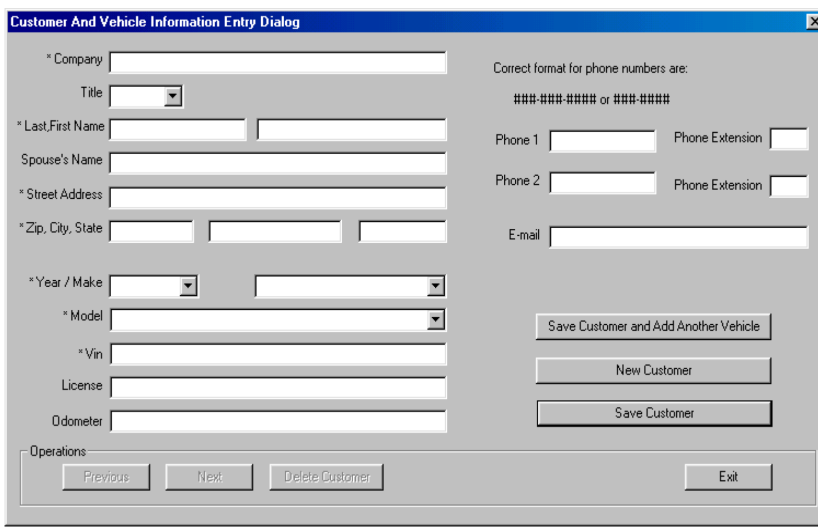
The Shop Management Entry Screens dialog box displays

.



Record Entry Type

2 Choose a **Record Entry Type** and then **Enter Information**. You can choose between forms for Customer, Inventory, or Vendor.



Record Entry Form - Customer and Vehicle Info.

3 Enter information in the data entry forms. The following options are available for working with data records.

Option	Description
Next	Move to the next record in the database.
Previous	Move to the previous record in the database.
New Customer	Clear all entries in the edit box in preparation for a new record entry.
Save Customer and Add Another Vehicle	Saves a record to the database and clears the edit boxes in the Vehicle Information section. Also this button will allow you to change a record that is displayed in the dialog box.
Save Customer	Saves a record to the database and clears all edit boxes on the dialog. Also this button will allow you to change a record that is displayed in the dialog box.
Exit	Exit the dialog box and return to the Shop Management Entry Screens dialog box.
Delete Customer	Delete the record shown in the dialog box.

All information is written to the Import.mdb database, where it can then be imported into Manager via the Import procedure described in the “Importing Records Into Manager” section, beginning on page 328.

Summary

This chapter provided instructions for importing data into Manager.

Appendix D
Electronic Parts Ordering

Overview

OnDemand5 Manager allows for the import and ordering of parts from participating Warehouse distributors. This appendix provides setup and basic usage instructions for using these products with Manager. Refer to the documentation that came with the Parts Catalog CD for detailed instructions on installing and using specific Parts Catalog software.

Setup

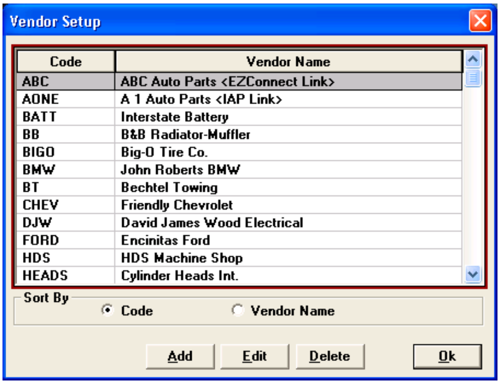
When opened, Manager looks for software for participating Parts Distributors on your computer. If it finds the software, you are able to add parts to your Manager orders and conduct price and availability checks and order parts from linked vendors..

NOTE: You must have the software for a participating vendor already installed to proceed to Vendor Setup.

The linked vendor setup process allows you to define the link between Manager and a specific distributor. This link is necessary for the program to be able to pull availability and pricing data from the distributor.

To setup a Linked Vendor for Parts Ordering:

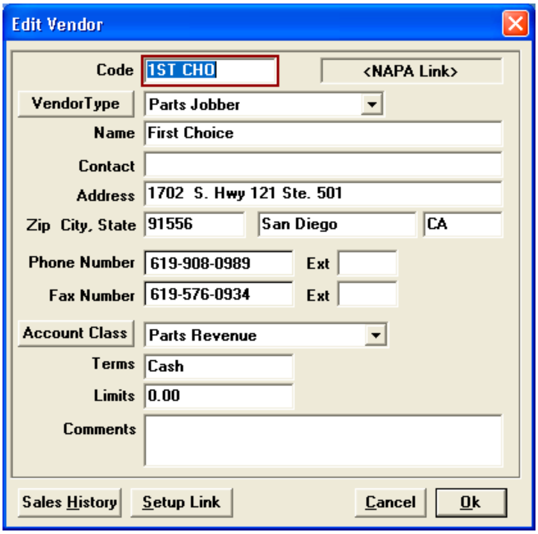
1 Choose Vendor Setup from the Setup menu to open the Vendor Setup dialog box.



Vendor Setup

NOTE: Use the Sort By options to choose between sorting by Vendor Code or Vendor Name.

2 Click on the Vendor you want to link to and choose **Edit** to open the Edit Vendor dialog box.



Edit Vendor

3 Choose **Setup Link**.

NOTE: This option will be available only if you have already installed the software from a participating distributor.

If you have more than one vendor, the Link Type Setup dialog box asks that you pick the appropriate linked software for the distributor.

4 Make your selection and click **OK**.

The Vendor Link dialog box displays. Depending on the linked software program, setup will vary. Refer to the documentation that came with your Parts Catalog software for instructions on setting up specific Vendors.

Summary

This appendix provided general information on working with Parts Catalog software of participating warehouse distributors. Refer to the documentation that came with the Parts Catalog CD for detailed instructions on installing and using specific Parts Catalog software.

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