



Mitchell 1 / ShopKey Management Solutions LEARN: SE Management Software

Self-paced tutorial of program basics with DEMO version of SE 9.x

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This workbook is intended to get users started; detailed reference information is found in the Online Help and Training Videos. This is accessed from top screen menu bar **Help** option or clicking on the **Help** button. [Pressing F1 key from most screens too]

# **Assisted Program Basics**

This self-paced tutorial assumes that you have the Manager SE v.9.1.x installed on your PC. If you do not have the software installed, the most current released version is available for download at: <u>https://kb.mitchell1.com/manager-files/</u>. [SE update is always line item #1]

Once the SE software has been installed, change it to **DEMO** mode using the instructions on the next page. (Then you'll have samples to work with)

**IMPORTANT:** *Always use this book with the DEMO version*. It will be easier to understand the concepts working with sample customers, vehicles, parts, orders and jobs. Be sure to switch back to LIVE mode once you start entering data you wish to keep. **Data added in DEMO mode cannot be transferred into the LIVE version later**.

Work these exercises in order as one section of the tutorial builds upon previous entries. Use of a printer is optional, although recommended, if one is available.

## Switching SE live program to DEMO mode

1. From "home" (splash) screen, click on **Configurations**, **Special Maintenance**.



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2. Select Toggle Demo Mode; program will prompt you to restart.

Once restarted, an on-screen text box indicates "Training Demonstration" (DEMO) mode.

**Note:** Look for the **Training Demonstration Overlay** to ensure you are working in Demo mode. This will allow you to access the pre-built demo database examples of Parts, Canned Jobs, etc.

## **Entering Customer & Vehicle Information**

Create a new customer / vehicle record as follows.

 From upper text menu, click on Utilities (Alt + U) then select Customer Screen option.



Company       Part Kits       Customer Snapshot       Payment Status         Name       Customer Screen       Lifetime \$ Spent 0.00       Cust #         Last, First       Customer Screen       End of Day       Address         Address       End of Day       Sales YTD 0.00         Home       000       Notes/Name       Telephone List       Include in CRM Campaign       Credit Bal. 0.00         More 000       Notes/Name       @ SMS Allowed       SocialCRM Details       Customer Status         E-mail       E-mail       E-mail       E-mail       E-mail       E-mail       E-mail       Referred By:       Membership #       Update Customer Status         License       Year       Make       Model       Vin       Color       Unit #       Recommendation	Mitchell 1 Tea e Edit Vie W.I.P. Quo O CUSTOMER	mWorks SE w Configurations te New Counter Customer	Utilities Inventory Find Customer Find History Recor Batch Payment Late Fee Assessm Check Profit	History Training Video F3 d F4 F5 eent F12	es CRM Help Change Source Reports Owner Forum History	Setup How to Repair Inf	· ·
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License Year Make Model Vin Color Unit # Recommendation	Home Office E-mail Birthday	000	Notes/Name Notes/Name En Re	Telep     Compared SM     Remarks     ferred By:	hone List IS Allowed	SocialCRM Details	Update Customer Status Set Flag
Change Customer Tax Type Market Exit	License	Year	Make	Model Vin	Color	Unit #	Recommendation

2. Type the customer's information into your Customer screen: (entering Zip Code then pressing the

Tab key\* automatically fills City + State fields)

- John Jones
- Kathy (Spouse)
- 1544 Kingsland Way
- 92064 (zip + Tab)
- Zip, City, State enter automatically
- 888-724-6742
- jsjones@cox.net

Last, First	Jones		John		
Spouse	Kathy				
Address	1544 Kingsla	nd Way			
Zip, City, State	92064	Poway		CA	
Home	888-724-6742	2	Notes/Name		Ŧ
Office	000		Notes/Name		-
E-mail	jsjones@co	x.net		Email List	

3. With customer data entry finished, click the Vehicle Tab ( or Alt + V).

Vehicle screen displays for vehicle entry. Type in the license plate and select Year / Make / Model, Body Style & Engine/Fuel vehicle data from the drop-down menus to match the values in the screen below.

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**Note:** DEMO has no VIN Decode or Plate Lookup functions; enter license # + year-make-model.

4. Then click on the Exit Button (Alt + X) to finish entry and close Vehicle screen.

**Note:** Use 'drop-down menus' when entering vehicles to ensure Estimator access to OE parts, labor, maintenance or TSBs. Manually type in Y-M-M only when vehicle is pre- 1974 or if it is a type of vehicle not covered in Estimator.

**5.** You are prompted to save your changes. Click **Yes** to confirm this vehicle and customer information is being added to the SE database for future use.





Click the W.I.P. button to display the Work In Progress screen. Think of W.I.P. as the rack that held hand orders. WIP screen provides an overview of all current business in your shop. We will provide more details on this screen later.

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RO			008769	Jones, John	2ABC123				2013 Chevrolet Impala LS		
INV			000496	Dahl, Charlie	BIGRED				1987 Toyota Land Cruiser	10/13/2005 11:26 AM (1	.32 hr
INV			000501	Harper, Phil	98W2831				1986 Toyota Camry DX	10/21/2005 07:35 AM (6	.50 hr
INV			000596	Thomson, Bruce	697 3NV		JAACHI8EOJ781900	5	1988 Isuzu Trooper II S	08/30/2005 08:50 AM (1	.80 hr
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INV			000605	Grimes, Jon	504-TDR				1983 Nissan Maxima GL	11/2/2006 02:18 PM (9.4	45 hrs)
INV			008748	Dyson, Brian	BTO-D46		1FTHX251XFKA9998	4	1985 Ford Pickup F250	11/20/2006 11:01 AM (0	.00 hr
INV			008749	Diez, Dito	DITO D				1990 Toyota Celica GT	11/20/2006 11:26 AM (0	.00 hr
INV			008750	Eric, Walker	PZY-52J				1976 Chevrolet Nova	11/20/2006 11:28 AM (0	.00 hr
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EST			002297	Quote Customer						08/8/2005 11:17 AM (0.	00 hrsi 🖕
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This concludes the basic customer / vehicle entry exercise. Continue on to **Creating an Estimate** with this data entered.

### **Creating an Estimate**

#### Creating an Estimate for customer 'John Jones' (2013 Chevrolet Impala)

E+ New

1. Click on 'New' (press F6 key) to begin writing this Estimate.

<b>Note:</b> 'New'/F6 key "remembers" last setting. Be sure	Start New Order As:	<ul> <li>Estimate</li> </ul>	O Repair Order
Estimate is selected, NOT Repair Order.			

**Customer List for Start Order** window quickly verifies a customer exists in database. If not found, **New Customer** button would be used to start entry.

In the Last field, type 'J-o-n'.

Custom	er List fo	or Start Orde	r												)
Displa	ay for	<ul> <li>Customer</li> </ul>	r 🔿 Company		Limit Results 1	Го	200			Start Ne	w Orde	er As:	Estimate	⊖ Rep	air Order
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144 - 44	<ul> <li>Custo</li> </ul>	mer 1 of 1 )	► ₩ ₩ <												ŀ
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2. When 'Jones, John' appears in results, double-click on it (**or press Enter**) to select Jones and start an estimate.

Customer information is retrieved and Customer screen displays automatically. The customer we entered (John Jones) has only one vehicle so it is automatically selected. Click on (Alt + O) to advance to the Order screen.

3. The Order Screen displays. Enter Vehicle Mileage as 45657

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#### Begin adding order items to the Estimate, starting with a Symptom.

**NOTE**: If Symptoms is not set to pop-up automatically, click button as shown.

A Symptom is a vehicle complaint that the customer is requesting your shop to look into. These include description, category and labor time to diagnose it. Additional text can be entered; this input helps the tech figure out the cause.

4. Click on **Symptom (Alt + Y)** to add the customer's vehicle complaint. Symptom

The **Symptoms Reported by Customer** screen displays a listing of symptoms to select from.

5. Choose the first Symptom, **AC Won't Cool** and click **Select Symptom**. The symptom details display in the right screen panel. You may change any of the values in this screen as desired.

Sort by 💽 Descrip	tion Category						
Short Description	Category	Hours	Labor	Parts	1	Short Deec	AC Won't Cool
AC Won't Cool	AC/Heating/Cooling	1.00	\$60.00	\$0.00		Symptom	
Backfires	Engine Performance/Fuel	1.00	\$60.00	\$0.00		Description	Air conditioning is not cooling properly
Battery Dead	Charging & Starting Systm	1.00	\$60.00	\$0.00			
Belt Squeal	Belts & Hoses	0.50	\$30.00	\$0.00			
Brake Noise	Brakes	0.50	\$30.00	\$0.00			
Brake Pedal Soft-Sinks	Brakes	0.50	\$30.00	\$0.00		Work	Diagnose air conditioning system
Brake Warning Light On	Brakes	0.50	\$30.00	\$0.00		Requested	Diagnose an conditioning system
Charge Light on	Charging & Starting Systm	1.00	\$60.00	\$0.00			
Check Engine Light	Engine Performance/Fuel	0.00	\$50.00	\$0.00			
Electrical Problem	Electrical	0.00	\$50.00	\$0.00			
Engine Miss	Engine Performance/Fuel	1.00	\$60.00	\$0.00		Channed line	1 00 Non Standard Labor Pata
Engine Noise	Engine Mechanical	1.00	\$60.00	\$0.00		Charged Hrs	
Engine Overheats	AC/Heating/Cooling	0.75	\$45.00	\$0.00		LaborTotal \$	60.00 Save as Standard Symptom
Engine Stalls	Engine Performance/Fuel	1.00	\$60.00	\$0.00		Est. Parts \$	0.00 Come Back Invoice #
Hard Shifting (MT)	Clutch	0.50	\$30.00	\$0.00			
Hesitate, Stumble or Sag	Engine Performance/Fuel	1.00	\$60.00	\$0.00		Category	AC/Heating/Cooling
Idle Too High	Engine Performance/Fuel	1.00	\$60.00	\$0.00	11	Account	<none></none>

6. Click on the **Done** Button **(Alt + D)** to copy the Symptom into the estimate.

**Note:** Symptoms use stored descriptions with labor times & prices. This makes it faster to receive vehicles and process customers; captures diagnostic time that should always be billed out. See tip below to set automatic list pop-up.

The Order Screen displays the Estimate with transferred Symptom as a labor item.

	Time	Rate	Sale	Qty	Extended	Description	Price	List	Part No.	Mfg Co	Added From	Catego		
	1.00	\$60.00	\$60.00		\$60.00	Diagnose air c						AC/Heating		
	0.00		\$0.00	0.00	\$0.00		\$0.00	\$0.00				<none></none>		

7. Click on the **Jobs** button **(Alt + J)** to open Canned Job list.

Witchell HeamWorks SE       - U X         File Edit View Configurations Wilkies Inventory History Training Videos CRM Help       - U X         WI.P. Quote New Counter P.O.s. Inventory Schedule Text       Users Reports Owner Forum Setup Howto Repairing Social/CRML         Jones, John 2013 Chevrolet Impaia LS 3.8L.UK (217Cl) VIKIS) Lie: CA 2ABC/23 Home: 519-391-5000 Office: 888-724-5742       Castomer Vehicle Order Revision History Estimater Maint.         Jones, John 2013 Chevrolet Impaia LS 3.8L.UK (217Cl) VIKIS) Lie: CA 2ABC/23 Home: 519-391-5000 Office: 888-724-5742       Castomer Vehicle Order Revision History Estimater Maint.         Jones, John 2013 Chevrolet Impaia LS 3.8L.UK (217Cl) VIKIS) Lie: CA 2ABC/23 Home: 519-391-5000 Office: 888-724-5742       Castomer Vehicle Order Revision History Estimater Maint.         Jones, John 2013 Chevrolet Impaia LS 3.8L.UK (217Cl) VIKIS) Lie: CA 2ABC/23 Home: 519-391-5000 Office: 888-724-5742       Castomer Prev. 0       In 45657         Promised 12/3/2024 → Ex0 PM → Source None>       Engine Hours - Prev. 0.0       In 0.0 Out 0.0       Row Colors         V Type Description Hours Rate Part # Qty Cost Sale Price Total Tech Category List Code I					
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W.I.P.       Quote       New       Counter       P.O.s.       Inventory Schedule       Text       Users       Reports       Owner       Forum       Setup       How to       Report Scied/CMML         Jones, John 2013       Chevrolet Impala LS 3/8L/V6 (217CI) VIN(3) Lic: CA 2ABC123       Home: 619-391-5000       Office: 888-724-6742       O02353         Quite       Vehicle       Order       Revision       History       Estimate #       002353         Parts       Labor       Notes       Source       Kite       Ref #       Odometer -       Prev.       0       In       45657         Promised       12/32024       Source       Kite       w       Engine Hours -       Prev.       0       In       45657         Promised       12/32024       Source       Kite       w       Engine Hours -       Prev.       0       In       45657         Promised       12/32024       Source       Kite       w       Engine Hours -       Prev.       0       In       45657         Promised       12/32024       Source       Nource       w       Engine Hours -       Prev.       0.0       0.0       0.0       0.0       0.0       0.0       0.0       Cote       Intet	自動自動	🚠 🖾 🖛	🂒 🗊 Change 🔇	) 💠 🕐 🗉	
Johns, John 2013 Chevrolet Impala LS 3.6L,V6 (217Cl) VIN(3) Lic: CA 2ABC123 Home: 619-391-5000 Office: 888-724-6742       Description       History       Estimate #       002353         Parts       Labor       Notes       Sublet       Symptom       Jobs       PartKit       Promos       Egtimator       Maint.       Fluids       TSgs       Open Recalls       Print LOF         Written By       cnone>       Hat #       Ref #       Odometer -       Prev. 0       in       45657         Promised       12/ 32024       © 500 PM *       Source       4tone>       •       mengine Hours -       Prev. 0.0       in       0.0       Out 0.0         Order Hrs:       1.00       Driver: <li>None&gt;       *       mengine Hours -       Prev. 0.0       in       0.0       &lt;</li>	W.I.P. Quote New Counter P.O.s	Inventory Schedule Text	Users Reports Owner Forun	n Setup How to Repai	r Info SocialCRM
Customer       Vehicle       Order       Revision       History       Estimate #       002353         Parts       Labor       Notes       Sublet       Symptom       Jobs       PartKit       Promos       Egtimator       Maint       Fluids       TSBs       Open Recalls       Print LOF         Written By       cnone>       Hat #       Ref #       Odometer -       Prev. 0       In       45657         Promised       12/ 3/2024       \$500 PM       Source <imbody>       m       Engine Hours -       Prev. 0.0       In       45657         Promised       12/ 3/2024       \$500 PM       Source       <imbody>       m       Engine Hours -       Prev. 0.0       In       45657         Promised       12/ 3/2024       \$500 PM       Source        New 200       Ref #       Odometer -       Prev. 0.0       In       45657         Promised       12/ 3/2024       *       Bagnose air conditioning system       Source        Source        Rev Colors       Estimate       Mfg       III         Labor       Diagnose air conditioning system       1.00       \$60.00       \$500.00       \$60.00       \$60.00       AC/Heating/Cooling       Inv. Bal.         Invoice       Parts       <td< td=""><td>Jones, John 2013 Chevrolet Impala LS 3.6L,V6</td><td>(217CI) VIN(3) Lic: CA 2ABC123 Ho</td><td>me: 619-391-5000 Office: 888-724-67</td><td></td><td><u>1011511 all011</u></td></td<></imbody></imbody>	Jones, John 2013 Chevrolet Impala LS 3.6L,V6	(217CI) VIN(3) Lic: CA 2ABC123 Ho	me: 619-391-5000 Office: 888-724-67		<u>1011511 all011</u>
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Labor       Diagnose air conditioning system       1.00       \$60.00       \$60.00       \$60.00       AC/Heating/C         In       Total:       \$60.00       Parts:       \$0.00       Labor:       \$60.00       AC/Heating/C         New Job       Quick Menu        Inv. Bal.       Parts       Labor       Sub Total       Haz Mat.       Supplies       Tax:       Total       Inv. Bal.         Finance       0.00       60.00       0.00       0.00       60.00       60.00         Cgnvert to Order       Parts Ordering       SocialCRM Details       Options       View PO       Worksheet       Share v       Print       Egit	<ul> <li>Diagnose air conditioning system</li> </ul>				:
In Total: \$60.00       Parts: \$0.00       Labor: \$50.00       Tax: \$0.00       Category: AC/Heating/Cooling         New Job       Quick Menu         >         Parts       Labor       Sub Total       Haz Mat.       Supplies       Tax: Total       Inv. Bal.         Invoice       0.00       60.00       0.00       0.00       60.00       60.00         Estimate       0.00       60.00       0.00       0.00       60.00       60.00         Convert to Order       Parts Ordering       SocialCRM Details       Options       View PO       Worksheet       Share v       Print       Exit	Labor Diagnose air conditioning system	1.00 \$60.00	\$60.00	\$60.00	AC/Heating/C
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Invoice         60.00           Estimate         0.00         60.00         0.00         0.00         60.00           Convert to Order         Parts Ordering         SocialCRM Details         Options         View PO         Worksheet         Share v         Print         Exit	Parts Labor S	iub Total Haz Mat. Suppli	es Tax Total		Inv. Bal.
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Ready m1skearly Manager SE Demo 9.1.0.3253 IIM 🏠 -	Ready			m1skearly Manager Si	E Demo 9.1.0.3253 TIM 🔇

The Canned Job List opens.

- 8. In Description, enter '**rec**' as partial search phrase. (not req'd to type entire job name)
- 9. Click on the **Search** button **(or press Enter)** to find jobs that include **'rec'** in Description.
- 10. Check the box in the Tag column for **'A/C Rech1'**; then click the transfer button to add the Canned Job (Freon + labor) to this Estimate.

Canned Job List					×
Search Criteria:				Г	2
Category	< All >		~		
Year	2013		~		Clear
Make	Chevrolet		~		Clear
Model	Impala LS		~		
lob #					
500#					
Description	rec				
	Use Advanced	Quick Menu			
Tag Job #		Description			
A/C Rec	h1	Recharge A/C (1 lbs	.)		
A/C Rec	h2	Recharge A/C (2 lbs	.)		
		·			

The Canned Job repair lines display in the Estimate.

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Labor A/C Recharge & Leak Test System	1.00 \$60.00		\$60.0	0	\$60.00	AC/Heating/C		
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## **The Completed Estimate**

This basic Estimate (Symptom - diagnostic time + 'A/C Recharge' Job) is now ready to print. (**TIP:** checking profit before quoting it is on the following page)

11. Choose **Preview** from the **File** menu to preview this Estimate on your screen.

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The Print Preview displays how printed estimate appears.

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Parameters # ×	1			<u>^</u>
Include Header         Yes         -           Include Comment         Yes         -           Include Signature Line         Yes         -           Show Labor Hours         Yes         -		Phone: ()-   Fax: ()-		Estimate #
Show Part Numbers No -				
Print in Color Yes -	Estimate		Es	stimate Due: \$
Show Technicians Yes -	lones John 2013	3 Chevrolet - Impala - LS	Estima	ate Date:
Reset	1544 Kingsland Way         3.6L,           Poway, CA. 92064         Licen           Home: (619) 391-5000         Odon           Office: (888) 724-6742         Engir	V6 (217CI) VIN(3) se Plate: 2ABC123 CA VIN: neter: In 45,657 Color: ne Hr: In 0.0	Servic Custo	e Advisor: mer ID:
	Type Description		Qty/Hr	Sale/Rate
	Job Title			Initials:
	Labor Diagnose air conditioning sys	stem	1.00 hr	\$60.00
	Labor A/C Recharge & Leak Test Sys	stem	1.00 hr	\$60.00
	Part Freon		1.00	\$24.00
	Parts: \$24.00 Labor: \$120.00	0 Tax:\$1.86 Total:\$14	5.86	
1				▼ ▼
Page 1 of 1 Printing			100%	+

The Parameters box in the left sidebar allows you to change some of the settings in the print preview.

12. Change the **Include Header** setting to **NO** and the **Show Part Numbers** setting to **Yes** and press the **Submit** button.



You will see that the Header has been removed from the top of the Estimate and the Part Number (FREON) has been added.

- 13. (Optional) Click the **Print** button to print the estimate.
- 14. Closing the Print Preview **X** returns you to the estimate on Order screen.

#### NEXT: F12 key = Check Profit

## **Using the Profit Wizard**

Profit Wizard provides a pie chart overview of costs / profit for this entire order OR [NEW] at the job level by selecting a specific job from the drop-down list. Use the **F12** function key as a shortcut to open this or by selecting **Options > Profit Wizard**.

**Note:** To get accurate numbers, use the Profit Wizard <u>after</u> actual labor & parts costs have been entered. 'Please, Select' labor tech entry provide a sample labor cost.

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ones, Joh	n 2013 (	Chevrolet Impala L	.S 3.6L,V6	(217CI) VIN(3)	Lic: CA 2A	3C123 Home: 619-	391-5000 Offic	e: 888-724-6742		em	ons	Stra	atio	<u>D</u> ľ
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dv								m1skearly	Manager SE	Demo	9.1.0.3253	DEFAU	TUSER	

Miscellaneous & Overhead are entered in Setup and don't impact INV totals; makes pie chart more realistic beyond part costs & tech pay.

**NEXT:** With profit verified and customer approval, convert Estimate to R.O.

### Converting an Estimate into a Repair Order

Typically, an estimate is prepared to get customer approval for the work. Once the customer agrees, that estimate is typically printed, signed, then converted to an active R.O. [your state regulations may vary on this]

1. Click on **Convert to Order (Alt + O)** in the lower left corner of the Order screen.

The System will then ask for confirmation to convert this Estimate to a Repair Order.



2. Click on Yes (type 'Y' or press Enter). Order Screen now displays as **Repair Order#**(with permanent # assigned).

**Note:** Shops create many Estimates; some don't result in actual work. These get temporary "throwaway" numbers. When an EST is converted to an R.O., it's assigned a new **permanent** number kept through the INV stage into History.

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v ·	Туре	Description	Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech	Category	List	Mfg Code	
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La	bor	Diagnose air conditioning system	1.00	\$60.00				\$60.00		\$60.00	<none></none>	AC/Heating/C			
La	bor	A/C Recharge & Leak Test System	1.00	\$60.00				\$60.00		\$60.00	<none></none>	AC/Heating/C			
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ady										m1skear	ly Manager	SE Demo 9.1	.0.3253	TIM	<u>~</u>

## Assigning Techs to R.O. / Print Tech Worksheet

Now that we have an active Repair Order, we need to assign technicians. Dropdowns are available in the Work in Progress grid to allow you to quickly assign a technician to each Part or Labor item. The drop-down technician list is enabled by right-clicking on the Tech Grid entry shown to the right (displays as None initially).

Tech	
<none></none>	
<none></none>	
<none></none>	

<none></none>	▼ AC/Heating/C	
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Charbonneau,	Wayne	
Day, Raymond	1	
DiVerde, Nick		
Johnson, Tina		
Please , Select	:	

# To Assign the Technician to a repair line: Right-click on the first Tech grid (highlighted).

- 2. Choose Charbonneau, Wayne from the Dropdown.
- 3. Repeat for the next three Repair Lines.

**Note:** You can also assign the technician by choosing **Options** and selecting the Default **Labor** and **Parts** technician for the Order. This is generally the quicker approach for orders with a lot of line items assigned to the same technician.

Once you have set the Technicians, the Repair Order is now ready to print.

4. Choose **File/Preview** to preview the Repair Order on-screen.

You may get a validation warning.

Repair Order Validations	×
Warnings	
'Inspection Date' is prior to today's date	<none>  \/&gt; 6/29/2021</none>
	<u>Cancel Print</u> Continue <u>Print</u>

5. Depending on system settings, there may be validations; just click on **Continue Print (**or press **Enter)** and continue to the print preview for the purposes of this exercise.

REPORTS × Ba N .⊮ 1 /1 👫 💐 🕶 . Þ SAP CRYSTAL REPORTS \* Main Report REPAIR ORDER # 008768 Org. Est. # 002350 Phone: 000- - Fax: 000- -**REPAIR ORDER - RO** Scheduled : 10/08/2024 01:36 PM Print Date : 11/26/2024 Jones, John and Kathy 2013 Chevrolet - Impala LS - 3.6L, V6 (217CI) VIN(3) 1544 Kingsland Way Lic # : 2ABC123 - CA Poway, CA 92064 Home 619-391-5000 --- Office 888-724-6742 VIN # : MFG Date : 6/29/2021 Cust ID : 6191 Elapsed: 0 Last Service : 10/8/2024 Previous Odom : 45657 Current Odom : 45657 Labor Requested / Part SubTotal Extended Diagnose air conditioning system Symptom: Air conditioning is not cooling properly 60.00 A/C Recharge & Leak Test System 60.00 Parts Subtotal 24.00 Total Page No.: 1 Zoom Factor: 100% Current Page No.: 1

Inspect the Repair Order content in the Print Preview window.

**Note:** You may also increase/decrease (zoom) the preview size by changing selected in the top line icons as shown



#### *Note: Marking the Repair Order as 'printed' triggers two important things:*

- Sets 'Time/Date In' field (visible in WIP Detail) as start of actual work.
- Parts become 'Committed' and visible to Pick List / Purchase Order process. You don't have to actually print to paper; automated setting TIP shown below.

**Tip:** It is also possible to automatically **Mark All ROs As Approved/Printed** in the **Screen View** settings under **Configuration > Shop Data**. This time-saving setting <u>bypasses</u> the RO "printing" steps as shown previously.

During the Convert Estimate to R.O. sequence, you'll be prompted for printing a Technician Worksheet.

8. Choose **Yes** to preview the Technician Worksheet. This worksheet includes details on services to be performed and space to record inspection findings.

**Note:** You cannot print the worksheet in SE Demo Mode, ordinarily you would print a copy for the Technician

REPORTS				- 0
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Main Report Technician We 2013 Chevrole VIN # : Engine : 3	ork Sheet Service Writer : et - Impala LS FWD 61 V6 (217C1) VIN(3)	Hat # : Color :	Print Date: 11/26/20 Repair Order # 008768	
Lic # : 2 Jones, John Home 619-391-4	ABC123	Lic. State : CA Schedule : 10/09/24 3:00 Promised Date : 10/08/24 5:00	P.M. P.M.	
Last Service : Current Odomei Previous Mileag Elapsed Mileag	6/29/21           10/08/24           ter:         45,657           ge:         45,657           le:         0	Unit # : Unit # : Trans : 6 speed Auto Brakes : 4-Wheel ABS Manufacture Date : 6/29/21	matic 6T70/MH2	
Part Numb	Per Part Description Freon	Qty 1.0	Part Location	
Labor Des Diagnose a Symptom: Techniciar A/C Rechar Techniciar	cription air conditioning system Air conditioning is not cooling properly n: Charbonneau rge & Leak Test System n: Charbonneau		Charged Hou	urs 1.00
OUT ODOMETE Hours out: 0.00	ER :	Total H	lours Charged : 2	2.00
-				
Current Page No.: 1	Total Page No.: 1		Zoom Factor: 100%	

You can close the window by clicking the  $\mathbf{X}$  in the right corner of the screen.

**Note:** Invoices use the same # assigned during R.O. An INV can be changed back to an R.O. if last minute items are added.(Configurations > Shop Data > Default Settings tab option)

**NEXT:** Converting a Repair Order to an Invoice

#### Converting the Repair Order to an Invoice

Once the repair has been completed, you will need to convert the Repair Order to an Invoice.

 Click on Convert to Invoice (Alt + O) (lower LH corner of Order screen). You are asked to confirm your request.



 Click on Yes (press 'Y' or Enter) to confirm conversion from R.O to an Invoice. Program confirms parts previously committed to the order were installed and subtracts them from inventory where applicable.

The Invoice screen looks <u>exactly</u> like the R.O. screen; the only difference is that it now displays as **Invoice** #.

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W.I.P. Quot	e New 13 Chevrolet Ir	Counter P.O.s	Invento	ry Sched	Jule Text	Use Home:	rs Repor	Chan ts Own	ge er Forum : 888-724-674	Setup	Now to Rep	pair Info Social	CRM		
<u>C</u> ustome	er	<u>V</u> ehicle		<u>O</u> re	der	<b>`</b>	<u>R</u> evision	) ľ	His	s <u>t</u> ory		Invoi	ce #	00	08768
Parts Labor	Notes	Sublet Symp	tom	lobs	Part <u>K</u> it	Promos	E <u>s</u> tima	tor <u>M</u> a	int. Fluid	is TS <u>B</u> s	)	Open Recalls	Print	LOF	
Written By <n< td=""><td>one&gt;</td><td>~</td><td>Hat #</td><td></td><td>Ref</td><td>#</td><td></td><td>0</td><td>dometer -</td><td>Prev.</td><td>0 In</td><td>45657</td><td></td><td></td><td></td></n<>	one>	~	Hat #		Ref	#		0	dometer -	Prev.	0 In	45657			
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Order Hrs: 2.	00		Driver:	<none></none>									Row Color	<u>'S</u>	
✓ Type	Des	cription	Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech	Category	List	Mfg Code	
👻 Job Title															:
Labor	Diagnose air co	nditioning system	1.00	\$60.00				\$60.00		\$60.00	Charbonneau,	AC/Heating/C			
Labor	A/C Recharge 8	& Leak Test System	1.00	\$60.00				\$60.00		\$60.00	Charbonneau,	AC/Heating/C			
+ Part	Freon				FREON	1.00	\$12.00	\$24.00	\$24.00	\$24.00	Charbonneau,	AC/Heating/C	\$0.00		
II. Total: \$14	5.86	Parts: \$24.00	Lab	or: \$120	.00 Tax:	\$1.86	Cate	gory: <no< td=""><td>one&gt;</td><td>-</td><td></td><td></td><td>0.00%</td><td>  Est: \$1</td><td>45.86</td></no<>	one>	-			0.00%	Est: \$1	45.86
New Job Quick	Menu I I														+
<b>O</b> Reilly	NAPA FIRST	nexpart.													
ATTE HATTS	Parts	Labor Su	ıh Total	Haz	Mat Su	unnlies	Тах	,	[otal				In	v Bal	
Invoice	24.00	120.00	144.00		0.00	0.00	1.86	1	45.86					145.86	
Estimate	24.00	120.00	144.00		0.00	0.00	1.86	1	45.86						
Pay/Post Invo	ice Parts	s Ordering	SocialCRM	A Details					Options	View	Workshe	et Shar	e 🗸 P	rint	E <u>x</u> it
Ready										m1skea	rly Manager	SE Demo 9.	1.0.3253	TIM	<u>ട്</u>

Before we advance to Pay & Post phase, try two WIP Options with this Invoice.

3. Click on **Exit (or press Esc)** to return to the Work-In-Progress screen.

#### Work in Progress Screen

The 'WIP' screen provides access to all your current shop estimates, repair orders, and invoices. The grid area of the screen contains pertinent information about the order and is configurable to suit your shop's needs. This is the screen that should be open when you are not working directly with a specific order.



**TIP:** Use the Up/Down arrow keys and press ENTER as a shortcut to select any EST/RO/INV/SO item to open up on Order screen. When finished, press ESC key to return to the WIP screen.

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Type 👻	Recalls	Messages Numb	er 🔺 O	ustomer	License	Color	Vin	Vehicle DC	MPI Progress Sched
RO		0006	)3 Iv	verson, Fred	123QER			1984 Cadillac DeVille	10/10/2005 01:59 PM (1.00 hr
RO		0087	51 K	onstantine, Doug	WDS-54Y		IB4FK5439KX617037	1989 Dodge Caravan	10/12/2005 03:11 PM (7.48 hr:
RO		0087	53 La	abelle, Patty	FDK 89S		3FAPP 15J3MRI72228	1992 Ford Escort LX	11/15/2006 02:50 PM (11.00 h
RO		0087	55 M	lack, Peter	MACKONE			1991 Dodge Dakota	
RO		0087	59 Jo	ones, John	2ABC123			2013 Chevrolet Impala LS	
INV		0004	96 D	ahl, Charlie	BIGRED			1987 Toyota Land Cruiser	10/13/2005 11:26 AM (1.32 hr
INV		0005	01 Н	arper, Phil	98W2831			1986 Toyota Camry DX	10/21/2005 07:35 AM (6.50 hr
INV		0005	96 TI	homson, Bruce	697 3NV		JAACHI8EOJ7819005	1988 Isuzu Trooper II S	08/30/2005 08:50 AM (1.80 hr
INV		0006	01 H	arkins, John	234ABC		V1NNUM6565656565656	. 1991 Toyota Pickup SR5	10/2/2005 11:38 AM (9.45 hrs
INV		0006	)4 Н	arkins, John	234ABC		V1NNUM6565656565656	. 1991 Toyota Pickup SR5	10/12/2005 05:41 PM (9.45 hr:
INV		0006	05 G	rimes, Jon	504-TDR			1983 Nissan Maxima GL	11/2/2006 02:18 PM (9.45 hrs)
INV		0087	48 D	yson, Brian	BTO-D46		1FTHX251XFKA99984	1985 Ford Pickup F250	11/20/2006 11:01 AM (0.00 hr
INV		0087	19 D	iez. Dito	DITO D			1990 Toyota Celica GT	11/20/2006 11:26 AM (0.00 hr
INV		0087	50			-			1 <mark>.00 hr</mark>
INV		0087	54	Appoi	intment	P	ayment	Post Det	ail Order <sup>.00 hr</sup>
EST		0022	13				-		7 <mark>.48 hr</mark>
EST		0022	70						,
EST		0022	74 R	ead-Me, First	CLICK HERE			2000 Chevrolet Blazer	10/25/2005 11:26 AM (0.00 hr
EST		0022	31 M	lack, Peter	MACKONE			1991 Dodge Dakota	10/27/2005 10:13 AM (1.00 hr
EST		0022	33 Q	uote Customer					10/31/2005 11:05 AM (0.00 hr
EST		0022	97 Q	uote Customer					08/8/2005 11:17 AM (0.00 hrs)
144 44 4	Record 13 of	39 ▶ ₩ ₩ ▲ √ >	4				_		۱
									Row Color Befinitions
			leset Layo	out Colum	Ins Send Tex	t Purge	Ests Display	Appointment Payme	nt Post Detail Order
Ready								m1skearly Manag	er SE Demo 9.1.0.3253 TIM 🔮 🚲

The WIP screen provides various tools for working with and making adjustments to orders; watch videos to learn more. Two of these options are discussed below:

1. Click on **Appointment** to view scheduling details for this order in the Appointment Editor.

2 10/9/	2024:	Jones, .	lohn											-		×
Save & De Close	<b>B</b> elete	Open Order	Cancel	Auto	Adjus h Drop nder	st End Tim p-Off to S None	ie itart Time +	Send Text ~								
Subject	Jor	nes, Joh	n													
Drop Off	10/	9/2024		8:00 AM	Ŧ	Schedu	led Hours:	2.00	Order H	s: 2.00		Appointment State	Open (OPEN)		~	
Promised	10/	8/2024		5:00 PM	Ŧ							Service Advisor	<none></none>		~	
Starts	10/	9/2024	•	3:00 PM	Ŧ							Technician	Charbonneau	Wayne	~	
Ends	10/	9/2024	•	5:00 PM	Ŧ		lay event					Resource	<none></none>		~	
Shop Co	omme	ents					Print	on order	as Note	Custome	r Comme	ents/Special Requests	🗌 Pr	int on o	rder as N	ote
																•
Custo	mer -	Jones,	John							Vehicle	- 2013 Ch	evrolet Impala LS				
Pho	one:	(Home	) 619-3	391-5000	~	Prefers:	< None >		~			0 Recommendations				
Er	nail:	jsjone	s@cox	.net							VIN:					
Comp	any:									Licens	e Plate: Engine:	2ABC123 Color 3.6L, V6 (217CI) VIN(3)	:			
Addre	ess:	1544 K Poway	ingslan , CA 92	nd Way 1064							Unit #:	5152, 10 (22, 52, 12, (3,				
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Look over the various options available for scheduling then click **Save and Close** or **X** to close the scheduler. Visit <u>https://kb.mitchell1.com/articles/id-803/</u> for detailed information on working in the scheduler.

WIP **Detail** includes several fields to update.

2. Click **Detail** (or right-click mouse on that order). With **Jones, John** already highlighted, update the status of details.



3. Click **Detail** to display details of Invoice. (Jones, John)

Update these WIP Detail fields:

- Status: Completed
- Location: Front Lot

Work In Progress Detail		X
Invoice	008768	Update Fields Status
Name Jone License 2AB( Year/Make/Model 2013 Service Writer	es, John C123 (CA) Chevrolet Impala LS	Completed  Location Front Lot  Hat # Reference #
Phone Numbers           Home         Ext.           619-391-5000         Office           888-724-6742         Ext.	Time/Date In 11/26/2024 11:58AM • • • • • • • • • • • • • • • • • • •	Promised Time/Date 10/08/2024 5:00PM
Schedule Start 10/9/2024 3:00 PM	Schedule End 10/9/2024 5:00 PM	Appointment
Repair Order Printed	Invoice Printed	Print Worksheet Cancel OK

4. Click on **OK** to save.

The WIP screen is visible again with Invoice (Jones) highlighted.

5. Double-click (**Alt + O**) to open the Jones Invoice again.

## NEXT: Apply Payments & Post the Invoice

## Apply Payments & Post the Invoice

John Jones is here to pick up the vehicle and you will now complete the order cycle by collecting payment, printing a finished invoice and posting it to History.

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Elle Edit View Configurations Utilities W.I.P. Quote New Counter P.O.s Jones, John 2013 Chevrolet Impala CS 3.6L,V6	Inventory Inventory Sch (217Cl) VIN(3) Li	History Training Videos	CRM Help Epite Change Source Constraints	(?) How to	Repair Inf	o SocialCRM	
<u>C</u> ustomer <u>V</u> ehicle	<u> </u>	Apply Payments		×		Invoice #	008768
Parts Labor Notes Sublet Symp Written By <none>  v</none>	tom Jobs	Customer Name Jo Charged Balance Credit Balance	ones, John \$0.00 \$0.00		Oper In 456	Recalls Prin	t LOF
Promised 10/ 8/2024 . 5:00 PM -	Source <no< td=""><td>Charged Balance does</td><td>NOT include this Invoice.</td><td></td><td>In <u>0.0</u></td><td>Out 0.0</td><td></td></no<>	Charged Balance does	NOT include this Invoice.		In <u>0.0</u>	Out 0.0	
V Type Description	Hours Rate	Invoice Amount Amount Paid	145.86 Print	Receipt	, c	ategory List	Mfg Code
✓ Job Title		Invoice Balance	145.86				:
Labor Diagnose air conditioning system	1.00 \$60.0	Date	11/27/2024		au, AC/	Heating/C	
Labor A/C Recharge & Leak Test System	1.00 \$60.0	Payment Type	Visa	*	au, AC/	Heating/C	
+ Part Freen		Payment	145.86		au, AC/	Heating/C \$0.0	
III Total: \$145.86 Parts: \$24.00	Labor: \$1	Check / Reference #				0.009	6   Est: \$145.86
New Job Quick Menu 4		Authorization #	558163j	Cancel			4
CREITY NAPA FRAN Multi-Seller		Пакогу Арриусте		cancer			
Parts Labor S	ub Total Ha	z Mat. Supplies	Tax Total			I	iv. Bal.
Invoice 24.00 120.00 Estimate 24.00 120.00	144.00 144.00	0.00 0.00 0.00 0.00	1.86         145.86           1.86         145.86				145.86
Pay/Post Invoice Parts Ordering Ready	SocialCRM Deta	Is	Options Vie m1si	w PO Wa	orksheet inager SE De	Share  9.1.0.3253	Print Exit

#### To Pay/Post Invoice:

- 1. Click on **Pay/Post Invoice (Alt + O)** at the bottom left corner of your screen to open the Apply Payment window. The Invoice Total is automatically entered for you as the Payment.
- Enter Payment Type: 'V' selects
   (Visa) + Authorization #: 558163
- 3. Click the **Pay** button.

**Note:** *Default payment type* is selected in Shop Data Setup. Payment Amount = defaults to INV balance due. Print Receipt is optional



4. When the Post Invoice dialog box displays, click on Yes **('Y' or Enter)** to continue.

**TIP**: When work is completed but customer is not there to pick up the vehicle, post the invoice as Charge to keep the invoice off of your WIP screen. Then use Batch Payment (F5) when they arrive to pay the Invoice.

The system will automatically display the Posting Date dialog window below.

Posting Date		×
	Post Order With This Date	11/27/2024
	Print Invoice before posting?	<u>C</u> ancel <u>O</u> K

- 5. Click to place a check in the **Print Invoice before Posting** checkbox. This box <u>only needs to be</u> <u>checked once</u>; the system will *remember* this preference.
- 6. Click on **Dk** to continue the process of Printing and Posting.
- 7. Depending on system settings, there may be further Validations; just click on

Continue Print

(or press Enter) for this exercise and continue to the print preview.

**Note:** Once comfortable with the program, you may go to Configurations – Reports/Printers area and turn off Default Print to Screen option to skip preview steps in the future.

Print Preview 88 ×, B Q QÐ **•** ID PDF  $\otimes$ \* Scale Orientation Quick Print Size Find Thumbnails Bookmarks Editing First Previous Next Fields Page Page Page Last Page Many Pages Zoom Out Zoom Zoom In Page Color Watermark Export E-Mail To Y As Y Close Q Print Page Setup G Navigation 7000 Page Background Export Close Parameter Include Header Yes Invoice # 008768 Include Comment Original Est # 2350 Yes Include Signature Lin Yes Phone: ()- | Fax: ()-Show Labor Hours Yes No Show Part Numbers Invoice Paid Balance Due: \$0.00 Print in Color Yes Show Revisions on INV Yes 2013 Chevrolet - Impala - LS Estimate Date: 10/08/24 Jones, John 1544 Kingsland Way Show Technicians Yes 3.6L, V6 (217CI) VIN(3 Service Adviso Poway, CA. 92064 License Plate: 2ABC123 CA VIN: Customer ID: 6191 Home: (619) 391-5000 Odometer: In 45,657 Color: Reset Submit Office: (888) 724-6742 Engine Hr: In 0.0 Type Description Otv/Hr Sale/Rate Total \$145.86 Job Title 1.00 hr \$60.00 \$60.00 Labor Diagnose air conditioning system Labor A/C Recharge & Leak Test System 1.00 hr \$60.00 \$60.00 Part Freon 1.00 \$24.00 \$24.00 Parts: \$24.00 Labor: \$120.00 Tax: \$1.86 Total: \$145.86 Thank you for your business. Labo \$120.00 In hereby authorize the above repair work to be done along with the necessary material and hereby grant you and/or your employees permission to operate the car or truck herein described on street, highways or Parts \$24.00 Subtotal \$144.00 100% - -----Page 1 of 1 .....

**Print** displays what your final printed invoice would look like.

8. Click the **X** to close the print window. The Invoice is closed into Order History and you are returned to the WIP screen.

#### How to find the John Jones Invoice in the History file:

9. Go to Utilities menu, select Find History Record (press F4 key).

Find History Recor	rd				— 🗆
Invoice	<u>V</u> ehicle				
Invoice #	8767	Posted Up To: Monda	y , December 2, 2024 🗐 🔻	Save Search	
Invoice	Posted Date	<ul> <li>Printed Date</li> </ul>	Name	Vehicle	Amount
008767	10/08/2024	10/08/2024	Jones, John	2013 Chevrolet Impala LS	60.00
008766	10/19/2021	10/19/2021	Gannon, Pat	1978 Nissan 280Z	20.00
008762	10/07/2021	10/07/2021	Jones, John	2013 Chevrolet Impala LS	163.96
008757	12/15/2006	12/15/2006	James, Jesse	1994 Toyota T100 DX	633.22
008754	12/15/2006	12/15/2006	Allen, Torren	1991 Nissan Maxima SE	630.61
008755	12/14/2006	12/14/2006	Bollig, John	1990 Dodge Shadow Base	600.00
008753	12/12/2006	12/12/2006	Miller, Jeff	1989 Chevrolet Pickup C1500	600.00
008752	11/28/2006	11/28/2006	Dahl, Charlie	1987 Toyota Land Cruiser	189.70
008751	11/24/2006	11/24/2006	Johnson, Tina	2001 Cadillac DeVille Base	63.23
008747	11/20/2006	11/20/2006	DeFilipo, Robert	1989 Chevrolet Suburban R1500	119.25
008756	11/05/2006	11/05/2006	James, Jesse	1994 Toyota T100 DX	600.00
000495	09/17/2005	09/17/2005	Counter Sale		122.11
000522	09/15/2005	09/15/2005	Mullan, Robert	1985 Ford Pickup F150	93.58
000494	09/13/2005	09/13/2005	Winn, Billy	1989 Nissan 300ZX Base	501.17
000467	09/13/2005	07/14/2005	Jensen, Tom	1994 Nissan 300ZX GS	421.41
000497	09/13/2005	09/13/2005	Dahl, Charlie	1978 Volkswagen Beetle	131.81
000498	09/13/2005	09/13/2005	Dahl, Charlie	1978 Volkswagen Beetle	138.62
000523	09/12/2005	09/12/2005	Smollen, Gail	1988 Honda Accord LX	726.47
000500	09/12/2005	09/12/2005	Harkins, John	1991 Toyota Pickup SR5	415.49
				<u>C</u> ancel	Vie <u>w</u> Record

10. Double-click on the John Jones invoice to open history for the customer. This allows access to view **Details**, **Print** or **Un-Post** an Invoice.

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.I.P. Quot	te	J	ones,	John			Writt	ten By				Up	date Odom	eter	Inve	oice 00876
es, John 201	13	2	013 C	hevrolet			Pron	nised	5:00 PM	N	10/7/202	4 Odd	om In		n Out	0
	<u>C</u> u	Ir	npala	LS			Hat #	/Def#				Enc	. Hrs In			
Display for:	(	c	ABC1	23			Sour	ce							0.0 Out	0.0
Туре	Pr		~	Туре	Desc	ription	Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech	Cate III
٩V		-	Job 1	Title												:
			_													•
vv			L	.abor	Diagnose air con	ditioning system	1.00	\$60.00				\$60.00		\$60.00	<none></none>	AC/Heating/C
NV		ıl.	L Tota	.abor I: <b>\$60.</b>	Diagnose air con <b>00</b>	ditioning system Parts: \$0.00	1.00 Lab	\$60.00 oor: \$60.00	0 Tax:	\$0.00	Ca	\$60.00 tegory: <no< th=""><th>ne&gt;</th><th>\$60.00</th><th><none></none></th><th>AC/Heating/C</th></no<>	ne>	\$60.00	<none></none>	AC/Heating/C
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11. Click Details to view the Details of the Posted Invoice in History

### **Entering Recommendations**

The Recommendations field is provided to enter service or repair needs identified for customer's vehicle. These findings are typically written on Tech Worksheets and returned to the Service Writer for entry. This information will be displayed within the Vehicle Screen as a reminder of noted repair needs, not performed as yet.



**NOTE:** Revisions for storing actual work details will be discussed after this.

1. Click on the **New** button **(F6)** type **jo** in the Last (name) field and select Jones, John (any name will do)

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nes, John 2	013 Chevrolet Impala L	S 3.6L,V6 (217CI) VIN(3) Lic:	CA 2ABC123 Home: 61	9-391-5000 Office: 8	88-724-6742	How to Repair Info Socia	Strat	io
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2. Go to Vehicle (Alt + V) screen.

- 3. Click on **Add** in the Recommendations section to begin entry of your first Recommendation.
- Today's date (default) is fine; use drop-down calendars or type dates if desired.

**TIP**: Date Work Needed is usually same as Date Recommended; it is provided to input repair needs to be completed by future date (30 days later, etc)

- Category: Select 'Automatic Trans/Transaxle' (or press 'A' 3 times).
- Type: 'Test drive: shifting not smooth; perform trans service 1st.'

Recommendations					- 0	×
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Test drive: shifting no	ot smooth; perform trans	s service 1st.				•
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					Cancel	<u>о</u> к

4. Click **OK** in Recommendations to save your first entry and proceed to begin entry of the second recommendation.

**Note**: By creating separate Recommendations for each identified repair issue, your follow-up marketing can be more precisely focused and you streamline the process of adding individual repairs when the customer only wants part of the recommended work completed. The requirement to include a Category as a filter is part of this approach.

- 5. Click on **Add** button (Alt + A) again to enter a second Recommendation.
- 6. Press the Tab key to move down to the Category field. Scroll down the Category list and select **Brakes**.

Type: 'Test drive: poor hard braking; perform ABS Brake inspection'.

Recommendations											×
Date Recommended	11/28/2024 11/28/2024		FollowUp Date Create Future Ap	None pointment	2			Clear <u>F</u> o	llowUp D	ate	
Work Recommended	i Standa	rd Notes			~	Category	Brakes				~
Test drive: poor har	d braking; perfo	rm ABS Brake	inspection'								•
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7. Click on **Ok** to save this Recommendation; the two entries display.

Recommendat	ions		
Date	Need by	Description	
08/01/2016	08/01/2016	Test drive: shifting not smooth; perform trans service first.	
08/01/2016	08/01/2016	Test drive: poor hard braking; perform ABS Brake inspection.	

**Tip:** Saving Recommendations as Standard Notes saves time. To create and store repeatable Recommendations text, go to Setup – Standard Descriptions - Notes tab. It will still be necessary to select Category when applied to vehicle.

All recommendations will be listed within the Vehicle screen as shown above. When tab is green, it indicates Recommendation(s) are on file for this vehicle.

omer	<u>V</u> ehicle	<u>O</u>

Note: The Vehicle tab will not turn green until you actually leave the Vehicle screen.

On future service visits for this vehicle, this visual reminder will also appear when a new order is started:

#### **Entering Revisions**

While a test drive triggered Recommendations to describe problems seen, it's time to work up actual repair costs. Revision has 9 separate Sub-Estimates tabs for transfer to Order, pending customer approval. Thisprovides an ability to perform "what-if" pricing options of original repairs along with various Sub-Estimate (repair job) combinations.



Revisions can contain all parts and labor detail for additional work discovered. These can be transferred to an existing estimate or order, once your customer approves them. Sub-Estimates not approved and sold today will remain on file (with reminders) on future repair visits.

**Note:** Sub-Estimates contain any combination of Parts, Labor, Sublet, Notes, Canned Jobs, Part Kits). Separate Sub-Estimates allow users to arrange these by job; these are stored and then transferred to orders in any combination.

- 1. Go to **Revision** screen (Alt + R) to create a Sub-Estimate.
- 2. From Revision screen, click **Jobs (Alt +J)** to open the Canned Job list.

#### Transferring a Canned Job into a (Revision) Sub-Est<u>1</u> workspace:

- 3. Enter '**trans**' in the Job # field.
- 4. Click on **Search** (or press Enter). SE Search finds a matching entry.

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Jones, John 2013 Chevrolet Impala LS 3.6L,V6 (217CI) VIN(3) Lic: CA 2ABC1	
Customer         Vehicle         Order         Category         < All >	
Parts Labor Notes Sublet Symptom Jobs Par Year 2013 V	
Written By <none> V Make Chevrolet V</none>	Clear
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Order Hrs: 0.00	
V Type Description Hours Rate Part # Description	
✓ Job Title           Use Advanced Quick Menu	
1. Total: \$0.00 Parts: \$0.00 Labor: \$0.00 Ta	
TRANS Transmission Service	
New Job Quick Menu 4	
Parts         Labor           Estimate         0.00         0.00   Transfer Add Edit Copy Delet	e Cancel

5. Tag the **TRANS** job and click on **Iransfer** (Alt + T) to copy into Revision (Sub-Estimate 1). The Revision screen now displays **SubEst1** with the TRANS Canned Job added.

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- 6. Click on **SubEst 2** tab to open the **SubEst**2 Revision workspace.
- 7. Right-click on the .00 line in SubEst<u>2</u> grid to open the Quick Canned Job list.

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8. Click on **BRK Inspect (STD), Brake Inspection (non-ABS)** from the list.

Revision screen now displays **SubEst**<sup>2</sup> with the BRAKES Canned Job added.

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#### Rename each Sub Estimate tab to identify work

1. Double-click directly on SubEst1 tab text; type Trans Service, then click once anywhere to save this change. Repeat this process for SubEst2 tab and enter Brakes.

The Revision tabs display with the updated SubEst text specific to the work:

Wri	itten	By <n< th=""><th>one&gt;</th><th>~</th><th>Sub-E</th><th>stimate "</th><th>'Brakes" Cre</th><th>ated: 11</th><th>/28/2024 3</th><th>3:04PM</th><th></th></n<>	one>	~	Sub-E	stimate "	'Brakes" Cre	ated: 11	/28/2024 3	3:04PM	
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th	Tot	al: <b>\$36</b>	.00 Parts:	\$0.00	Lab	or: \$36.0	00 Tax:	\$0.00	Ca	tegory: Bra	ikes

You now have a Revision screen with two sub-estimates ready to transfer to the order once approved.

## Sell (Transfer) Revisions

The Revision Authorization screen is useful to provide customer with options, get their approval, then transfer these Sub-Estimate(s) to the active Order screen.



- 1. Click on **Sell Revision** to display the Revision Authorization screen.
- 2. Select / input the following:
  - Initiated by: Shop
  - Written by: McDonnell, Tim
  - Authorized by: Jones, John
  - Reason: Wants problems fixed
  - Method: Customer Called In
  - Include in this Revision: Select both **Trans Service** and **Brakes**.

Checking/un-checking these Sub-Estimates boxes is how to review repair pricing options with the customer. If customer can't handle all repairs today, un-check a Sub-Estimate and quote a revised figure. Un-sold Sub-Estimate(s) remain on file for future service visits with pop-up reminders.

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Type Description H     Brake Inspection (non-ABS)     Labor Complete Brake Inspection 0	Sub Estimate 3         0.00           Sub Estimate 4         0.00           Sub Estimate 5         0.00           Sub Estimate 6         0.00	Written By     McDonnell, Tim     List     Mfg Code       Authorized by     Jones, John       Reason     Wants problems fixed
I. Total: \$36.00 Parts: \$0.00	Sub Estimate 7     0.00       Sub Estimate 8     0.00       Sub Estimate 9     0.00       Current Order Variance     0.00	Contact Method Method Customer Called In
New Job Quick Menu 4	Total This Revision         55.80           Current Estimate Amount         0.00           New Estimate Total         55.80	Clear Sub Estimates and Titles after Transfer
Parts Estimate 0.00	Telephone 30.00 0.00	Cancel Transfer
Check Profit Remove SubEst Sell Revision	Parts Ordering	Email Fax Print Detail Exit
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**NOTE:** It is recommended that 'Clear Sub Estimates after Transfer' remain checked to avoid later introducing work that has already been performed.

3. Once the Revisions are agreed upon, click **Transfer** to trigger the process to move selected Revisions onto the Order screen.

The Recommendations screen automatically prompts user to review and clear any related Recommendations, IF any of these triggered the creation of specific Revisions to address.

ecommendatio	ons	—
Date	Need by	Description
11/27/2024	11/27/2024	Test drive: shifting not smooth; perform trans service 1st.
11/28/2024	11/28/2024	Test drive: poor hard braking; perform ABS Brake inspection'

**Note:** Look at Recommendations very carefully. Delete only those taken care of by these transferred Revisions. Follow-up on Recommendations is a valuable tool driven by these entries; take care not to lose any new sales opportunities.

4. Delete the two Recommendations and click OK. The order now displays the line items for the two revisions.

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#### End of the Assisted Program Basics section

This concludes the assisted portion of management training.

Users should continue with the Self-Instruction portion of the book to learn more about the software and about additional help and video training options available to help you become a Shop Management software power user.

## Self-Instruction

The **Assisted Training** portion of this workbook gave you the basics on the program workflow from Estimate through Invoice as well as the process of creating and adding vehicle-specific recommendations to an order. The **Self-Instruction** sections of this workbook delve a little deeper into important subjects like adding parts to the Inventory List, Creating Canned Jobs, and Scheduling.

## Help/Training Video Resources

Before launching into the self-instruction portion of this guide, please take a moment to familiarize yourself with the help/and Training Video resources that are readily available to you within your management system.

- The **How do I** link under **Training Videos** provides access to more than 100 training videos covering every important program function.
- The Help menu provides access to the Help Files Index (Home Page) and Documentation (Document Central) which includes the most current versions of the program workbooks and other guides for working in the shop management system.



• Finally, *context-sensitive* (F1) help is available within almost any of the management system screens and dialog boxes. What this means is that you can access help that is specific to what you are working on simply by pressing the F1 key. Also, if there is a training video available for the screen you are in, a link to it will be provided at the top of your help screen.



Now that you have reviewed the basic online help options, we'll continue with the Self-Instruction tutorial exercises.

## Adding a Part to Inventory

The **Inventory List** screen has two primary functions:

- Searching existing Part records
- Entering new Part Records

The SE Search function is used to find existing parts and add them to an Order or Revision; it also serves as an input screen to add new part records that can be applied to orders repeatedly.

- 1. Click on the **Inventory** icon.
- 2. Click on **Add (Alt + A)** to begin the new part entry process.
  - Part No.: **70-5YR**
  - Part Code: **bat** [auto-fills Description + Category]
  - Re-Order Point: 1
  - Stocking Level: 3
  - On Hand: 2
  - Last Cost \$: \$43.60 (Note: when your Price/Markup Matrix has been completed in Setup, the Price will calculate automatically.)

<b>III≫</b> Mitchel	I 1 TeamWorks SE							- 0	×
File Edit	View Configuratio	ns Utilities	Inventory Hist	tory Training Videos	CRM Help Change Reports Owner F	orum Setup Ho	Repair Info		
	Inventory List Search Criteria: Vendor Category Manufacture Part No Description Size	< All >         < All >         < All >         < All >         Descriptio	Add New Part Part No. Description Size Manufacturer Category Account Location Attached Comment Re-Order Point Stocking Level Alt Sale Alt F	70-5YR       Battery <none>       Battery       Parts Revenue       0       1.00       3.00       Tri       3.00</none>	re No Usi ixable Fee	New Part     Used     Rebuilt Commission er Entered Price \$ cise Tax Vendor Superse	Prev/Next Part Last Paid Last Sold Average Cost Total Cost Total Price On Hand On Order Committed Last Cost \$ Price \$ List \$ Margin % ede Cancel	SUI 2110 X S0.00 New S0.00 S0.00 S0.00 2.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00	×
Peady	<ul> <li>Employe</li> <li>Technici</li> <li>Electroni</li> <li>Secure P</li> </ul>	e Shift Ti an Job Cl c Fleet In vavment S	me Tracking ock tegrations Storage			Print Copy	Update Add I	dit Delete Done	B

3. Click on Vendor; select Interstate Battery (BATT) from list and click OK.



	Detail
~	Detail
~	Detail
~	Detail
	~

4. Click **OK** in the Add New Part dialog box. You are prompted to confirm the new Part.

Manager	SE	×
?	Saving Part No. 70-5YR. Continue?	
	<u>Y</u> es <u>N</u> o	

5. Click **Yes** to complete the part entry process. The Inventory List screen displays the new part record.

nventory List								- 0	×
Search Criteria:									
Vendor	< All >				•				
Category	< All >			•		$\sim$			
Manufacturer	< All >	+ Line Co	ode < All >	•		Clear			
Part No.									
Description									
Size						Limit results	1000		
								_	
Part No.	Description		Size	Line Code	Price	On Hand	On Order	Vendor	
70-5YR	Battery				87.20	2.00	0.00	Interstate Batte	ry

6. Click **Done** to close Inventory List screen.

## **Creating a Part Kit**

<u>U</u> tilities	Lurencery	
Find	<u>C</u> ustomer	F3
Find	History Record	F4
Batc	h <u>P</u> ayment	F5
Late	Fee Assessme	nt
Che	ck Profit	F12
Part	<u>K</u> its	

Part Kits save time by grouping any number of items that are frequently sold together. (Examples: tune-up parts, lift kits, etc).



This exercise will create a 'Radiator Hose' Part Kit from part records existing in the Inventory List.

1. From top menu, click on **Utilities**, **Part Kits**. This is whre you go to add, edit, or delete a Part Kit. In this Exercise we will be adding a new Part Kit.

Part Kits				— D	×
Search Criteria: Category Kit No. Description	< All >			Clear	
Sort By: Part Numl	ber	O Description			
Number	r		Description		

- 2. Click on **Add** (Alt + A) to open the Add Kit screen.
- 3. Enter/choose the identifying Kit information.
  - Kit No.: **7202-Kit**
  - Description: Radiator Hose Kit
  - Category: **Belts & Hoses** (type 'B' twice)

(it No:	7202-Kit	:			Use bu	undled p	ricing?	
escription:	Radiator	r Hose Kit			_		-	
ategory:	Belts &	Hoses	~					
art List								
art List Qty Par	rt#	D	Description	Prompt	Cost	Cost Ext.	Price	Price Ext.
art List Qty Par	rt#	D	)escription	Prompt	Cost	Cost Ext.	Price	Price Ext.
art List Qty Par	rt #	D	Description	Prompt	Cost	Cost Ext.	Price	Price Ext.

Now that you have named the kit, you will want to add some parts to it.

4. Click on **Add (Alt + A)** to open Inventory to add part to a new part kit.

Enter the following: Part No.: 7202

- 5. Click on **Search** (or press Enter).
- 6. Click on **Transfer (Alt + T)** to place a copy in the Part Kit.

nventory List								— 🗆	×
Search Criteria:									
vendor	< All >			7		0			
Category	Belts & Hoses								
Manufacturer	< All >		ode < All >	•		Clear			
Part No.	7202	_							
Description									
Size						Limit results	1000	]	
Part No. 🔺	Description		Size	Line Code	Price	On Hand	On Order	Vendor	
202	Radiator Hose				24.95	3.00	0.00	Rapid Fire Auto Par	rts

**Note:** The Program also automatically transferred two hose clamps that had been "attached" to the radiator hose part record.

- Click on Add (Alt + A) to open Inventory to transfer a 2<sup>nd</sup> part into kit.Click on 'Clear' to add a part from a different category. Clear
- 8. With Category cleared, enter '**anti**' in Description.
- 9. Click on **Search (press Enter)**; 'afc1/2 Anti-Freeze Coolant ½ Gal' is located automatically.

Inventory List								– 🗆 X
Search Criteria:								
Vendor	< All >				•			
Category	< All >			•	_ L	<u> </u>		
Manufacturer	< All >	+ Line Co	ode < All >	•	1	Clear		
Part No.								
Description	anti							
Size						Limit results	1000	
Part No.	Description		Size	Line Code	Price	On Hand	On Order	Vendor
afc1/2	Anti-Freeze 1/2 Gal				11.90	4.00	1.00	Rapid Fire Auto Parts
		_						
		Transfe	r Tag	P	rint	Copy Update	<u>A</u> dd <u>E</u>	dit De <u>l</u> ete <u>C</u> ancel

10. Click on Transfer (Alt + T) to copy 'afc1/2' part record into the part kit. Add Kit displays with

transferred radiator hose, hose clamps and Anti-Freeze.

#### A simple adjustment is required; change quantity of anti-freeze to <u>2 units</u>.

- 11. Double-click on the Anti-Freeze line (or click Edit). The Edit Kit Line dialog box opens.
- 12. Change the Quantity to **2 (2.00)** and click OK .

irt Info	rmation:		Price Information:	
t No:	ī	7202-Kit	Use bundled pricing?	
escript	ion: F	Radiator Hose Kit		
ategor	y:	Belts & Hoses	Edit Kit Line X	
ırt List			afc1/2 Anti-Freeze 1/2 Gal	
Qty	Part #	E Contraction of the second seco	Cost \$ 5.95 Price \$ 11.90	Price Ext.
1.00	7202	Radiator Hose		24.9
2.00	1012	Hose Clamp - No.	Quantity 2,00 Prompt On	2.0
1.00	afc1/2	Anti-Freeze 1/2 G	If the kit is using Bundled Pricing, selecting 'Prompt On Use' will have no effect.	11.90
			Cancel OK	
			Total Cost 23.05 Drive	20.0

The Add Kit window displays with the adjusted Anti-Freeze quantity

Part Info Kit No:	rmation: 7	202-Kit		Price Inf	ormatio	n: Indled p	oricing?	
Descript Category	ion: R y: E	adiator Hose Kit elts & Hoses	~					
Qty	Part #	Description		Prompt	Cost	Cost Ext.	Price	Price Ext.
1.00	7202	Radiator Hose		No	16.10	16.10	24.95	24.95
2.00	1012	Hose Clamp - No. 12		No	1.00	2.00	2.00	4.00
2.00	afc1/2	Anti-Freeze 1/2 Gal		No	5.95	11.90	11.90	23.80
				Total C	ost	30.00	Price	52.7

- 13. Click OK in the Add Kit window to save your input work.
- 14. Click on Done (Alt + D) in Part Kits window to close.

The 7202 Kit is now included in the Part Kit list and ready to use.

**TIP:** Part Kits can also be used to manage part options when attached to Canned Jobs.

## **Creating a Canned Job**



Canned jobs save time entering work onto orders by grouping parts and labor that are used in repeated combinations. In this exercise, we'll build a canned job to perform a Cooling System Flush & Pressure check.



1. Using the menu bar at top of screen, click on **Utilities**, **Canned Jobs**.

2. From the Canned Job List screen, click **Add (Alt + A)** to open the Canned Jobs creation screen. From the Canned Job List screen, enter the following:

- Job #: Flush-1
- Description: Cooling System Flush & Check
- Category: Maintenance
- 3. Click Labor (Alt + L) to add labor content to the Canned Job.
- 4. In Order item entry LABOR screen enter the following:
- Work Requested: Flush Cooling System, Install New Anti-Freeze, Pressure Check.
- Work Performed: Drain & flush radiator, inspect hoses & clamps. Add cooling system lubricant. Add up to 1 gallon of coolant. Check thermostat and electric cooling fan operation.
- Charged Hrs.: 1.2
- Category: AC/Heating/Cooling
- Account: Labor Revenue

#### Click on Save (Alt + V).

	Canned Job List	Order Item Entry	/ - LABOF	2		~		×	
	Search Criteria:	<u>P</u> arts		<u>L</u> abor	<u>N</u> otes		Su <u>b</u> let		
Canned Jobs Job #	Flush-1	Work Requested	Flush C	ooling System, Insta	all New Anti-Freeze,	Press	ure Check.	* *	
Description	Cooling System Flush & Check	Work Performed	Work Performed Drain & flush radiator, inspect hoses & clamps. Add cooling system lubricant. Add up to 1 gallon of coolant. Check thermose and electric cooling fan operation.						
Category	Maintenance	Charged Hrs	1.20	Category	AC/Heating/Coolin	9		•	
Year	All	LaborTotal \$	72.00	Account	Labor Revenue			•	
Make	All	Est. Parts \$							
Model	All	Non-Stand	ard Labo	Rate No C	commission	Fixed	Commission	-	ve
	🗌 Include in Quick Menu	Pay H	ours	Technician	Act. Ho	urs	Comm.		
Time	Rate Description	<b>Þ</b> 1	1.20	Assign on WO		1.20	Var.		c
		Tot	als for Te	echnician(s)	1.20	1.20			
Parts	Labor Notes S	Tax C	ust Type	Symptom	Cancel	Sa	ve Done	;	Exit
		Add	Edit	Сору	Delete Don	•			

This copies Labor item to Canned Job, keeping entry box open for next entry.

#### Now begin adding Part items to the Canned Job.

- 1. After saving the Labor item, click on the Parts tab to begin adding parts.
- 2. In the Order item entry PARTS screen enter the following information:
  - Part No.: afc1/2
  - Quantity: 2

<u>P</u> arts	l	_abor	<u>N</u> otes	Su <u>b</u> let
Part No.	afc1/2		Part Code	
Description	Anti-Freeze 1/	2 Gal		
				-
Quantity	2	Size		Tire
Unit Cost \$	5.95	Vendor	Rapid Fire Auto Parts (RFA	P) -
Unit Price \$	11.90	Manufact.	<none></none>	Ŧ
Unit Sale \$	11.90	Category	Fluids/Sprays/Sealers	•
Unit List \$	0.00	Account	Parts Revenue	-
QOH	4.00	Technician		Ŧ
Margin %	50.0	Ref/Inv #		
🗌 No Co	mmission 🗌	Fixed Commiss	sion Commission \$ Var.	
User I	Entered Sale \$	🔽 Inver	ntory Part Core	Off

- 3. Click **Save (Alt + V)**. This keeps the entry box open for the next part selection or entry.
- 4. Enter the following: Part No.: bar1
- 5. Press Tab key and part details fill in automatically. (Quantity: 1 is fine)
- 6. Click on **Done (Alt + D)** to save the part and close entry screen.

The completed Canned Job displays.

**Note**: We recommend that Year-Make-Model be left 'All/All/All' so that the Canned Job Search would always find it, no matter which vehicle is selected.

Canned Jobs										— 🗆	×
Job #	Flush-1						Part Kits	Attached to	this Canne	ed Job	
Description	Cooling	ystem Flush & Check									
Category	Mainte	nance		~							
Year	All			~							
Make	All			~							
Model	All			~			D	etail	<u>A</u> dd	Remove	
	🗌 Ir	nclude in Quick Menu									
Time	Rate	Description	Qty	Extended	Sale	Price	List	Part No.	MfgCode	Tech Name	C
1.20	60.00	Flush Cooling System, Inst		72.00	72.00	0.00	0.00			<none></none>	
	0.00	Anti-Freeze 1/2 Gal	2.00	23.80	11.90	11.90	0.00	afc1/2		<none></none>	
	0.00	Additive - Cooling Sys Lub	1.00	10.68	10.68	10.68	0.00	Bar1		<none></none>	
	0.00			0.00	0.00	0.00	0.00				
								_			
<u>P</u> arts		abor <u>N</u> otes	S <u>u</u> blet		(	E <u>s</u> timat	or	<u>T</u> otal Sale		etail E <u>x</u>	it

Click on **Exit** (Alt + X) to close the Canned Job list window and return to the screen you were working on.

**TIP:** Parts & labor items may also be copied and pasted into Canned Jobs from an existing Order or Revisions sub-estimate.

## Writing a Counter Sale



Counter Sale provides a fast method to sell parts to walk-in customers. This exercise will show you how to write a basic Counter Sale and (optional) how to add an existing Customer name to the transaction.



- 1. Click on **Counter** (or press F11 key) to begin.
- 2. Click on **Parts** (Alt +P).
- 3. Type "wb1". A popup listing of all parts beginning with WB1 is displayed. Choose WB14 from the list. (Part record details fill in)

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File Edit	t View	Configura	tions	Utilities	Inventory	History	Train	ing Videos	CR	M Help				_			
a.	ISI,	<b>徂</b> .		貫				C.	a	<b>0</b>	$\otimes$	<b>11</b> 0	0		r Alt	ng	
W.I.P.	Quote	New	Counter	P.O.s	Inventory So	hedule	Text	Users	Repor	ts Owner	Forum	Setup	How to	Repair Ir	nfo SocialCRM		
NO CUSTO	OMER												D	em	onst	rati	<u>01</u>
	<u>C</u> u	stomer			Order Item Er	ntry - PART	S						$\times$		Invoice #		NEW
Parts	Labor	Notes	Suble	et 🕴	<u>P</u> arts			Labor		<u>N</u> otes		Su <u>b</u> le	t	Bs O	pen Recalls		
Cour	nter Sale				Part No.	WB14				Part Code							
	Writter	n By <non< td=""><td>e&gt;</td><td></td><th>Description</th><td>Wiper</td><th>Blade -</th><td>14" Triple E</td><td>dge Re</td><td>fill</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></non<>	e>		Description	Wiper	Blade -	14" Triple E	dge Re	fill							
0	order Hrs:	0.00											w				
	Time	Rate	Descr	iption	Quantity		2.00		Size				Tire	Category	/ Tech Name	Cost	
	0.00				Unit Cost \$		5.30	Ver	ndor	Rapid Fire Aut	to Parts (R	RFAP)	•	<none></none>	<none></none>	\$	0.00
					Unit Price \$	1	0.60	Manu	fact.	<none></none>			Ŧ				
					Unit Sale \$	1	0.60	Categ	gory	Miscellaneou	8		•				
					Unit List \$		0.00	Acco	ount	Parts Revenue	e		•				
					QOH		3.00	Techni	ician				•				
					Margin %		50.0	Ref/I	Inv #								
					No C	commissio	on 🗌	Fixed Con	nmissi	on Commis	ssion \$ V	ar.					
					Use	r Entered	Sale \$		Invent	ory Part	Core	y Off					
	7. Mar Nap	A FURST	Marti-S	art Seller	Inventory	Tax	Cu	ist Type		Cance	el Sav	ve D	one		-		+
Invoi	ice	0.00	Labo 0.0	00		0.00		0.00							Inv	и. ваі. 0.00	
Che	ck Profit	Pa	rts Order	ring						Paym	ent	Post	Ema	il Print	Detail	Cancel	Exit
Ready												m1ske	arly N	/lanager SE D	emo 9.1.0.32	53 TIM	<u>\$</u>

4. Change **Quantity: 2** and press tab.

5. Click on Done **(Alt + D)** to save part to the sale & close the entry screen. With the part added to this Counter Sale, you could collect payment from this "Cash" customer, print an invoice and be done.

# Next we're going to show how to add an existing customer's information; this is useful for tracking items with warranties, such as batteries.

6. Click on the Customer tab to access list of existing customers.

The Customer screen displays for this Counter Sale (no name included yet).

W.I.P. Quote New Co					Display by
D CUSTOMER	B	First	Company	Balance Due	Custom.
Customor	c Dahl	Charlie		A	
Customer	D Daniel	Carney			Company
Company	E Darrin	Dan			
	E Darrin	Daniel			
Name	Darrin	John			
Last, First	Davidson	Julie			
Spouse	J Davies	Bart		1.00	
Address	K Dawson	Gary			
Zip, City, State	L Day	Sam			
Home 000	DeFilipo	Robert			
000	Derringer	John			
Office 000	P Deshane	Monique		32.63	
Email	Q Diez	Dito			
E-mail	R Ditman	Wes			
Birthday _/ MM/DD	S Doe-Jones	Jane		809.37	
No.	Dolf	Norm			
License Year	Duffy	Frank			
	W Duke	Barbara			New
	X Dukmagian	Barbara		88.93	
	Y Dwulet	Doug			Cancel
	Z Dwulet	Fred	Hill Country Motor Inn		ОК
	Dwulet	John		8.65	
		2011			]
	Company (Last, First) Mr. Da	arrin, Dan	Balance Due		
	Address 1902	S.Hy 121 916 Spring Valley	, CA 92131		
	017				

7. Click on Name (Alt + A) to open the list of existing customers.

8. Select a name from the customer list and then click **OK** or just double- click directly on the name itself, as this will also select it. You are returned to the customer screen with the Customers name and info and his Vehicles displayed.

Note: You could also click New to add a new customer if a name is not found.

- 9. Click on Order (Alt + O) to Pay, Print & Post this Counter Sale.
- 10. Click on Payment to process the customer payment. In Payment Type, type a  ${}^{\boldsymbol{\mathsf{C}}}\!\!\!\!\!\!\!C'$  (shortcut for Cash payment type or select Cash from the menu.

Mitchell 1 TeamWorks SE							-	- 🗆 X
File Edit View Configurations Utilities Inven	tory History Training \	/ideos CRM	Help					
W.I.P. Quote New Counter P.O.s Invent	ory Schedule Text U	sers Reports	Change Owner Fo	orum Setup	? How to	Repair Info	SocialCRM	
Darrin, Dan 1989 Ford Tempo 2-3 Lic: CA DFG-02K VIN:	Apply Payments			>	<			
<u>C</u> ustomer	Customer Name Da	rrin, Dan			]		Invoice #	008770
Parts Labor Notes Sublet Symptom	Charged Balance Credit Balance	\$0.00 \$0.00				SBs Oper	n Recalls	
Written By <none></none>	Charged Balance does	NOT include this	Invoice.					
Order Hrs: 0.00	Invoice Amount Amount Paid	22.84 0.00	C	) Print Receipt				
Time Rate Description Qt	Invoice Balance	22.84			lded om	Category	Tech Name	Cost III
+ Wiper Blade - 1	Date	11/30/2024				Miscellaneous	<none></none>	\$5.30
0.00	Payment Type	Cash		•		<none></none>	<none></none>	\$0.00
	Payment Check / Reference # Authorization #	22.84						
4						)		4
Parts         Labor         Sub Tot           Invoice         21.20         0.00         21.	History Apply Cred	it 4	Pay	Cancel		_	Inv. 2	Bal. 2.84
Check Profit Parts Ordering			Payment	t Post	Ema	ail Print	Detail	ancel Exit
Ready				m1skea	irly M	Manager SE Den	9.1.0.3253	TIM 🗳 .;;

- 11. Click on **Pay** to record the payment.
- 12. Answer affirmatively to the next three questions (**Yes, Yes, OK**):

**Make certain there is a check mark** in "Print Invoice before Posting?" box. (this only has to be done once; users can print invoices reflecting payment info)

Post		>	$\langle \cdot \rangle$			
?	Invoice balance i Post this Invoice	s now \$0.00			~	
		Post Invoice		$\times$	1	
	<u>Y</u> es	? In Po	voice has not be st anyway?	en printed!		
		6		Posting Date		×
			<u>Y</u> es			
					Post Order With This Date	11/30/2024
					Print Invoice before posting?	Cancel OK

The Counter Sale displays in Print Preview [next page]

H ← ▶   1 /1 m k, -   sap crys eport   Counter Sale #: 00087 Print Date : 11/30/2
ort Counter Sale #: 00087 Print Date : 11/30/2
Counter Sale #: 00087 Print Date : 11/30/2
Counter Sale #: 00087 Print Date : 11/30/2
Counter Sale #: 00087 Print Date : 11/30/2
Print Date : 11/30/2
SOLD D. C.D.
TO 1902 S.Hy 121 916
Spring Valley, CA 92131
Phone - 000 Fax - 000 Uttice [619-816-3925 363] Home [619-315-0842]
Vin # IFAPP31X6KK124598 Unit # :
Qty         Part Number         Part Description         Sale         Line T
2.00 WB14 Wiper Blade - 14" Triple Edge Refill 10.60 2
Payment Method: [ Payments - Cash - \$22.84 ]
Payment Method:         [ Payments - Cash - \$22.84 ]           Labor:         \$ 0.00         Parts Total:         21.20         Tax : \$ 1.64         Total:         \$ 2

13. Click on X in upper RH corner of screen **(Alt + F4)** to close Preview. You are asked to confirm the order as printed (and therefore complete).

Mitchell 1	1 TeamWorks SE	×
?	Mark this order as printed?	
	<u>Y</u> es <u>N</u> o	

14. Click on Yes ('Y' or Enter) to mark Counter Sale as printed.

The Counter Sale is removed from WIP & posted to History.

## **Create an Appointment**



Scheduler events (appointments) are created when you start an Estimate or Repair Order. The exercise below demonstrates how you can create an appointment for a customer in advance of their visit to the shop. The subsequent appointment can be converted to EST / RO from the Appointment Editor screen.



1. Click the Schedule button to open the Scheduler.

📅 Scheduler - 12/1/2024			- 0	×
· View Filtering				
New Appointment New Shop Event	Print Print Help Se	ttings Backward Forward Go to Zoom In Zoom Out	Timelne Day View Week View View View View View View View View	
Operations	Printing Schedu	ler Navigate	Arrange	^
Scheduling Appointment	Shop Events Requests		Enter text to filter view	م
▲ December ▶ ▲ 20:	24 • 🔿 D	ecember 2, 2024		ור
Su Mo Tu We Th Fr 49 1 2 3 4 5 6 50 8 9 10 11 12 13	7 3 14	Monday (0 App (0.00	, December 2 ts, 0.00 Hrs) Order Hrs)	Ē
51 15 16 17 18 19 20	2 21			_
<sup>52</sup> 22 23 24 25 26 2 1 29 30 31	7 28 7 AM			
	8 AM			- 11
January 202	25			
Su Mo Tu We Th Fr	r Sa 9 AM			
1 1 2 3	4			
2 5 6 7 8 9 10 3 12 13 14 15 16 17	0 11 7 18			
4 19 20 21 22 23 24	4 25			
5 26 27 28 29 30 3	1 1 11 AM			
6 2 3 4 5 6 7	8			-
Today	12 PM			
Resource View Mode				
Normal	~ 1 PM			
Show/Hide:				-
			Total Order Hours: 0.00, Total Scheduled Hours	s: 0.00

- 2. Scroll to Tomorrow's date and double-click on it. The Find Customer for Schedule dialog box displays.
- 4. Click on **New Customer** to open the Create New Customer dialog box.
- 5. Type the Last and First Names (Wilson, Jim) and an Address (123 Elm St.).
- 6. Enter the **Zip Code** and press **TAB**.
- 7. The City and State are entered automatically for you. Enter **512-333-4444** as the phone number.
- 8. Click **OK**.

觉 Sc	:hea	duler	- 13	2/1/2	2024	1																			-	_		$\times$
١		View		Filte	ring																							
New Ap	poi	) intme	nt I	New	t Shop	5	Drint	Prin	) It	<b>Relp</b>	¢۵ Settings	Backw	ard Forwa	ard	Go to	Zoom	In Ze	Oom Out	Timelin	e Day V	liew	5 Work	7 Week	) [	=ull	31 Month		
				Eve	ent		Preview							1	Today				View			Week Viev	/ View	Wee	k View	View		
	C	pera	tions	s			Printi	ng		Sche	eduler			Na	avigate	2						Arra	nge					^
Sched	lulii	ng	Арр	oint	mer	nt :	Shop Eve	ents	Rec	quests											E	inter text	to filter v	view				م
	D	ecen	nber	Þ	4	202	4 ⊧		<	Creat	e New Cus	tomer									X							
	Su	u Ma	Ти	We	e Th	Fr	Sa			Crea	ate a new ci	ustomer	on this ap	ointr	nent:													
49	1	2	3	4	5	6	7																					
50	8	9	10	11	12	13	14				Compa	ny _									_							
51	15	5 16	17	18	19	20	21		-		Т	tle									$\sim$	_						_
52	22	2 23	24	25	26	27	28		7 A		Laet F	net W	lileon			lim												
1	29	9 30	31								Edde, I		13011			-					-							
									8 A		Addre	ss <u>1</u> 2	23 Elm St.								_							
		Janua	ary			202	5				Zip, City, Sta	ite 78	3613		Lear	nder		TX										
	Su	u Ma	Ти	We	: Th	Fr	Sa		9 A	Pho	ine, Ext., De	sc. 51	12-333-444	4			Hor	ne			$\sim$							
1				1	2	3	4	4			Fr	ail																
2	5	6	7	8	9	10	11		10.4												-							_
3	12	2 13	14	15	16	17	18		10 A									Consel		01/								
4	19	9 20	21	22	23	24	25											Cancel		UK								
5	26	5 27	28	29	30	31	1		11 A	м																		
6	2	3	4	5	6	7	8																					- 1
			Т	'oday	/				12 PI	м																		-
Reso	urce	e Viev	v Mo	de																								
Norm	al						~		1 PI	м																		
Show	/Hic	le:																										*
																					Tot	al Order I	lours: (	.00, To	otal Sc	hedule	Hour	s: 0.00

The Vehicle Selection dialog box opens. Because it is a new customer, there are no Vehicles displayed.

9. Click on Add Vehicle.

The New Vehicle dialog box displays.

**Note:** VIN Decode and License lookup are not available in Demo mode, so you must manually enter your vehicle.

10. Fill in the vehicle fields:

- License: FJB 3831
- State: TX
- Vehicle: 2012 Toyota Tundra Limited
- Body Style: 4D Pickup Extra Cab
- Engine: 5.7 L V8
- Trans: 6 Speed Automatic AB60E

New Vehicle			X
VIN	Decode	Drive Type	~
License	FJB 3831 State/Prov TX V Lookup	Brake	4-Wheel ABS
		GVW	6200-7200 ~
Year / Make	2012 V Toyota V	Unit #	Fleet #
Model	Tundra Limited 🗸 🗸	Color	
Body Style	4D Pickup Extra Cab 🗸		
Engine / Fuel	5.7L, V8 VIN(W) Gas/Ethanol 🗸 🗸		
Transmission			
Driver			
View/Edit	Driver: <none></none>		Vehicle Color Definition
			<u>Cancel</u> <u>Save &amp; Close</u>

#### 11. Click Save & Close.

The Appointment Editor dialog box displays. Tomorrow's date and the drop-off time of 10 am is automatically scheduled.

12. Change the End Time to 1:00 PM.

📅 12/2/2024: Wilson, Jim	– 🗆 X
Save & Create     Delete     Cancel       Close     Concel     Cancel       Auto Adjust End Time     Send       Auto Adjust End Time     Send	
Subject Wilson, Jim	
Drop Off 12/02/2024 10:00 AM Scheduled Hours: 3.00 Order	Irs: 0.00 Appointment State Open (OPEN)
Promised 12/ 2/2024 🔍 🛪 5:00 PM 🕞	Service Advisor </th
Starts 12/ 2/2024 🗐 🔻 10:00 AM 👻	Technician <none> V</none>
Ends 12/ 2/2024 🗐 🗸 1:00 PM 🕞 🗋 All day event	Resource <none></none>
Shop Comments	Customer Comments/Special Requests 🛛 Vint on order as Note
Customer - Wilson, Jim Phone: (Home) 512-333-4444 v Prefers: <none> v</none>	Vehicle - 2012 Toyota Tundra Limited 0 Recommendations
Email:	VIN:
Company:	License Plate: FJB3831 Color:
Address: 123 Elm St. Leander, TX 78613 Membership #:	Hat: Odometer In: None Yearly Mileage:
Job Hours: 0.00 Source: <none>  Category: <none> Description</none></none>	Jobs: Add Delete

13. Click **Add** in the **Jobs** section to add a Canned Job to the scheduled appointment. The Canned Job List displays.

Scheduler - 12/1/20	24						- 0	×		
View Filterin	g	💆 12/2/2024: Wils	on, Jim						- 0	$\times$
	Canned Job List		— — — — — — — — — — — — — — — — — — —		×	:				
New Appointment New Sh Even	Search Criteria	:								
Operations										
Scheduling Appointm	Category	LOF (Lube, Oil, Filt	er) 🗸			Hray 0.00	Appointment State	Onen (ODEN)		
	Year	< All >	~			nrs: 0.00	Appointment state	Open (OPEN)		
December				Cle	ar		Service Advisor	<none></none>	`	
Su Mo Tu We 1	Маке	< All >	~				Technician	<none></none>		<u> </u>
49 <b>1</b> 2 3 4 50 <b>8</b> 9 10 11	Model	< All >	~				Resource	<none></none>		<u>~</u>
51 15 16 17 18	Job #					Customer Commo	ents/Special Requests	🔽 Prin	t on order as	Note
52 22 23 24 25 3	Description									
1 29 30 31		Use Advanced	Quick Menu							
lanuary										-
Su Mo Tu Wo	Tag Job #	t	Description			Vehicle - 2012 To	yota Tundra Limited			
1 1	LOF E	Z Select 4	Lube Oil Filter 4 Qt				0 Recommendations			
2 5 6 7 8	LOF E	Z Select 5	Lube Oil Filter 5 Qt			VIN:				
3 12 13 14 15		abor	Lube-Oil-Filter (Labor Only)			License Plate:	FJB3831 Color	:		
4 19 20 21 22 3	LOF4		Lube-Oil-Filter - 4 Qts			Engine:	5.7L, V8 (346CI) VIN(W)			
6 2 3 4 5	LOF5		Lube-Oil-Filter - 5 Qts			Unit #: Hat:				
Today						Odometer In:	None			
						Yearly Mileage:				
Resource View Mode										
Normal						~		Jobs:	Add De	elete
Show/Hide:	Transfer	Ade	Edit Copy	Delete	ancel					

- 14. Choose **LOF** as your Category and click the **Search** button. Matching jobs displays in the lower grid area.
- 15. Choose LOF EZ Select 5.
- 16. Click **Transfer**. The Canned Job is added to the Appointment detail.
- 17. Add a note **Customer's son to pick up vehicle** to the Shop Comment section.

🗮 12/2/2024: Wilson, Jim				-		×
Image: Save & Create       Delete       Cancel       ✓       Auto Adjust End Time       Image: Save & Create         Gose       ✓       Match Drop-Off to Start Time       Send         ✓       ✓       Match Drop-Off to Start Time       Send						
Subject Wilson, Jim						
Drop Off 12/02/2024 10:00 AM Scheduled Hours: 3.00 Order Hr	s: 0.00	Appointment State	Open (OPEN)		~	
Promised 12/ 2/2024 🗐 🔻 5:00 PM 🔹		Service Advisor	<none></none>		~	
Starts 12/ 2/2024 🗐 🔻 10:00 AM 👻		Technician	<none></none>		$\sim$	
Ends 12/ 2/2024 🗐 🔻 1:00 PM 🔹 🗌 All day event		Resource	<none></none>		~	
Comments (217 Chars Remaining)	order as Note	Customer Comments/Special Requests	🗹 Pri	nt on ore	der as No	ote
Customer's son to pick up vehicle	•					•
Customer - Wilson, Jim	Vehicle - 2012	loyota Tundra Limited				
Phone:         (Home)         512-333-4444         V         Prefers:         < None >         V		0 Recommendations				
Email:	VIN:					
Company:	License Plate: Engine	5.7L V8 (346CT) VIN(W)				
Address: 123 Elm St. Leander, TX 78613	Unit #:					
	Hat:					
Membership #:	Odometer In: Yearly Mileage:	None				
					Dela	
Job Hours: 0.20 Source: < None > V Category: < None >	~		Jobs:	Add	Dele	ete
Description						
Lube oil Filter 5 Qt						
						-

#### 18. Click Save and Close.

Sc	hedu	uler	- 12/	1/2	024																											-			×
-	Vi	ew	F	ilter	ing																			_		_									
ew Ap	poin	: tmer	it Ni	ew S	Shop		Prin	at and	Pri	nt	Н	? elp	Setting	) js B	G	rd Fo	Tward	Go to	) ( p Za	oom In	Zoor	n Out	Timelin	e D	1 ay Vie	w	5 Work	2141	7 Week	We	Full	Mo	31 onth		
	00	erat	005	LVC	inc.		-iev	Drint	00			Sche	eduler					Naviga	y te				VICVV					rano	- view	we			CVV		
ched	uling			intr	nen	t :	Sho	D Eve	ents	5 R	eau	ests	Edulei					Naviga	ite.							En	ter tex	t to f	e filter vi	ew					_
_							_		1		•	_																							
4	De	cem	ber	Þ	4	202	4 ⊧			<		>	Dece	emb	er 2,	, 20	24																		
	Su	Мо	Tu	We	Th	Fr	Sa														М	londay,	Decemb	er 2											
49	1	2	3	4	5	6	7														(	(1 Appts)	, 3.00 H Order Hr	irs) s)											
50	8	9	10	11	12	13	14															(0100)	or exer this	-7											-
51	15	16	17	18	19	20	21			-	414																								-
52	22	23	24	25	26	27	28				AM																								
1	29	30	51																																
										8	AM																								
	Ja	anua	y			202	5																												
	Su	Мо	Tu	We	Th	Fr	Sa			9	AM																								
1				1	2	3	4		4																										
2	5	6	7	8	9	10	11			10	AM	Wil	son. Jim	1																					
3	12	13	14	15	16	17	18					(0.	00 Orde	r Hrs,	3.00 S	ched H	lrs)																		
5	26	20	21	22	30	31	1					Cu	stomer's	son t	o pick u	ıp veh	ide																		L
6	2	3	4	5	6	7	8			11	AM																								
			То	day																															L
										12	PM																								
Reso	irce '	View	Mod	e																															
Norm	al							$\sim$		1	PM																								
Show	/Hide	2:																																	
									1																1	Fotal	Order	r Hou	urs: 0.	00, T	otal S	ched	uled H	lours	s: 3

The Appointment now appears in the Scheduler under tomorrow's date.

It is highly recommended that you watch the detailed videos in the SE online help system. Simply click Help [F1 key] in any Scheduler screen to access the videos. Click the icon to the right to view the demo Appointment Scheduling video.



#### **Invoice History**

Users can search for a specific invoice number or for history records on certain vehicles and/or repair work in history.

1. Click **F4** or choose **Find History Record** from the Utilities menu.

The Find History Record screen displays in Invoice view.

Mitche	II 1 TeamWorks SE					- 0
Į Fi	ind History Record					
自.	<u>I</u> nvoice	<u>V</u> ehicle				
V.I.P	Invoice # 875	Post	ed Up To: Monday	, December 2, 2024 🗐 🔻 🗌 Sav	e Search	
	Invoice	Posted Date	Printed Date	Name	Vehicle	Amount
	008767	10/08/2024	10/08/2024	Jones, John	2013 Chevrolet Impala LS	60.00
	008766	10/19/2021	10/19/2021	Gannon, Pat	1978 Nissan 280Z	20.00
	008762	10/07/2021	10/07/2021	Jones, John	2013 Chevrolet Impala LS	163.96
	008757	12/15/2006	12/15/2006	James, Jesse	1994 Toyota T100 DX	633.22
	008754	12/15/2006	12/15/2006	Allen, Torren	1991 Nissan Maxima SE	630.61
	008755	12/14/2006	12/14/2006	Bollig, John	1990 Dodge Shadow Base	600.00
	008753	12/12/2006	12/12/2006	Miller, Jeff	1989 Chevrolet Pickup C1500	600.00
	008752	11/28/2006	11/28/2006	Dahl, Charlie	1987 Toyota Land Cruiser	189.70
	008751	11/24/2006	11/24/2006	Johnson, Tina	2001 Cadillac DeVille Base	63.23
	008747	11/20/2006	11/20/2006	DeFilipo, Robert	1989 Chevrolet Suburban R1500	119.25
_	008756	11/05/2006	11/05/2006	James, Jesse	1994 Toyota T100 DX	600.00
	000495	09/17/2005	09/17/2005	Counter Sale		122.11
	000522	09/15/2005	09/15/2005	Mullan, Robert	1985 Ford Pickup F150	93.58
	000494	09/13/2005	09/13/2005	Winn, Billy	1989 Nissan 300ZX Base	501.17
	000467	09/13/2005	07/14/2005	Jensen, Tom	1994 Nissan 300ZX GS	421.41
	000497	09/13/2005	09/13/2005	Dahl, Charlie	1978 Volkswagen Beetle	131.81
	000498	09/13/2005	09/13/2005	Dahl, Charlie	1978 Volkswagen Beetle	138.62
	000523	09/12/2005	09/12/2005	Smollen, Gail	1988 Honda Accord LX	726.47
	000500	09/12/2005	09/12/2005	Harkins, John	1991 Toyota Pickup SR5	415.49
4					Cancel	View Record
-		Reset Layout	Columns Send T	ext Purge Ests Display	Appointment Payment Post	Detail Orde
					m1skearly Manager SE Demo	9103253 TIM 0

2. Double click on *James, Jesse*; displays history records for his selected vehicle.

James, Jesse 1994 Toyota T100 DX Lic: CA 4KJT698 Home: 619-278-9965 Ext: 8754 Office: 619-559-5874 Ext: 2213											
		<u>C</u> ustomer		ľ	<u>V</u> ehicle			His <u>t</u> or	/		
	Display for: O Customer O Vehicle								Show Categories		
	Туре	Provider	Date Posted	Inv/QC #	Odometer	Hours Out	License	State	Vehicle	Category	Customer
	INV		12/15/2006	8757	0	0.0	4KJT698	CA	1994 To		James, Jess
	INV		11/05/2006	8756	0	0.0	4KJT698	CA	1994 To		James, Jess
	INV		07/07/2005	438	68261	0.0	4KJT698	CA	1994 To	Automatic Trans/Transaxle	James, Jess

#### 3. Click **Show Categories** to show all Categories included on each invoice.

Display for:	⊖ Custon	ner 🔾 Ve	ehicle						Show Categories	]	
Туре	Provider	Date Posted	Inv/QC #	Odometer	Hours Out	License	State	Vehicle	Category		Customer
INV		12/15/2006	8757	0	0.0	4KJT698	CA	1994 To	Maintenance		James, Jes
INV		12/15/2006	8757	0	0.0	4KJT698	CA	1994 To	Filters (Oil, Fuel, Air)		James, Jes
INV		12/15/2006	8757	0	0.0	4KJT698	CA	1994 To	Fluids/Sprays/Sealers		James, Jes
INV		11/05/2006	8756	0	0.0	4KJT698	CA	1994 To	Maintenance		James, Jes
INV		07/07/2005	438	68261	0.0	4KJT698	CA	1994 To	Attached Items		James, Jes
INV		07/07/2005	438	68261	0.0	4KJT698	CA	1994 To	Engine Cooling		James, Jess

## **Vehicle View**

- 1. Click **F4** to open the Find History Record dialog box.
- 2. Find past work in history by any combination of Year-Make-Model and/or Word Search. [enter a make without years or models if you like]
- 3. Select the Vehicle tab.
- 4. Set up your Search Criteria. In this instance, do a Word Search for **'A/C'** for **'Toyota'** with a Posted Date of 1/1/2005-12/31/2005.
- 5. Click the **Search** button. Your results display in the grid below.

Find History Record	d							
Invoice	<u>V</u> ehicle							
<u>Y</u> ear	< All >		~	Posted <u>F</u> rom				
<u>M</u> ake	Toyota		~	<u>T</u> o	12/31/2005			
M <u>o</u> del			~		Clear			
Word Search	A/C							
Invoice	Posted Date	Printed Date	Name		Vehicle	Amount	Found In	
000492	08/31/2005	08/31/2005	Harkins, John		1991 Toyota Pickup SR5	373.99	Multiple	
000485	08/12/2005	08/10/2005	Harkins, John		1991 Toyota Pickup SR5	263.47	Multiple	
000484	08/07/2005	08/07/2005	Harkins, John		1991 Toyota Pickup SR5	262.45	Multiple	
						Cancel	Vie <u>w</u> Record	

6. Press the **Esc** key to close the Find History Record screen and return to the History screen.

#### **Other History screen options**

- **Unpost Invoice** Allows un-posting an invoice for corrections. (Do NOT answer Yes to 'use Current Rates'; may affect existing totals when reposted.)
- **Search** Filters History invoices list based upon key word(s) entered. Searches parts and labor descriptions of each invoice to find matches and narrow the list.
- **Detail** View selected invoice parts and labor detail with history of payments. History Detail window allows viewing individual order lines.

This concludes the self-instruction portion of workbook exercises. On the following pages you will see how to visit **managerforum.net** and also where to access the **SE Training Video Modules/Quizzes** certificate program.

## Managerforum.net Discussion Board

Answers, Tips and Ideas 24/7, Visit Managerforum.net and join us now!

- Q. What is a forum account?
- A. It's used to identify members (security); it's how the forum can know what you've seen, what's new and which email address to use for your notifications.



- Q. How do I get started?
- A. Click on the Forum icon and start browsing. To post questions and replies you need to do a one-time registration using the **Register** link on the site as shown below:



- Q. What happens after I click Register?
- A. You are sent an automated email with a link to "complete the circuit". Once you click that link, you may log into the forum.

**NOTE:** If you do not see the activation email within a few minutes, please check your spam folder. If not found, click on Forum Administrator link found at the bottom of every forum page.

- Q. What do users say about using the Forum?
- A. "A meeting place where you can interact with others like yourself, get answers to questions and tips on how to use Manager to its fullest. It's one of the best tools in your toolbox."

"One thing I love about this forum is all the great input we get from shops like us. I wish I would've started on here sooner" The insights and fellowship provided is unbelievable!"



## **Shop Management Modules & Quizzes**

To develop a more thorough understanding of SE software concepts, we recommend taking advantage of our 4 modules/quizzes certificate program accessed as follows:

- Manager SE: <u>http://m1training.net</u>
- ShopKey SE: <u>http://sktraining.net</u>

and click on the Manager SE or Shop Management SE link.



We highly recommend you complete all of the video modules and pass the quizzes. A certificate is available for each quiz passed with 85% or higher grade

# Get2Know - Manager SE

