

MANAGER SE

POWERFUL NEW ENHANCEMENTS AVAILABLE INTRODUCING JOB VIEW

- By-the-Job Order / Revision Screens
- By-the-Job Estimate / Invoice Documents
- 1 Click Move Deferred Work to Revisions
- Instant Canned Jobs

Mitchell1
In your shop, at your side

SHOP MANAGEMENT

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- 1 Click Move Deferred Work to Revisions
- Instant Canned Jobs

 **SHOPKEY**

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]

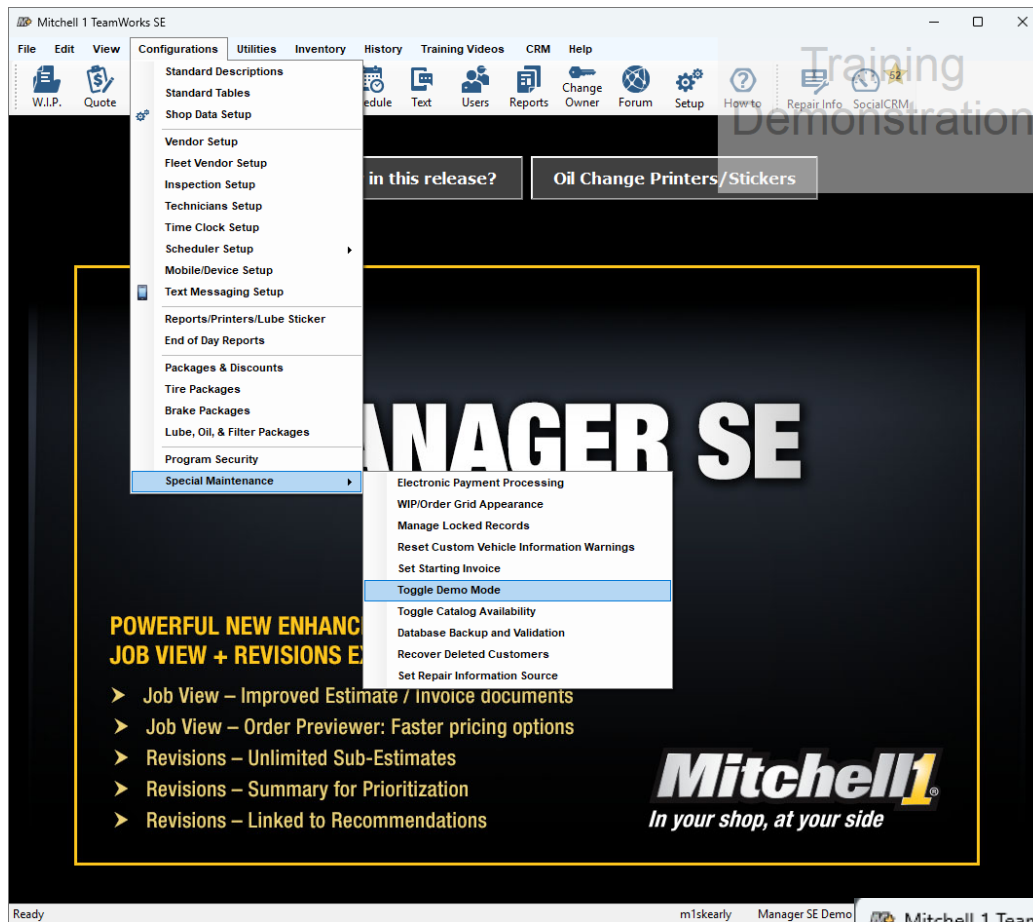
Assisted Program Basics

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: <https://kb.mitchell1.com/manager-files/>. [SE update is always line item #1]

Once the SE software has been installed, change it to **DEMO** mode using the instructions on this 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.

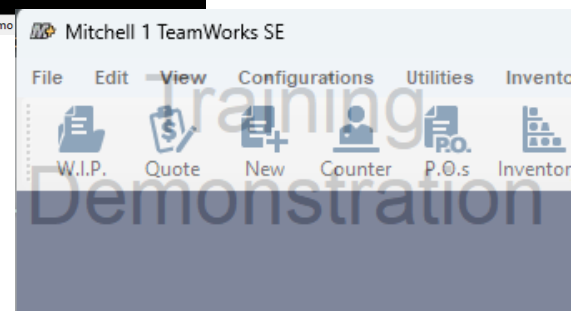


Switching SE live program to DEMO mode

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

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



The screenshot shows the Mitchell1 TeamWorks SE software interface. The 'Utilities' menu is open, and 'Customer Screen' is highlighted. The main window displays a 'Customer' form with fields for Company, Name, Last, First, Spouse, Address, Zip, City, State, Home, Office, E-mail, and Birthday. There are also sections for 'Customer Snapshot' and 'Payment Status'. The bottom of the screen shows a table with columns: License, Year, Make, Model, Vin, Color, Unit #, and Recommendation.

2. Type the customer's information into your Customer screen: (entering Zip Code then pressing the Tab key* automatically fills City + State fields)

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

The screenshot shows the 'Customer' form with the following information entered:

- Last, First: White James
- Spouse: Kathy
- Address: 1644 Kingsland Way
- Zip, City, State: 92064 Poway CA
- Home: 888-724-6742
- Office: 000- - - -
- E-mail: jwhite@cox.net

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 (**2018 Acura NSX, 2D Coupe**).

Note: DEMO has no VIN Decode or Plate Lookup functions; enter license # (**2BTX143**) + year-make-model (**2018 Acura NSX, 2D Coupe**).

Exit

4. Then click on the **Exit** Button (**Alt + X**) in the bottom right corner to finish entry and close the 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.



The Work In Progress (W.I.P.) screen is displayed. 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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File Edit View Configurations Utilities Inventory History Training Videos CRM Help

W.I.P. Quote New Counter P.O.s Inventory Schedule Text Users Reports Change Owner Forum Setup Howto Repair Info SocialCRM

Type	Recalls	Messages	Number	Customer	License	Color	Vin	Vehicle	MPI Progress	Sched
SO			000499	Dahl, Charlie	BOVEE			1978 Volkswagen Beetle		10/21/2005 05:00 PM (1.00 hrs)
SO			000597	Fisher, Peggy	SAYHOY			1993 Mercury Capri		09/22/2005 05:00 PM (0.00 hrs)
RO			000465	Tag, Pete	XYZ123			1995 Chevrolet Blazer		10/17/2005 09:11 AM (6.30 hrs)
RO			000474	Hammel, Charlie	ZTLG119			1994 Honda Accord DX		10/12/2005 01:26 PM (14.70 hrs)
RO			000475	Diez, Dito	DITO D			1990 Toyota Celica GT		10/31/2005 10:06 AM (3.75 hrs)
RO			000483	Fisher, Peggy	SAYHOY			1993 Mercury Capri		10/10/2005 08:35 AM (4.90 hrs)
RO			000493	Sellick, Tom	BIG G		VIN	1996 Ford Explorer		10/20/2005 09:04 AM (1.40 hrs)
RO			000582	Judd, Ron	THEJUDD			1988 Nissan 200SX SE		10/3/2005 08:45 AM (0.90 hrs)
RO			000595	Franks, Debra	BFL-70H		IFACP5U9LG201833	1990 Ford Taurus GL		08/16/2005 10:31 AM (0.00 hrs)
RO			000598	Blackledge, Glen				1995 Chevrolet S10 Pickup		09/22/2005 02:55 PM (0.00 hrs)
RO			000599	Harkins, John	234ABC		V1NNUM6565656565656...	1991 Toyota Pickup SR5		09/22/2005 05:16 PM (5.30 hrs)
RO			000600	Harkins, John	234ABC		V1NNUM6565656565656...	1991 Toyota Pickup SR5		10/2/2005 11:32 AM (8.05 hrs)
RO			000603	Iverson, Fred	123QER			1984 Cadillac DeVille		10/10/2005 01:59 PM (1.00 hrs)
RO			008761	Konstantine, Doug	WDS-54Y		IB4FK5439KX617037	1989 Dodge Caravan		10/12/2005 03:11 PM (7.48 hrs)
RO			008763	Labelle, Patty	FDK 89S		3FAPP1533MRI72228	1992 Ford Escort LX		11/15/2006 02:50 PM (11.00 hrs)
RO			008765	Mack, Peter	MACKONE			1991 Dodge Dakota		
RO			008768	Jones, John	2ABC123			2013 Chevrolet Impala LS		10/9/2024 03:00 PM (2.00 hrs)
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 hrs)
INV			000501	Harper, Phil	98W2831			1986 Toyota Camry DX		10/21/2005 07:35 AM (6.50 hrs)

Record 3 of 42

Reset Layout Columns Send Text Purge Ests Display Appointment Payment Post Detail Order

Ready m1skearly Manager SE Demo 9.1.0.3253 TIM

Note: The Customer/Vehicle you just entered should not show in the WIP screen yet as you have yet to create an estimate.

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 'James White' (2018 Acura NSX)

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

Note: 'New'/F6 key "remembers" last setting. Be sure Estimate is selected, NOT Repair Order.

Start New Order As: ☒ Estimate ☐ 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 **First** field, type 'J-a-m'.

Last Name	First Name	Phone	Membership #	Address	City	State	Zip	License	State	Unit No.	VIN
Johnson	James	619-777-0000		1623 Rimstone D...	Poway	CA	92064				
White	James	888-724-6742		1644 Kingsland ...	Poway	CA	92064	2BTX143	CA		

2. When 'White, James' appears in results, double-click on it (**or press Enter**) to select James White and start an estimate.
3. Customer information is retrieved and Customer screen displays automatically. The customer we entered (James White) has only one vehicle so it is automatically selected. Click on the Order Tab (**Alt + O**) to advance to the Order screen.

- The Order Screen displays with the cursor in the Odometer – In number entry field. Enter Vehicle Mileage as **45657**

Note: Enter mileage; program warns later if it's missing. It is crucial for your customer communications and SocialCRM reminders to have accurate mileage.

In

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W.I.P. Quote New Counter P.O.s Inventory Schedule Text Users Reports Change Owner Forum Setup How to Repair Info SocialCRM

Jones, John 2013 Chevrolet Impala LS 3.6L V6 (217CI) VIN(3) Lic: CA 2ABC123 Home: 619-391-5000 Office: 888-724-6742

Customer Vehicle **Order** Revision History Estimate # NEW

Parts Labor Notes Sublet **Symptom** Jobs PartKit Promos Estimator Maint. Fluids TSBs Open Recalls Print LOF

Written By <none> Hat # Ref # Odometer - Prev. 45657 In **45657**

Promised 12/ 2/2024 5:00 PM Source <None> Engine Hours - Prev. 0.0 In 0.0 Out 0.0

Order Hrs: 0.00 Driver: <None> Row Colors

Type	Description	Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech	Category	List	Mfg Code
Job Title													
Total: \$0.00 Parts: \$0.00 Labor: \$0.00 Tax: \$0.00 Category: <None>													

New Job Quick Menu

	Parts	Labor	Sub Total	Haz Mat.	Supplies	Tax	Total	Inv. Bal.
Invoice								
Estimate	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Convert to Order Parts Ordering SocialCRM Details Options View PO Worksheet Share Print Exit

Ready m1skearly Manager SE Demo 9.1.0.3253 TIM

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 above.

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

- 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.

- 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 needed. Once you are finished, click on the **Done** Button (**Alt + D**) to copy the Symptom into the estimate.

Symptoms Reported by Customer

Sort by ☒ Description ☐ Category

Short Description	Category	Hours	Labor	Parts
AC Won't Cool	AC/Heating/Cooling	1.00	\$60.00	\$0.00
Backfires	Engine Performance/Fuel	1.00	\$60.00	\$0.00
Battery Dead	Charging & Starting System	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
Brake Warning Light On	Brakes	0.50	\$30.00	\$0.00
Charge Light on	Charging & Starting System	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
Engine Noise	Engine Mechanical	1.00	\$60.00	\$0.00
Engine Overheats	AC/Heating/Cooling	0.75	\$45.00	\$0.00
Engine Stalls	Engine Performance/Fuel	1.00	\$60.00	\$0.00
Hard Shifting (MT)	Clutch	0.50	\$30.00	\$0.00
Hesitate, Stumble or Sag	Engine Performance/Fuel	1.00	\$60.00	\$0.00
Idle Too High	Engine Performance/Fuel	1.00	\$60.00	\$0.00

Short Desc. AC Won't Cool

Symptom Description: Air conditioning is not cooling properly

Work Requested: Diagnose air conditioning system

Charged Hrs: 1.00 ☐ Non-Standard Labor Rate

Labor Total \$: 60.00 ☐ Save as Standard Symptom

Est. Parts \$: 0.00 ☐ Come Back Invoice #

Category: AC/Heating/Cooling

Account: <none>

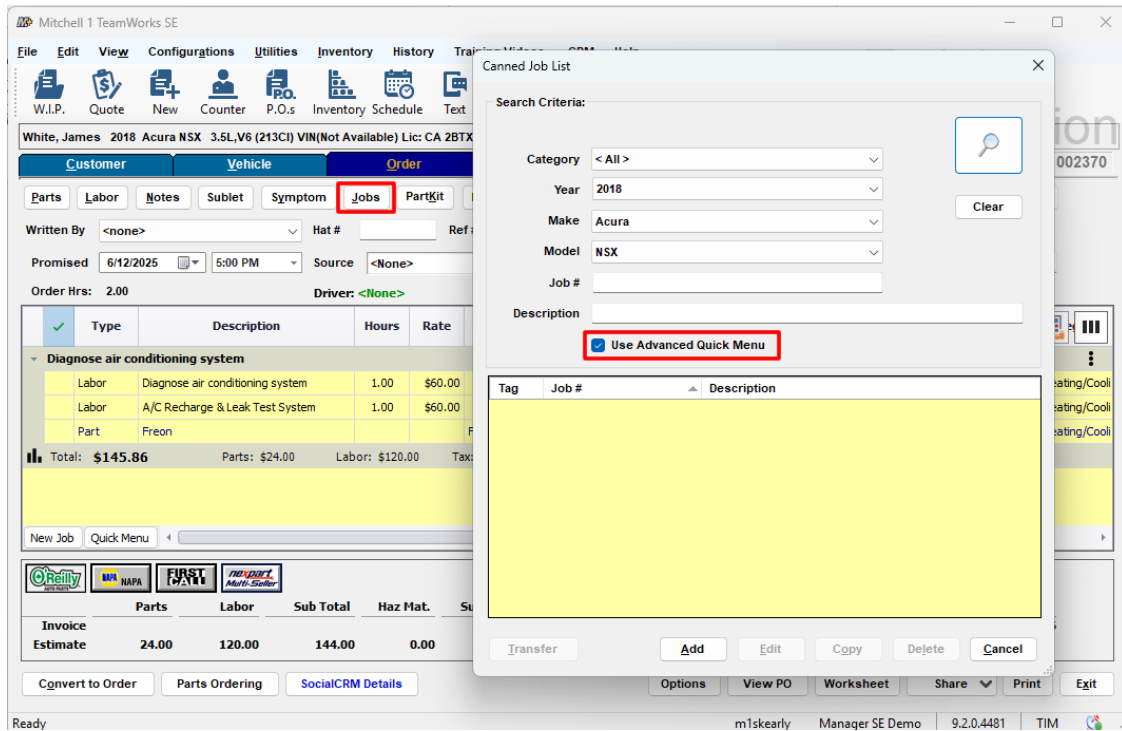
Select Symptom View Symptoms on Order Cancel Save Done

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.

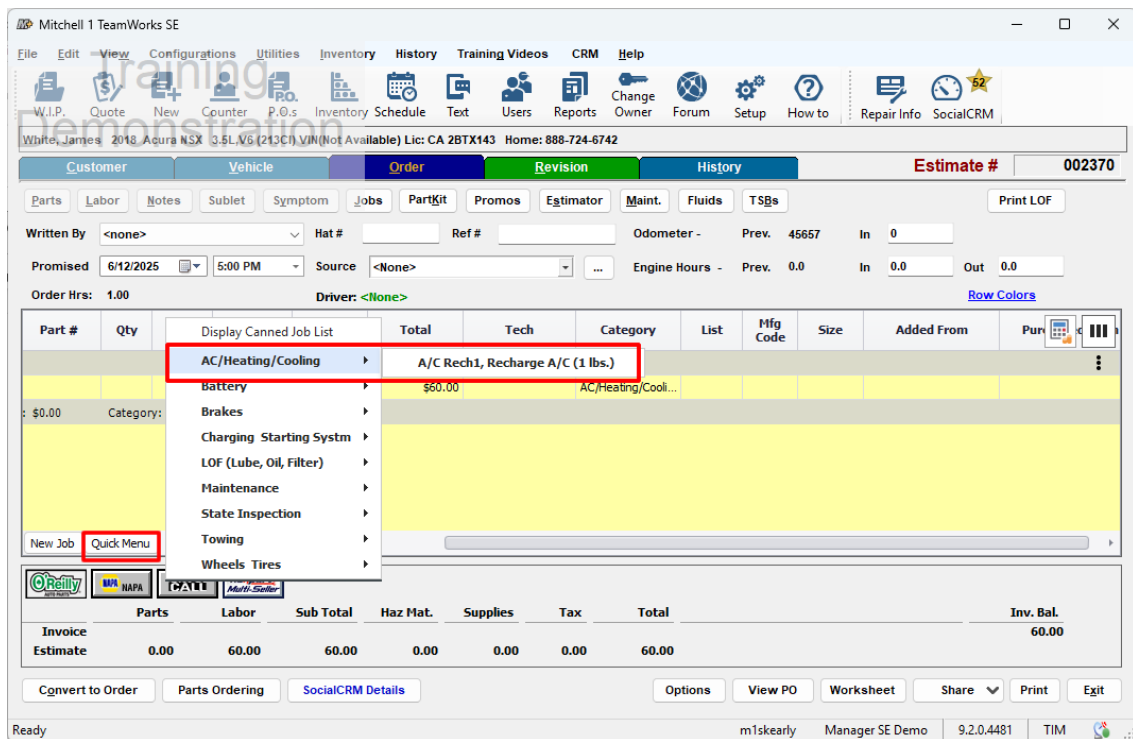
The Order Screen displays the Estimate with transferred Symptom as a labor item.

Now that we've added the symptom, it is time to add some parts and labor to the estimate in the form of a Canned Job. Before we begin, you will set Manager to use the Advanced Canned Job feature.

- Click on the **Jobs** button to open the **Canned Job List**.
- Select **Use Advanced Quick Menu** (if not already selected). Then click on **Cancel** or **X** to exit the dialog box.



9. Click on the **Quick Menu** button (**Alt + J**) to open the Quick Menu.
10. Browse the **AC/Heating/Cooling** Category and **pick A/C Rech 1, Recharge A/C (1 lbs.)**



The Canned Job part and labor repair lines display in the Estimate.

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W.I.P. Quote New Counter P.O.s Inventory Schedule Text Users Reports Change Owner Forum Setup How to Repair Info SocialCRM

White, James 2018 Acura NSX 3.5L V6 (213CI) VIN(Not Available) Lic: CA 2BTX143 Home: 888-724-6742

Customer Vehicle Order Revision History Estimate # 002370

Parts Labor Notes Sublet Symptom Jobs PartKit Promos Estimator Maint. Fluids TSBs Print LOF

Written By <none> Hat # Ref # Odometer - Prev. 45657 In 0

Promised 6/12/2025 5:00 PM Source <None> Engine Hours - Prev. 0.0 In 0.0 Out 0.0

Order Hrs: 2.00 Driver: <None> Row Colors

Type	Description	Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech
Labor	Diagnose air conditioning system	1.00	\$60.00					\$60.00	\$60.00	AC/Heating/Cool
Labor	A/C Recharge & Leak Test System	1.00	\$60.00					\$60.00	\$60.00	AC/Heating/Cool
Part	Freon			FREON	1.00	\$12.00	\$24.00	\$24.00	\$24.00	AC/Heating/Cool
Total: \$145.86		Parts: \$24.00	Labor: \$120.00	Tax: \$1.86	Category: AC/Heating/Cooling					

New Job Quick Menu

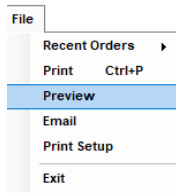
	Parts	Labor	Sub Total	Haz Mat.	Supplies	Tax	Total	Inv. Bal.
Invoice								145.86
Estimate	24.00	120.00	144.00	0.00	0.00	1.86	145.86	

Convert to Order Parts Ordering SocialCRM Details Options View PO Worksheet Share Print Exit

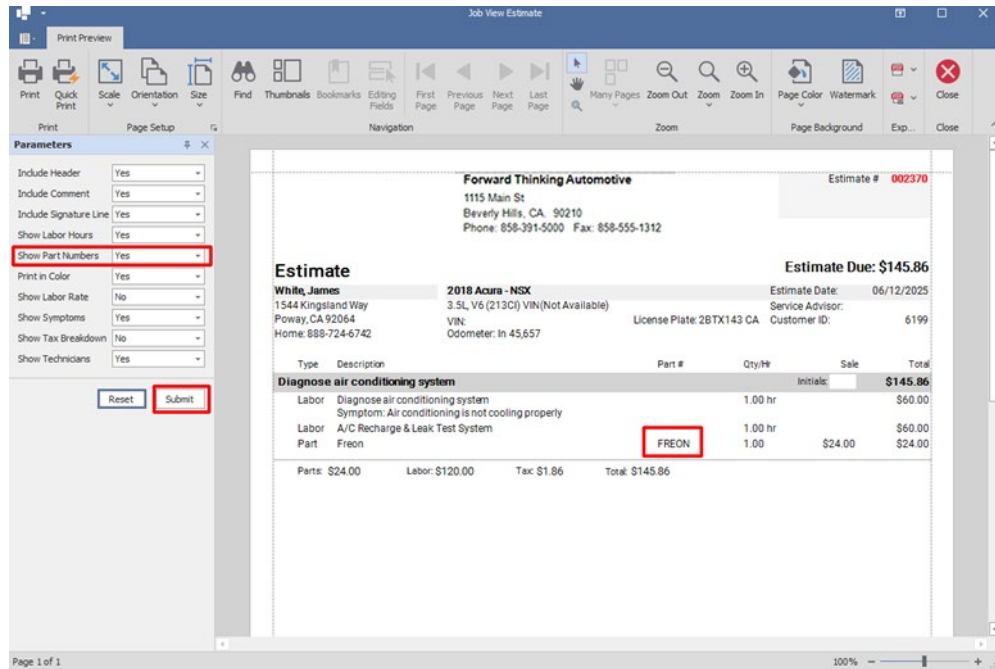
Ready m1s Kearly Manager SE Demo 9.2.0.4481 TIM

The original estimate is now complete. Before moving on to the repair order, let's print the Estimate.

Printing the Job View Estimate



1. Choose **Preview** from the **File** menu to preview this Repair Order on your screen.
2. The **Print Preview** displays how printed Repair Order appears.
3. The Parameters box in the left sidebar allows you to change some of the settings in the print preview. Change the **Show Part Numbers** setting to **Yes** and press the **Submit** button.



You will see that the Part Number (FREON) has been added to the estimate print preview.

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

Revisions

Let's say that in addition to the original estimate, you found a couple of additional repair/maintenance issues to recommend to the customer. You would record these issues as **Sub-Estimates** to have available when you contact the customer for approval.

Creating Sub-Estimates:

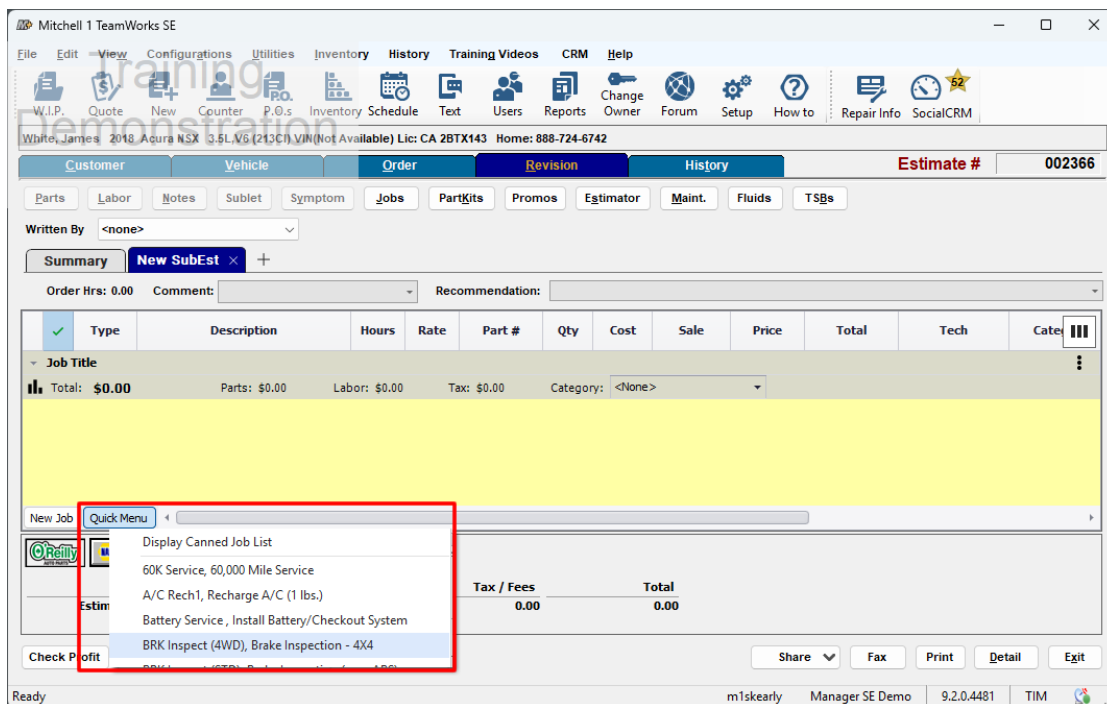
1. You begin the Sub-Estimate/Order Revision process by clicking the **Revision** tab.

This opens the Revision panel, initially blank.

2. Click the "+" tab to create a new **Sub-Estimate**.



3. We are going to use the Quick Menu to create the Sub-Estimate.
4. Click on the **Quick Menu** button to open the Quick Menu. Choose **BRK Inspect (4WD), Brake Inspection – 4x4**



The canned job is added to the Sub-Estimate.

Type	Description	Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech	Category
Brake Inspection - 4X4											
Labor	Brake Inspection	0.60	\$60.00					\$36.00	\$36.00		Brakes
Total: \$36.00											
Parts: \$0.00		Labor: \$36.00		Tax: \$0.00		Category: Brakes					

	Parts	Labor	Tax / Fees	Total
Estimate	0.00	36.00	0.00	36.00

The Labor is added to the Sub-Estimate and the title of the tab changes from **New Sub-Est** to **Brake Inspection**.

Based on the vehicle mileage you anticipate that a Front Disk Brake job may be needed upon completion of the Brake Inspection.

- Click the "+" tab to create another **Sub-Estimate**.

Type	Description	Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech	Category
Job Title											
Total: \$0.00											
Parts: \$0.00		Labor: \$0.00		Tax: \$0.00		Category: <None>					

	Parts	Labor	Tax / Fees	Total
Estimate	0.00	0.00	0.00	0.00

- Click **LOF** and **LOF EZ Select 4, Lube Oil Filter 4 qt.**

You are prompted to select the filter.

Optional Parts

Parts Kit: FILTERS Select Filters

Qty	Part #	Description	Select
1	ph13	Oil Filter - Fram	<input type="checkbox"/>
1	ph2850	Oil Filter - Fram	<input type="checkbox"/>
1	ph30	Oil Filter - Fram	<input type="checkbox"/>
1	ph3657	Oil Filter - Fram	<input type="checkbox"/>
1	ph43	Oil Filter - Fram	<input type="checkbox"/>
1	ph8a	Oil Filter - Fram	<input type="checkbox"/>
1	DG13	Oil Filter - Fram Double Guard	<input checked="" type="checkbox"/>
1	DG30	Oil Filter - Fram Double Guard	<input type="checkbox"/>
1	DG3682	Oil Filter - Fram Double Guard	<input type="checkbox"/>

Select optional parts for this kit. OK

7. Pick **DG13 Oil Filter – Fram Double Guard** and click **OK**.
You are prompted to select the Oil.

Optional Parts

Parts Kit: OILS 4Q Select Oils - 4 Qts

Qty	Part #	Description	Select
4	10w30c	Eng Oil - 10w30 Castrol	<input type="checkbox"/>
4	10w30b	Eng Oil - 10w30 Blended	<input type="checkbox"/>
4	10w30y	Eng Oil - 10w30 YZZ Premium	<input type="checkbox"/>
4	10w40c	Eng Oil - 10w40 Castrol	<input checked="" type="checkbox"/>
4	10w40v	Eng Oil - 10w40 Valvoline	<input type="checkbox"/>
4	20w50c	Eng Oil - 20w50 Castrol	<input type="checkbox"/>
4	20w50v	Eng Oil - 20w50 Valvoline	<input type="checkbox"/>

Select optional parts for this kit. OK

8. Choose **10w40c Castrol** and click **OK**.
The parts and labor are added to the Sub Estimate.

Summary Brake Inspection Lube Oil Filter 4

Order Hrs: 0.20 Comment: Recommendation:

Type	Description	Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech	Cate
Labor	Lube, Oil & Filter LABOR	0.20	\$60.00					\$6.50	\$6.50		LOF (Lube, Oil, F
Part	Oil Filter - Fram Double Guard			DG13	1.00	\$8.77	\$12.99	\$12.99	\$12.99		Filters (Oil, Fuel,
Part	Eng Oil - 10w40 Castrol			10w40c	4.00	\$1.20	\$1.50	\$1.50	\$6.00		Fluids/Sprays/Se
Total: \$26.96		Parts: \$18.99	Labor: \$6.50	Tax: \$1.47	Category: LOF (Lube, Oil, Filter)						

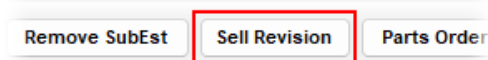
New Job Quick Menu

Selling Revisions

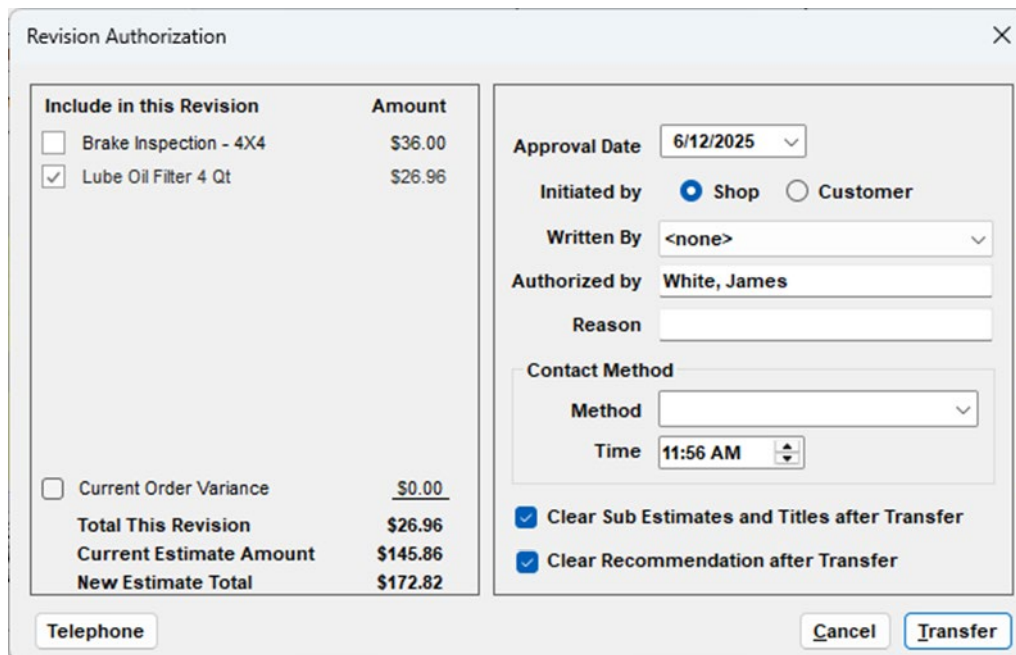
This basic Estimate (Symptom - diagnostic time + 'A/C Recharge' Job) along with two Sub-Estimates are now complete. The next logical step might be to contact the customer to authorize the repair and sell the revision(s). Once you have gotten the repairs approved, you will convert the Estimate to the Repair Order.

To Sell Revisions:

1. In the Revisions panel, with the **LOF** Tab selected (continuing from previous step), choose the **Sell Revision** button (bottom right corner)



This opens the Revision Authorization dialog box. Your two Sub-Estimates are displayed with Lube Oil Filter 4 Qt selected along with the Current Estimate amount and Revision Total.



Include in this Revision	Amount
<input type="checkbox"/> Brake Inspection - 4X4	\$36.00
<input checked="" type="checkbox"/> Lube Oil Filter 4 Qt	\$26.96
<input type="checkbox"/> Current Order Variance	\$0.00
Total This Revision	\$26.96
Current Estimate Amount	\$145.86
New Estimate Total	\$172.82

Approval Date: 6/12/2025

Initiated by: ☒ Shop ☐ Customer

Written By: <none>

Authorized by: White, James

Reason:

Contact Method:

Method:

Time: 11:56 AM

☒ Clear Sub Estimates and Titles after Transfer

☒ Clear Recommendation after Transfer

Telephone Cancel Transfer

2. Click on Brake Inspection 4X4 also and note how the Totals at the bottom of the Revision Authorization screen update to reflect your selection.

Revision Authorization

Include in this Revision	Amount
<input checked="" type="checkbox"/> Brake Inspection - 4X4	\$36.00
<input checked="" type="checkbox"/> Lube Oil Filter 4 Qt	\$26.96
<input type="checkbox"/> Current Order Variance	\$0.00
Total This Revision	\$62.96
Current Estimate Amount	\$145.86
New Estimate Total	\$208.82

Approval Date: 6/12/2025

Initiated by: ☒ Shop ☐ Customer

Written By: <none>

Authorized by: White, James

Reason:

Contact Method:

Method:

Time: 11:56 AM

☒ Clear Sub Estimates and Titles after Transfer

☒ Clear Recommendation after Transfer






Telephone Cancel Transfer

- You will also want to make sure that the **Clear Sub Estimates and Titles after Transfer** and **Clear Recommendation after Transfer** boxes are checked. This clears the Sub Estimates and Recommendations from the Order as the work having been addressed once you have Transferred them to the Order.

Note: You can supply "what if" scenarios for your customer by clicking on/off the selection boxes of the available sub-estimates. The **Total This Revision** amount and **New Estimate Total** fields change dynamically so that the customer can consider the cost of the various sub-estimate combinations. Please feel free to experiment with this capability before moving on.

- Click the **Transfer** button to add the Revision work to the estimate. You are returned to the Order panel with the Revisions transferred to the Estimate. You may be prompted about missing information. Click **Yes** to continue.

The two sub-estimate jobs **Brake Inspection** and **LOF** are added to the order grid.

✓	Type	Description	Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech	Category	List		
▼ Diagnose air conditioning system															
	Labor	Diagnose air conditioning system	1.00	\$60.00				\$60.00		\$60.00		AC/Heating/Cooli...			
	Labor	A/C Recharge & Leak Test System	1.00	\$60.00				\$60.00		\$60.00		AC/Heating/Cooli...			
	Part	Freon			FREON	1.00	\$12.00	\$24.00	\$24.00	\$24.00		AC/Heating/Cooli...	\$0.00		
	Total: \$145.86		Parts: \$24.00		Labor: \$120.00		Tax: \$1.86		Category: AC/Heating/Cooling ▼						
▼ Brake Inspection - 4X4															
	Labor	Brake Inspection	0.60	\$60.00				\$36.00		\$36.00		Brakes			
	Total: \$36.00		Parts: \$0.00		Labor: \$36.00		Tax: \$0.00		Category: Brakes ▼						
▼ Lube Oil Filter 4 Qt															
	Labor	Lube, Oil & Filter LABOR	0.20	\$60.00				\$6.50		\$6.50		LOF (Lube, Oil, F...			
	Part	Oil Filter - Fram Double Guard			DG13	1.00	\$8.77	\$12.99	\$12.99	\$12.99		Filters (Oil, Fuel, ...	\$0.00		
	Part	Eng Oil - 10w40 Castrol			10w40c	4.00	\$1.20	\$1.50	\$1.50	\$6.00		Fluids/Sprays/Se...	\$0.00		
	Total: \$26.96		Parts: \$18.99		Labor: \$6.50		Tax: \$1.47		Category: LOF (Lube, Oil, Filter) ▼						
New Job Quick Menu															

Next, we will convert the Estimate to a Repair Order.

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 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 screenshot shows the Mitchell1 TeamWorks SE software interface. The 'Order' screen is active, displaying a table of items and a summary section at the bottom. A dialog box titled 'Options' is open in the center, asking 'Convert Estimate to Order?'. The 'Yes' button is highlighted with a red box. The background shows the 'Order' screen with a table of items and a summary section at the bottom.

Type	Description	Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech
Diagnose air conditioning system										
Labor	Diagnose air conditioning system	1.00	\$60.00					\$60.00	\$60.00	AC/Heating/C
Labor	A/C Recharge & Leak Test System	1.00	\$60.00					\$60.00	\$60.00	AC/Heating/C
Part	Freon			FREON				\$24.00	\$24.00	AC/Heating/C
Total: \$145.86 Parts: \$24.00 Labor: \$120.00 Tax: \$1.86										
Brake Inspection - 4X4										
Labor	Brake Inspection	0.60	\$60.00					\$36.00	\$36.00	Brakes
Total: \$36.00 Parts: \$0.00 Labor: \$36.00 Tax: \$0.00										
Lube Oil Filter 4 Qt										
Labor	Lube, Oil & Filter LABOR	0.20	\$60.00					\$6.50	\$6.50	LOF (Lube, Oi

Invoice Summary:

Invoice	Parts	Labor	Sub Total	Haz Mat.	Supplies	Tax	Total	Inv. Bal.
Estimate	42.99	162.50	205.49	0.00	0.00	3.33	208.82	208.82

Buttons: **Convert to Order** (highlighted), Parts Ordering, SocialCRM Details, Options, View PO, Worksheet, Share, Print, Exit.

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.

Estimate # 002366 ➡ **Repair Order #** 008772

Note: Your numbers will be different than these examples

You should also notice that the Tech fields in the Order Screen are highlighted. This is to prompt you to assign default technicians for the parts and labor of the order. You do this in Order Options.

3. Click the **Options** button.
4. In **Order Options** select **Charbonneau, Wayne** for **Labor** and **DiVerde, Nick** for your **Parts** technicians.

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W.I.P. Quote New Counter P.O.s Inventory Schedule Text Users Reports Change Owner Forum Setup How to Repair Info SocialCRM

White, James 2018 Acura NSX 3.5L V6 (213CI) VIN(Not Available) Lic: CA 2BTX143 Home: 888-724-6742

Customer Vehicle Order Revision History Repair Order # 008777

Parts Labor Notes Sublet Symptom Jobs PartKit Promos Estimator Maint. Fluids TSBs Print LOF

Written By <none> Promised 6/12/2025 5:00 PM Order Hrs: 1.80

Order Options

Default Technicians: Labor Charbonneau, Wayne Parts DiVerde, Nick Include: ☐ Shop Supplies ☒ Hazard Materials

Convert to Order Apply Payments Revision History

Convert to Invoice Discounts Tech WorkSheet

Post Invoice Confirm All Parts Maintenance

Appointment Check Profit Tax Rates Applied

Pick List Purchase Order Tech. Observations

Print LOF Sticker Fax

Done

Type	Description	Total	Parts
Recharge A/C (1 lbs.)		\$85.86	\$24.00
Labor	A/C Recharge & Leak Test System		
Part	Freon		
Brake Inspection - 4X4		\$36.00	\$0.00
Labor	Brake Inspection		
Lube Oil Filter 4 Qt		\$10.80	\$3.99
Labor	Lube, Oil & Filter LABOR		
Part	Oil Filter - Fram		

Parts	Labor	Sub Total	Haz Mat.	Supplies	Tax	Total	Inv. Bal.
Invoice							132.66
Estimate	27.99	102.50	130.49	0.00	0.00	2.17	132.66

Convert to Invoice Parts Ordering SocialCRM Details Options View PO Worksheet Share Print Exit

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5. Click **Done** to close Order Options.

The Technician assignments are displayed in the grid.

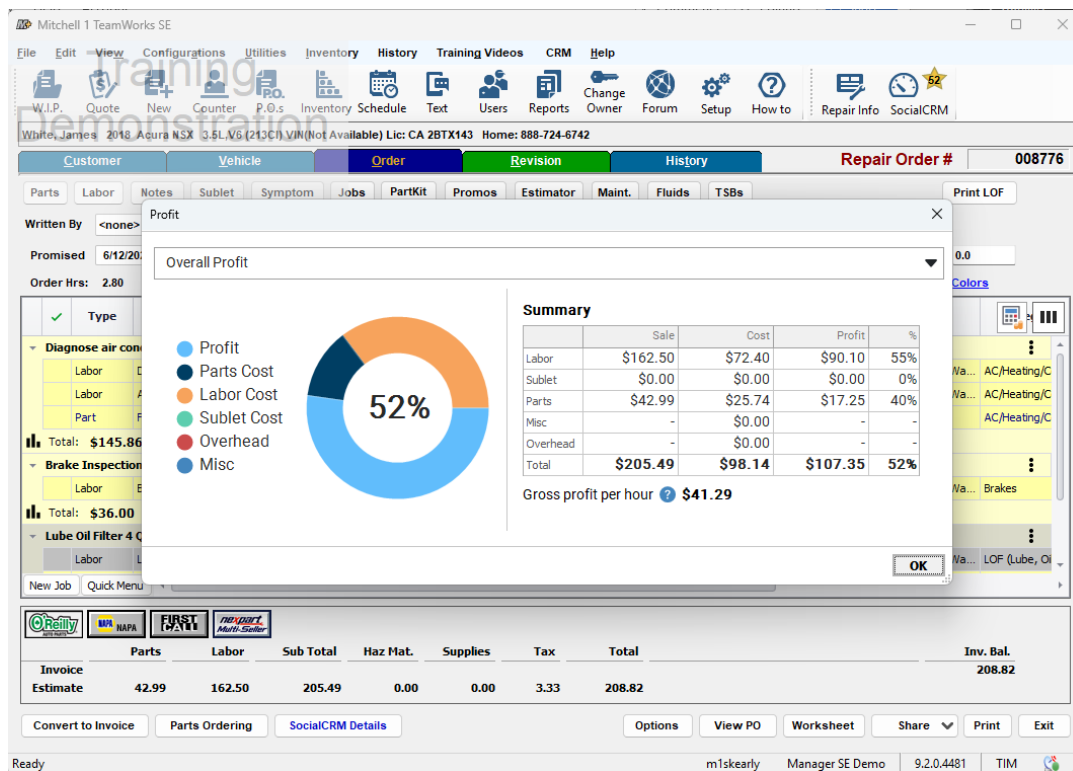
NEXT: F12 key = Check Profit

Using the Profit Wizard

Profit Wizard provides a pie chart overview of costs / profit for this entire order OR 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**.

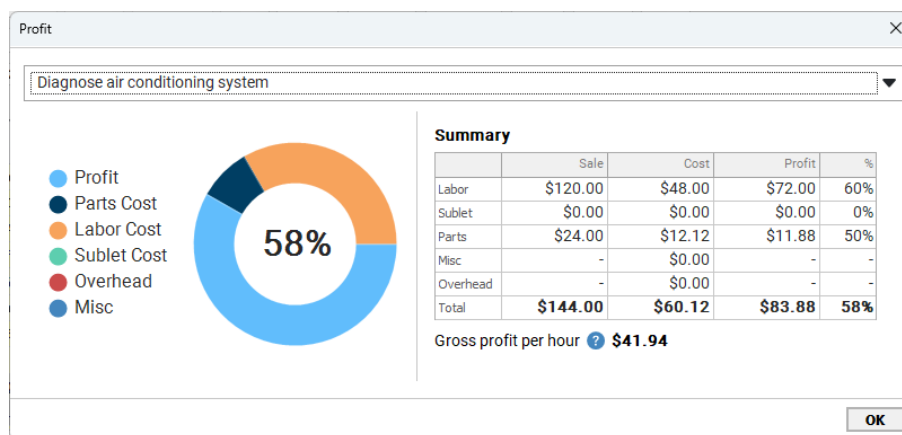
To Check Profit:

1. Click **F12** (or pick Profit Wizard from Utilities) to display the Profit Wizard.



You can also display the Profit margin for a single job.

2. Pick the **Diagnose Air Conditioning System** Job from the pulldown menu.



Your Profit totals change to reflect the profit on that Job only.

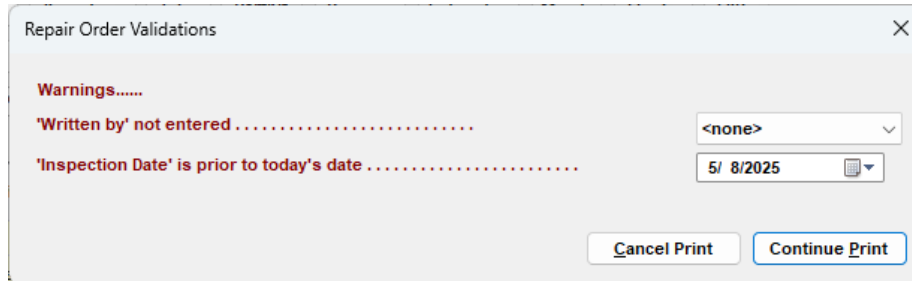
3. Click **OK** to close the Profit Wizard.

Note: Miscellaneous & Overhead are entered in Setup and don't impact INV totals. They can be used to make pie chart more realistic beyond part costs & tech pay.

Printing the Repair Order

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

You may get a validation warning.



Repair Order Validations

Warnings.....

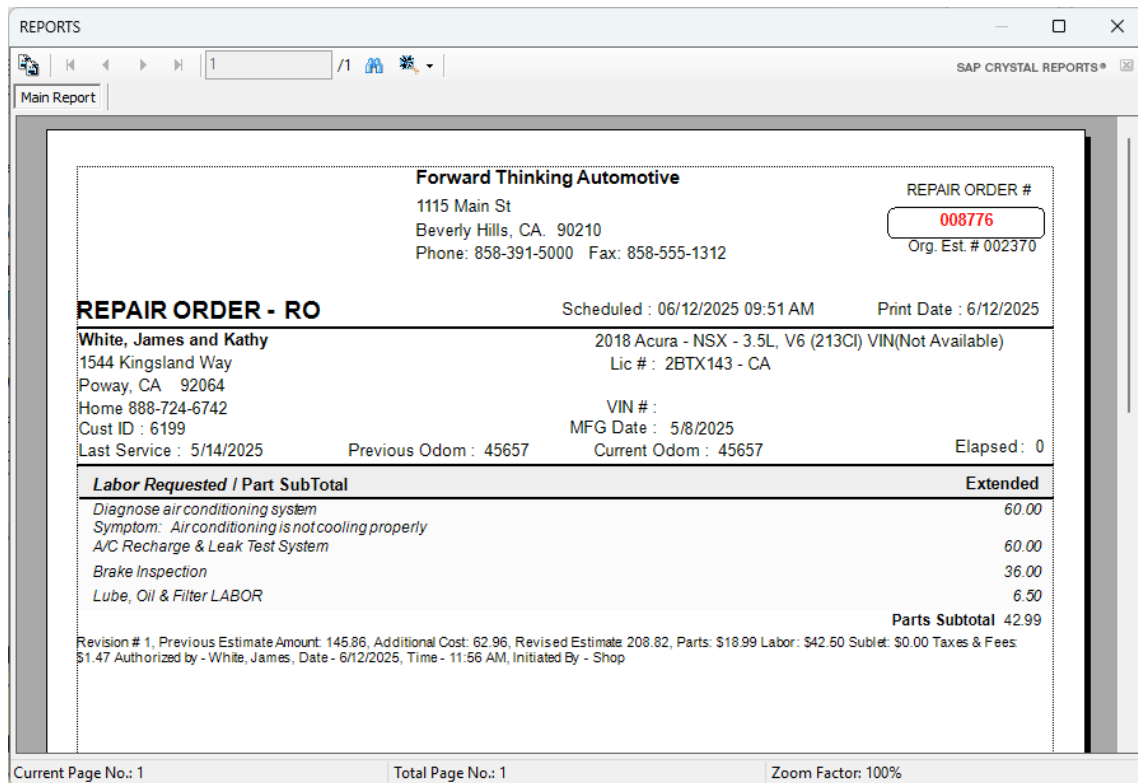
'Written by' not entered <none>

'Inspection Date' is prior to today's date 5/ 8/2025

Cancel Print Continue Print

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

Inspect the Repair Order content in the Print Preview window.



REPORTS

1 /1

SAP CRYSTAL REPORTS

Main Report

Forward Thinking Automotive
1115 Main St
Beverly Hills, CA. 90210
Phone: 858-391-5000 Fax: 858-555-1312

REPAIR ORDER #
008776
Org. Est. # 002370

Scheduled : 06/12/2025 09:51 AM Print Date : 6/12/2025

REPAIR ORDER - RO

White, James and Kathy
1544 Kingsland Way
Poway, CA 92064
Home 888-724-6742
Cust ID : 6199
Last Service : 5/14/2025

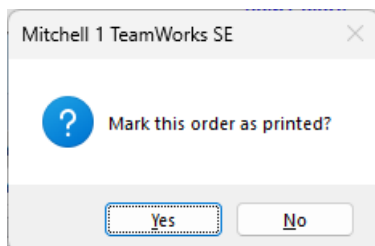
2018 Acura - NSX - 3.5L, V6 (213CI) VIN(Not Available)
Lic # : 2BTX143 - CA
VIN # :
MFG Date : 5/8/2025
Previous Odom : 45657
Current Odom : 45657
Elapsed: 0

Labor Requested / Part SubTotal	Extended
Diagnose air conditioning system	60.00
Symptom: Air conditioning is not cooling properly	
A/C Recharge & Leak Test System	60.00
Brake Inspection	36.00
Lube, Oil & Filter LABOR	6.50
Parts Subtotal	42.99

Revision # 1, Previous Estimate Amount: 145.86, Additional Cost: 62.96, Revised Estimate 208.82, Parts: \$18.99 Labor: \$42.50 Sublet: \$0.00 Taxes & Fees: \$1.47 Authorized by - White, James, Date - 6/12/2025, Time - 11:56 AM, Initiated By - Shop

Current Page No.: 1 Total Page No.: 1 Zoom Factor: 100%

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



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?

Mark this order as printed?

Yes No

3. Click on the X in upper RH corner of screen (**Alt + F4**) to close the Preview.
4. Next you will be prompted to mark this Repair Order as Printed.
5. Click on **Yes** to mark this Repair Order as printed.

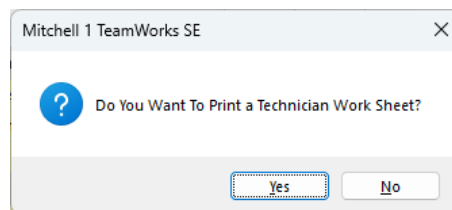
Note: Marking the Repair Order as 'printed' triggers two important things:

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.

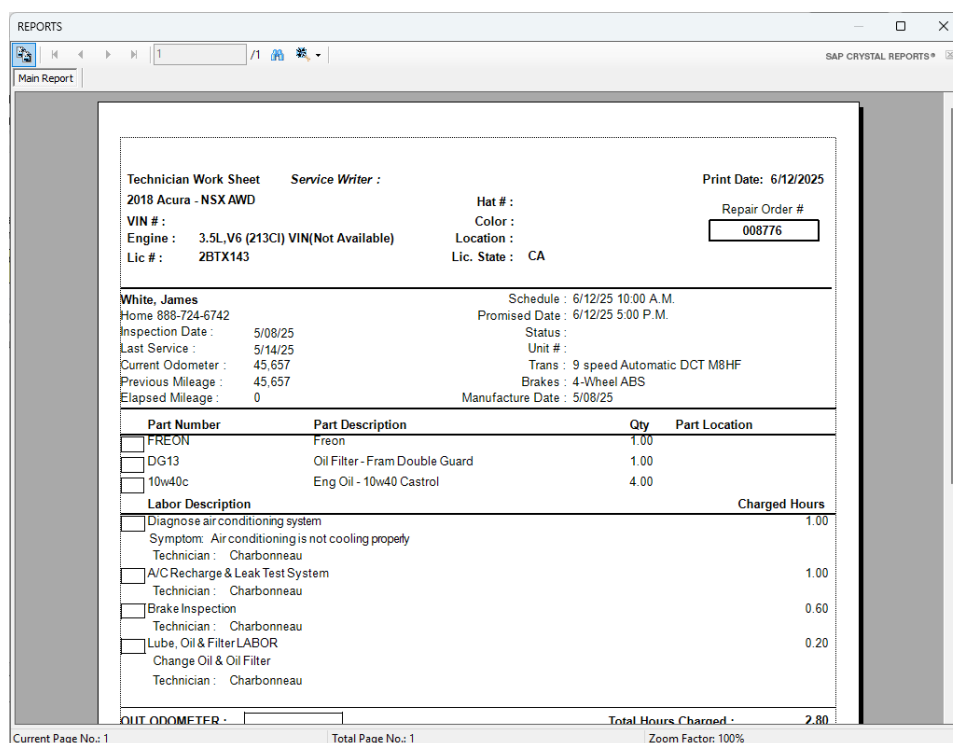
Tip: It is also possible to automatically **Mark All ROs As Approved/Printed** in the **Screen View** settings under **Configuration > Shop Data**. This time-saving setting bypasses the RO "printing" steps as shown previously. You will want to enable this feature now if your shop doesn't typically print Repair Orders.

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



6. 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



Part Number	Part Description	Qty	Part Location
<input type="checkbox"/> FREON	Freon	1.00	
<input type="checkbox"/> DG13	Oil Filter - Fram Double Guard	1.00	
<input type="checkbox"/> 10w40c	Eng Oil - 10w40 Castrol	4.00	

Labor Description	Charged Hours
<input type="checkbox"/> Diagnose air conditioning system Symptom: Air conditioning is not cooling properly Technician: Charbonneau	1.00
<input type="checkbox"/> A/C Recharge & Leak Test System Technician: Charbonneau	1.00
<input type="checkbox"/> Brake Inspection Technician: Charbonneau	0.60
<input type="checkbox"/> Lube, Oil & Filter LABOR Change Oil & Oil Filter Technician: Charbonneau	0.20

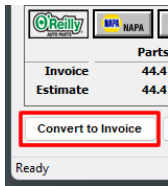
OUT ODOMETER: Total Hours Charged: 2.80

You can close the window by clicking the **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)

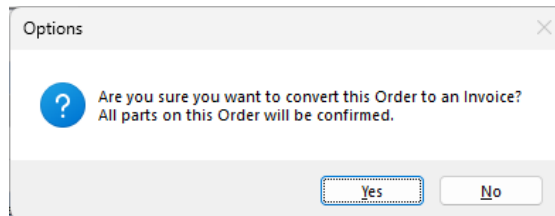
NEXT: Converting a Repair Order to an Invoice

Converting the Repair Order to an Invoice



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

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



2. 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 exactly like the R.O. screen; the only difference is that it now displays as **Invoice #**.

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File Edit View Configurations Utilities Inventory History Training Videos CRM Help

W.I.P. Quote New Counter P.O.s Inventory Schedule Text Users Reports Change Owner Forum Setup How to Repair Info SocialCRM

White, James 2018 Acura NSX 3.5L V6 (213CH VIN) (Not Available) Lic: CA 2BTX143 Home: 888-724-6742

Customer Vehicle Order Revision History Invoice # 008776

Parts Labor Notes Sublet Symptom Jobs PartKit Promos Estimator Maint. Fluids TSBs Print LOF

Written By: <none> Hat #: Ref #: Odometer - Prev. 45657 In 45657

Promised 6/12/2025 5:00 PM Source: <None> Engine Hours - Prev. 0.0 In 0.0 Out 0.0

Order Hrs: 2.80 Driver: <None> Row Colors

Type	Description	Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech
Diagnose air conditioning system										
Labor	Diagnose air conditioning system	1.00	\$60.00				\$60.00		\$60.00	Charbonneau, Wa...
Labor	A/C Recharge & Leak Test System	1.00	\$60.00				\$60.00		\$60.00	Charbonneau, Wa...
Part	Freon			FREON	1.00	\$12.00	\$24.00	\$24.00	\$24.00	DVerde, Nick
Total: \$145.86 Parts: \$24.00 Labor: \$120.00 Tax: \$1.86 Category: AC/Heating/Cooling 0.00% Est: \$145.86										
Brake Inspection - 4X4										

	Parts	Labor	Sub Total	Haz Mat.	Supplies	Tax	Total	Inv. Bal.
Invoice	42.99	162.50	205.49	0.00	0.00	3.33	208.82	208.82
Estimate	42.99	162.50	205.49	0.00	0.00	3.33	208.82	

Pay/Post Invoice Parts Ordering SocialCRM Details Options View PO Worksheet Share Print Exit

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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 on Order screen. When finished, press ESC key to return to the WIP screen.



The WIP screen provides various tools for working with and making updates to orders. Two of these options, **Appointment** and Order **Detail** are discussed below:

1. Click the W.I.P button to open the Work in Progress screen.
2. You will be looking for the Invoice for a 2018 Acura NSX.

Note: You can sort the Work In Progress grid by clicking on any heading. The grid is ordered in Ascending order. Click again to re-sort the grid in Descending order.

The WIP screen provides various tools for working with and making updates to orders. Two of these options, **Appointment** and Order **Detail** are discussed below:

1. Click the **Vehicle** column heading **Twice** to reorder the grid by Vehicle in descending order.
2. Select the order for **James White, 2018 Acura NSX**.
3. Click on **Appointment** to view scheduling details for this order in the Appointment Editor.

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W.I.P. Quote New Counter P.O.s Inventory Schedule Text Users Reports Change Owner Forum Setup How-to Your Info Social CRM

Type	Number	Customer	License	Color	Vin	Vehicle	Progress	Sched	Promised
INV	008772	White, James	2B7X143			2018 Acura NSX		05/8/2025 09:30 AM (4.20 hrs) - OPEN	5/8/2025 5:00:00 PM
RO	008771	White, Dan	2B7X143			2018 Acura NSX		04/24/2025 12:00 PM (4.20 hrs) - OPEN	4/24/2025 5:00:00 PM
EST	002353	Jones, John	2ABC123			2013 Chevrolet Impala LS		12/3/2024 03:00 PM (2.00 hrs) - OPEN	12/3/2024 5:00:00 PM
RO	008769	Jones, John	2ABC123			2013 Chevrolet Impala LS		11/29/2024 8:56:52	
RO	008768	Jones, John	2ABC123			2013 Chevrolet Impala LS		10/9/2024 03:00 PM (2.00 hrs) - CLOSED	10/8/2024 5:00:00 PM
EST	002345	Rojo, Beth	00IUJ101J			2000 Ford Mustang		01/4/2007 02:00 PM (1.50 hrs) - OPEN	1/4/2007 5:00:00 PM
EST	002274	Read-Me, First	CLICK HERE			2000 Chevrolet Blazer		10/25/2005 11:26 AM (0.00 hrs) - OPEN	10/27/2005 5:00:00 PM
EST	002270	Ingerson, Ralph	FLAT55			1998 Audi A6 Quattro		10/26/2005 08:54 AM (10.00 hrs) - OPEN	10/26/2005 5:00:00 PM
RO	004493	Selick, Tom	BIG G		VIN	1996 Ford Explorer		10/20/2005 09:04 AM (1.40 hrs) - OPEN	10/24/2005 5:00:00 PM
RO	000598	Blackledge, Glen				1995 Chevrolet S10 Pickup		09/22/2005 02:55 PM (0.00 hrs) - OPEN	9/22/2005 5:00:00 PM
RO	000465	Tag, Pete	XYZ123			1995 Chevrolet Blazer		10/17/2005 09:11 AM (7.30 hrs) - OPEN	10/21/2005 5:00:00 PM
CSALE	000602	Jensen, Tom	234AGC			1994 Nissan 300ZX GS		12/12/2006 5:00:00	
RO	000474	Hammel, Charlie	ZTLG119			1994 Honda Accord DX		10/12/2005 01:26 PM (14.70 hrs) - OPEN	10/17/2005 5:00:00 PM
SO	000597	Fisher, Peggy	SAYHOY			1993 Mercury Capri		09/22/2005 05:00 PM (0.00 hrs) - OPEN	9/22/2005 5:00:00 PM
RO	000483	Fisher, Peggy	SAYHOY			1993 Mercury Capri		10/10/2005 08:35 AM (4.90 hrs) - OPEN	10/25/2005 5:00:00 PM
RO	008763	Labelle, Patty	FDK 89S		3FAPP153MR172228	1992 Ford Escort LX		11/15/2006 02:50 PM (11.00 hrs) - OPEN	11/15/2006 5:00:00 PM
INV	000604	Harkins, John	234ABC		V1NNUM6565656565656...	1991 Toyota Pickup SR5		10/12/2005 05:41 PM (9.45 hrs) - OPEN	10/12/2005 5:00:00 PM
INV	000601	Harkins, John	234ABC		V1NNUM6565656565656...	1991 Toyota Pickup SR5		10/2/2005 11:38 AM (9.45 hrs) - OPEN	10/2/2005 5:00:00 PM
RO	000600	Harkins, John	234ABC		V1NNUM6565656565656...	1991 Toyota Pickup SR5		10/2/2005 11:32 AM (8.05 hrs) - OPEN	10/2/2005 5:00:00 PM
RO	000599	Harkins, John	234ABC		V1NNUM6565656565656...	1991 Toyota Pickup SR5		09/22/2005 05:16 PM (5.30 hrs) - OPEN	9/22/2005 5:00:00 PM
EST	002213	Harkins, John	789GHI			1991 Toyota Pickup SR5		10/20/2005 10:08 AM (7.48 hrs) - OPEN	10/24/2005 5:00:00 PM
RO	008765	Mack, Peter	MACKONE			1991 Dodge Dakota		10/12/2021 8:49:17	
EST	002281	Mack, Peter	MACKONE			1991 Dodge Dakota		10/27/2005 10:13 AM (1.00 hrs) - OPEN	10/31/2005 5:00:00 PM
INV	008749	Diez, Ditto	DITO D			1990 Toyota Celica GT		11/20/2006 11:26 AM (0.00 hrs) - OPEN	11/20/2006 5:00:00 PM
RO	000475	Diez, Ditto	DITO D			1990 Toyota Celica GT		10/31/2005 10:06 AM (3.75 hrs) - OPEN	10/31/2005 5:00:00 PM

Record 1 of 44

Reset Layout Columns Send Text Purge Ests Display Appointment Payment Post Detail Order

Ready m1skearly Manager SE Demo 9.2.0.4481 TIM

5/8/2025: White, James

Save & Close Delete Open Cancel Auto Adjust End Time Match Drop-Off to Start Time Reminder: None Send Text

Subject: White, James

Drop Off: 05/08/2025 09:30 AM Scheduled Hours: 4.20 Order Hrs: 4.20 Appointment State: Open (OPEN)

Promised: 5/ 8/2025 5:00 PM Service Advisor: <None>

Starts: 5/ 8/2025 9:30 AM Technician: Charbonneau, Wayne

Ends: 5/ 8/2025 1:42 PM All day event Resource: <None>

Shop Comments Print on order as Note Customer Comments/Special Requests Print on order as Note

Customer - White, James

Phone: (Home) 888-724-6742 Prefers: <None>

Email: jwhite@cox.net

Company: --

Address: 1544 Kingsland Way
Poway, CA 92064

Membership #: --

Vehicle - 2018 Acura NSX

0 Recommendations

VIN: --

License Plate: 2BTX143 Color: --

Engine: 3.5L, V6 (213CI) VIN(Not Available)

Unit #: --

Hat: --

Odometer In: None

Yearly Mileage: --

Job Hours: 0.00 Source: <None> Category: <None> Jobs: Add Delete

Description

Look over the various options available for scheduling then click **Save and Close** or **X** to close the scheduler. Visit <https://kb.mitchell1.com/articles/id-803/> for detailed information on working in the scheduler.

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

- Click **Detail** (or right-click mouse on that order). With **White James** still highlighted, update the status of details.



- Click **Detail** to display details of Invoice. (Smith, Will)

Update these WIP Detail fields:

- Status:** Completed
- Location:** Front Lot

Work In Progress Detail

Invoice 008772	
Name White, James License 2BTX143 (CA) Year/Make/Model 2018 Acura NSX Service Writer	
Phone Numbers Home 888-724-6742 Ext.	Time/Date In 05/13/2025 2:32PM Completion Time/Date Promised Time/Date 05/08/2025 5:00PM Schedule Start 5/8/2025 9:30 AM Schedule End 5/8/2025 1:42 PM
Update Fields Status Completed Location Front Lot Hat # Reference #	
<input checked="" type="checkbox"/> Repair Order Printed <input type="checkbox"/> Invoice Printed <input type="button" value="Print Worksheet"/> <input type="button" value="Cancel"/> <input type="button" value="OK"/>	

6. Click on **OK** to save.

The WIP screen is visible again with Invoice (White, James) highlighted.

7. Double-click (**Alt + O**) to open the White Invoice again.

NEXT: Apply Payments & Post the Invoice

Apply Payments & Post the Invoice

James White 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.

To Pay/Post Invoice:

1. Click on **Pay/Post Invoice (Alt + Q)** 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.
2. Enter Payment Type: 'V' selects **(Visa) + Authorization #: 558163**

Note: The Authorization # is filled in automatically with shops with Integrated Payments.

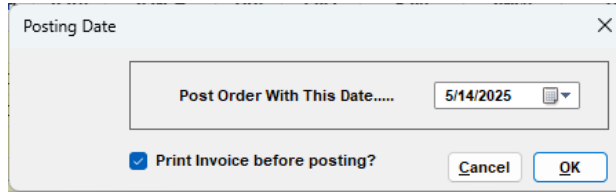
3. Click the **Pay** button.

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.

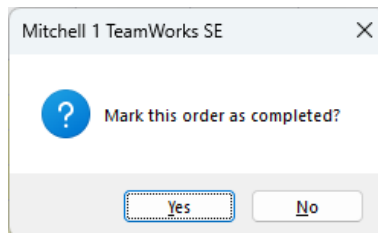


5. Click to place a check in the **Print Invoice before Posting** checkbox. This box only needs to be checked once; the system will *remember* this preference.
6. Click on **Ok** to continue the process of Printing and Posting.
7. Depending on system settings, there may be further Validations; just click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

8. You are prompted to **Mark this order as completed**. Click **Yes**.



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

Job View Invoice

Print Preview

Print Quick Print Scale Orientation Size Find Thumbnails Bookmarks Editing Fields First Page Previous Page Next Page Last Page Many Pages Zoom Out Zoom Zoom In Page Color Watermark Page Background Exp... Close

Parameters

Include Header Yes
 Include Comment Yes
 Include Signature Line Yes
 Show Labor Hours Yes
 Show Part Numbers No
 Print in Color Yes
 Show Revisions on INV Yes
 Show Technicians Yes
 Show Labor Rate No
 Show Date Printed Yes
 Show Symptoms Yes
 Show Tax Breakdown No

Reset Submit

Forward Thinking Automotive
 1115 Main St
 Beverly Hills, CA. 90210
 Phone: 858-391-5000 Fax: 858-555-1312

Invoice # **008776**
 Original Est # 2370

Invoice **Paid Balance Due: \$0.00**

White, James **2018 Acura - NSX**
 1544 Kingsland Way 3.5L V6 (213CI) VIN(Not Available) Work Complete: 06/12/2025
 Poway, CA 92064 VIN: License Plate: 2BTX143 CA Service Advisor:
 Home: 888-724-6742 Odometer: In 45,657 Customer ID: 6199
 Printed Date: 06/12/2025

Type	Description	Qty/Hr	Sale	Total
Diagnose air conditioning system				
Labor	Diagnose air conditioning system	1.00 hr		\$60.00
	Symptom: Air conditioning is not cooling properly			
Labor	A/C Recharge & Leak Test System	1.00 hr		\$60.00
Part	Freon	1.00	\$24.00	\$24.00
Parts: \$24.00	Labor: \$120.00	Tax: \$1.86	Total: \$145.86	
Brake Inspection - 4X4				
Labor	Brake Inspection	0.60 hr		\$36.00
Parts: \$0.00	Labor: \$36.00	Tax: \$0.00	Total: \$36.00	
Lube Oil Filter 4 Qt				
Labor	Lube, Oil & Filter LABOR	0.20 hr		\$6.50
	Change Oil & Oil Filter			
Part	Oil Filter - Fram Double Guard	1.00	\$12.99	\$12.99
Part	Eng Oil - 10w40 Castrol	4.00	\$1.50	\$6.00
Parts: \$18.99	Labor: \$6.50	Tax: \$1.47	Total: \$26.96	

Page 1 of 1 100%

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

Posting the Invoice permanently removes it from Work in Progress but the Invoice is permanently stored in Order History for future reference.

How to find the James White Invoice in the History file:

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

Find History Record

Invoice # 8772 Posted Up To: Wednesday, May 14, 2025 ☐ Save Search

Invoice	Posted Date	Printed Date	Name	Vehicle	Amount
008772	05/14/2025	05/14/2025	White, James	2018 Acura NSX Base	299.85
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

Cancel View Record

11. The White, James invoice should be the top entry in the grid. Double-click on the invoice or click **View Record** to open history for the customer.

This allows access to view **Detail**, **Print** or **Un-Post** an Invoice.

Mitchell 1 TeamWorks SE

File Edit View Configurations Utilities Inventory History Training Videos CRM Help

History Detail

White, James

2018 Acura

NSX

2BTX143

CA

Type

INV

Diagnose air conditioning system

Labor Diagnose air conditioning system

Labor A/C Recharge 8

Part Freon

Total: \$145.86

Brake Inspection - 4X4

Labor Brake Inspection

Invoice

Estimate

Copy to Clipboard

Un-Post Invoice Search Criteria: None

Labor Item - VIEW (No Changes Saved)

Parts Labor Notes Sublet

Work Requested Diagnose air conditioning system

Work Performed

Charged Hrs 1.00 Category AC/Heating/Cooling

LaborTotal \$ 60.00 Account Labor Revenue

Est. Parts \$ 0.00

☐ Non-Standard Labor Rate ☐ No Commission ☐ Fixed Commission

Technician	Pay Hours	Act. Hours	Comm.
1 Charbonneau, Wayne	1.00	1.00	Var.
2 <None>	0.00	0.00	Var.
3 <None>	0.00	0.00	Var.

Totals for Technician(s) 1.00 1.00

Tax Cust Type Symptom Cancel Save Done

Invoice 008776

45657 Out 0

0.0 Out 0.0

Price Total

\$60.00 Char

\$60.00 Char

\$24.00 \$24.00 Diver

\$36.00 Char

Tax 3.33 Total 208.82

3.33 208.82

Fax Print Done

Email Print Search Detail Exit

Ready m1s Kearly Manager SE Demo 9.2.0.4481 TIM

12. Select the first line item **Diagnose air conditioning system** and **Detail** to view the Details of the line item (Labor) from the Posted Invoice in History.

Note: This step is for informational purposes only.

13. Press your **Esc** key to close the labor item and then **Esc** again to close History Detail. (Clicking **Done** or the **x** on the dialog box closes the window as well.)

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 **ja** in the **First** (name) field and select James, White (any name will do)
2. Click on Vehicle (**Alt + V**) tab.

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**.
- Type: **Test drive: shifting not smooth; perform trans service 1st**.
- Uncheck the **Create Future Appointment checkbox** (if checked) as we don't want to schedule the appointment yet.

- 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.

- Click on **Add** button (**Alt + A**) again to enter a second Recommendation.
- 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.**

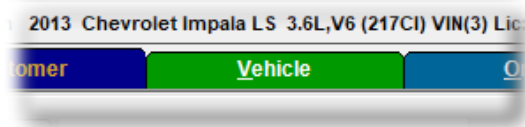
- Click **OK** to save this Recommendation.

The two recommendations display.

Date	Need by	Description
6/13/2025	6/13/2025	Test drive: shifting not smooth; perform trans service 1st.
6/13/2025	6/13/2025	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.



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:

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..

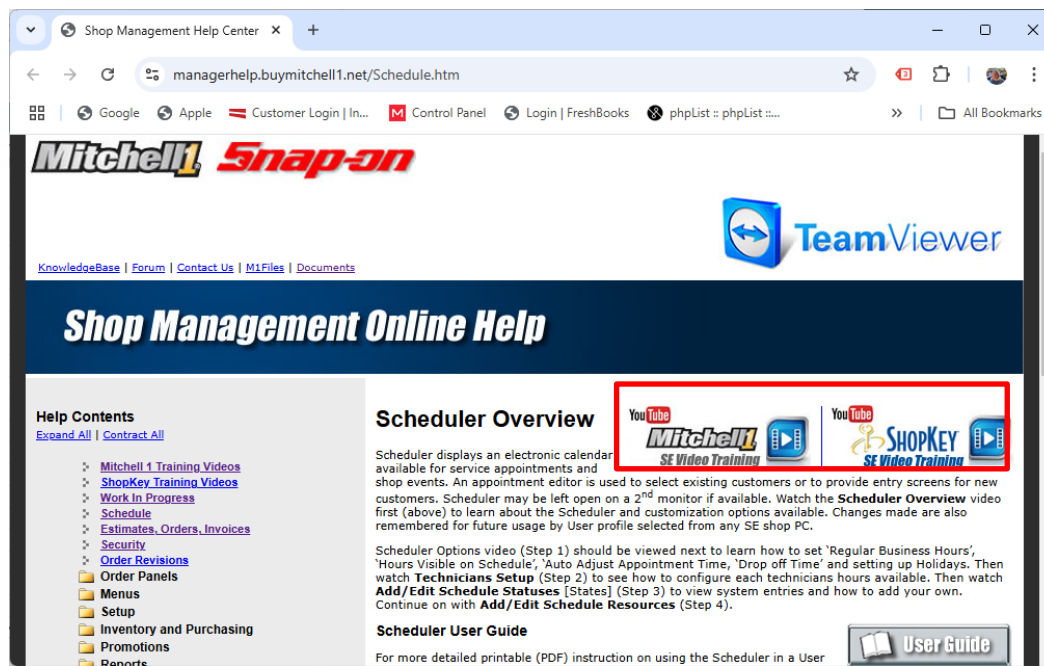
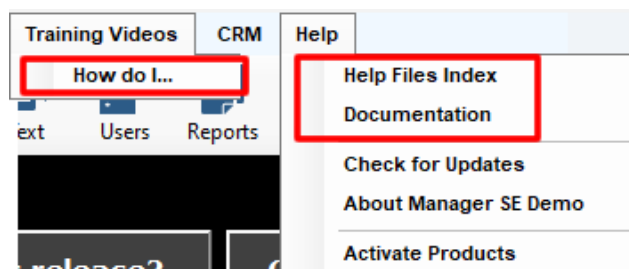
Self-Instruction

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.)

The screenshot displays the Mitchell1 TeamWorks SE software interface. The 'Inventory List' window is open in the background, showing search criteria and a list of parts. Overlaid on this is the 'Add New Part' dialog box. In the dialog box, the 'Part No.' field contains '70-5YR' and the 'Part Code' field contains 'bat'. The 'Description' field is 'Battery'. The 'Size' field is empty. The 'Manufacturer' dropdown is set to '<none>'. The 'Category' dropdown is set to 'Battery'. The 'Account' dropdown is set to 'Parts Revenue'. The 'Location' field is empty. The 'Attached' field is set to '0'. The 'Comment' field is empty. The 'Re-Order Point' field is set to '1.00' and the 'Stocking Level' field is set to '3.00'. There are checkboxes for 'Tire', 'No Commission', 'User Entered Price \$', 'Excise Tax', and 'Taxable' (which is checked). The 'On Hand' field is set to '2.00' and the 'Last Cost \$' field is set to '43.60'. The 'Price \$' field is set to '0.00', the 'List \$' field is set to '0.00', and the 'Margin %' field is set to '0.0'. At the bottom of the dialog box, there are buttons for 'Alt Sale', 'Alt Parts', 'Sales', 'Core', 'Fee', 'Vendor' (highlighted with a red box), 'Supersede', 'Cancel', and 'OK' (highlighted with a red box). The background window shows the 'Inventory List' screen with search criteria and a list of parts. The status bar at the bottom of the software shows 'Ready', 'm1skeyar', 'Manager SE Demo', '9.1.0.3253', 'TIM', and a taskbar icon.

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

Vendors For This Part

Vendor #1
 Interstate Battery (BATT) Detail
 Phone: 619-569-7541 : 619-555-1212

Vendor #2
 <none> Detail
 Phone:

Vendor #3
 <none> Detail
 Phone:

Add Vendor Cancel OK

- 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?

Yes No

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

Inventory List

Search Criteria:
 Vendor < All >
 Category < All >
 Manufacturer < All > Line Code < All >
 Part No.
 Description
 Size
 Limit results 1000

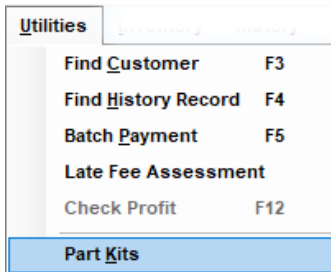
Clear

Part No.	Description	Size	Line Code	Price	On Hand	On Order	Vendor
70-5YR	Battery			87.20	2.00	0.00	Interstate Battery

Print Cgpy Update Add Edit Delete Done

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

Creating a Part Kit

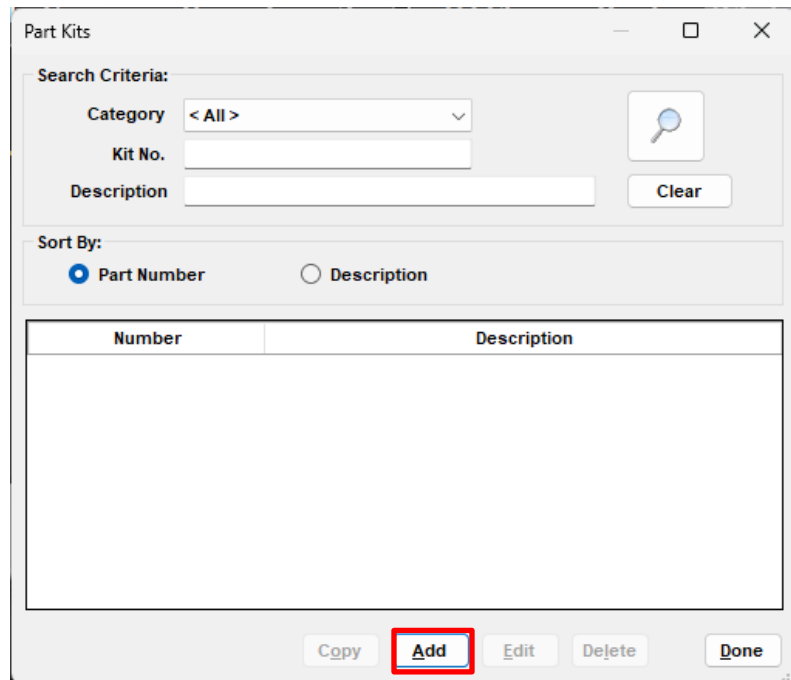


Part Kits save time by grouping any number of items that are frequently sold together. (Examples: tune-up parts, lift kits, etc).



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

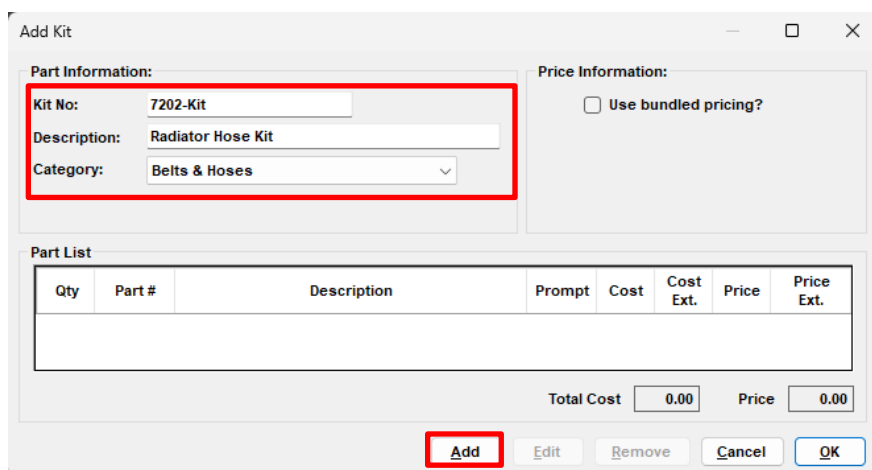
1. From top menu, click on **Utilities, Part Kits**. This is where you go to add, edit, or delete a Part Kit. In this Exercise we will be adding a new Part Kit.



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)



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

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

Enter the following: Part No.: **7202**

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

The screenshot shows the 'Inventory List' window. In the 'Search Criteria' section, 'Part No.' is set to '7202'. The 'Category' is 'Belts & Hoses'. A red box highlights the 'Part No.' field. Another red box highlights the 'Search' icon (magnifying glass). Below the search criteria, there is a table with the following data:

Part No.	Description	Size	Line Code	Price	On Hand	On Order	Vendor
7202	Radiator Hose			24.95	3.00	0.00	Rapid Fire Auto Parts

At the bottom of the window, the 'Transfer' button is highlighted with a red box.

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 2nd part into kit. Click on 'Clear' to add a part from a different category. **Clear**
- With Category cleared, enter 'anti' in Description.
- Click on **Search (press Enter)**; 'afc1/2 Anti-Freeze Coolant 1/2 Gal' is located automatically.

The screenshot shows the 'Inventory List' window. In the 'Search Criteria' section, 'Description' is set to 'anti'. The 'Category' is cleared. A red box highlights the 'Description' field. Another red box highlights the 'Search' icon (magnifying glass). Below the search criteria, there is a table with the following data:

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

At the bottom of the window, the 'Transfer' button is highlighted with a red box.

- 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 2 units.

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 .

Add Kit

Part Information:
 Kit No: 7202-Kit
 Description: Radiator Hose Kit
 Category: Belts & Hoses

Price Information:
☐ Use bundled pricing?

Edit Kit Line

Part
 afc1/2
 Anti-Freeze 1/2 Gal
 Cost \$ 5.95
 Price \$ 11.90

Quantity 2.00 Prompt On ☐
 If the kit is using Bundled Pricing, selecting 'Prompt On Use' will have no effect.

Cancel OK

Part List

Qty	Part #	Description	Price Ext.
1.00	7202	Radiator Hose	24.95
2.00	1012	Hose Clamp - No.	2.00
1.00	afc1/2	Anti-Freeze 1/2 Gal	11.90

Total Cost 23.05 Price 38.85

Add Edit Remove Cancel OK

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

Edit Kit

Part Information:
 Kit No: 7202-Kit
 Description: Radiator Hose Kit
 Category: Belts & Hoses

Price Information:
☐ Use bundled pricing?

Part List

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 Cost 30.00 Price 52.75

Add Edit Remove Cancel OK

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

Utilities	
Find Customer	F3
Find History Record	F4
Batch Payment	F5
Late Fee Assessment	
Check Profit	F12
Part Kits	
Canned Jobs	

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.



- Using the menu bar at top of screen, click on **Utilities, Canned Jobs**.
- 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.: **1.20**
- Category: **AC/Heating/Cooling**
- Account: **Labor Revenue**

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

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

Now begin adding Part items to the Canned Job.

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

Order Item Entry - PARTS

Parts	Labor	Notes	Sublet
Part No.	afc1/2		
Description	Anti-Freeze 1/2 Gal		
Quantity	2	Size	<input type="checkbox"/> Tire
Unit Cost \$	5.95	Vendor	Rapid Fire Auto Parts (RFAP)
Unit Price \$	11.90	Manufact.	<none>
Unit Sale \$	11.90	Category	Fluids/Sprays/Sealers
Unit List \$	0.00	Account	Parts Revenue
QOH	4.00	Technician	
Margin %	50.0	Ref/Inv #	
<input type="checkbox"/> No Commission <input type="checkbox"/> Fixed Commission Commission \$ Var.			
<input type="checkbox"/> User Entered Sale \$ <input checked="" type="checkbox"/> Inventory Part <input type="checkbox"/> Core			
<input type="checkbox"/> Confirmed <input type="checkbox"/> Display Off			
Inventory	Tax	Cust Type	Cancel Save Done

- Click **Save (Alt + V)**. This keeps the entry box open for the next part selection or entry.
 - Enter the following: Part No.: **bar1**
 - Press **Tab** key and part details fill in automatically. (Quantity: 1 is fine)
 - 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 #

Description

Category

Year

Make

Model

☐ Include in Quick Menu

Part Kits Attached to this Canned Job

Detail Add Remove

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>	
	0.00	Anti-Freeze 1/2 Gal	2.00	23.80	11.90	11.90	0.00	afc1/2		<None>	
	0.00	Additive - Cooling Sys Lub...	1.00	10.68	10.68	10.68	0.00	Bar1		<None>	
	0.00			0.00	0.00	0.00	0.00				

Parts Labor Notes Sublet Estimator Total Sale Detail Exit

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.

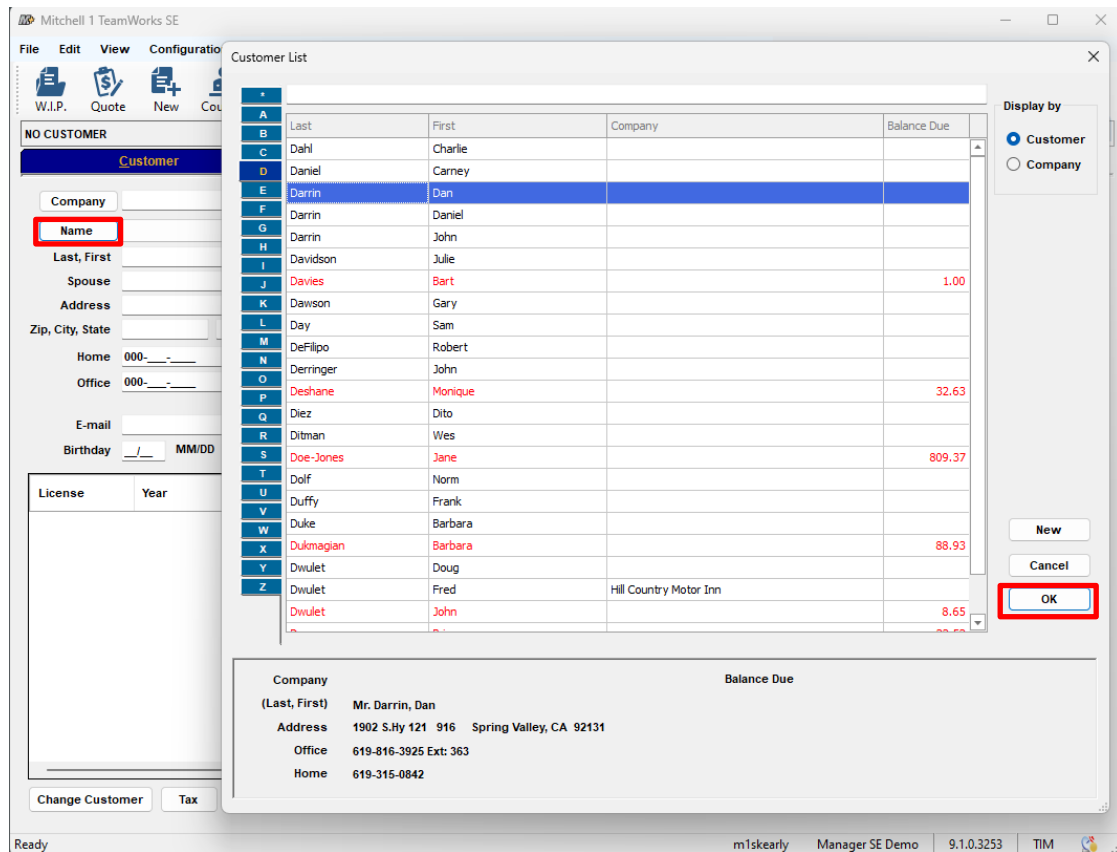


1. Click on **Counter** (or press F11 key) to begin.
2. Click on **Parts** (Alt +P).
3. Type "wb1". A popup listing of all parts beginning with WB1 is displayed. Choose WB14 from the list. (Part record details fill in)
4. Change **Quantity: 2** and press tab.

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.

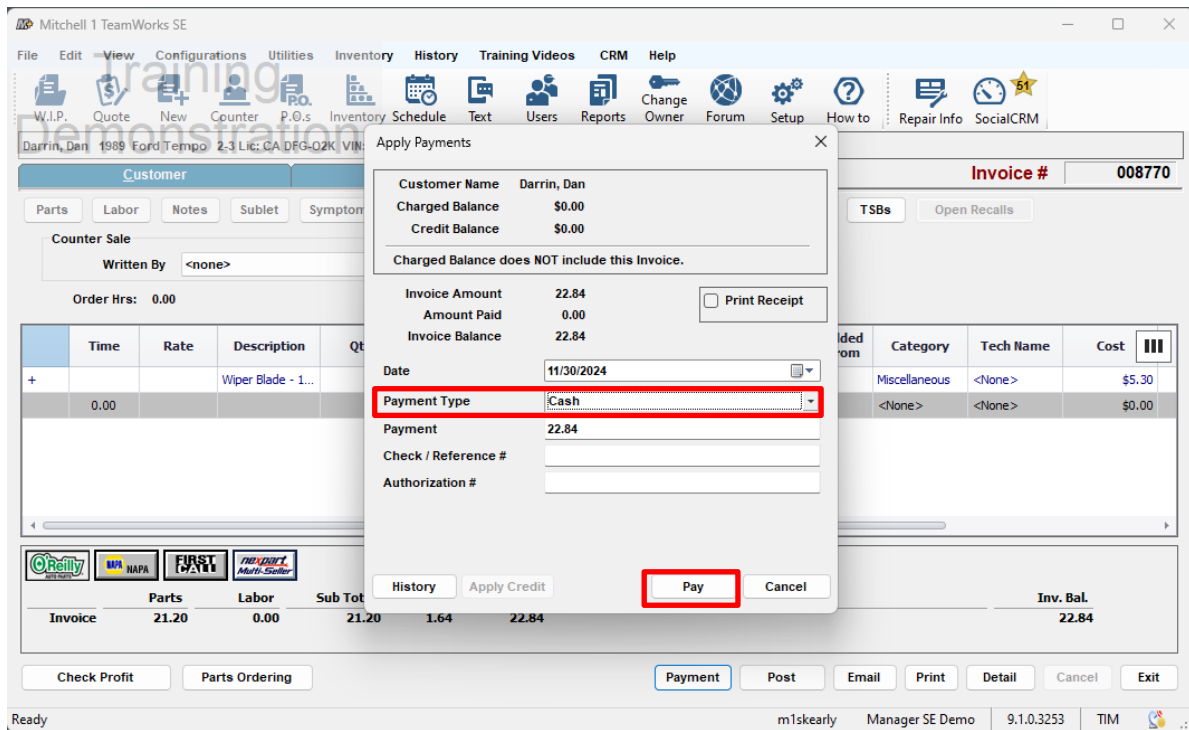
6. Click on the **Customer** tab to access list of existing customers.
The Customer screen displays for this Counter Sale (no name included yet).
7. Click on **Name (Alt + A)** to open the list of existing customers.



- 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.

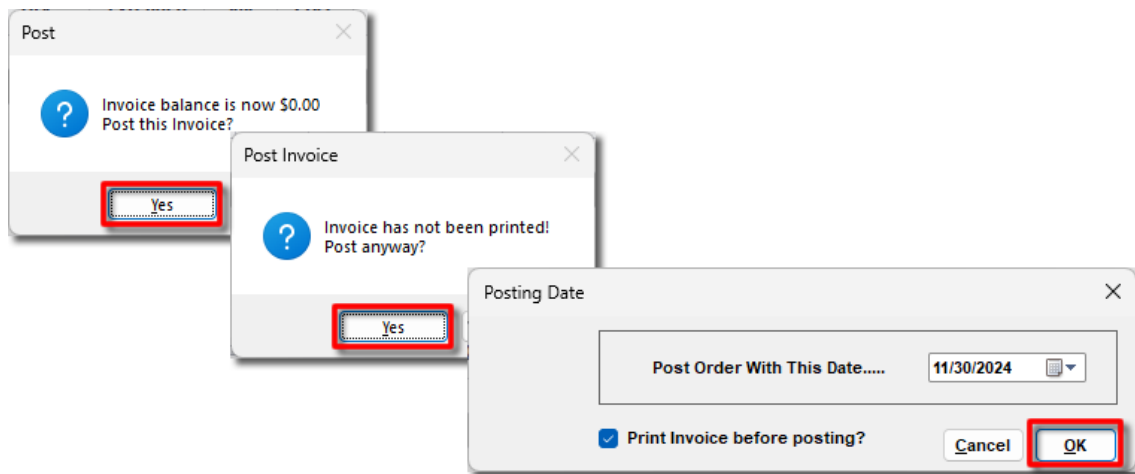
- Click on Order (**Alt + O**) to Pay, Print & Post this Counter Sale.
- Click on Payment to process the customer payment. In Payment Type, type a '**C**' (shortcut for Cash payment type or select Cash from the menu.



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)



The Counter Sale displays in Print Preview [next page]

REPORTS

SAP CRYSTAL REPORTS

Main Report

Counter Sale #: 0008770
Print Date : 11/30/2024

SOLD TO: Darrin, Dan
1902 S.Hy 121 916
Spring Valley, CA 92131
Office [619-816-3925 363] --- Home [619-315-0842]

Phone - 000- - Fax - 000- -
For: 1989 Ford - Tempo
Vin # :IFAPP31X6KK124598
Lic #: DFG-O2K - CA
Unit # :

Qty	Part Number	Part Description	Sale	Line Total
2.00	WB14	Wiper Blade - 14" Triple Edge Refill	10.60	21.20

Payment Method: [Payments - Cash - \$22.84]

Labor : \$ 0.00 Parts Total : 21.20 Tax : \$ 1.64 Total: \$ 22.84
Less Payments: 22.84
Remaining Due: \$0.00

A buyer of this product has the right to have this product serviced or repaired during the warranty period. The warranty period will be extended for the number of whole days that the product has been out of the buyer's hands for warranty repair. If a defect exists within the warranty period, the warranty will not expire until the defect has been fixed. The warranty period will be extended if the warranty repairs did not remedy the defect and the buyer notifies the manufacturer or seller of the failure of the repairs within 60 days after sale.

Current Page No.: 1 Total Page No.: 1 Zoom Factor: 100%

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).

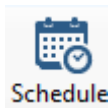
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Mark this order as printed?

Yes No

14. Click on Yes (**'Y' or Enter**) to mark Counter Sale as printed.
The Counter Sale is closed and posted to History.

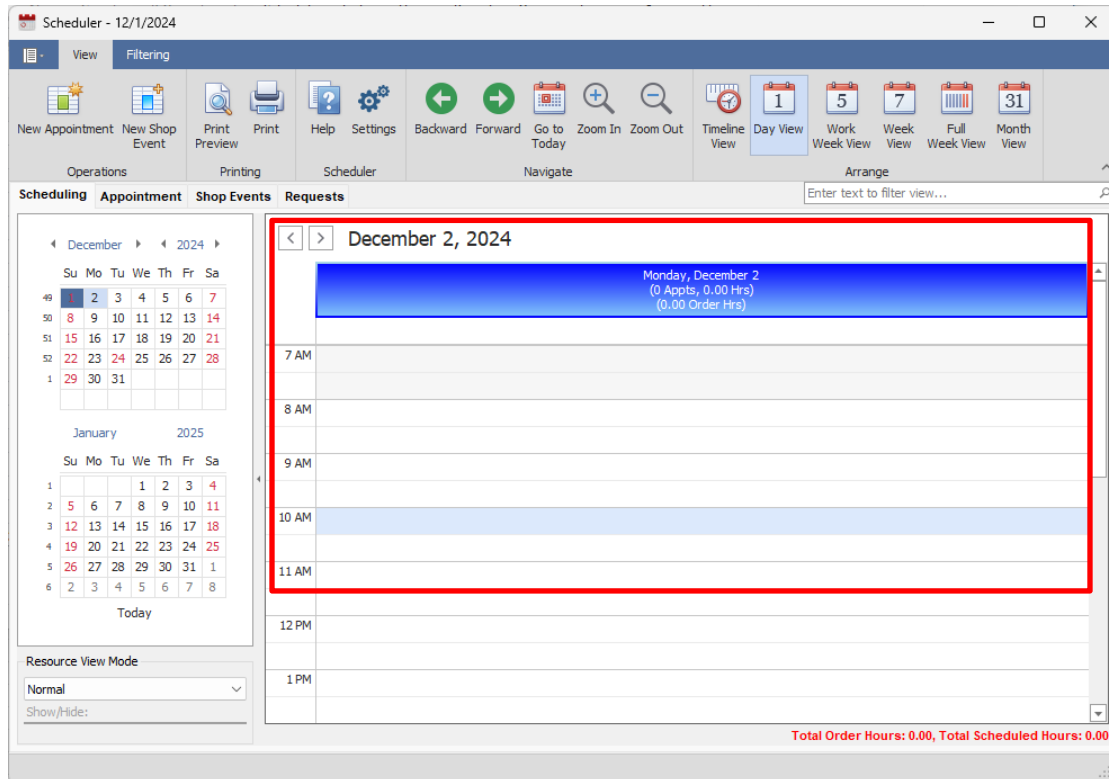
Create an Appointment



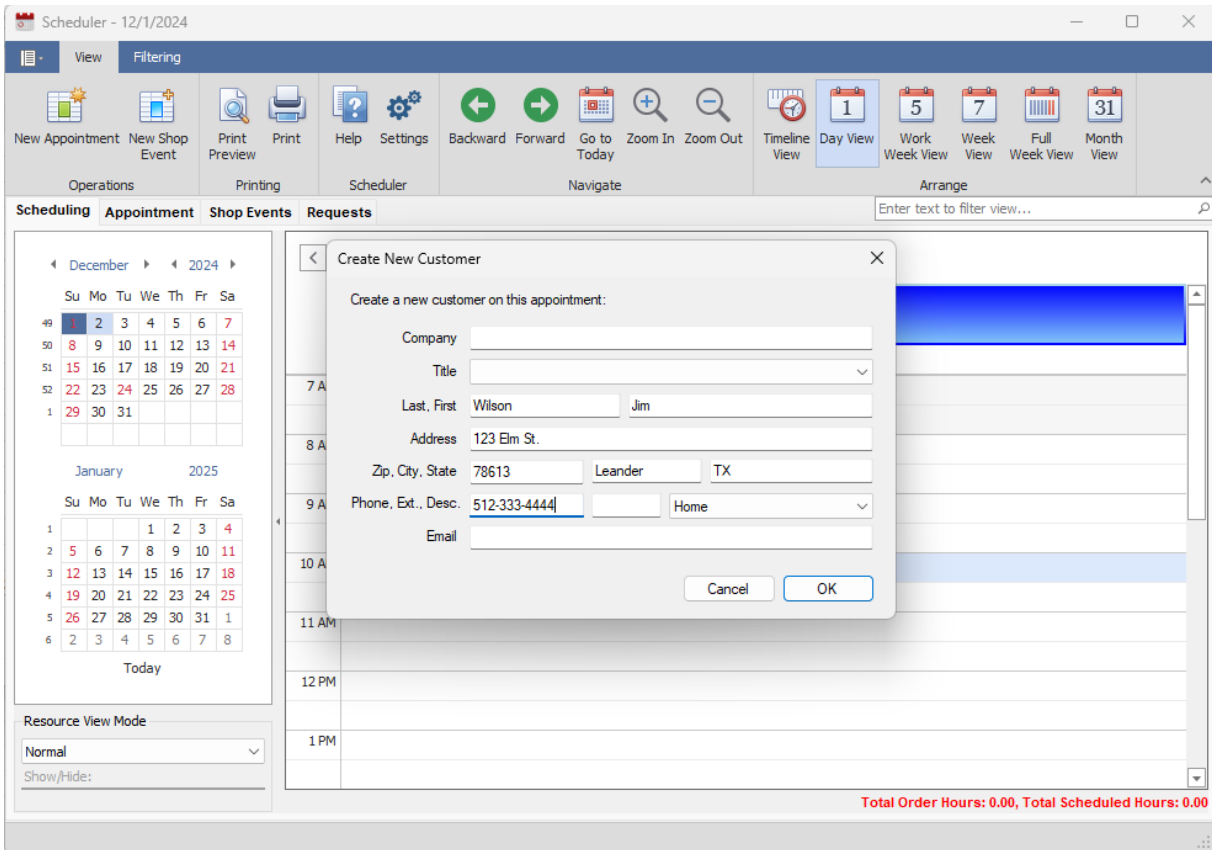
Scheduler events (appointments) are created when you start an Estimate or Repair Order. The exercise below demonstrates how you can create an appointment for a customer in advance of their visit to the shop. The subsequent appointment can be converted to EST / RO from the Appointment Editor screen.



1. Click the Schedule button to open the Scheduler.



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**.



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

VIN Decode

License FJB 3831 State/Prov TX

Year / Make 2012 Toyota

Model Tundra Limited

Body Style 4D Pickup Extra Cab

Engine / Fuel 5.7L, V8 VIN(W) Gas/Ethanol

Transmission

Drive Type

Brake 4-Wheel ABS

GVW 6200-7200

Unit # Fleet #

Color

Driver View/Edit Driver: <None> [Vehicle Color Definition](#)

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

Save & Close Create... Delete Cancel Auto Adjust End Time Match Drop-Off to Start Time Reminder None Send Text

Subject Wilson, Jim

Drop Off 12/02/2024 10:00 AM Scheduled Hours: 3.00 Order Hrs: 0.00 Appointment State Open (OPEN)

Promised 12/ 2/2024 5:00 PM Service Advisor <None>

Starts 12/ 2/2024 10:00 AM Technician <None>

Ends 12/ 2/2024 1:00 PM All day event Resource <None>

Shop Comments ☒ Print on order as Note Customer Comments/Special Requests ☒ Print on order as Note

Customer - Wilson, Jim

Phone: (Home) 512-333-4444 Prefers: <None >

Email: --

Company: --

Address: 123 Elm St. Leander, TX 78613

Membership #: --

Vehicle - 2012 Toyota Tundra Limited

0 Recommendations

VIN: --

License Plate: FJB3831 Color: --

Engine: 5.7L, V8 (346CI) VIN(W)

Unit #: --

Hat: --

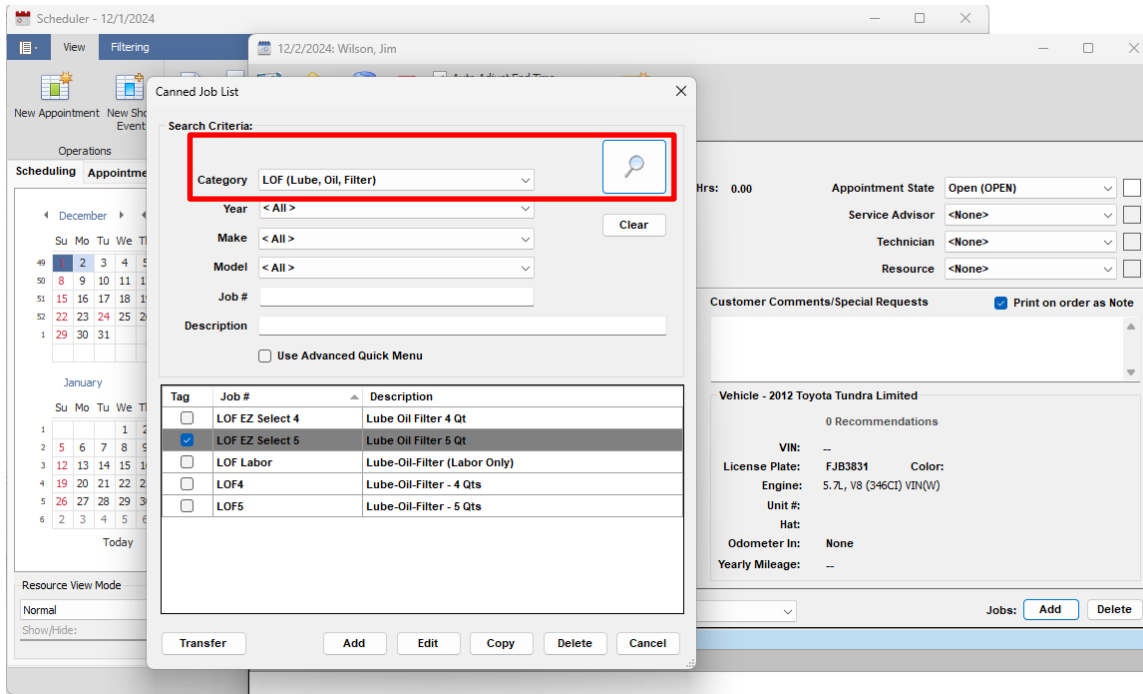
Odometer In: None

Yearly Mileage: --

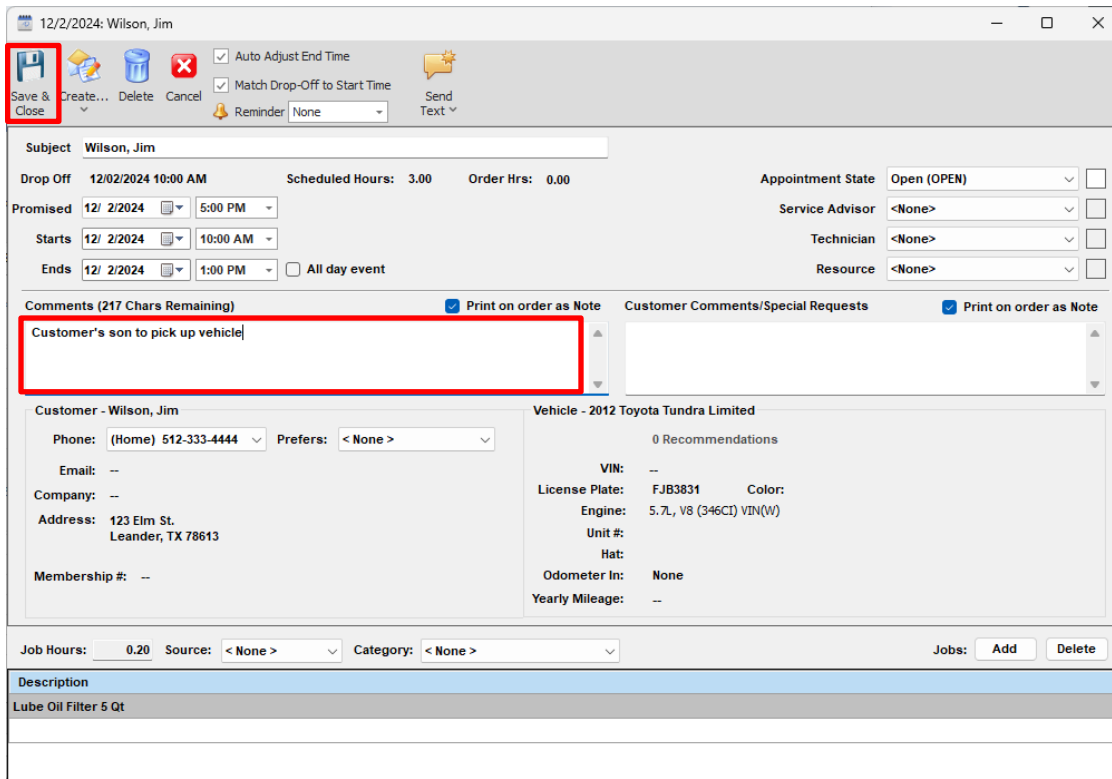
Job Hours: 0.00 Source: <None > Category: <None > Jobs:

Description

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

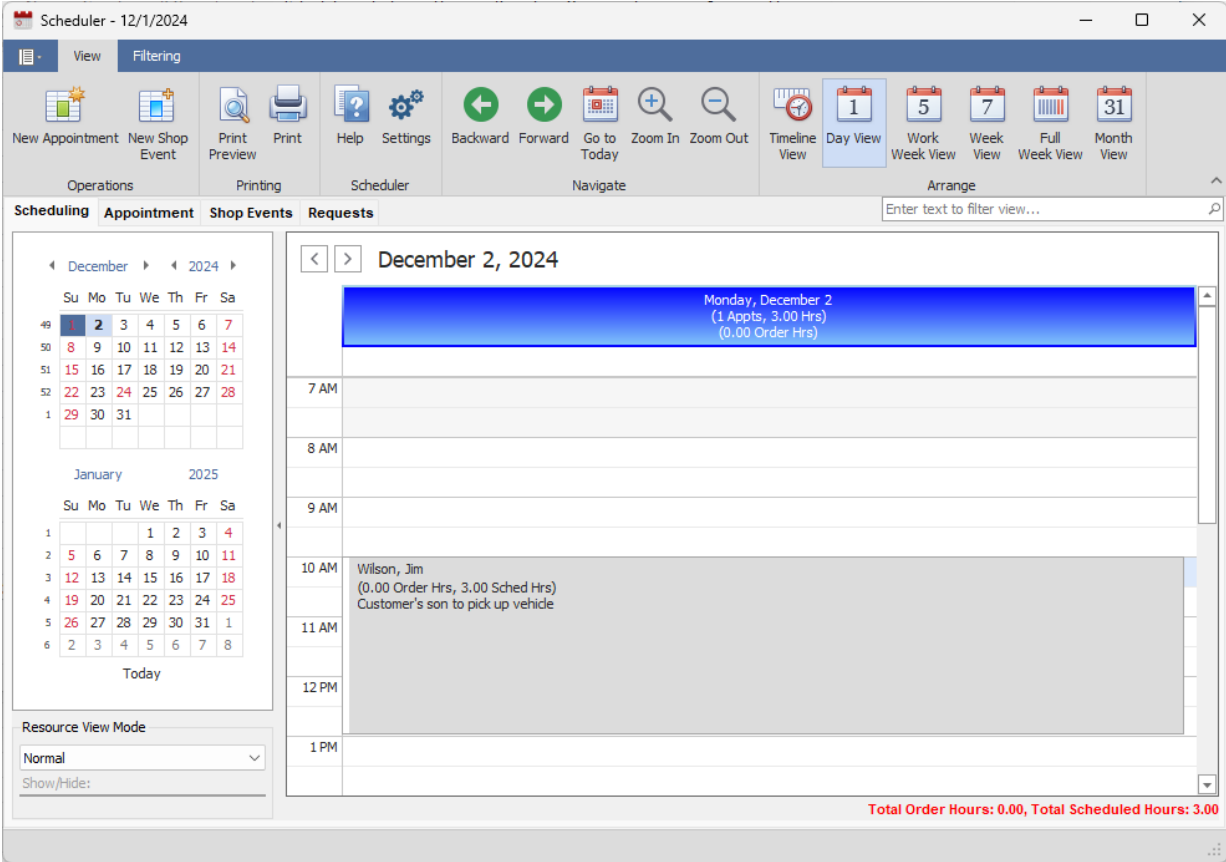


14. Choose **LOF** as your Category and click the **Search** button. Matching jobs displays in the lower grid area.
15. Choose **LOF EZ Select 5**.
16. Click **Transfer**. The Canned Job is added to the Appointment detail.
17. Add a note **Customer's son to pick up vehicle** to the Shop Comment section.



18. Click **Save and Close**.

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.

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File Edit Find History Record

Invoice # 8757 Posted Up To: Monday, December 2, 2024 ☐ Save 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

Cancel View Record

Reset Layout Columns Send Text Purge Ests Display Appointment Payment Post Detail Order

Ready m1skearly Manager SE Demo 9.1.0.3253 TIM

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

Customer Vehicle History

Display for: ☐ Customer ☒ Vehicle ☐ Show Categories

Type	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: ☐ Customer ☒ Vehicle ☒ Show Categories

Type	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, Jess
INV		12/15/2006	8757	0	0.0	4KJT698	CA	1994 To...	Filters (Oil, Fuel, Air)	James, Jess
INV		12/15/2006	8757	0	0.0	4KJT698	CA	1994 To...	Fluids/Sprays/Sealers	James, Jess
INV		11/05/2006	8756	0	0.0	4KJT698	CA	1994 To...	Maintenance	James, Jess
INV		07/07/2005	438	68261	0.0	4KJT698	CA	1994 To...	Attached Items	James, Jess
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

Invoice Vehicle

Year < All >
Make Toyota
Model
Word Search A/C

Posted From 1/ 1/2005
To 12/31/2005

Clear

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 View 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!"

Re: Scheduling

by allamerican1 » Sat Jul 19, 2014 9:15 pm

Thank you all for the good help! I think I waited too long to utilize the forums.

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

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

Product Supports

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 - Documents
 - Videos/Quizzes
 - ProDemand Live Training
- TruckSeries
 - Documents
 - Videos
 - TruckSeries Live Training
- Manager SE
 - Documents
 - Videos/Quizzes**
 - Manager Forum

Manager SE Training Videos

Our SE Shop Management videos are organized into five playlists with quizzes to serve as knowledge checks. Click on a Playlist, select 'Play All' to watch video clips, then take the associated quiz. A score of 85% or greater provides options to print or save a PDF copy of your own certificate.



Playlist - 1	Playlist - 2	Playlist - 3	Playlist - 4
Playlist - 1 Workflow & Features			
<div><div>▶ Play All</div><div>💡 Take Quiz</div></div>			
▶ Scheduler Overview		▶ Inventory Overview	
▶ Parts Ordering		▶ Symptoms	

