Fleet / VMRS User's Guide

Setting up and using Fleet / VMRS

MANAGER SE / SHOPKEY SHOP MANAGEMENTSE

VERSION 8.3.1.x UPDATE

August 2021

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Authored by Geoffrey Moore
Published in the USA by Mitchell 1

Fleet - Requirements

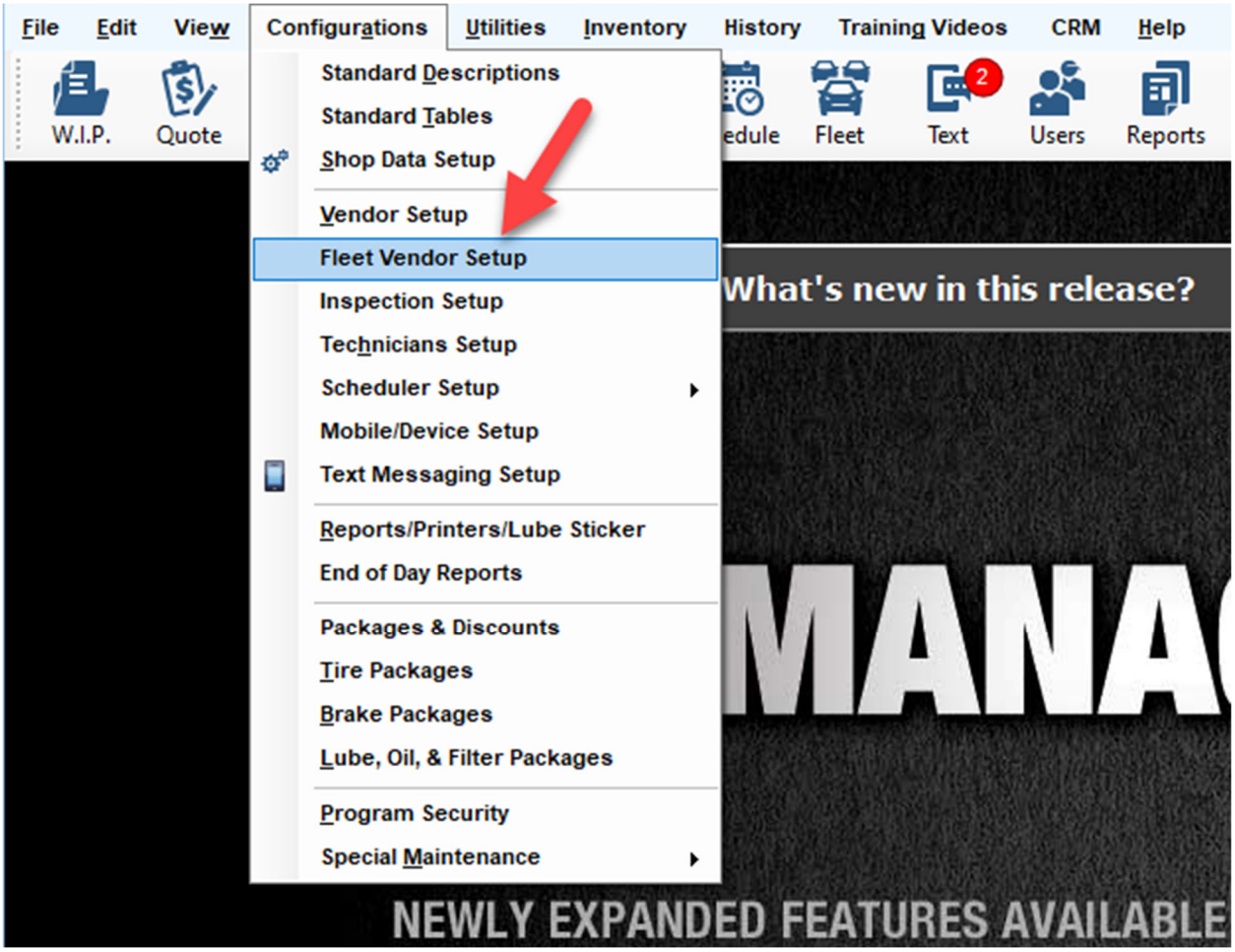
- Mitchell 1 / ShopKey SE version 8.3.1.x or higher

Fleet - Defined

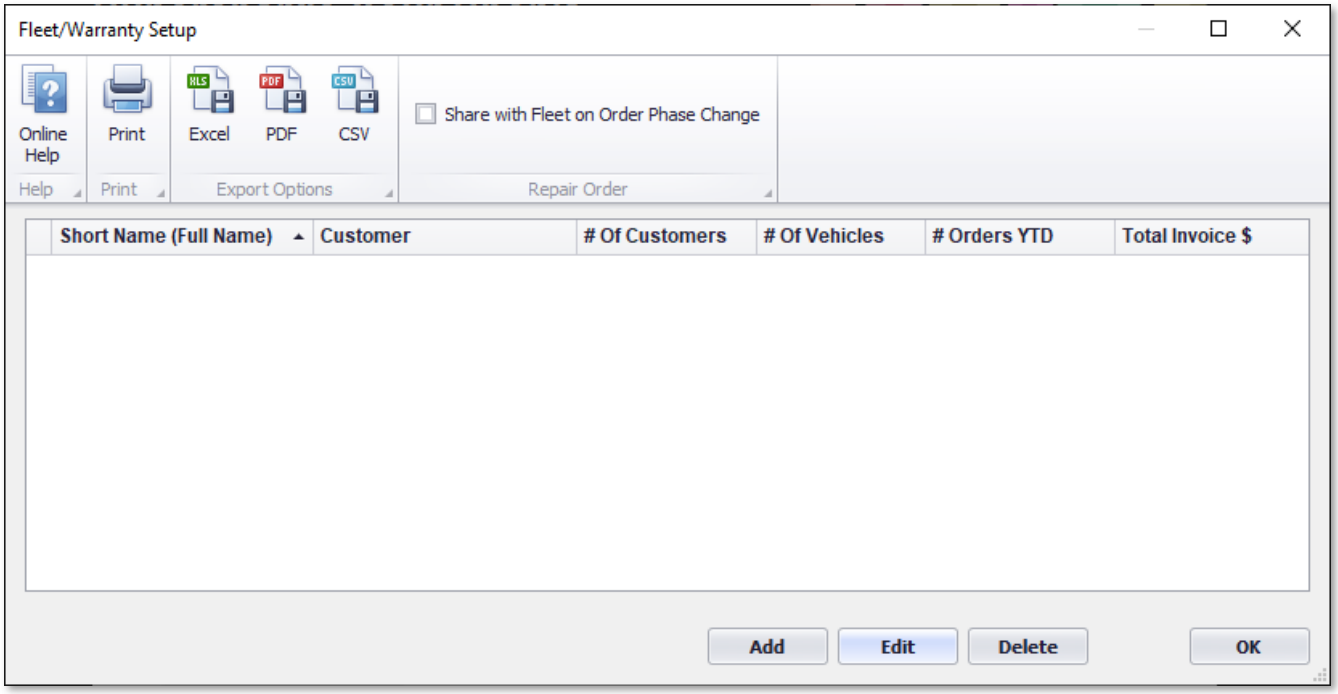
- Fleet Vendor configuration allows a shop to associate SE customer record(s) to an external fleet vendor for approvals of repair work and payments of shop invoices. The fleet vendors are setup as either offline (manual) or online (approvals, updates, payments are electronically transmitted).

Fleet - Setup

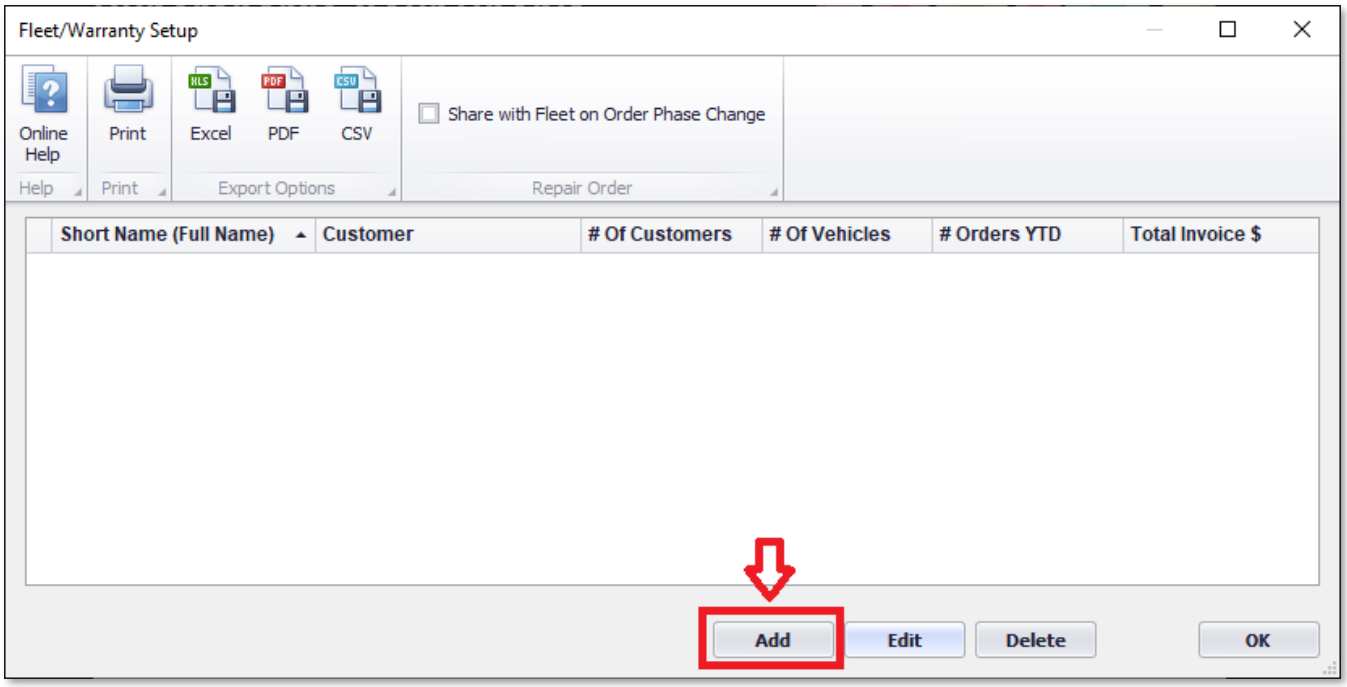
- To get started, open the **Configurations** menu. Then select **Fleet Vendor Setup.**



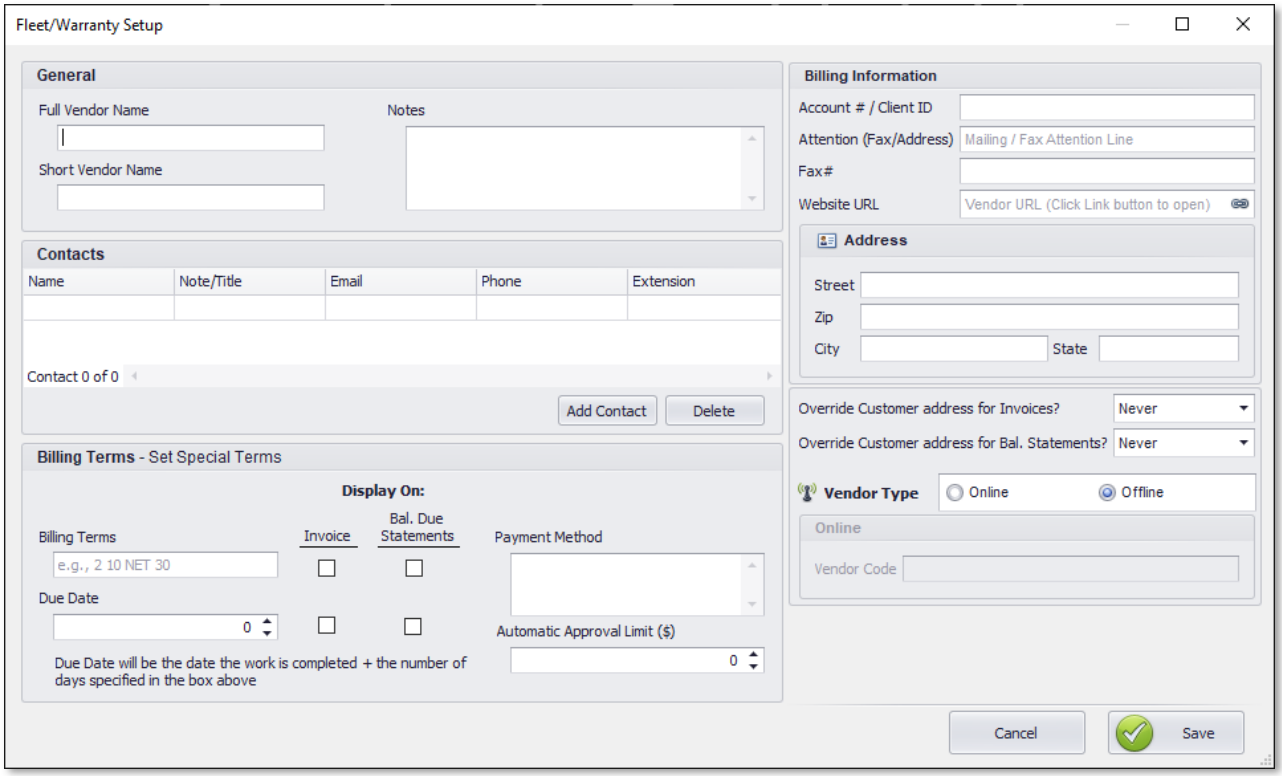
- The Fleet/Warranty screen is displayed. It will list fleet entries as they're saved.



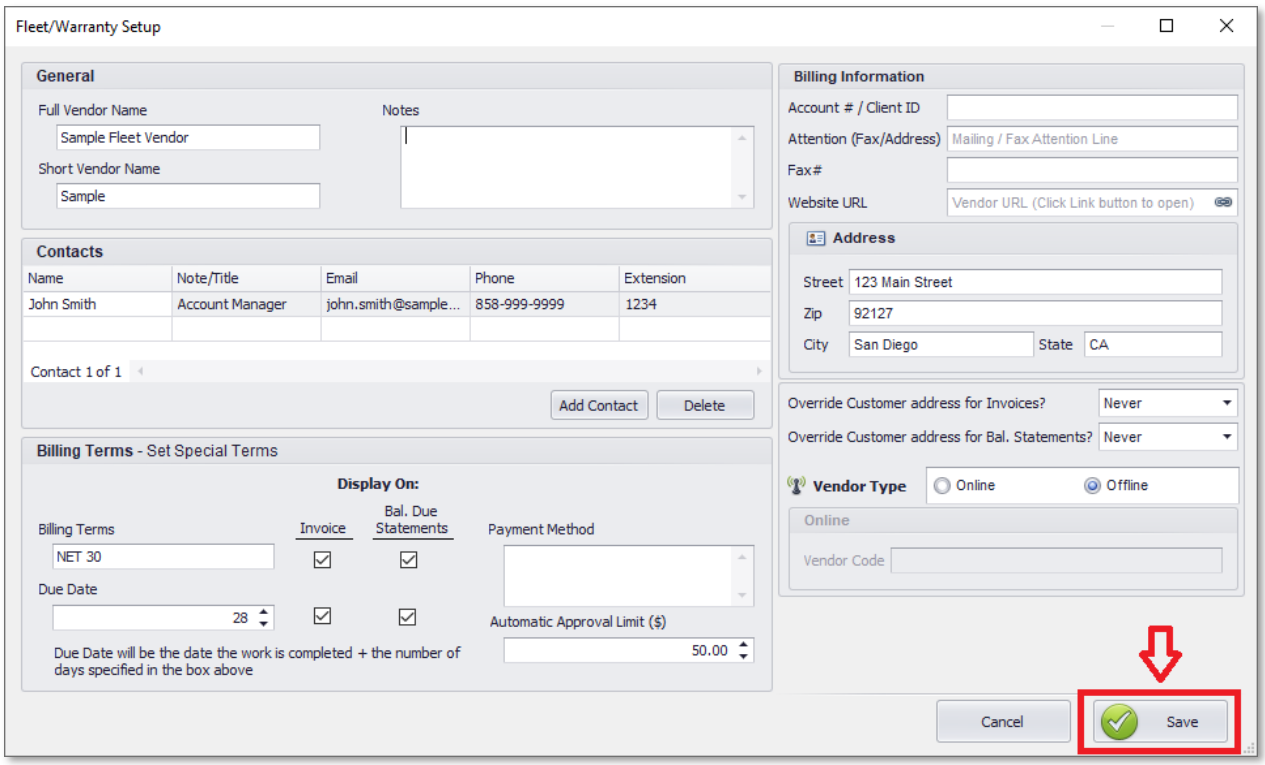
- To create a new Fleet Vendor, click on **Add**.



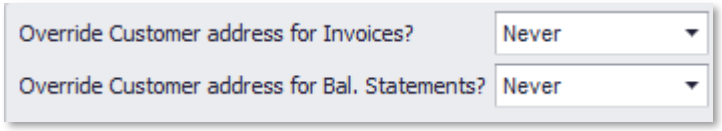
- The Fleet Vendor Setup screen provides workspace to define each Fleet entry.



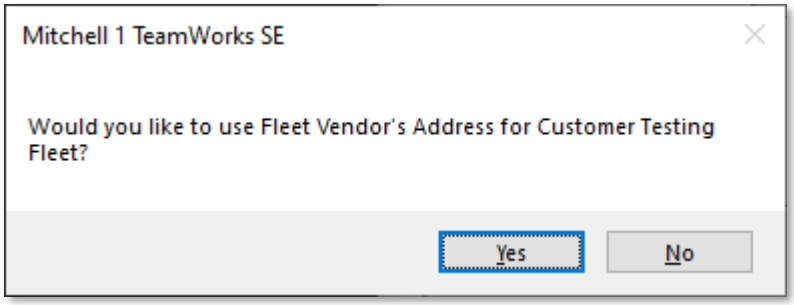
- Review sample Fleet Vendor below as a guide to create your entry. Then click **Save**.



- NOTE: It's possible to default the Fleet's address to be used in place of customer's address for SE Invoices and/or Balance Due Statements involving a Fleet vendor:

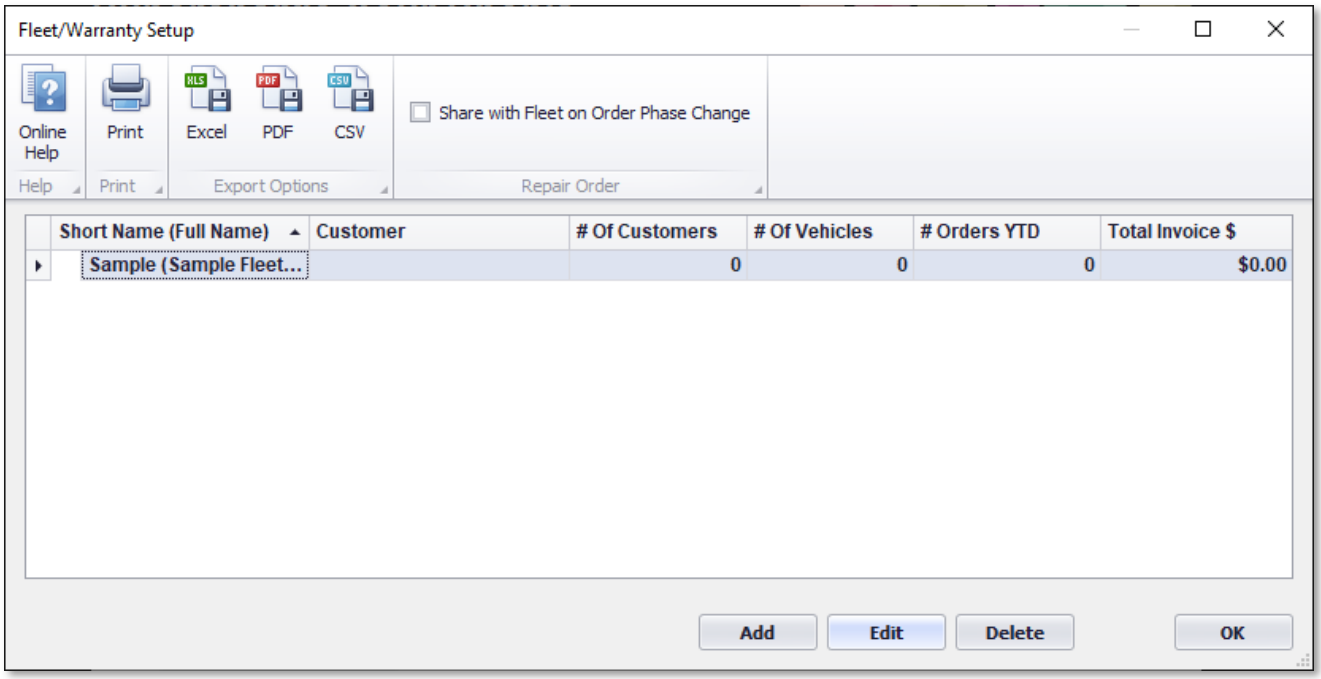


- Here are the options available for each setting:
  - **Always**
    - Always display Fleet Vendor's address instead of Customer's
  - **Never** *(default setting)*
    - Always display the Customer's address
  - **Prompt**
    - Triggers a prompt (below) to confirm which address to use

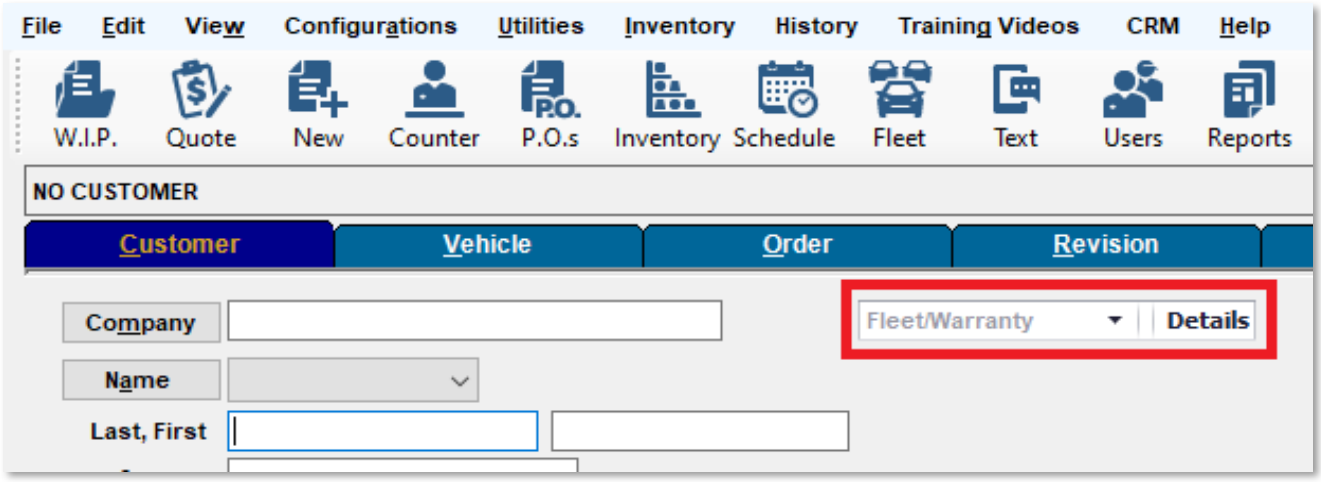


  - Refer to Fleet Documents (pages 10-13) for address variation examples.

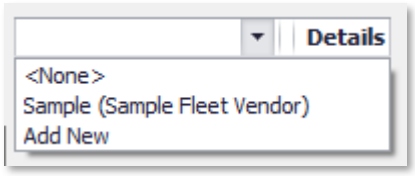
- Once a Fleet Vendor is saved, it will now be listed on the Fleet Setup screen.



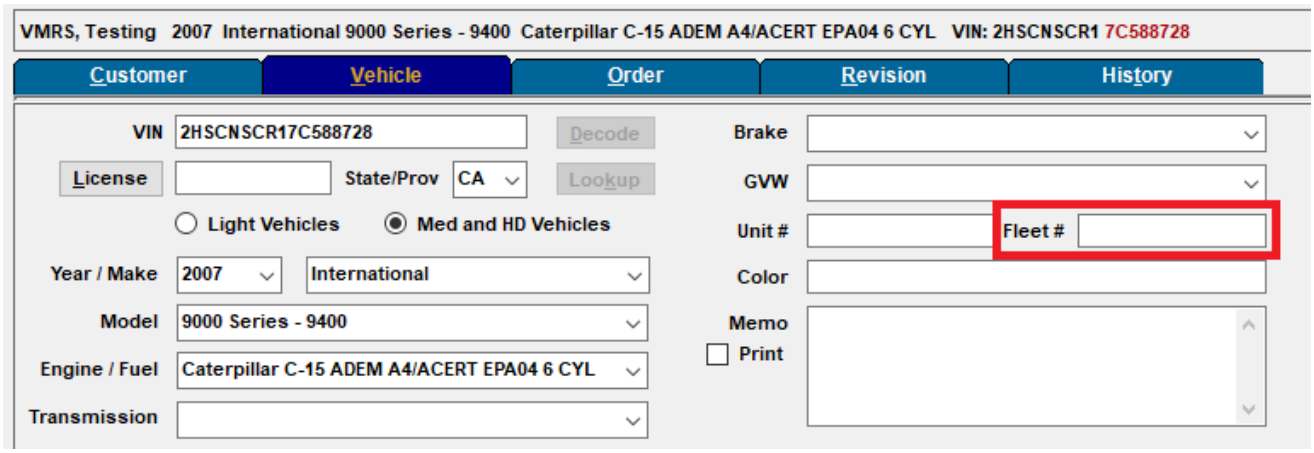
- Once at least one Fleet vendor has been saved in your SE system, the Customer screen will include see a new drop-down list of Fleet Vendors



- Select an existing Fleet Vendor (previously defined) or select the 'Add New' option as a shortcut to the workspace (see page 6) to define a new Fleet Vendor record.

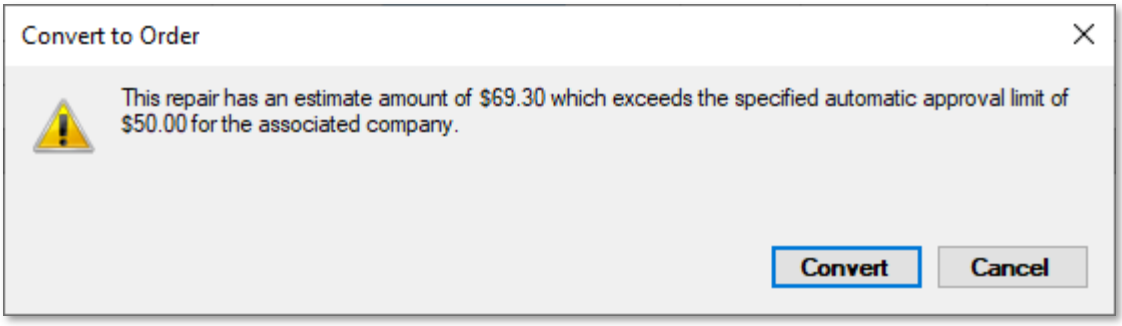


- The Vehicle screen will now include a new 'Fleet #' as a handy reference.



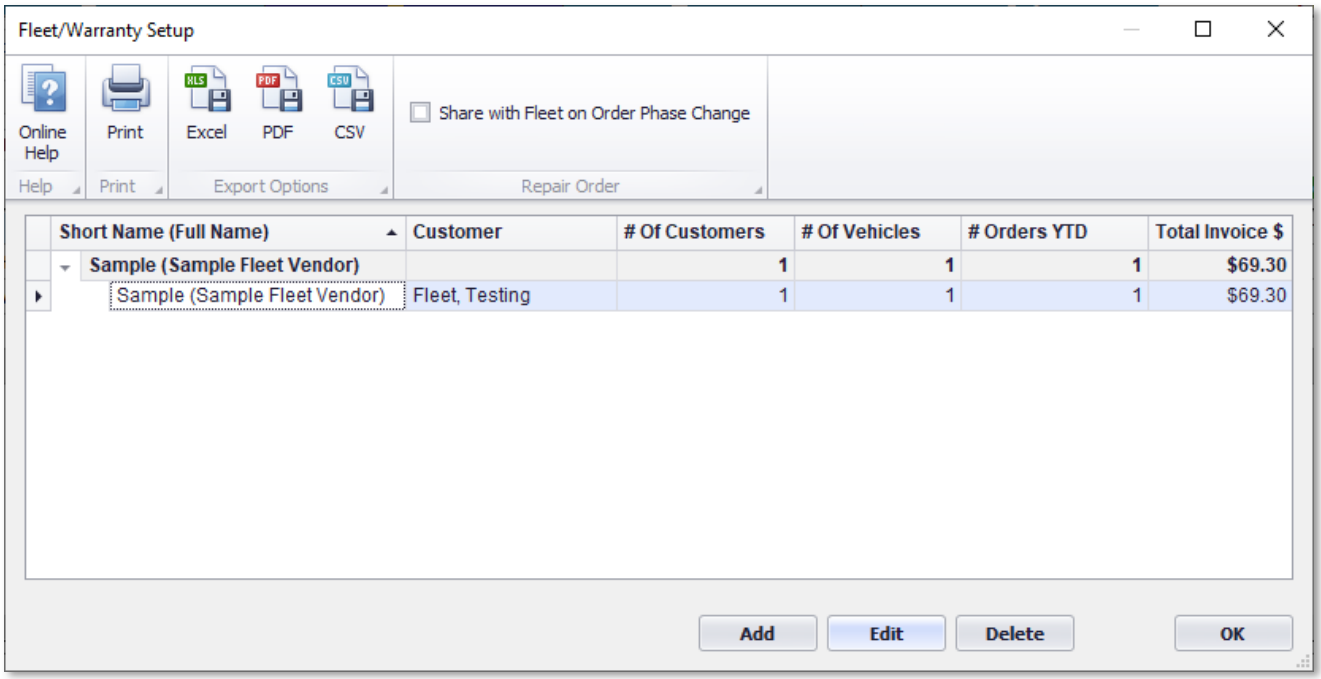
Fleet – Approval Process

- When converting an Estimate to a Repair Order, for an SE customer with a Fleet vendor assigned, the order total will be compared to Vendor's "Automatic Approval Limit".
    - If amount is over the "Automatic Approval Limit" the following message displays.



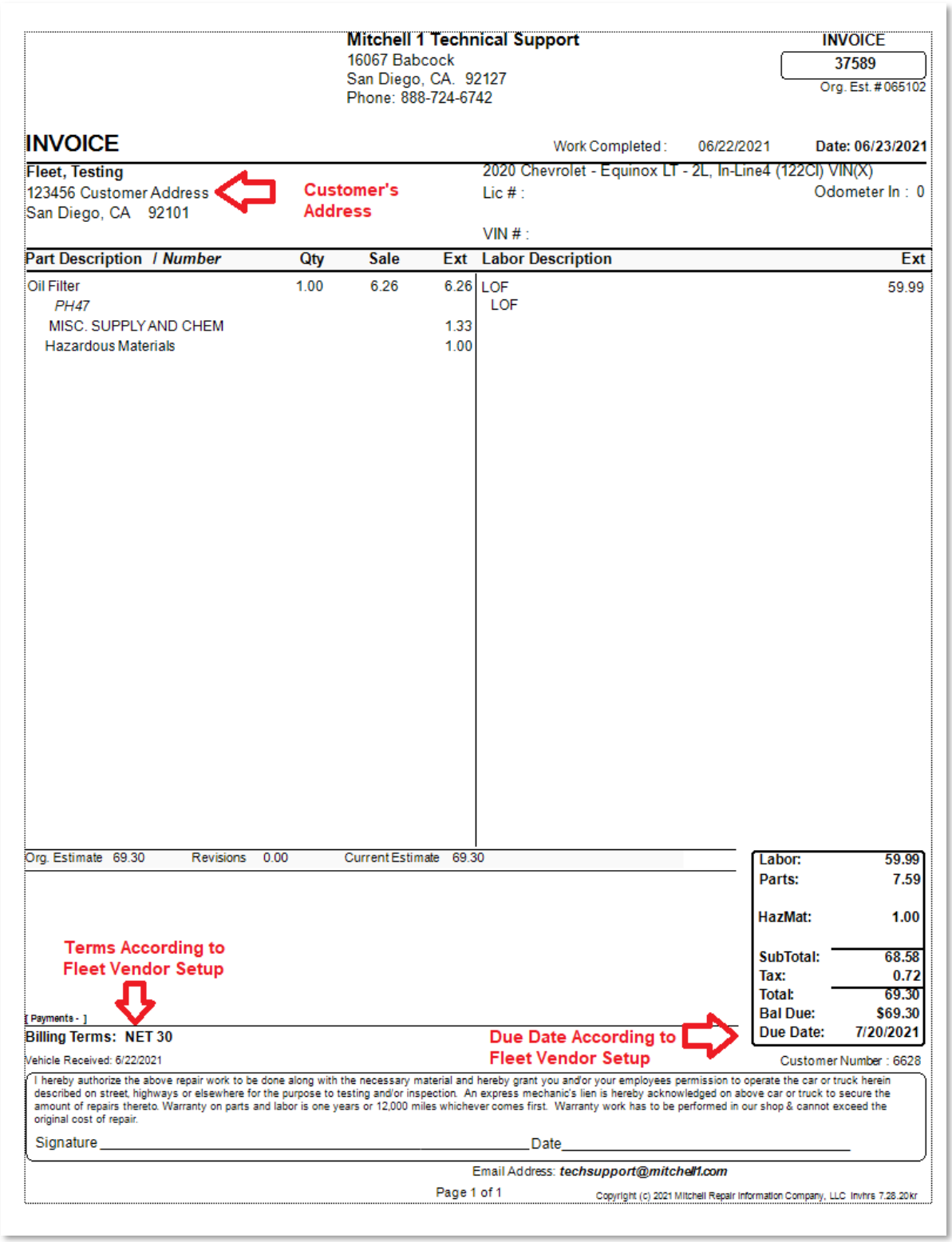
- NOTE: You will still be able to convert to a Repair Order or Invoice; it will be necessary to contact the Fleet Vendor assigned to get approval above the specified approval limit.

- Once an Invoice is posted for any customer assigned to a Fleet Vendor, you are able to view the number of customers, vehicles, Orders YTD and Total Invoices $ from Fleet Setup screen.



Fleet – Documents

Invoice with Customer's Address



Mitchell 1 Technical Support
16067 Babcock
San Diego, CA. 92127
Phone: 888-724-6742

INVOICE
37589
Org. Est. # 065102

INVOICE

Work Completed : 06/22/2021 **Date: 06/23/2021**

Fleet, Testing
123456 Customer Address
San Diego, CA 92101

Customer's Address

2020 Chevrolet - Equinox LT - 2L, In-Line4 (122CI) VIN(X)
Lic # :
Odometer In : 0
VIN # :

Part Description / *Number*	Qty	Sale	Ext	Labor Description	Ext
Oil Filter	1.00	6.26	6.26	LOF	59.99
PH47				LOF	
MISC. SUPPLY AND CHEM			1.33		
Hazardous Materials			1.00		

Org. Estimate 69.30 Revisions 0.00 Current Estimate 69.30

Labor:	59.99
Parts:	7.59
HazMat:	1.00
SubTotal:	68.58
Tax:	0.72
Total:	69.30
Bal Due:	$69.30
Due Date:	7/20/2021

Terms According to Fleet Vendor Setup

[Payments -]

Billing Terms: NET 30

Due Date According to Fleet Vendor Setup

Vehicle Received: 6/22/2021

Customer Number : 6628

I 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 elsewhere for the purpose to testing and/or inspection. An express mechanic's lien is hereby acknowledged on above car or truck to secure the amount of repairs thereto. Warranty on parts and labor is one years or 12,000 miles whichever comes first. Warranty work has to be performed in our shop & cannot exceed the original cost of repair.

Signature _____ Date _____

Email Address: ***techsupport@mitchell1.com***

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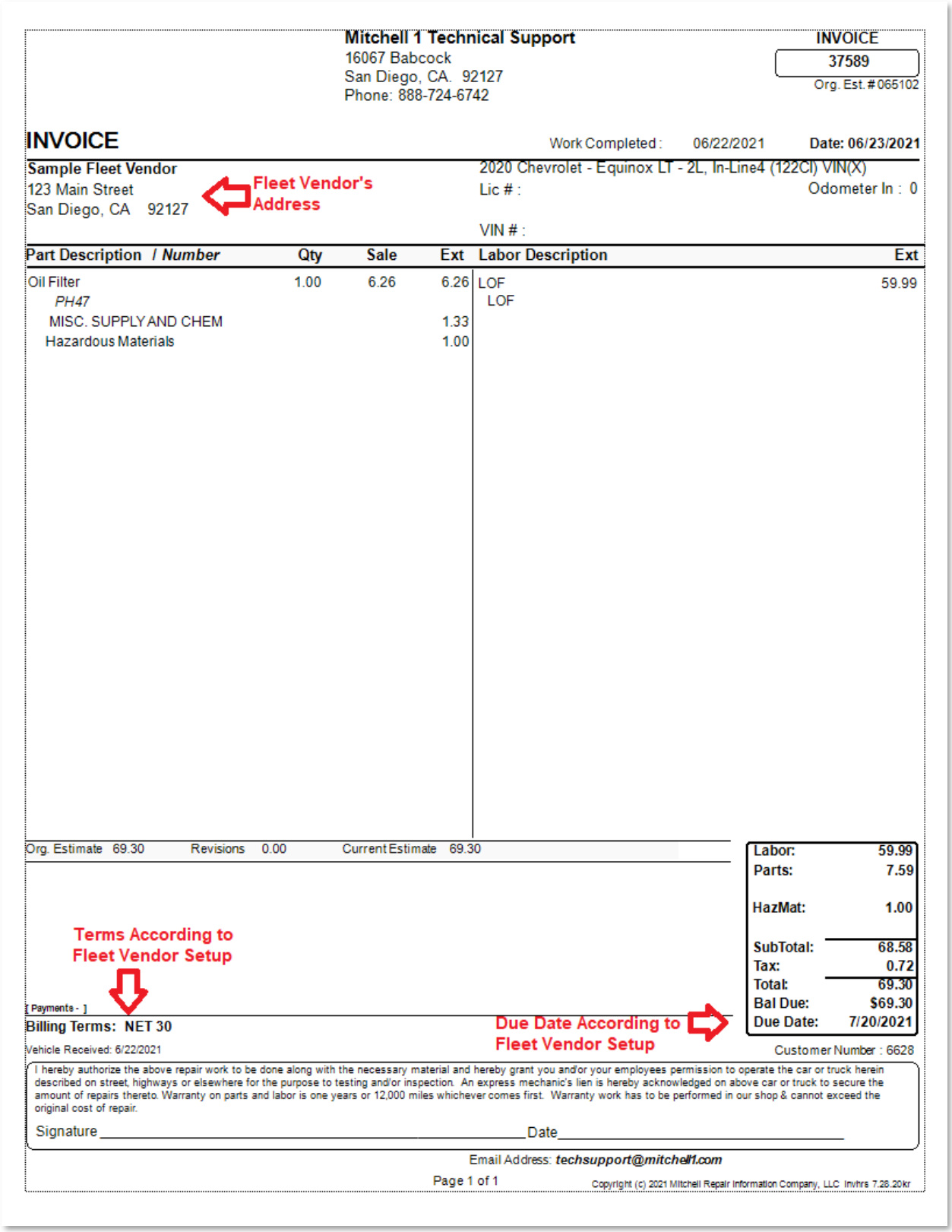
Invoice with Fleet Vendor's Address



Mitchell 1 Technical Support
16067 Babcock
San Diego, CA. 92127
Phone: 888-724-6742

INVOICE
37589
Org. Est. # 065102

INVOICE

Work Completed : 06/22/2021 **Date: 06/23/2021**

Sample Fleet Vendor
123 Main Street
San Diego, CA 92127

Fleet Vendor's Address

2020 Chevrolet - Equinox LT - 2L, In-Line4 (122Cl) VIN(X)
Lic # :
Odometer In : 0
VIN # :

Part Description / *Number*	Qty	Sale	Ext	Labor Description	Ext
Oil Filter	1.00	6.26	6.26	LOF	59.99
PH47				LOF	
MISC. SUPPLY AND CHEM			1.33		
Hazardous Materials			1.00		

Org. Estimate 69.30 Revisions 0.00 Current Estimate 69.30

Labor:	59.99
Parts:	7.59
HazMat:	1.00
SubTotal:	68.58
Tax:	0.72
Total:	69.30
Bal Due:	$69.30
Due Date:	7/20/2021

Terms According to Fleet Vendor Setup

[Payments -]

Billing Terms: NET 30

Due Date According to Fleet Vendor Setup

Vehicle Received: 6/22/2021

Customer Number : 6628

I 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 elsewhere for the purpose to testing and/or inspection. An express mechanic's lien is hereby acknowledged on above car or truck to secure the amount of repairs thereto. Warranty on parts and labor is one years or 12,000 miles whichever comes first. Warranty work has to be performed in our shop & cannot exceed the original cost of repair.

Signature _____ Date _____

Email Address: ***techsupport@mitchell1.com***

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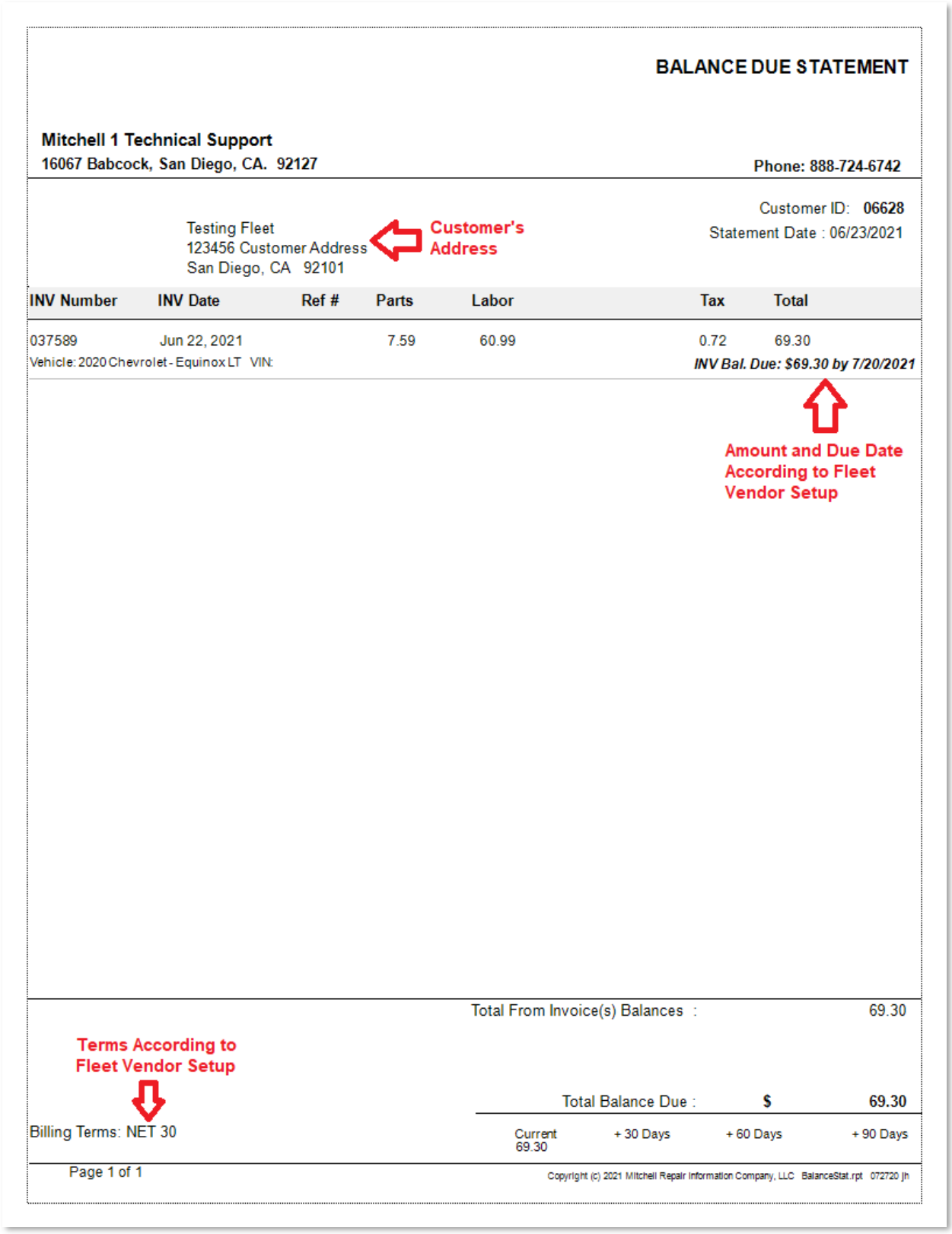
Balance Due Statement with Customer's Address



BALANCE DUE STATEMENT

Mitchell 1 Technical Support
16067 Babcock, San Diego, CA. 92127
Phone: 888-724-6742

Customer ID: **06628**
Statement Date : 06/23/2021

Testing Fleet
123456 Customer Address
San Diego, CA 92101

Customer's Address

INV Number	INV Date	Ref #	Parts	Labor	Tax	Total
037589	Jun 22, 2021		7.59	60.99	0.72	69.30
Vehicle: 2020 Chevrolet - Equinox LT VIN:						***INV Bal. Due: $69.30 by 7/20/2021***

Amount and Due Date According to Fleet Vendor Setup

Total From Invoice(s) Balances : 69.30

Terms According to Fleet Vendor Setup

Billing Terms: NET 30

Total Balance Due : **$ 69.30**

Current	+ 30 Days	+ 60 Days	+ 90 Days
69.30			

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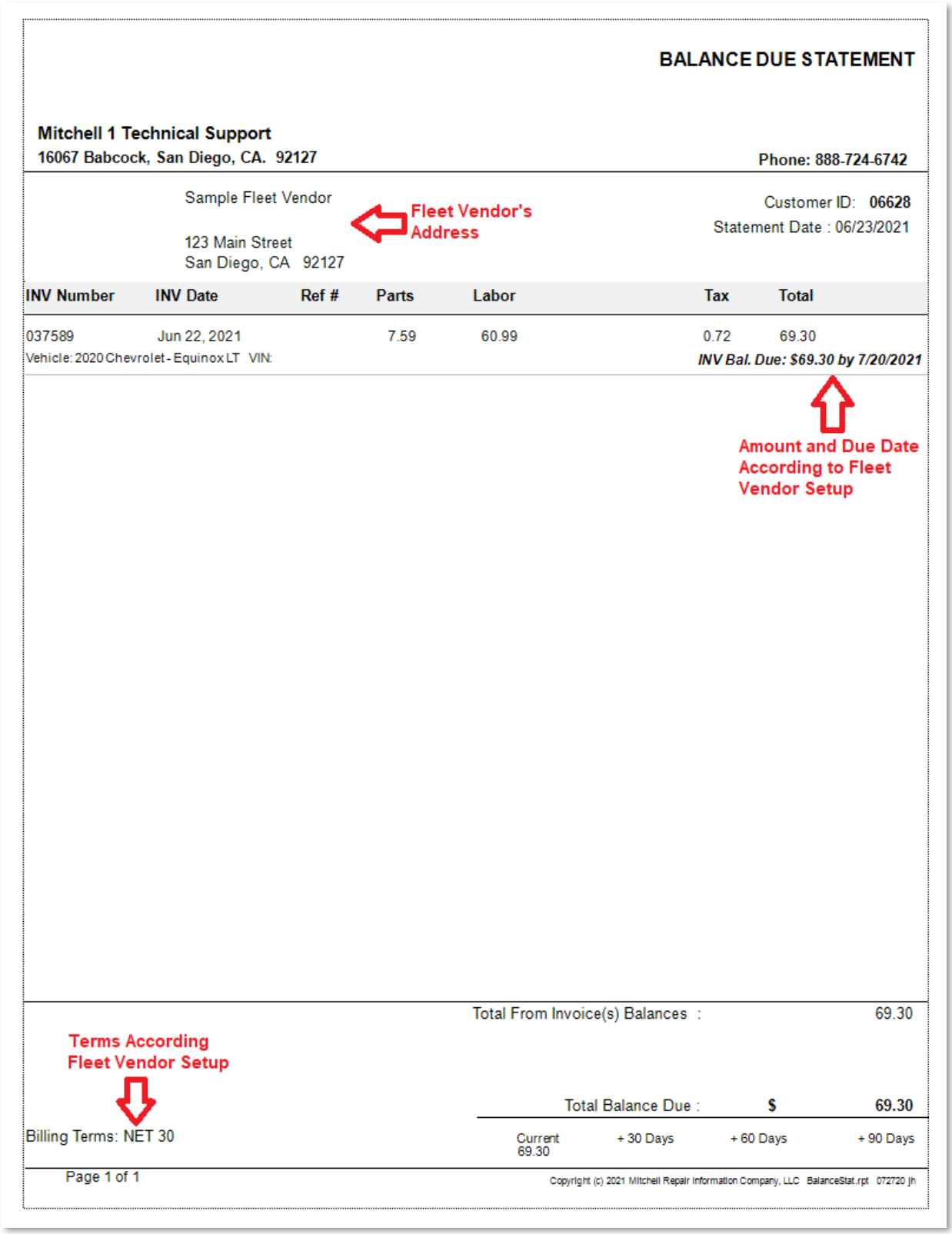
Balance Due Statement with Fleet Vendor Address



BALANCE DUE STATEMENT

Mitchell 1 Technical Support
16067 Babcock, San Diego, CA. 92127
Phone: 888-724-6742

Sample Fleet Vendor

123 Main Street
San Diego, CA 92127

Fleet Vendor's Address

Customer ID: 06628
Statement Date : 06/23/2021

INV Number	INV Date	Ref #	Parts	Labor	Tax	Total
037589	Jun 22, 2021		7.59	60.99	0.72	69.30

Vehicle: 2020 Chevrolet - Equinox LT VIN:

INV Bal. Due: $69.30 by 7/20/2021

Amount and Due Date According to Fleet Vendor Setup

Total From Invoice(s) Balances : 69.30

Terms According Fleet Vendor Setup

Billing Terms: NET 30

Total Balance Due : $ 69.30

Current	+ 30 Days	+ 60 Days	+ 90 Days
69.30			

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VMRS - Requirements

- Mitchell 1 / ShopKey SE version 8.3.1.x or higher
- CVG Manager Subscription (Med /HD Trucks)

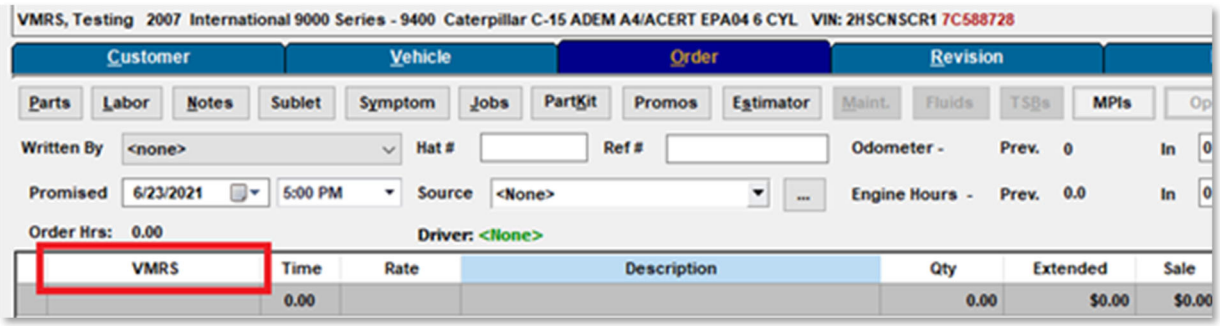
VMRS - Defined

- Vehicle Maintenance Reporting Standard (VMRS) provides a single, concise coding convention to manage fleets' assets and analyze maintenance operation costs. VMRS provides a vital communication link between maintenance personnel, computers, and management. It establishes a 'universal' language for fleets, original equipment manufacturers' (OEMs), industry suppliers, computers, and the people whose responsibility it is to specify, purchase, operate, and maintain equipment.

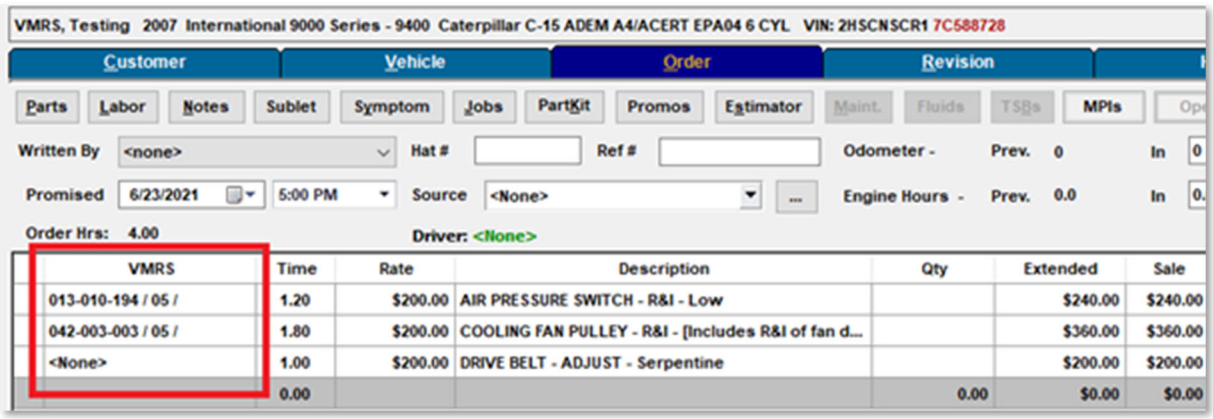
- NOTE: VRMS codes are assigned **only** to (Med/HD) labor operations available from Truck Labor.

VMRS – Codes on Orders

- With a Med or HD vehicle selected, the Order screen will include a new VMRS column.
    - NOTE: New columns appear on far right; VMRS column dragged left for visibility.

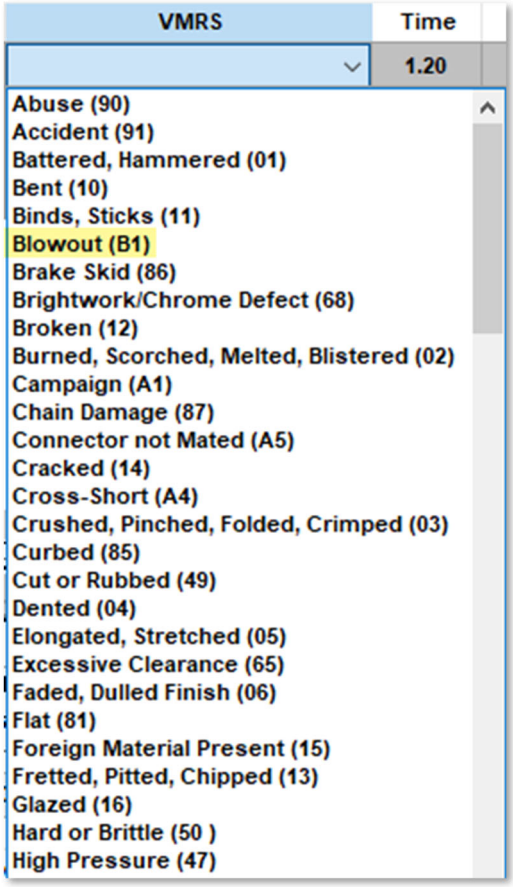
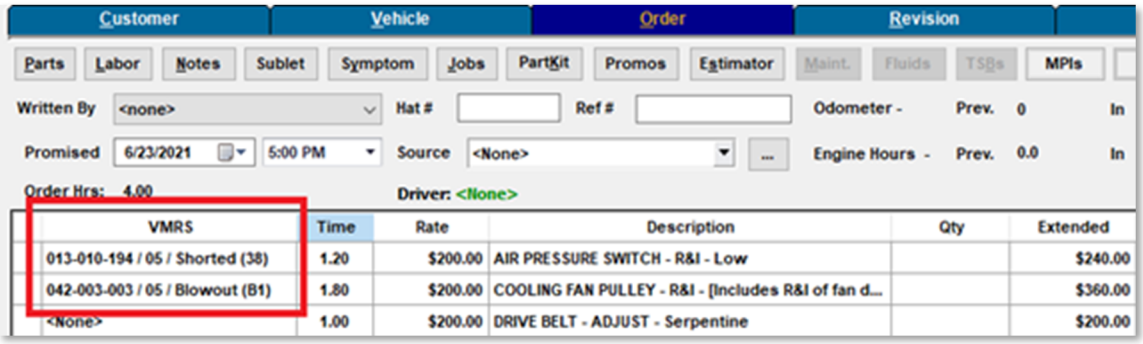


- When transferring labor operations from 'Estimator' [Truck Labor] on the Order screen, if there is an applicable VMRS Code, it will be displayed within the VMRS column.



VMRS – Failure Types

- Right-click on any Order screen labor item that has a VMRS Code associated with it and a drop-down list opens for selection of a Failure type that required the labor item to occur.



- When a Failure type is selected, it will be appended to that VMRS code as shown below: