

# Fleet / VMRS User's Guide

Setting up and using Fleet / VMRS

MANAGER SE /  
SHOPKEY SHOP  
MANAGEMENTSE

VERSION 8.3.1.x  
UPDATE

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Published in the USA by Mitchell 1



## Fleet - Requirements

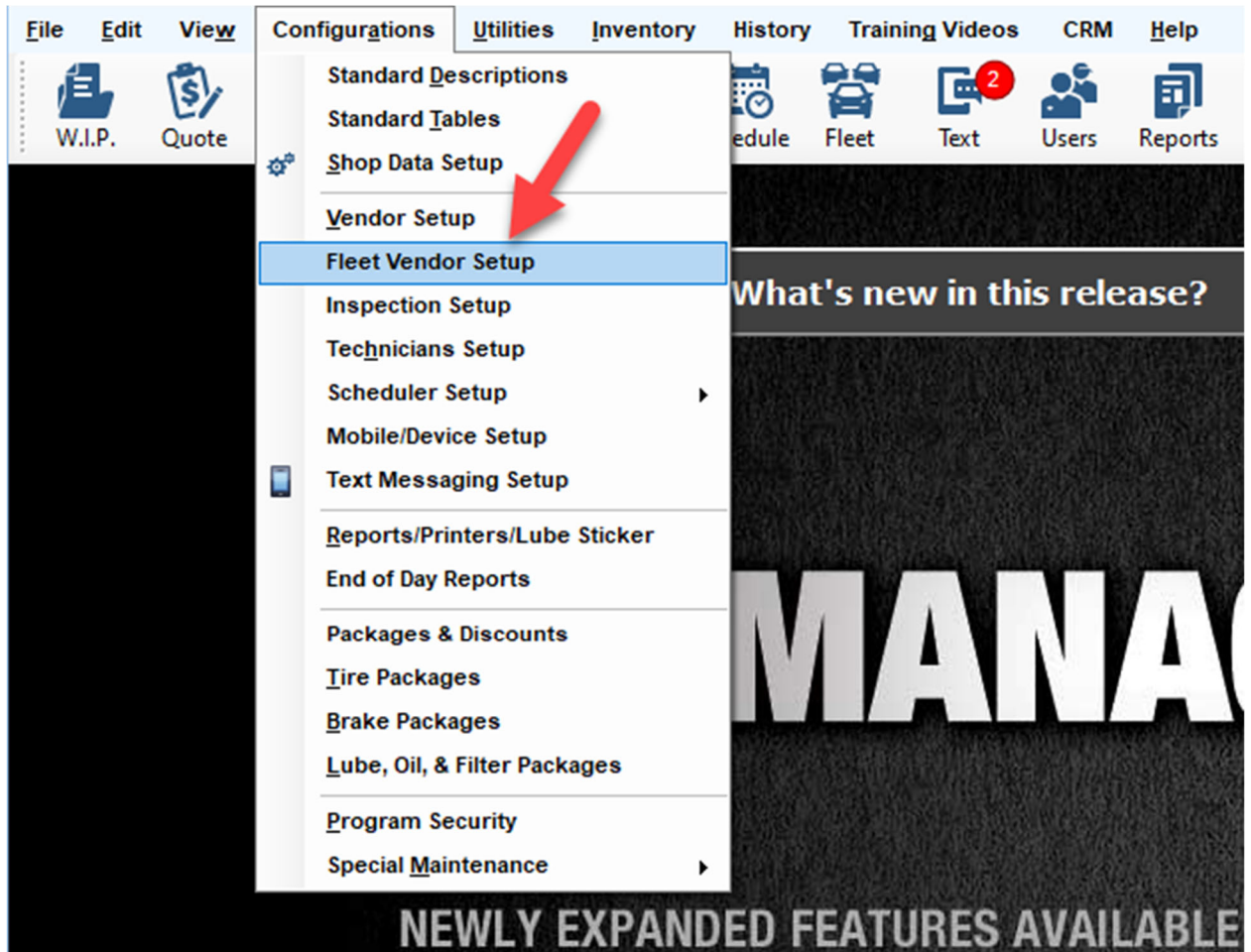
- Mitchell 1 / ShopKey SE version 8.3.1.x or higher

## 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).

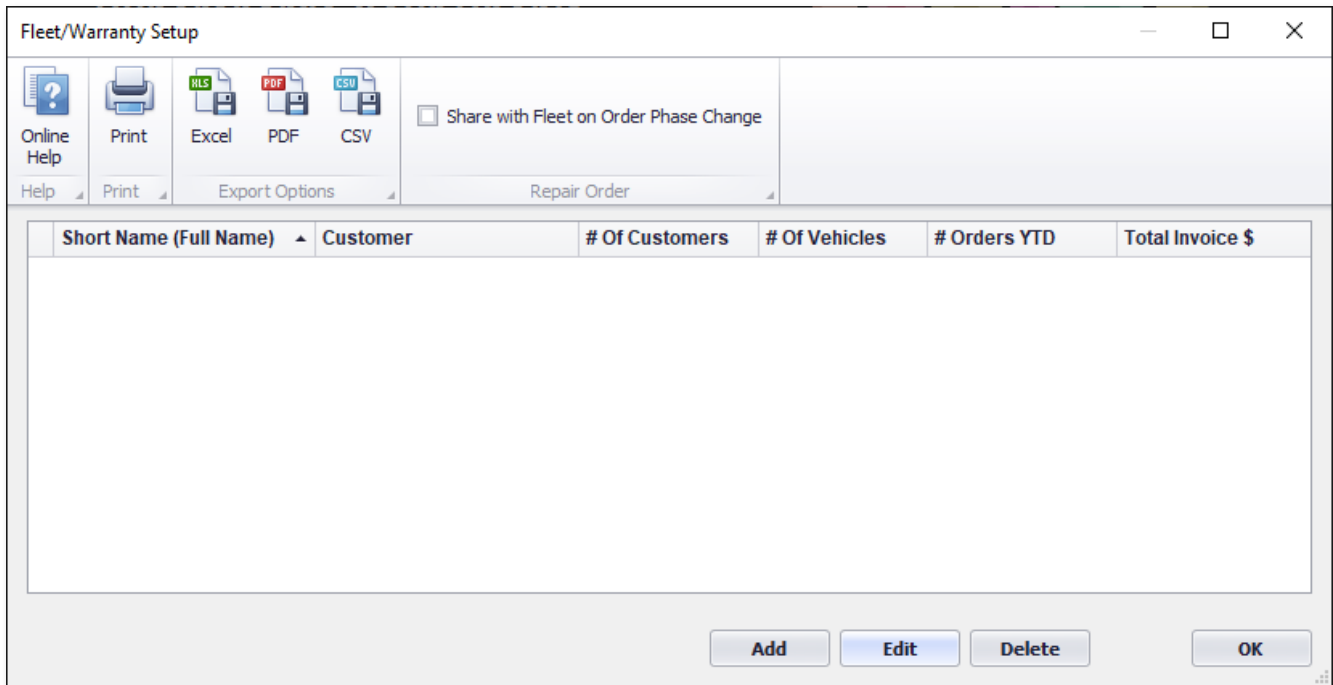
## Fleet - Setup

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

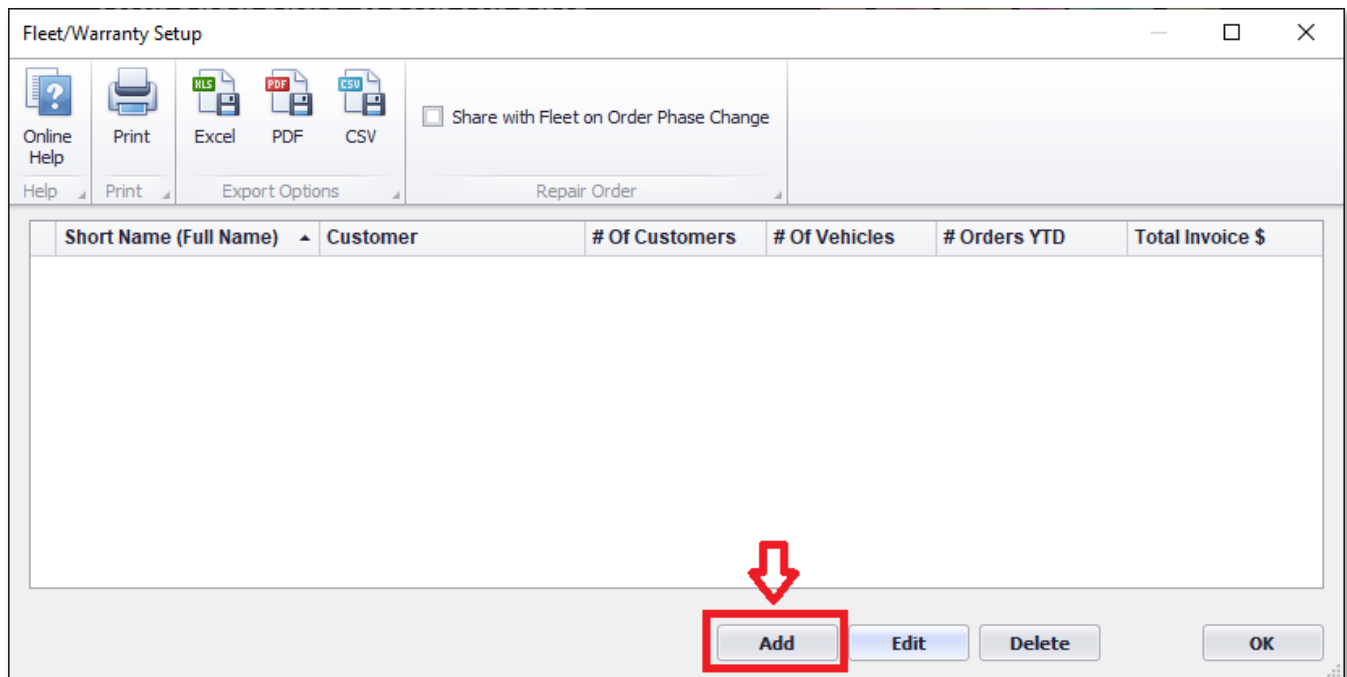


## MITCHELL 1 / SHOPKEY SE MANAGEMENT FLEET / VMRS

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



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



## MITCHELL 1 / SHOPKEY SE MANAGEMENT FLEET / VMRS

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

The screenshot shows the 'Fleet/Warranty Setup' window with several sections:

- General:** Fields for 'Full Vendor Name', 'Short Vendor Name', and 'Notes' are empty.
- Contacts:** A table with columns 'Name', 'Note/Title', 'Email', 'Phone', and 'Extension' is empty. Below it, 'Contact 0 of 0' is shown with 'Add Contact' and 'Delete' buttons.
- Billing Terms - Set Special Terms:** Includes 'Display On:' with checkboxes for 'Invoice' and 'Bal. Due Statements', 'Billing Terms' (e.g., '2 10 NET 30'), 'Due Date' (0), and 'Automatic Approval Limit (\$)' (0).
- Billing Information:** Fields for 'Account # / Client ID', 'Attention (Fax/Address)', 'Fax #', and 'Website URL' are empty.
- Address:** Fields for 'Street', 'Zip', 'City', and 'State' are empty.
- Override Customer address for Invoices?** and **Override Customer address for Bal. Statements?** are set to 'Never'.
- Vendor Type:** 'Offline' is selected.
- Vendor Code:** Field is empty.

Buttons for 'Cancel' and 'Save' are at the bottom right.

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

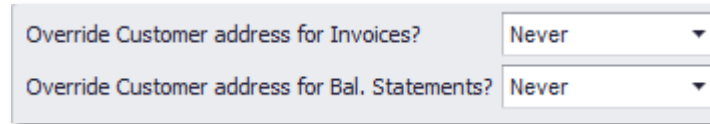
The screenshot shows the 'Fleet/Warranty Setup' window with sample data:

- General:** 'Full Vendor Name' is 'Sample Fleet Vendor', 'Short Vendor Name' is 'Sample', and 'Notes' is empty.
- Contacts:** A table with one contact: John Smith, Account Manager, john.smith@sample..., 858-999-9999, 1234. Below it, 'Contact 1 of 1' is shown with 'Add Contact' and 'Delete' buttons.
- Billing Terms - Set Special Terms:** 'Display On:' has 'Invoice' and 'Bal. Due Statements' checked. 'Billing Terms' is 'NET 30', 'Due Date' is '28', and 'Automatic Approval Limit (\$)' is '50.00'.
- Billing Information:** Fields for 'Account # / Client ID', 'Attention (Fax/Address)', 'Fax #', and 'Website URL' are empty.
- Address:** 'Street' is '123 Main Street', 'Zip' is '92127', 'City' is 'San Diego', and 'State' is 'CA'.
- Override Customer address for Invoices?** and **Override Customer address for Bal. Statements?** are set to 'Never'.
- Vendor Type:** 'Offline' is selected.
- Vendor Code:** Field is empty.

The 'Save' button is highlighted with a red box and a red arrow pointing to it.

## MITCHELL 1 / SHOPKEY SE MANAGEMENT FLEET / VMRS

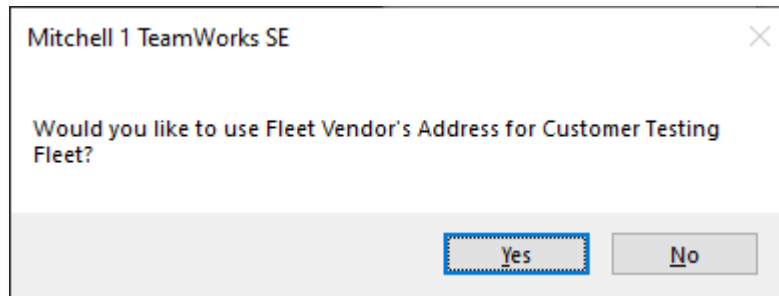
- NOTE: It's possible to default the Fleet's address to be used in place of customer's address for SE Invoices and/or Balance Due Statements involving a Fleet vendor:



Override Customer address for Invoices? Never

Override Customer address for Bal. Statements? Never

- 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



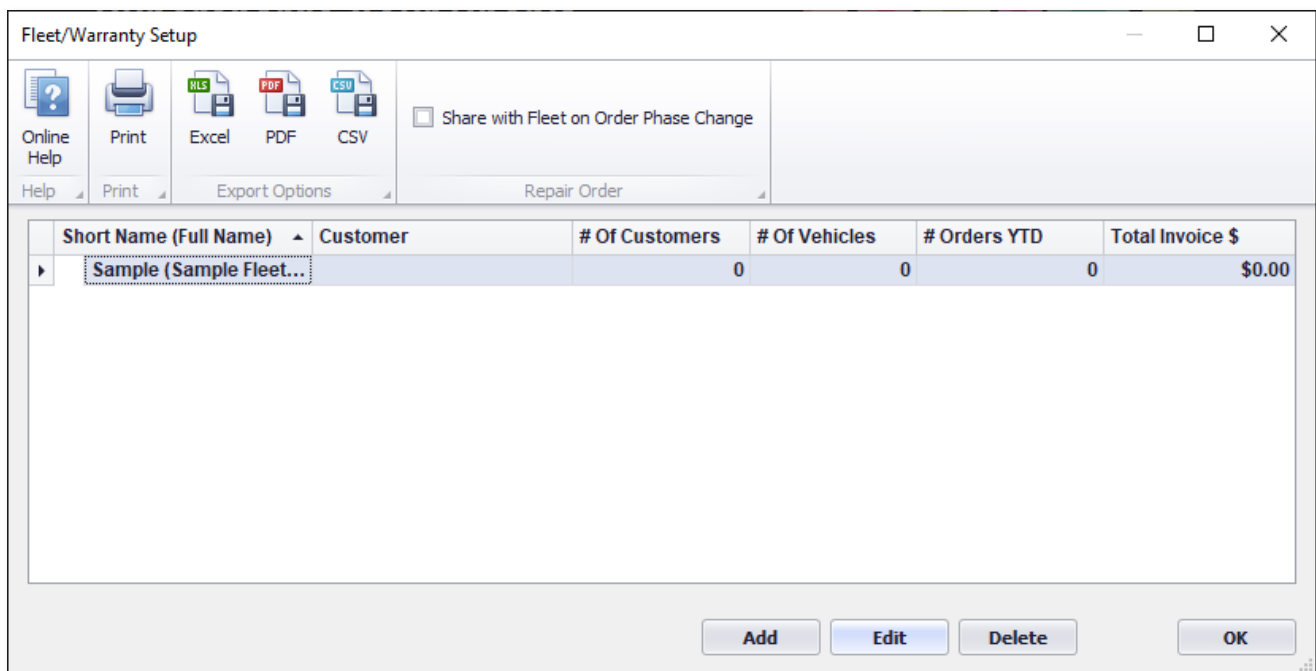
Mitchell 1 TeamWorks SE

Would you like to use Fleet Vendor's Address for Customer Testing Fleet?

Yes No

- 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.



Fleet/Warranty Setup

Online Help Print Excel PDF CSV Share with Fleet on Order Phase Change

Short Name (Full Name) ▲	Customer	# Of Customers	# Of Vehicles	# Orders YTD	Total Invoice \$
▶ Sample (Sample Fleet...)		0	0	0	\$0.00

Add Edit Delete OK

## MITCHELL 1 / SHOPKEY SE MANAGEMENT FLEET / VMRS

- 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

The screenshot shows the 'Customer' screen with a menu bar at the top containing 'File', 'Edit', 'View', 'Configurations', 'Utilities', 'Inventory', 'History', 'Training Videos', 'CRM', and 'Help'. Below the menu bar are icons for 'W.I.P.', 'Quote', 'New', 'Counter', 'P.O.s', 'Inventory', 'Schedule', 'Fleet', 'Text', 'Users', and 'Reports'. The main content area has a 'NO CUSTOMER' status and tabs for 'Customer', 'Vehicle', 'Order', and 'Revision'. The 'Customer' tab is active, showing fields for 'Company', 'Name', and 'Last, First'. A dropdown menu for 'Fleet/Warranty' is open, showing options: '<None>', 'Sample (Sample Fleet Vendor)', and 'Add New'. The 'Details' button is also visible.

- 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.

A close-up of the dropdown menu showing the following options: '<None>', 'Sample (Sample Fleet Vendor)', and 'Add New'. The 'Details' button is also visible to the right of the dropdown.

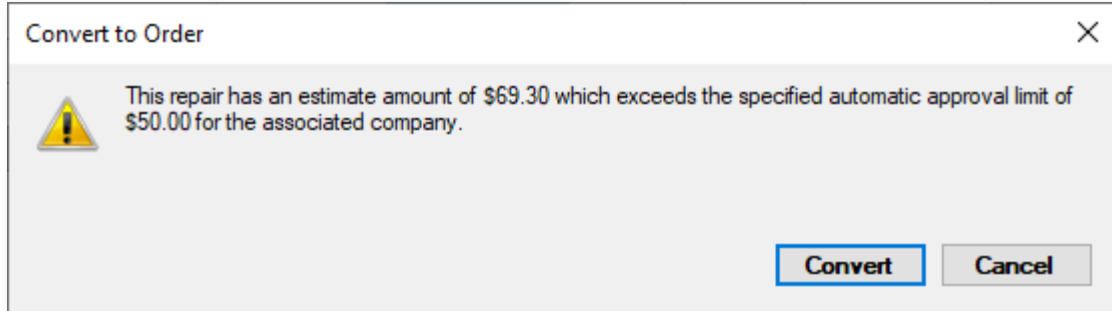
- The Vehicle screen will now include a new 'Fleet #' as a handy reference.

The screenshot shows the 'Vehicle' screen with a header bar displaying 'VMRS, Testing 2007 International 9000 Series - 9400 Caterpillar C-15 ADEM A4/ACERT EPA04 6 CYL VIN: 2HSCNSCR1 7C588728'. The 'Vehicle' tab is active, showing fields for 'VIN', 'License', 'State/Prov', 'Year / Make', 'Model', 'Engine / Fuel', and 'Transmission'. The 'Fleet #' field is highlighted with a red box. Other fields include 'Brake', 'GWV', 'Unit #', 'Color', and 'Memo'. There are also 'Decode' and 'Lookup' buttons, and radio buttons for 'Light Vehicles' and 'Med and HD Vehicles'.



## 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.

Short Name (Full Name)	Customer	# Of Customers	# Of Vehicles	# Orders YTD	Total Invoice \$
Sample (Sample Fleet Vendor)		1	1	1	\$69.30
Sample (Sample Fleet Vendor)	Fleet, Testing	1	1	1	\$69.30

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Fleet – Documents

Invoice with Customer's Address

<b>Mitchell 1 Technical Support</b>			<b>INVOICE</b>		
16067 Babcock San Diego, CA. 92127 Phone: 888-724-6742			37589 Org. Est. #065102		
<b>INVOICE</b>		Work Completed: 06/22/2021		Date: 06/23/2021	
Fleet, Testing		2020 Chevrolet - Equinox LT - 2L, In-Line4 (122CI) VIN(X)			
123456 Customer Address San Diego, CA 92101		<b>Customer's Address</b>		Lic # : Odometer In : 0	
		VIN # :			
<b>Part Description / Number</b>	<b>Qty</b>	<b>Sale</b>	<b>Ext</b>	<b>Labor Description</b>	<b>Ext</b>
Oil Filter PH47	1.00	6.26	6.26	LOF LOF	59.99
MISC. SUPPLY AND CHEM Hazardous Materials			1.33 1.00		
Org. Estimate 69.30		Revisions 0.00	Current Estimate 69.30		
				<b>Labor:</b>	59.99
				<b>Parts:</b>	7.59
				<b>HazMat:</b>	1.00
				<b>SubTotal:</b>	68.58
				<b>Tax:</b>	0.72
				<b>Total:</b>	69.30
				<b>Bal Due:</b>	\$69.30
				<b>Due Date:</b>	7/20/2021
<b>Payments - J</b>				Customer Number : 6628	
<b>Billing Terms: NET 30</b>		<b>Due Date According to Fleet Vendor Setup</b>			
Vehicle Received: 6/22/2021					
<p>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 &amp; cannot exceed the original cost of repair.</p>					
Signature _____			Date _____		
Email Address: <a href="mailto:techsupport@mitchell1.com">techsupport@mitchell1.com</a>					
Page 1 of 1		Copyright (c) 2021 Mitchell Repair Information Company, LLC Invtrs 7.28.20kr			



**MITCHELL 1 / SHOPKEY SE MANAGEMENT FLEET / VMRS**

Invoice with Fleet Vendor's Address

<b>Mitchell 1 Technical Support</b>			<b>INVOICE</b>																		
16067 Babcock San Diego, CA. 92127 Phone: 888-724-6742			37589 Org. Est. #065102																		
<b>INVOICE</b>		Work Completed: 06/22/2021	Date: 06/23/2021																		
Sample Fleet Vendor 123 Main Street San Diego, CA 92127		2020 Chevrolet - Equinox LT - 2L, In-Line4 (122Cl) VIN(X) Lic # : Odometer In : 0 VIN # :																			
<b>Fleet Vendor's Address</b>																					
Part Description / Number	Qty	Sale	Ext	Labor Description	Ext																
Oil Filter PH47	1.00	6.26	6.26	LOF	59.99																
MISC. SUPPLY AND CHEM Hazardous Materials			1.33 1.00	LOF																	
Org. Estimate 69.30		Revisions 0.00	Current Estimate 69.30																		
<b>Terms According to Fleet Vendor Setup</b>				<table style="width:100%; border-collapse: collapse;"> <tr><td>Labor:</td><td style="text-align: right;">59.99</td></tr> <tr><td>Parts:</td><td style="text-align: right;">7.59</td></tr> <tr><td>HazMat:</td><td style="text-align: right;">1.00</td></tr> <tr><td>SubTotal:</td><td style="text-align: right; border-top: 1px solid black;">68.58</td></tr> <tr><td>Tax:</td><td style="text-align: right;">0.72</td></tr> <tr><td>Total:</td><td style="text-align: right; border-top: 1px solid black;">69.30</td></tr> <tr><td>Bal Due:</td><td style="text-align: right;">\$69.30</td></tr> <tr><td>Due Date:</td><td style="text-align: right;">7/20/2021</td></tr> </table>		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
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																				
<b>Terms According to Fleet Vendor Setup</b>		<b>Due Date According to Fleet Vendor Setup</b>																			
Billing Terms: NET 30		Customer Number : 6628																			
Vehicle Received: 6/22/2021																					
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 of 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: <a href="mailto:techsupport@mitchell1.com">techsupport@mitchell1.com</a>																					
Page 1 of 1			Copyright (c) 2021 Mitchell Repair Information Company, LLC Invtrs 7.28.20kr																		




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Balance Due Statement with Customer's Address

<b>BALANCE DUE STATEMENT</b>						
<b>Mitchell 1 Technical Support</b>						
16067 Babcock, San Diego, CA. 92127				Phone: 888-724-6742		
Testing Fleet				Customer ID: 06628		
123456 Customer Address				Statement Date : 06/23/2021		
San Diego, CA 92101						
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:					<b>INV Bal. Due: \$69.30 by 7/20/2021</b>	
						 <b>Amount and Due Date According to Fleet Vendor Setup</b>
Total From Invoice(s) Balances :						69.30
<b>Terms According to Fleet Vendor Setup</b> 						<b>Total Balance Due : \$ 69.30</b>
Billing Terms: NET 30						Current 69.30      + 30 Days      + 60 Days      + 90 Days
Page 1 of 1						Copyright (c) 2021 Mitchell Repair Information Company, LLC BalanceStat.rpt 072720 Jh

MITCHELL 1 / SHOPKEY SE MANAGEMENT FLEET / VMRS

Balance Due Statement with Fleet Vendor Address

<b>BALANCE DUE STATEMENT</b>								
<b>Mitchell 1 Technical Support</b> 16067 Babcock, San Diego, CA. 92127				Phone: 888-724-6742				
Sample Fleet Vendor 123 Main Street San Diego, CA 92127				Customer ID: 06628 Statement Date : 06/23/2021				
 <b>Fleet Vendor's Address</b>								
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:					<b>INV Bal. Due: \$69.30 by 7/20/2021</b>			
 <b>Amount and Due Date According to Fleet Vendor Setup</b>								
					Total From Invoice(s) Balances :		69.30	
					Total Balance Due :		<b>\$ 69.30</b>	
					Current	+ 30 Days	+ 60 Days	+ 90 Days
					69.30			
<b>Terms According Fleet Vendor Setup</b> 					Billing Terms: NET 30			
Page 1 of 1								
<small>Copyright (c) 2021 Mitchell Repair Information Company, LLC BalanceStat.rpt 072720 Jn</small>								

## MITCHELL 1 / SHOPKEY SE MANAGEMENT FLEET / VMRS

### 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.

VMRS, Testing 2007 International 9000 Series - 9400 Caterpillar C-15 ADEM A4/ACERT EPA04 6 CYL VIN: 2HSCNSCR1 7C588728

Customer	Vehicle	Order	Revision			
Parts	Labor	Notes	Sublet	Symptom		
Jobs	PartKit	Promos	Estimator	Maint.		
Fluids	TSGs	MPIs	Op			
Written By	<none>	Hat #	Ref #	Odometer - Prev. 0 In 0		
Promised	6/23/2021	5:00 PM	Source <None>	Engine Hours - Prev. 0.0 In 0		
Order Hrs:	0.00	Driver:	<None>			
VMRS	Time	Rate	Description	Qty	Extended	Sale
	0.00			0.00	\$0.00	\$0.00

- 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, Testing 2007 International 9000 Series - 9400 Caterpillar C-15 ADEM A4/ACERT EPA04 6 CYL VIN: 2HSCNSCR1 7C588728

Customer	Vehicle	Order	Revision			
Parts	Labor	Notes	Sublet	Symptom		
Jobs	PartKit	Promos	Estimator	Maint.		
Fluids	TSGs	MPIs	Op			
Written By	<none>	Hat #	Ref #	Odometer - Prev. 0 In 0		
Promised	6/23/2021	5:00 PM	Source <None>	Engine Hours - Prev. 0.0 In 0		
Order Hrs:	4.00	Driver:	<None>			
VMRS	Time	Rate	Description	Qty	Extended	Sale
013-010-194 / 05 /	1.20	\$200.00	AIR PRESSURE SWITCH - R&I - Low		\$240.00	\$240.00
042-003-003 / 05 /	1.80	\$200.00	COOLING FAN PULLEY - R&I - [Includes R&I of fan d...		\$360.00	\$360.00
<None>	1.00	\$200.00	DRIVE BELT - ADJUST - Serpentine		\$200.00	\$200.00
	0.00			0.00	\$0.00	\$0.00

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:

Customer	Vehicle	Order	Revision		
Parts	Labor	Notes	Sublet		
Symptom	Jobs	PartKit	Promos		
Estimator	Maint.	Fluids	TSGs		
MPis					
Written By	<none>	Hat #	Ref #		
Odometer -	Prev. 0	In			
Promised	6/23/2021	5:00 PM	Source		
<None>			...		
Engine Hours -	Prev. 0.0	In			
Order Hrs: 4.00	Driver: <None>				
VMRS	Time	Rate	Description	Qty	Extended
013-010-194 / 05 / Shorted (38)	1.20	\$200.00	AIR PRESSURE SWITCH - R&I - Low		\$240.00
042-003-003 / 05 / Blowout (B1)	1.80	\$200.00	COOLING FAN PULLEY - R&I - [Includes R&I of fan d...		\$360.00
<None>	1.00	\$200.00	DRIVE BELT - ADJUST - Serpentine		\$200.00