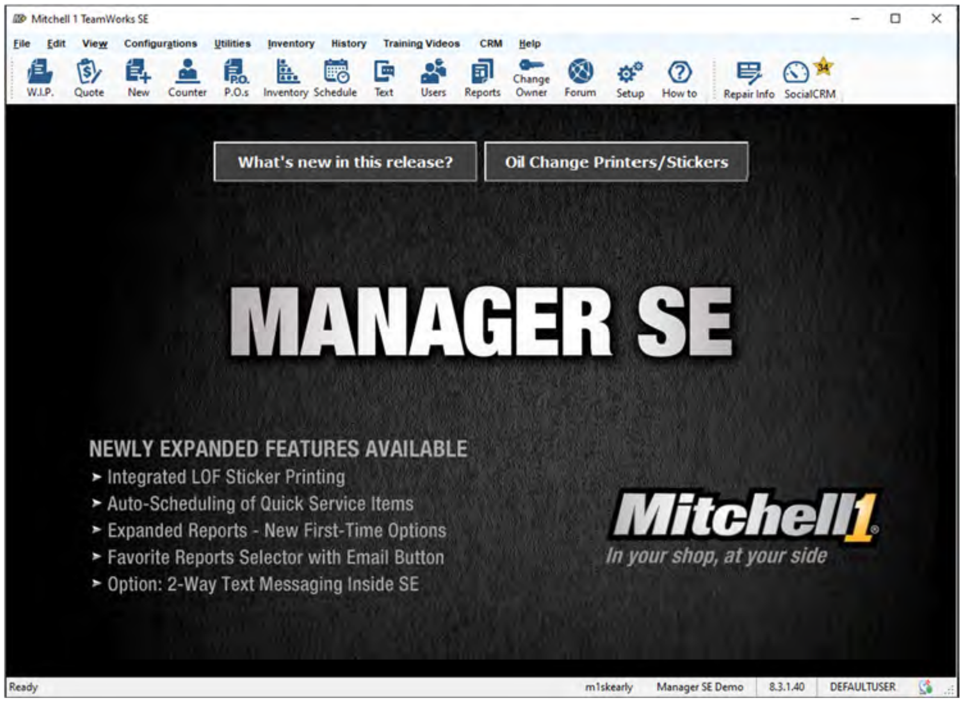
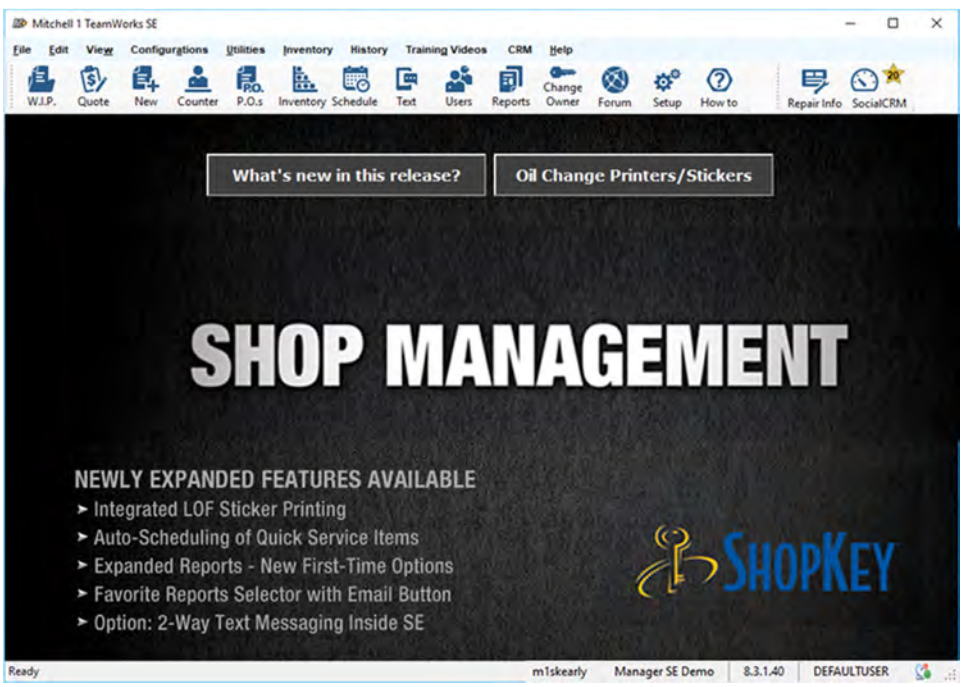




Mitchell 1 / ShopKey Management Solutions

LEARN: SE Management Software

Self-paced tutorial of program basics with DEMO version of SE 8.x

Published by Mitchell 1
San Diego, CA

Published in the USA

Contents

NOTE: Once the Assisted Instruction portion is completed, we recommend that users also complete the Self Instruction section to learn additional program concepts.

*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]*

Getting Started with Your Management Software

NOTE: If your PC doesn't have a DVD drive, please contact technical support for an alternate installation method.

1. Insert the SE installation disc into your DVD drive; it should automatically display a menu; if it does not, browse the disc and run **autorun.exe**.

2. Follow on-screen prompts to install to a single computer or multiple PCs.

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

<u>Always use this book with the DEMO version</u>. It will be easier to understand the concepts working with sample customers, vehicles, parts, orders and jobs.

Work these exercises in order; this is taught as a story; a printer is optional.

NOTE: Do NOT enter data you wish to keep while in Demo mode; data added in Demo CANNOT be transferred into your LIVE version of SE.

Keyboard shortcuts: By holding down the Alt key and then pressing letter shown, the command is executed without even having to use your mouse.

These will follow button/mouse commands in workbook like this:

1. Click on 

or press **(Alt + <u>O</u>)** to advance to the Order Screen.

NOTE: All keyboard shortcuts are listed on the **Shortcuts SE**.

ShortCuts SE

Common to Most Screens

Batch Payment [Utilities] = **F5**
BPS menu = **Alt + B**
Configurations menu = **Alt + C**
Counter Sale = **F11**
Edit menu = **Alt + E**
File menu = **Alt + F**
Find Customer [Utilities] = **F3**
Find History [Utilities] = **F4**
Help [context + related videos] = **F1**
Help menu [General] = **Alt + H**
Inventory = **Alt + I** [ManagerPlus]
New [EST/RO] Order = **F6**
New Estimate = **F8**
New Repair Order = **F9**
New Invoice = **F10**
Training Videos [How Do I?] = **Alt + G**
Utilities menu = **Alt + U**
View menu = **Alt + W**

<<< Navigation Commands >>>

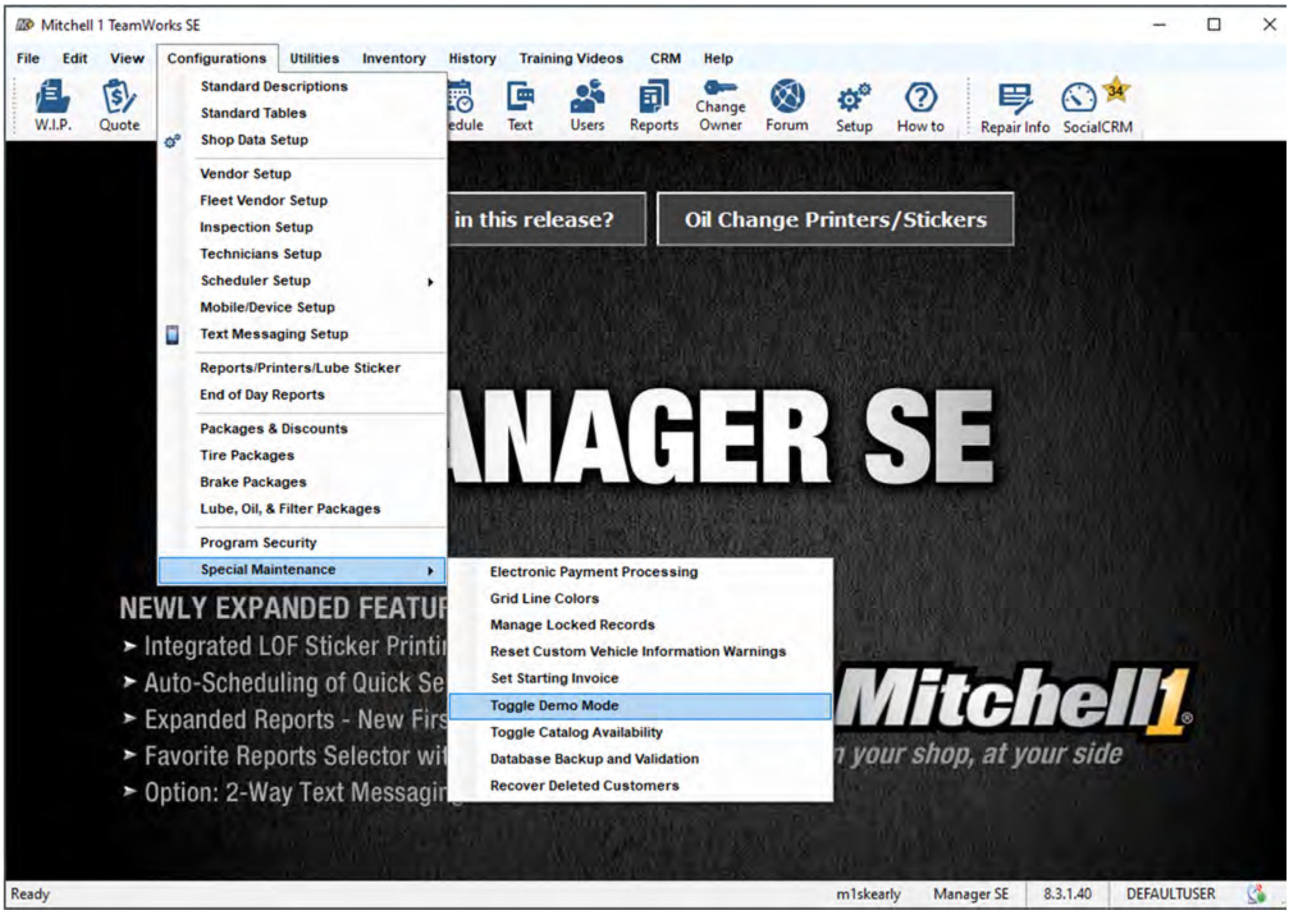
Advance to next entry field = **Tab**
Close a window/dialog box = **Esc**
Open a drop list = **Alt + Down Arrow**
Place a check in checkbox = **Spacebar**
Quit current program = **Alt + F4**
Reverse to previous field = **Shift + Tab**
Switch programs = **Alt + Tab**

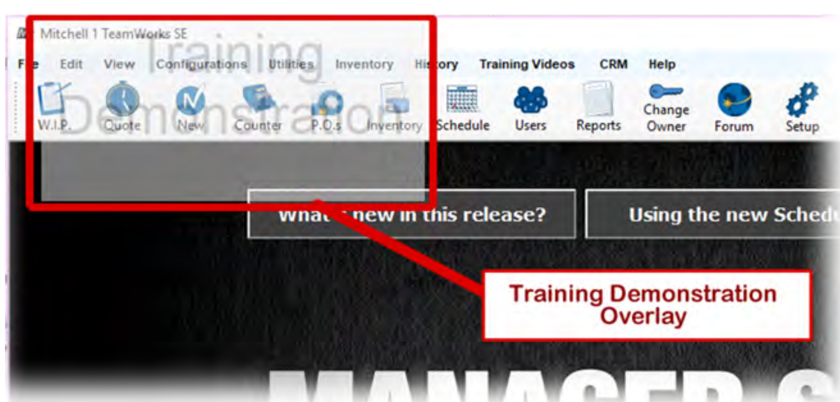
<<< Editing Commands >>>

Copy from current location = **Ctrl + C**
Cut [remove] from location = **Ctrl + X**
Paste from Cut/Copy action = **Ctrl + V**

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. 3. Once restarted, an on-screen text box indicates *“Training Demonstration”* (DEMO) mode.

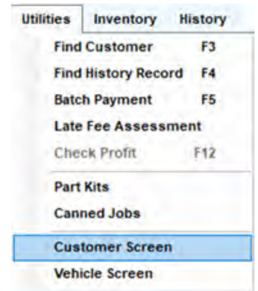




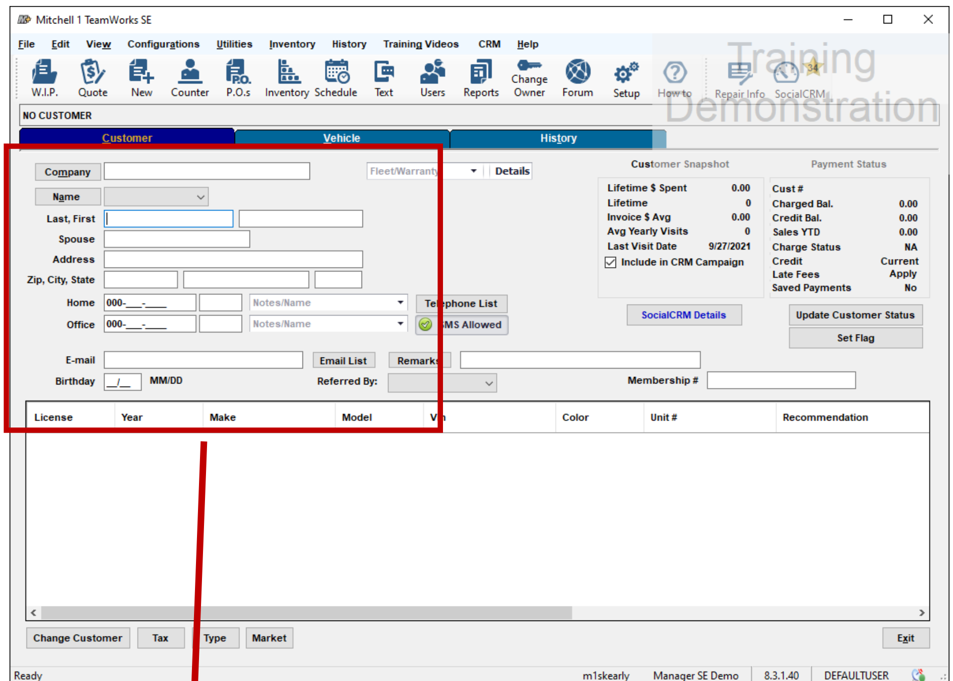
NOTE: Look for the Training Demonstration Overlay to ensure you are working in Demo mode

Entering Customer & Vehicle Information

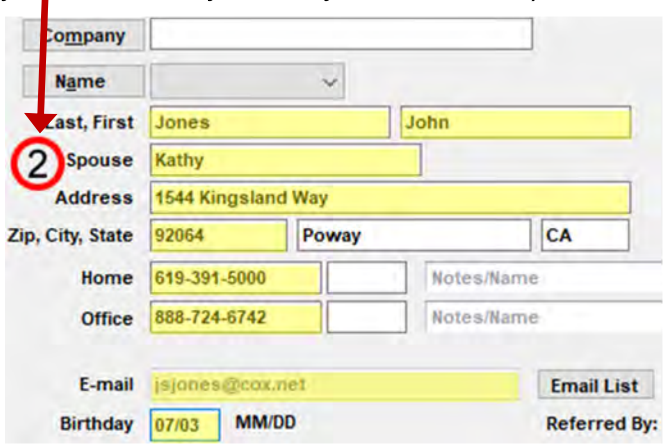
Create a new customer / vehicle record as follows.



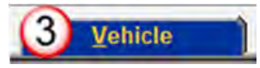
1. From upper text menu, click on Utilities **(Alt + U)** then select Customer Screen option.



2. Type the highlighted text below into your Customer screen: (entering Zip Code then pressing the Tab key* automatically fills City + State fields)



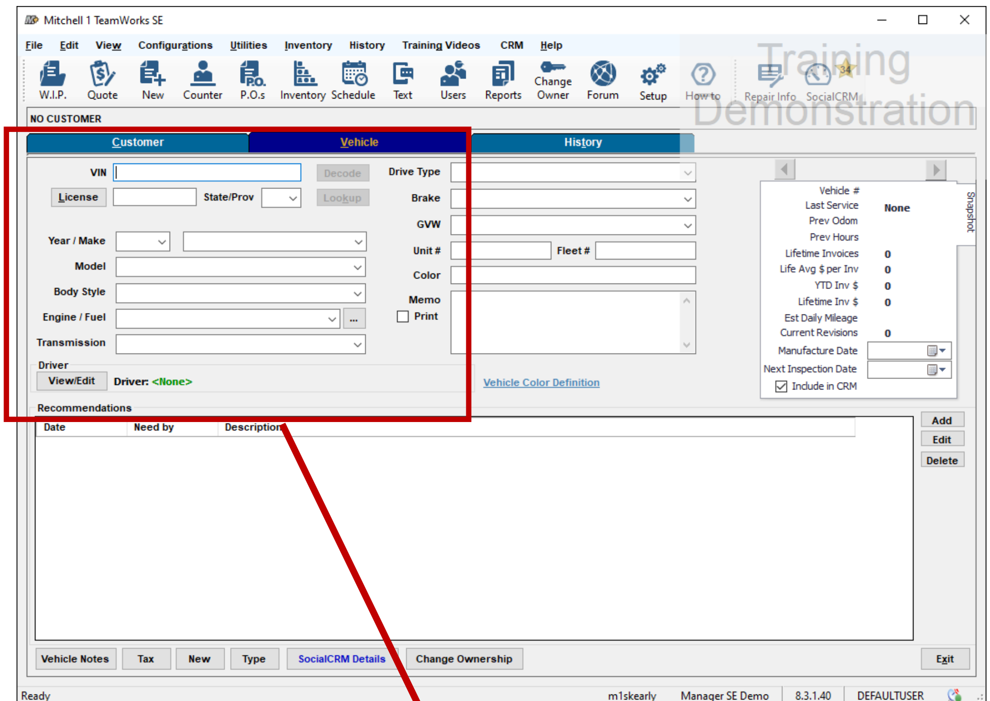
Tip: Use **Tab** key to advance to next field; use Shift + Tab to reverse. <u>Do **NOT**</u> use the Enter key; if you did, click the Customer tab to return to this screen. **E-mail** is not directly entered in the field. Click **Email List** to add an email not already in the system.

3. With customer data entry finished, now click 

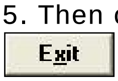
(Alt + V).

Vehicle screen displays for vehicle entry.

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



4. Type in the license plate and select Year / Make / Model, Body Style & Engine/Fuel vehicle data from the drop-down menus.

5. Then click on 

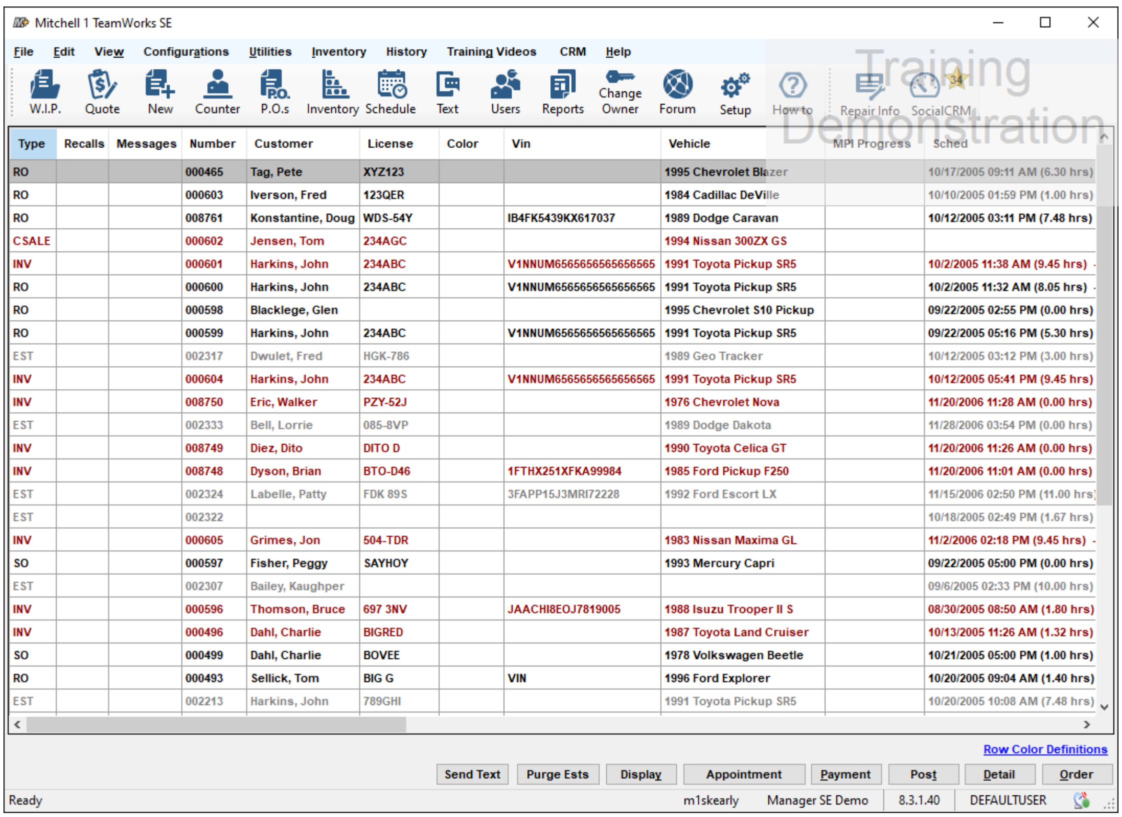
(Alt + X) to finish entry and close Vehicle screen**.**

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

6. Click <u>Y</u>es **(type a 'Y' or press Enter)** to confirm this vehicle and customer information is being added to the SE database for future use.

Note: There is no Estimate for John Jones yet; this customer and his vehicle were just added to the database. This customer name will not appear on this (WIP) screen until an actual estimate is created as shown in the next section.

'**WIP**' button can be clicked to display the Work In Progress screen. Think of it as the rack that held handwritten work orders. WIP screen provides an overview of all current business in your shop. We will provide more details on this screen later.



Type	Recalls	Messages	Number	Customer	License	Color	Vin	Vehicle	MPI Progress	Sched
RO			000465	Tag, Pete	XYZ123			1995 Chevrolet Blazer		10/17/2005 09:11 AM (6.30 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)
CSALE			000602	Jensen, Tom	234AGC			1994 Nissan 300ZX GS		
INV			000601	Harkins, John	234ABC		V1NNUM6565656565656565	1991 Toyota Pickup SR5		10/2/2005 11:38 AM (9.45 hrs)
RO			000600	Harkins, John	234ABC		V1NNUM6565656565656565	1991 Toyota Pickup SR5		10/2/2005 11:32 AM (8.05 hrs)
RO			000598	Blacklege, Glen				1995 Chevrolet S10 Pickup		09/22/2005 02:55 PM (0.00 hrs)
RO			000599	Harkins, John	234ABC		V1NNUM6565656565656565	1991 Toyota Pickup SR5		09/22/2005 05:16 PM (5.30 hrs)
EST			002317	Dwulet, Fred	HGK-786			1989 Geo Tracker		10/12/2005 03:12 PM (3.00 hrs)
INV			000604	Harkins, John	234ABC		V1NNUM6565656565656565	1991 Toyota Pickup SR5		10/12/2005 05:41 PM (9.45 hrs)
INV			008750	Eric, Walker	PZY-52J			1976 Chevrolet Nova		11/20/2006 11:28 AM (0.00 hrs)
EST			002333	Bell, Lorrie	085-8VP			1989 Dodge Dakota		11/28/2006 03:54 PM (0.00 hrs)
INV			008749	Diez, Dito	DITO D			1990 Toyota Celica GT		11/20/2006 11:26 AM (0.00 hrs)
INV			008748	Dyson, Brian	BTO-D46		1FTHX251XFKA99984	1985 Ford Pickup F250		11/20/2006 11:01 AM (0.00 hrs)
EST			002324	Labelle, Patty	FDK 89S		3FAPP15J3MRI72228	1992 Ford Escort LX		11/15/2006 02:50 PM (11.00 hrs)
EST			002322							10/18/2005 02:49 PM (1.67 hrs)
INV			000605	Grimes, Jon	504-TDR			1983 Nissan Maxima GL		11/2/2006 02:18 PM (9.45 hrs)
SO			000597	Fisher, Peggy	SAYHOY			1993 Mercury Capri		09/22/2005 05:00 PM (0.00 hrs)
EST			002307	Bailey, Kaughper						09/6/2005 02:33 PM (10.00 hrs)
INV			000596	Thomson, Bruce	697 3NV		JAACHI8EOJ7819005	1988 Isuzu Trooper II S		08/30/2005 08:50 AM (1.80 hrs)
INV			000496	Dahl, Charlie	BIGRED			1987 Toyota Land Cruiser		10/13/2005 11:26 AM (1.32 hrs)
SO			000499	Dahl, Charlie	BOVEE			1978 Volkswagen Beetle		10/21/2005 05:00 PM (1.00 hrs)
RO			000493	Sellick, Tom	BIG G		VIN	1996 Ford Explorer		10/20/2005 09:04 AM (1.40 hrs)
EST			002213	Harkins, John	789GHI			1991 Toyota Pickup SR5		10/20/2005 10:08 AM (7.48 hrs)

This concludes the basic customer / vehicle entry exercise.

Continue on to Creating an Estimate with this data entered.

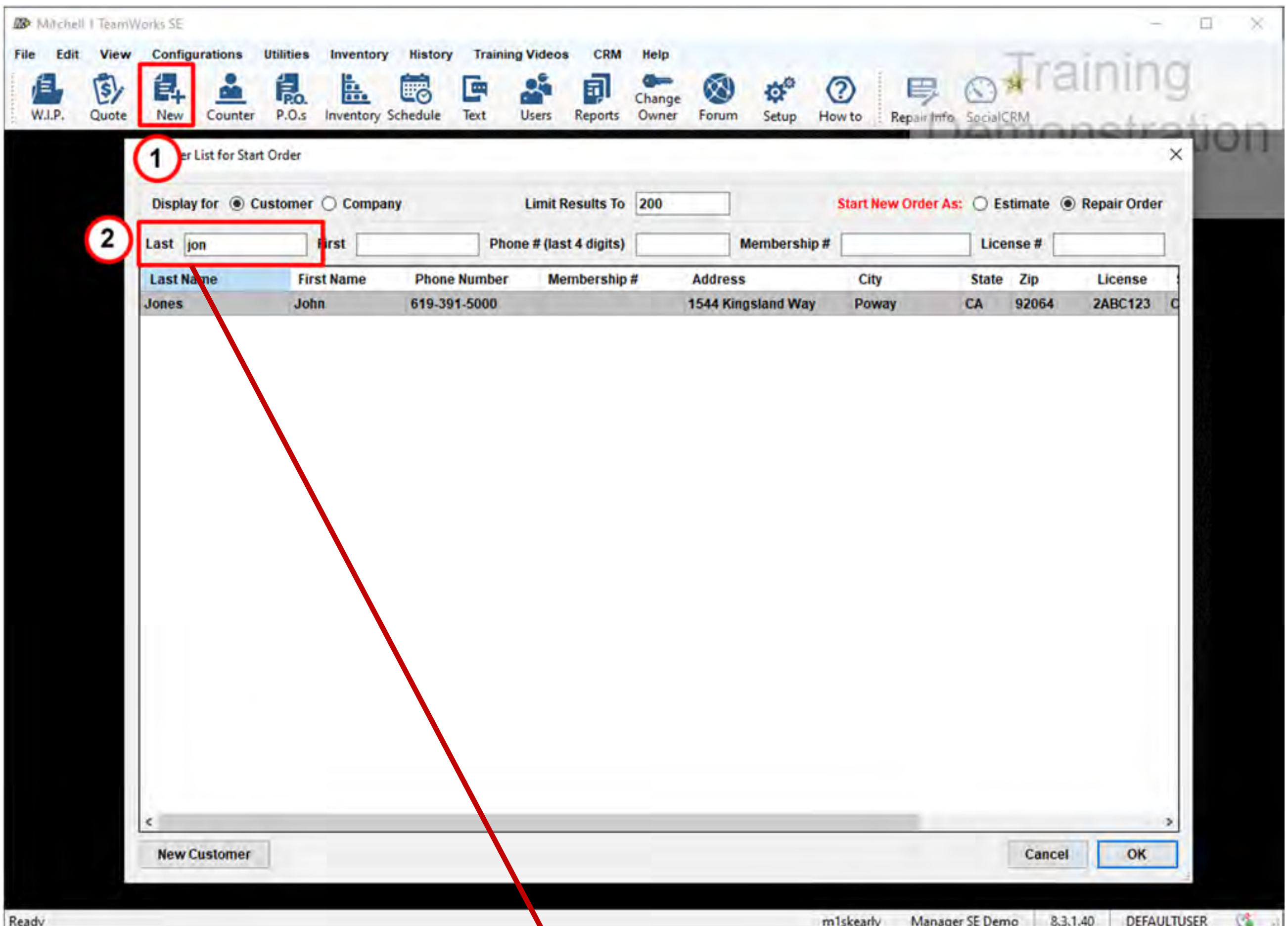
Creating an Estimate

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

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.*

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.



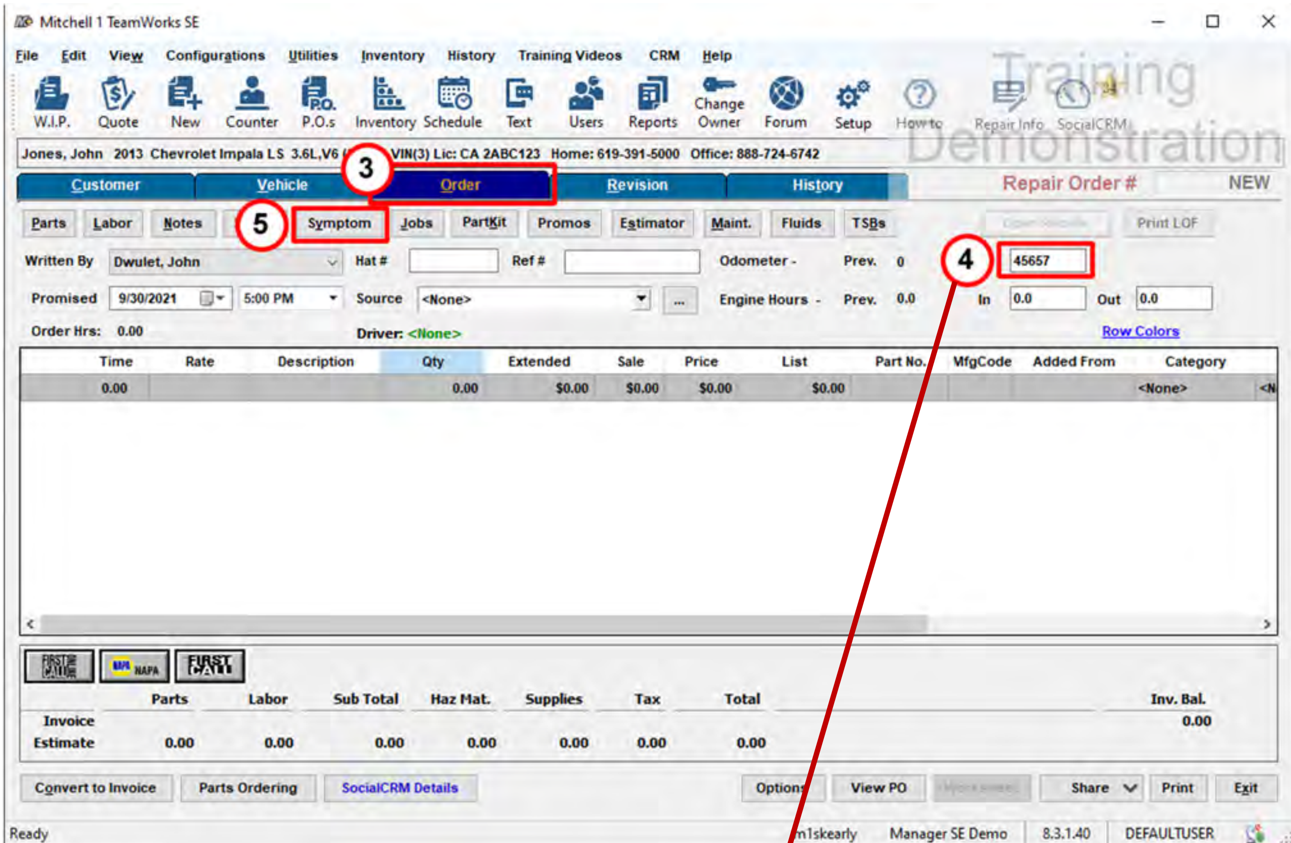
2. In the Last field, type 'J-o-n' as shown at right. >>>

When 'Jones, John' appears in results, double-click on it (**or press Enter**) to select Jones and start an estimate.

Customer information is retrieved and Customer screen displays automatically. The customer we entered has only one vehicle; that is automatically selected.

3. Click on **Order** **(Alt + O)** to advance to Order screen.

The Order Screen displays.



4. Enter the vehicle In Mileage as shown here: In 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.

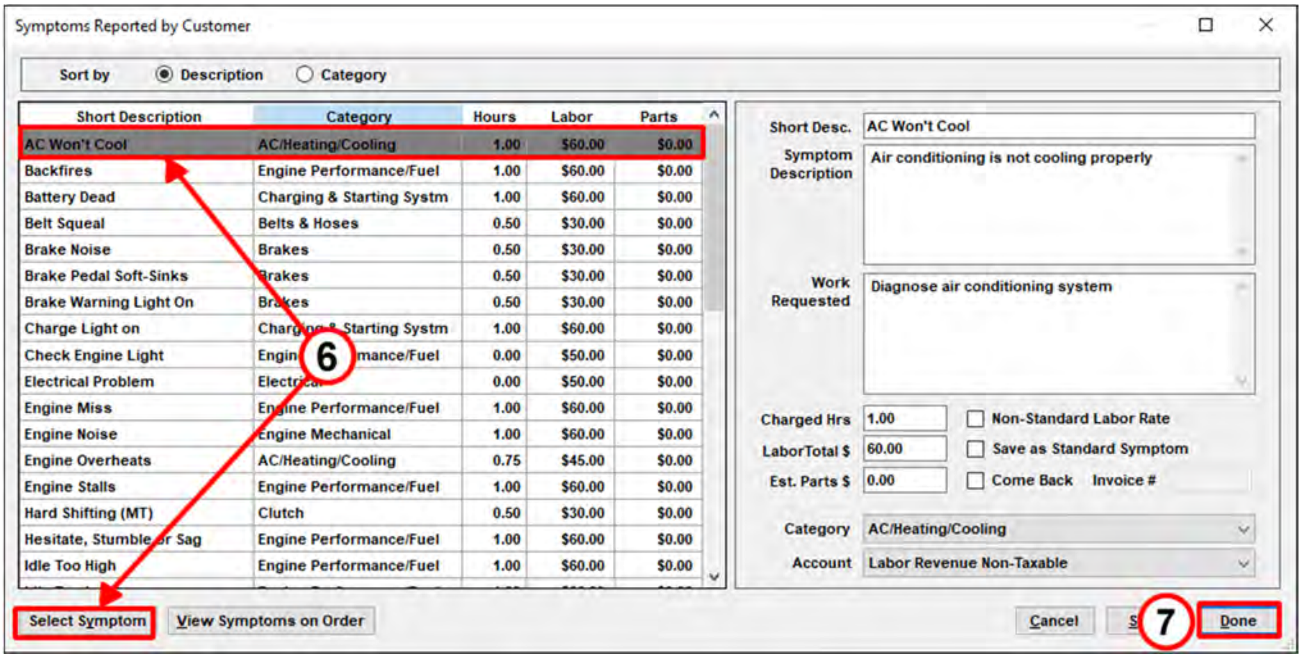
Begin adding order items to the Estimate, starting with a Symptom.

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

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

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

The 'Symptoms Reported by Customer' screen displays to select from.



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

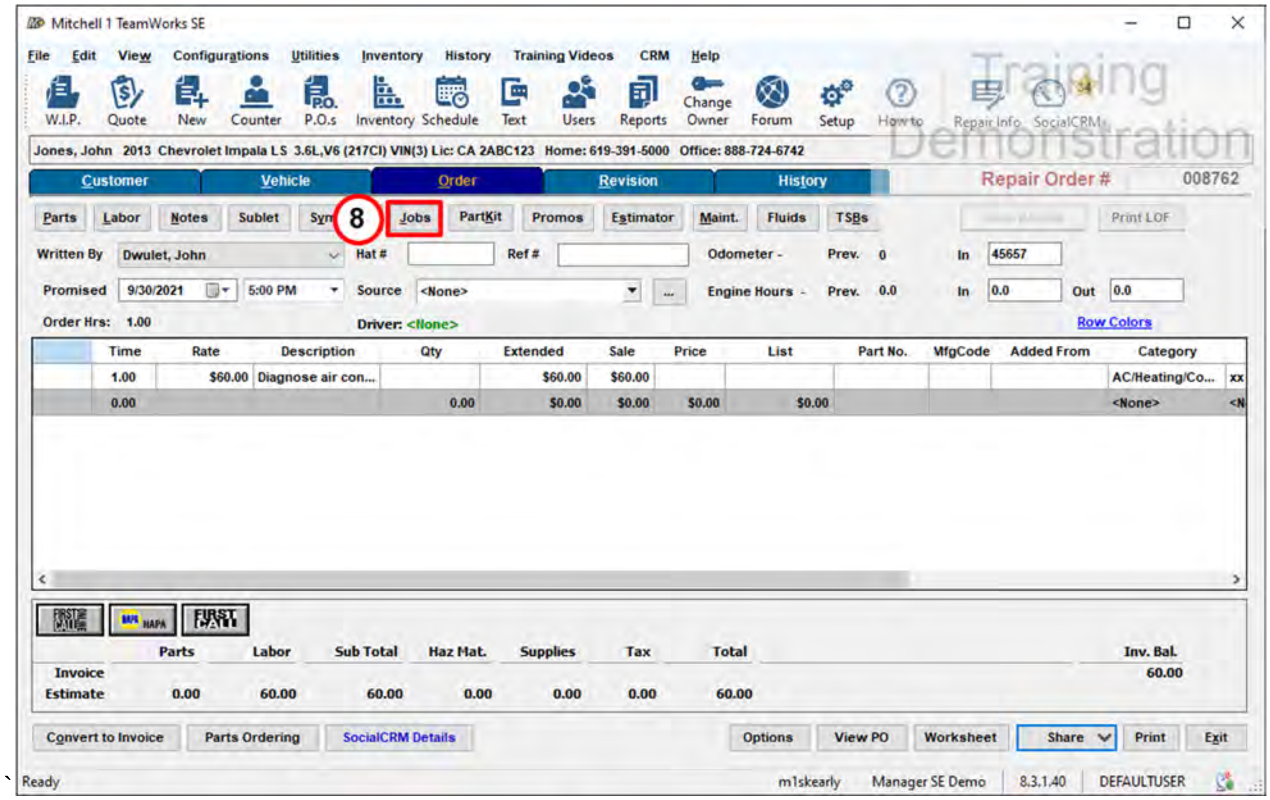
Symptom displays on Order screen as line item of Estimate:

	Time	Rate	Description	Qty	Extended	Sale	Price	List	Part No.	MfgCode	Tech Name
	1.00	$60.00	Diagnose air con...		$60.00	$60.00					Please , Select
	0.00			0.00	$0.00	$0.00	$0.00	$0.00			<None>

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.

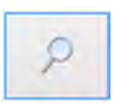
Tip: Shop Data → Screen View → Show Symptoms on New Orders ☑

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

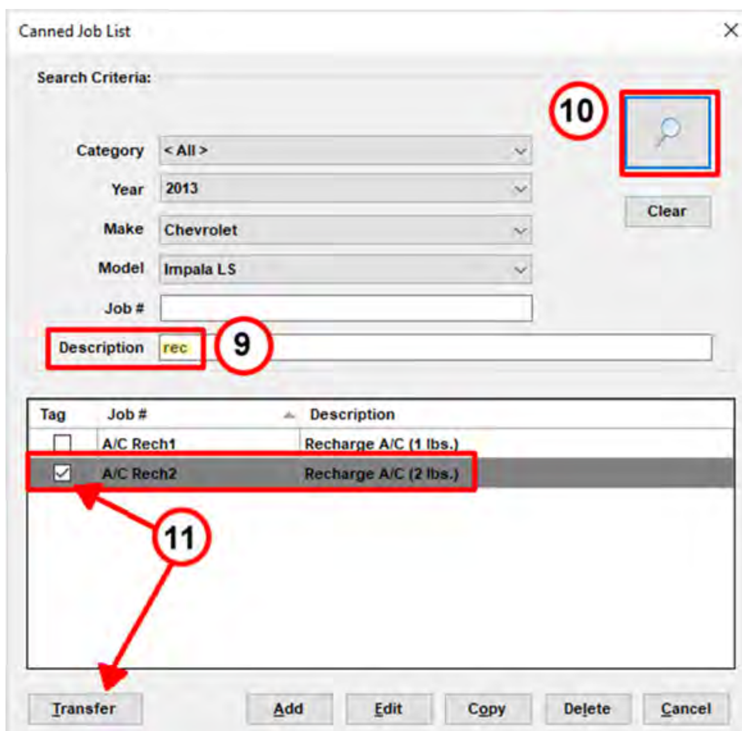


8. Click on **Jobs** **(Alt + J)** to open Canned Job list. This screen will display DEMO sample jobs.

9. In Description, enter '**rec**' as partial search phrase. (not req'd to type entire job name)

10. Click on  **(press Enter)** to find jobs that include '**rec**' in Description.

11. Check the box in the Tag column for **'A/C Rech1'**; then click on **Transfer** **(Alt + T)** to copy this Job (Freon + labor) to this Estimate.

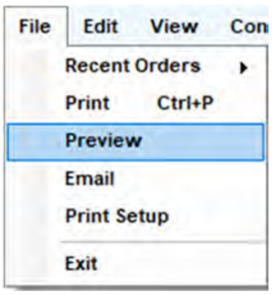


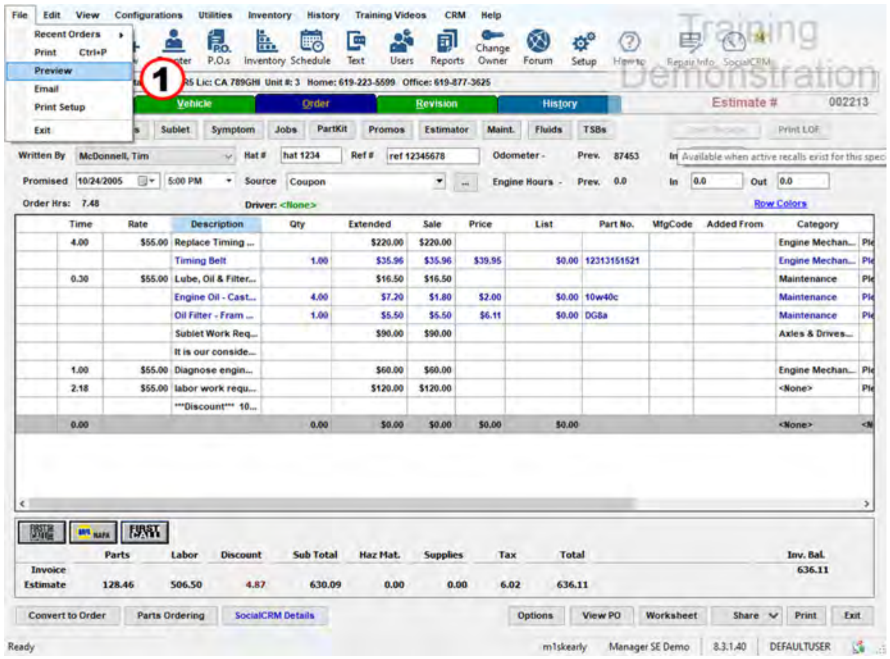
Supports selection & transfer of multiple Jobs

The Completed Estimate

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

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





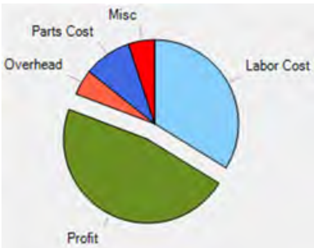
2. The Print Preview displays how printed estimate appears.

3. Click on (**press Alt + F4)** to close Print Preview window.

Closing the Print Preview returns you to estimate on Order screen.

NEXT: F12 key = Check Profit

Using the Profit Wizard

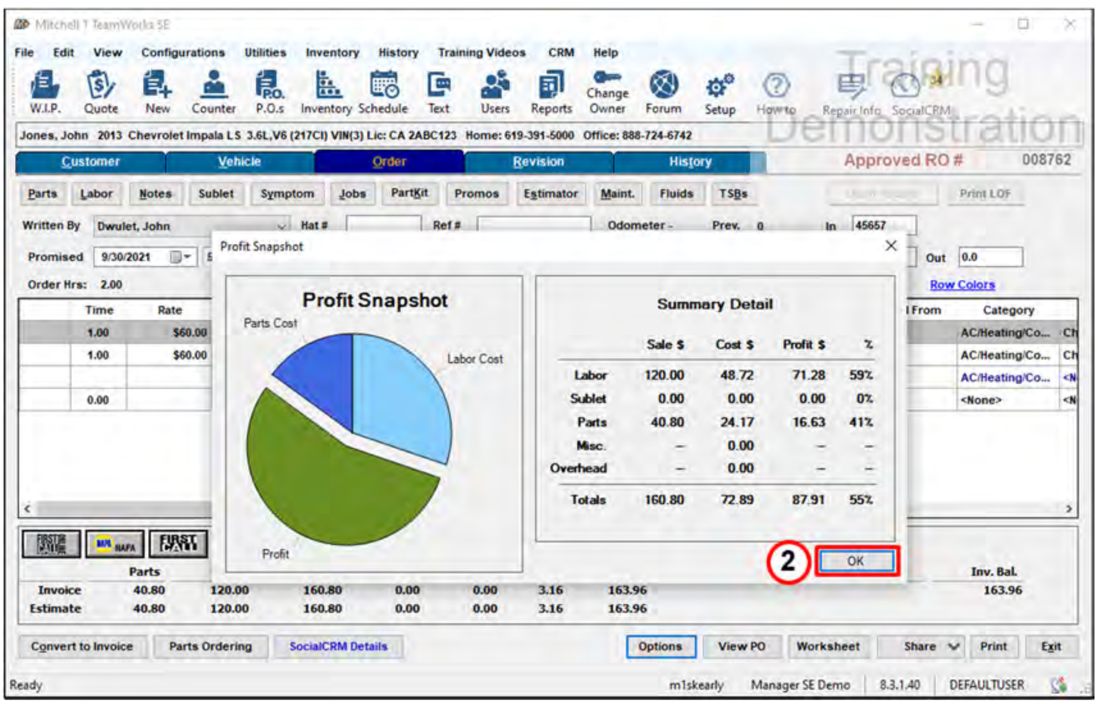


Profit Wizard provides an overview of your costs and profit on this order in the form of a pie chart. Use the **F12** key as a shortcut to look at this order data.

1. Click on **Options** *(bottom of Order screen)*, select **Check Profit**. (press **F12** key)

2. Click on  **(press Esc key)** to close Profit Snapshot window.

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



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

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

Converting an Estimate into a Repair Order

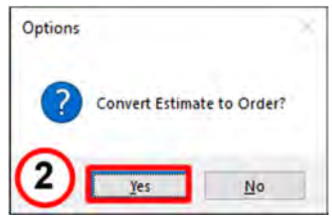
Typically, an estimate is prepared to get customer approval for the work. Once the customer agrees, that estimate is typically printed, signed, then converted to an active R.O. [your state regulations may vary on this]

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

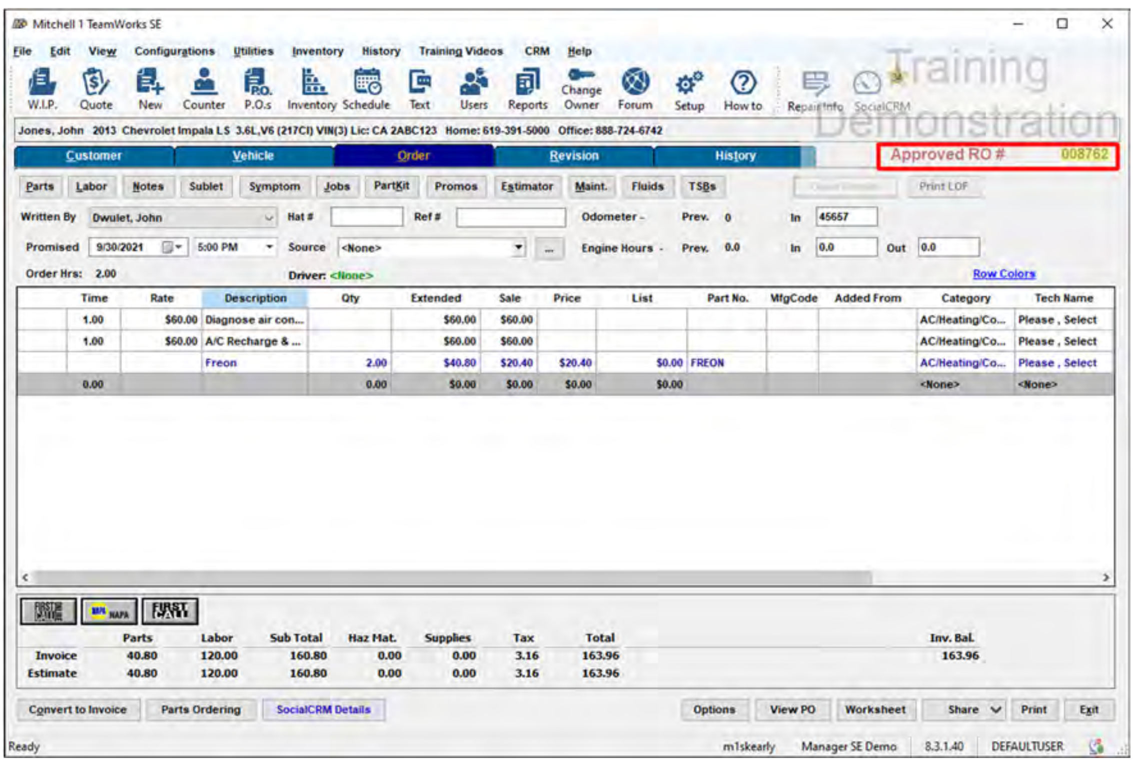
System will then ask for confirmation to convert this Estimate to a Repair Order:

2. Click on Yes **(type 'Y' or press Enter)**.

Order Screen now displays as **Approved RO#** (with permanent # assigned).

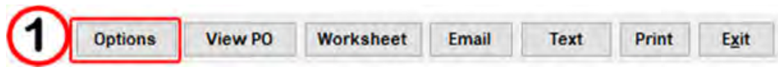


Note: Shops create many Estimates; some don't result in actual work. These get temporary "throwaway" numbers. When an EST is converted to an R.O., it's assigned a new **permanent** number kept through the INV stage into History.



Assigning Techs to R.O. / Print Tech Worksheet

Now that we have an active Repair Order, we need to assign technicians.



1. Click on 

to access the drop-down lists for technicians.

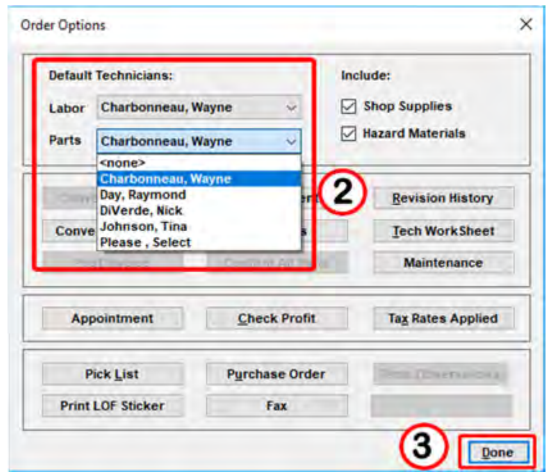
While you may change each line one at a time, a selection here change all order lines at once.

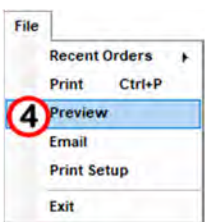
2. Assign Technicians from the drop-down lists as follows:

Labor: **'Charbonneau, Wayne'**
Parts: **'Charbonneau, Wayne'**

3. Click 

to complete. This R.O. is now ready to print.





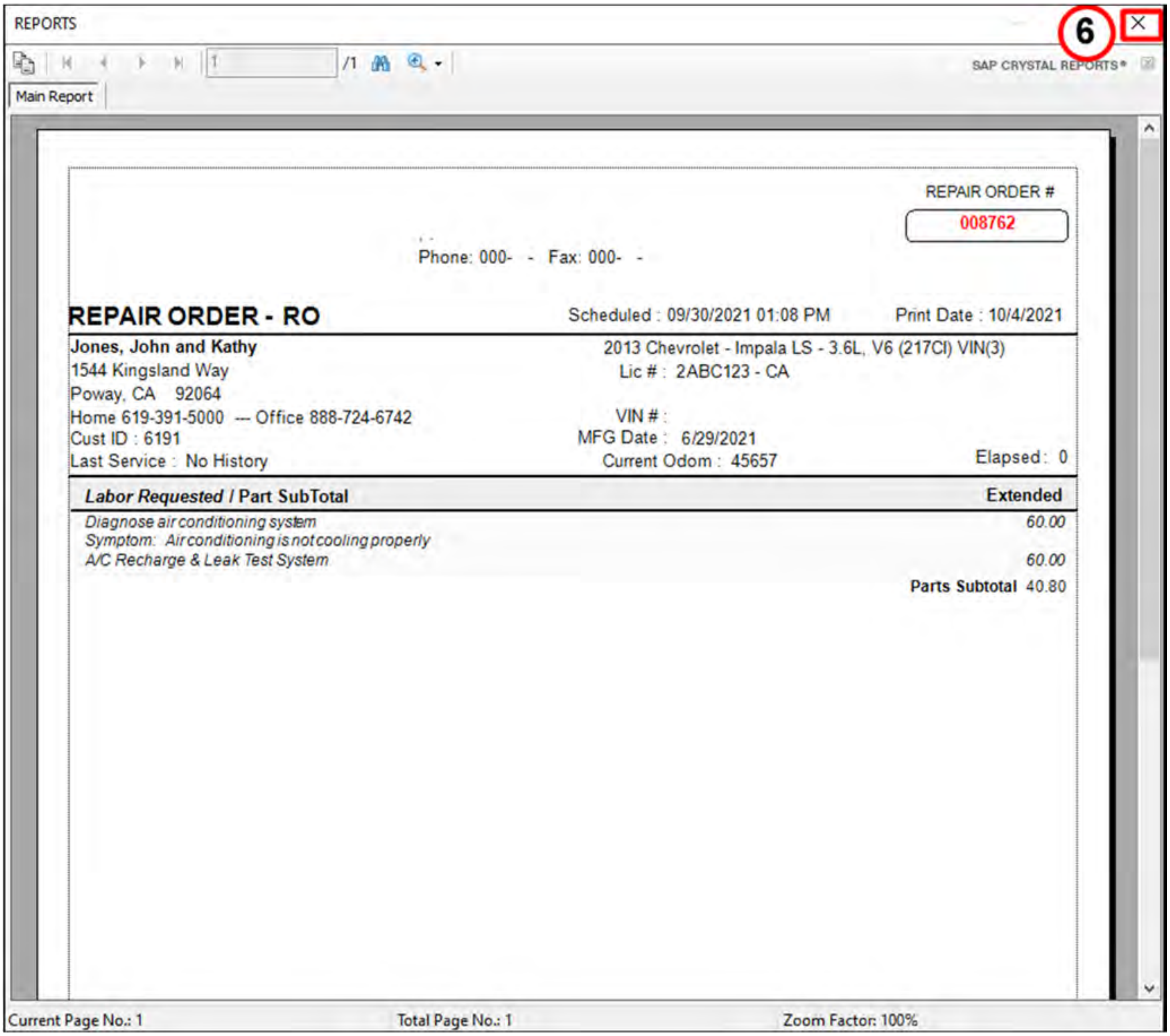
4. Choose **File / Preview** to preview the Repair Order on-screen.

You may get a validation warning.

5. Depending on system settings, there may be validations; just click on 

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

Inspect the Repair Order content in the Print Preview window.



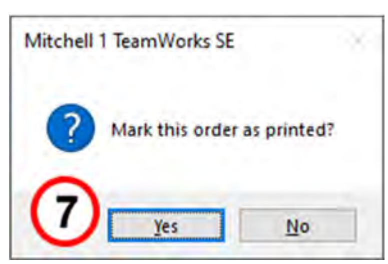
Note: You may also increase/decrease (zoom) the preview size by changing  the value selected in the top line icons as shown.

6. Click on  in upper RH corner of screen **(Alt + F4)** to close the Preview.

Next you will be prompted to mark this Repair Order as Printed.

7. Click on 

('Y' or press Enter) to mark this Repair Order as printed.



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

1) Sets 'Time/Date In' field (visible in WIP Detail) as beginning of actual work.

2) Parts become 'Committed' and visible to Pick List / Purchase Order process.

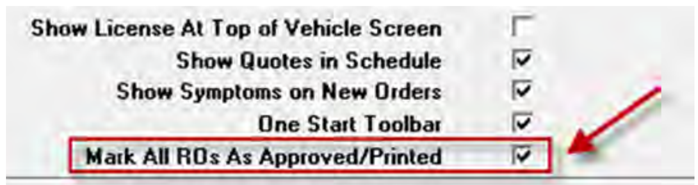
You don't have to actually print to paper; automated setting TIP shown below.

TIP: It is also possible to automatically 'Mark All ROs As Approved/Printed'.

Click on 

then select 

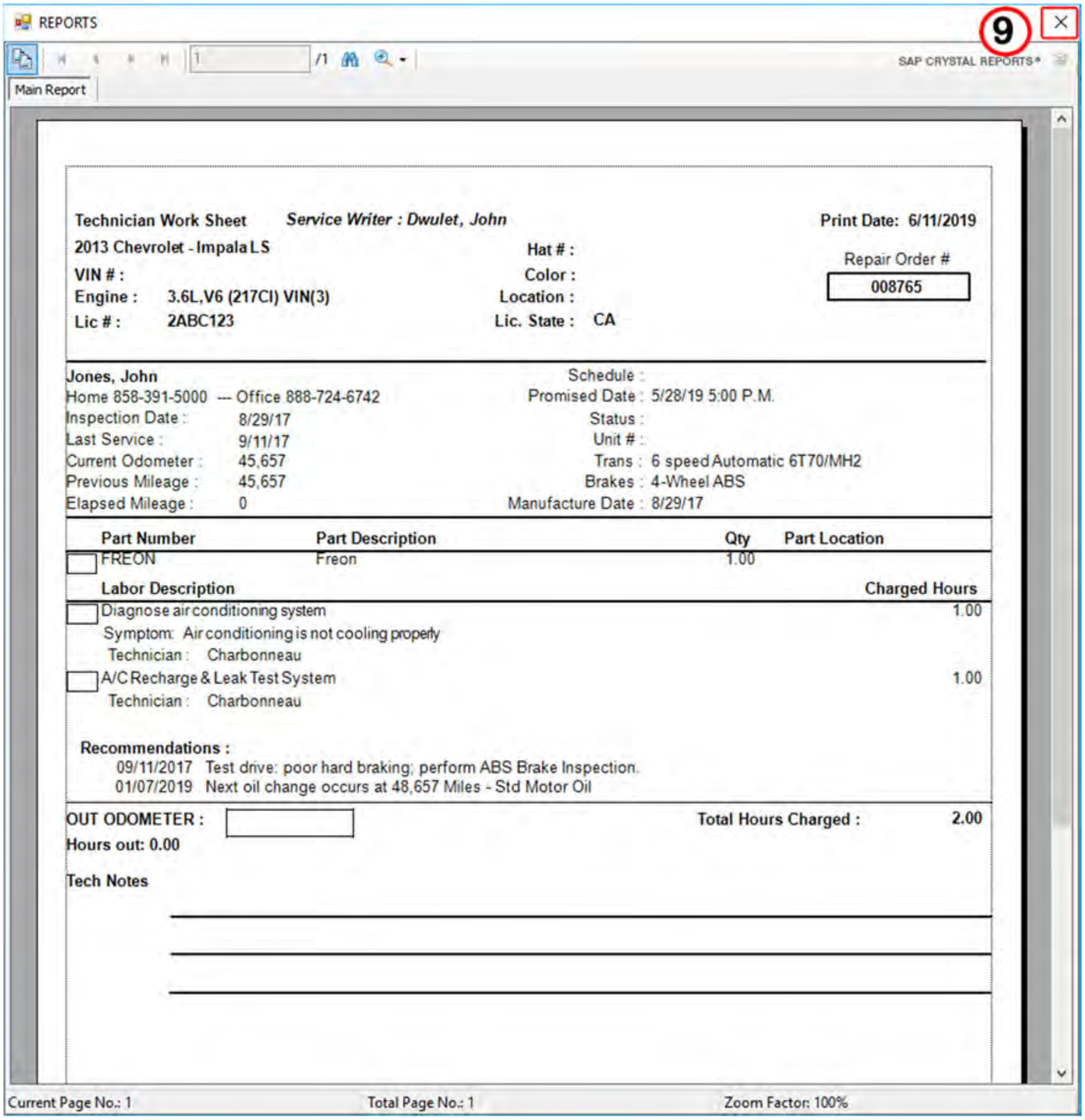
and check the box as shown.



This time-saving setting <u>bypasses</u> the RO "printing" steps as shown previously.

During the Convert Estimate to R.O. sequence, you'll be prompted for printing a Technician Worksheet. (secondary question shown below) = YES

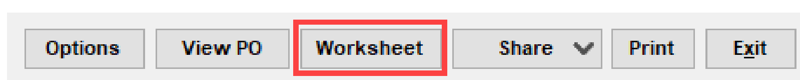
8. Click on Yes **('Y' or press Enter)** to preview the Technician Worksheet. It includes details to perform service and to also enter their findings from inspection or test drive.



Inspect the Technician Worksheet in the Print Preview window.

9. Click on the  in the upper RH corner of screen **(Alt + F4)** to close the Print Preview.

Note: It is also possible to re-print a Technician Worksheet at any time (even for an Estimate) from within the window.



Note: Invoices use <u>same</u> # assigned during R.O. An INV <u>can</u> be changed back to an R.O. if last minute items are added.(Setup-Shop Data-Default Settings option)

NEXT: Converting a RO to an Invoice.

Converting a Repair Order to an Invoice

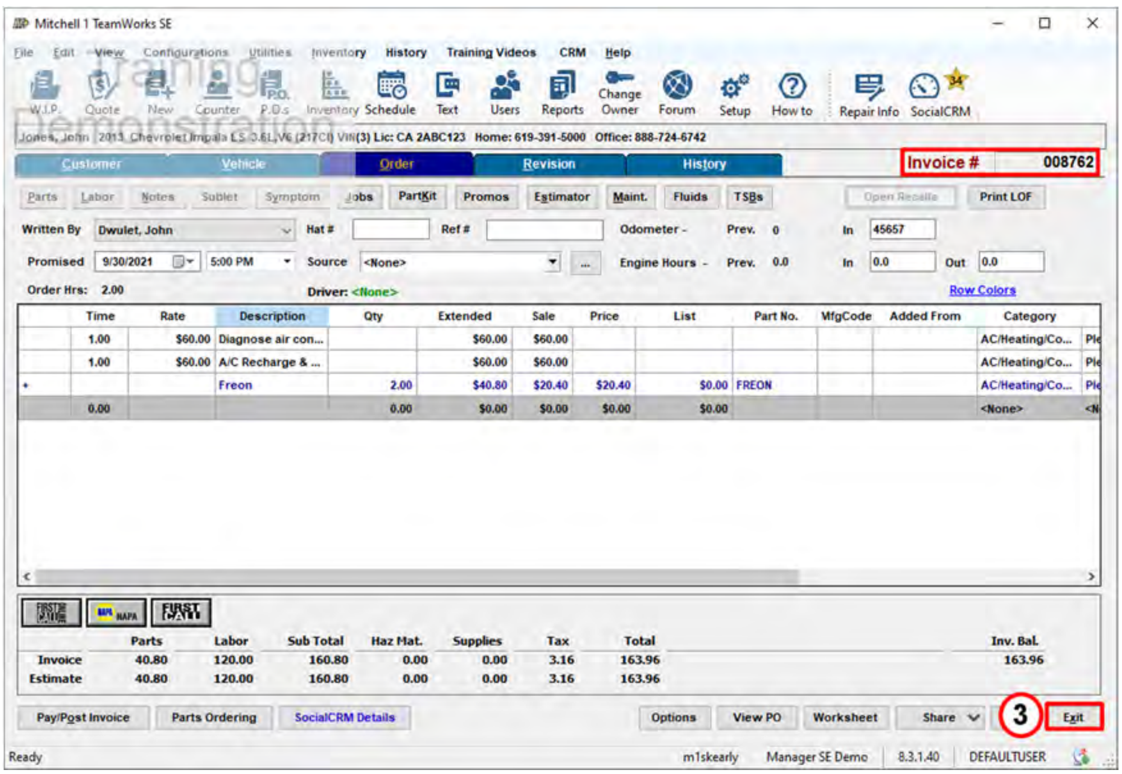
Convert an existing Repair Order to an Invoice once the work is completed.

1. Click on 

(Alt + O) (lower LH corner of Order screen).

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.

Invoice screen looks <u>exactly</u> like the R.O. screen; it now display as **Invoice** #.



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

3. Click on 

(or press Esc) to return to the Work-In-Progress screen.

Work in Progress Screen

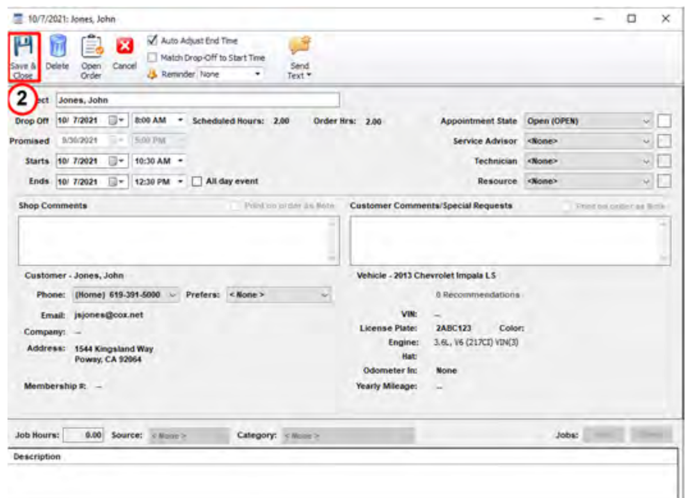
The ‘WIP’ screen provides overview of all your current shop business. This is the screen you will be in when not working directly with a specific order.

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

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

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

2. Click on Save & Close .



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

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

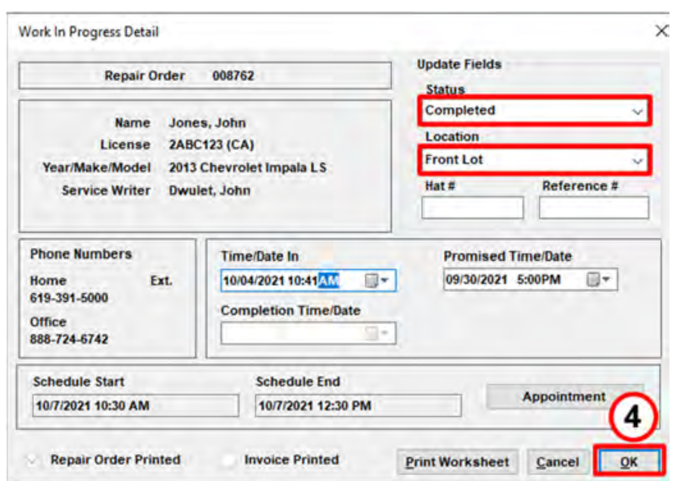
Update these WIP Detail fields:

Status: Completed
Location: Front Lot

4. Click on Ok to save.

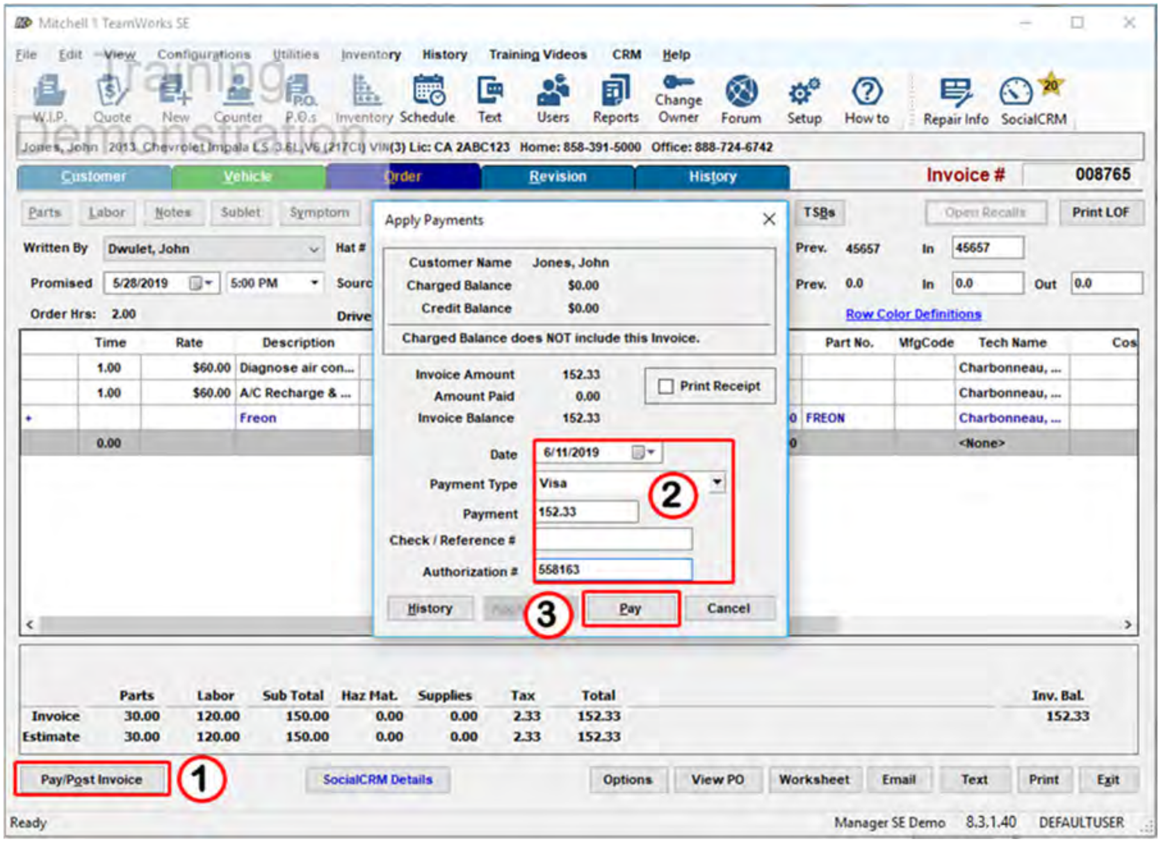
WIP screen visible again with Invoice (Jones) highlighted.

Click on Order (**Alt + O**) to open the Jones Invoice again.



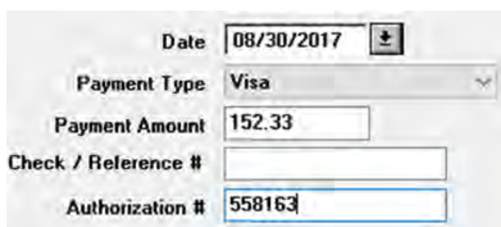
Apply Payments & Post the Invoice

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



1. Click on **Pay/Post Invoice** **(Alt + O)** to open the Apply Payment window.

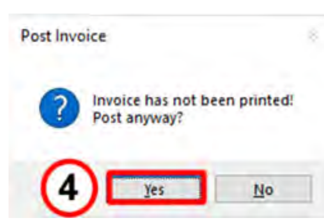
2. Enter Payment Type: 'V' selects **(Visa)** + Authorization #: **558163**



3. Click on **Pay** to continue.

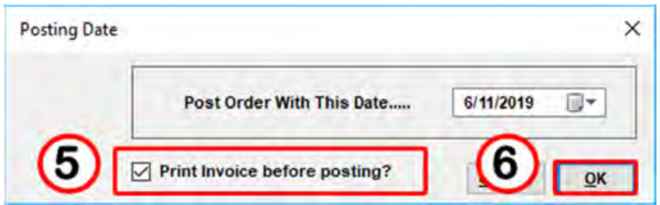
Note: *Default payment type* is selected in Shop Data Setup. Payment Amount = defaults to INV balance due. Print Receipt is optional.

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.

System will automatically display the Posting Date dialog window below.



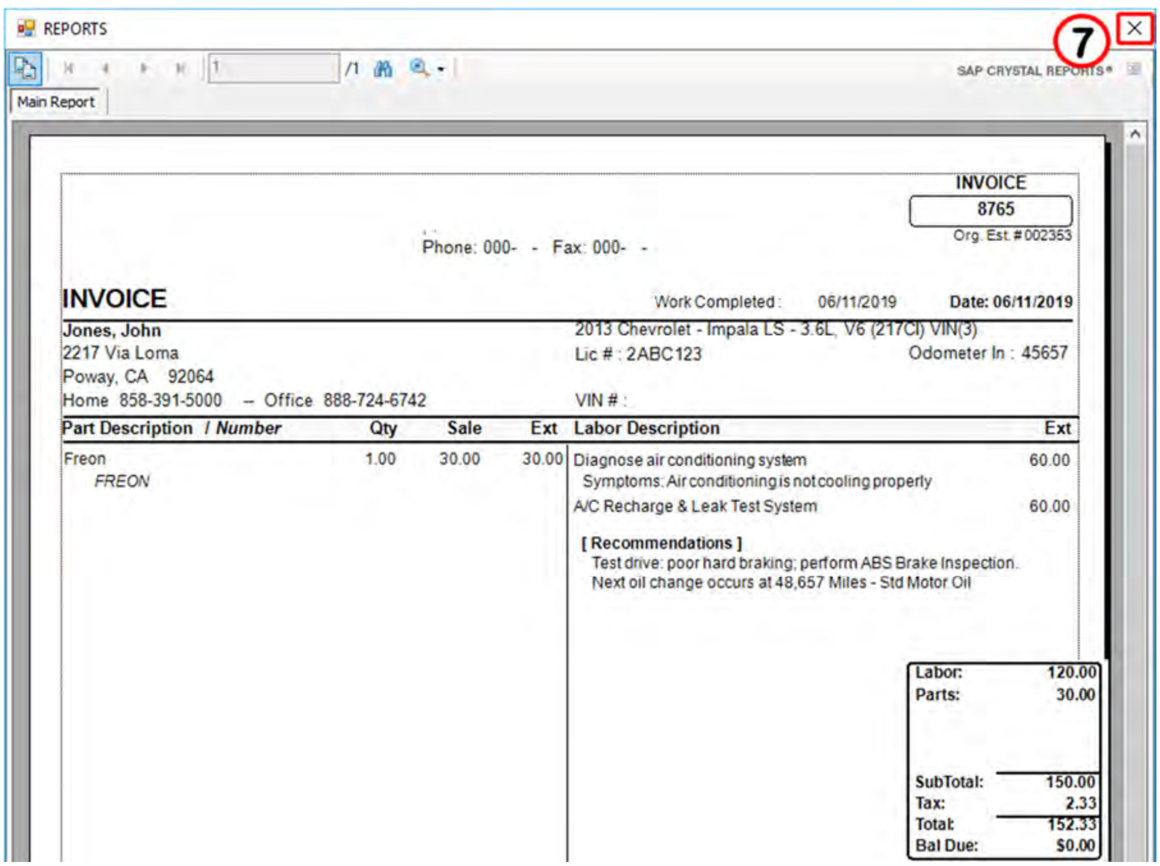
5. Click to place a check in the **Print Invoice before Posting** checkbox. This box only needs to be checked once; the system will *remember* this preference.

6. Click on **Ok** to continue the process of Printing and Posting.

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

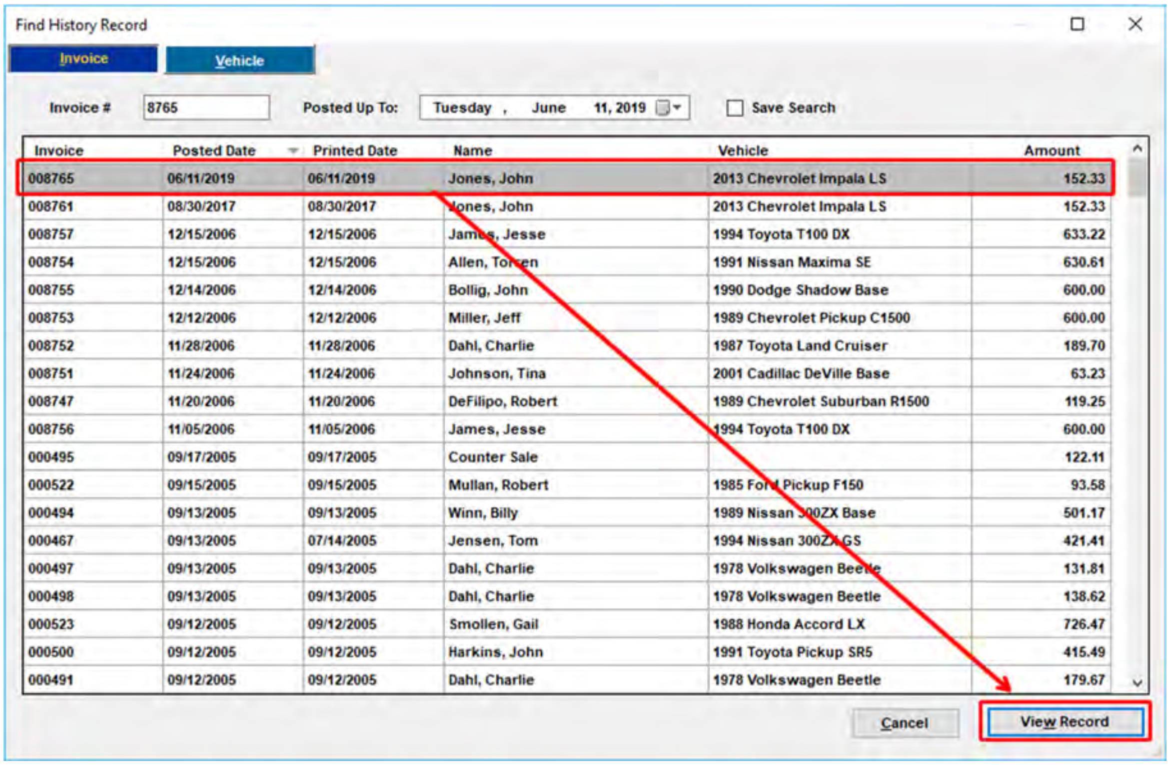
Once comfortable with the program, you may go to Configurations – Reports/Printers area and turn off Default Print to Screen option to skip preview steps in the future.

Print displays what your final printed invoice would look like.



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

Go to **Utilities** menu, select Find History Record **(press F4 key)**. View Record button allows access to view details, re-print or un-post an Invoice.



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.

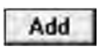
NOTE: Revisions for storing actual work details will be discussed after this.

1. Click on 

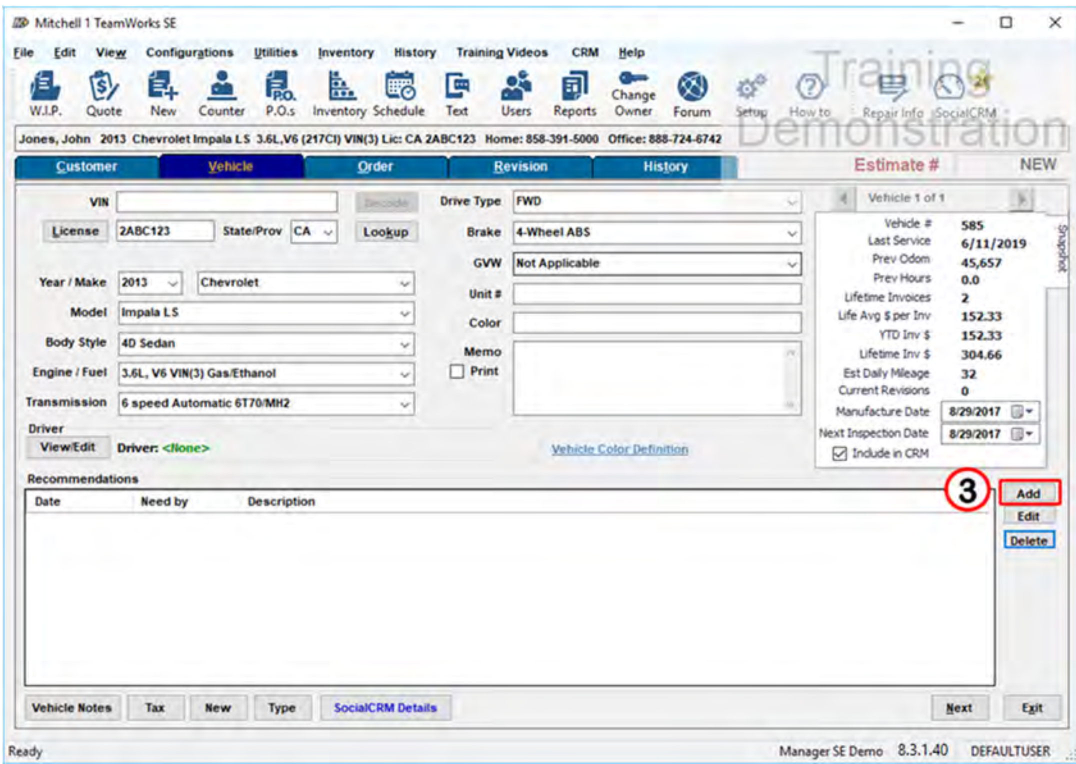
(Press F6) and select Jones, John (any name will do)

2. Go to 

(Alt + V) screen.

3. Click on 

to begin entry of your first Recommendation.

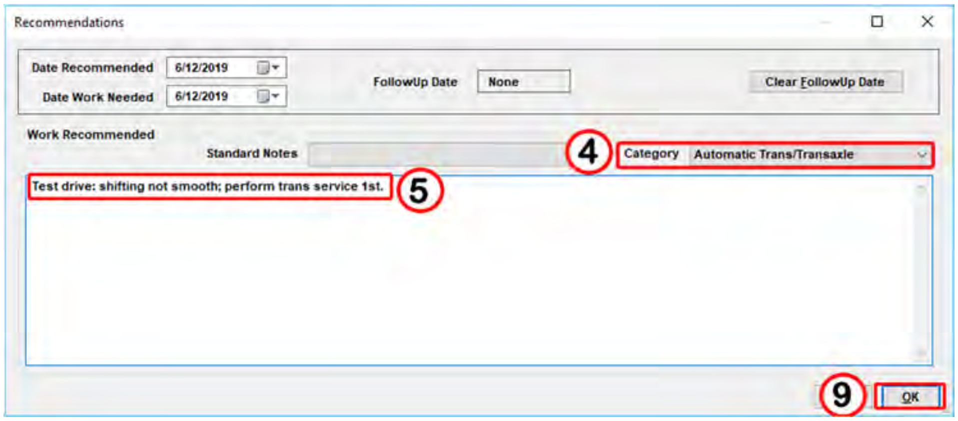


Today's date (default) is fine; use drop-down calendars or type dates if desired.

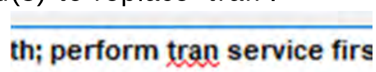
TIP: Date Work Needed is usually same as Date Recommended; it is provided to input repair needs to be completed by future date (30 days later, etc)

4. Category: Select '**Automatic Trans/Transaxle**' (or press 'A' 3 times).

5. Type: **'Test drive: shifting not smooth; perform trans service 1st.'**

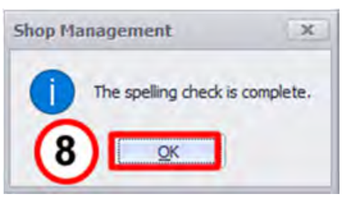


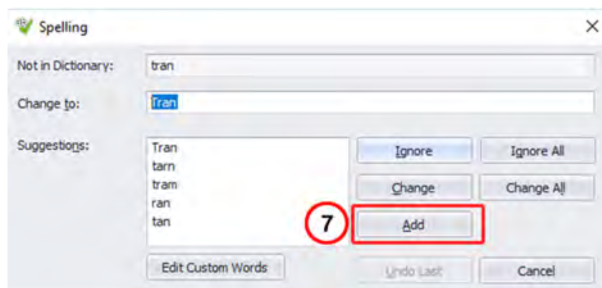
6. When Recommendation text entry is finished, press **F2** to check spelling. Dictionary will display options and suggest other word(s) to replace 'tran'. **Note:** tran is now underlined in red, this is because it is not yet recognized by the spell check.



7. Select  option.

8. Click **OK** to close Spellcheck.





Note: Custom Dictionary allows you to store any number of automotive terms to keep the "Not Found" warning from bothering you every time you use them.

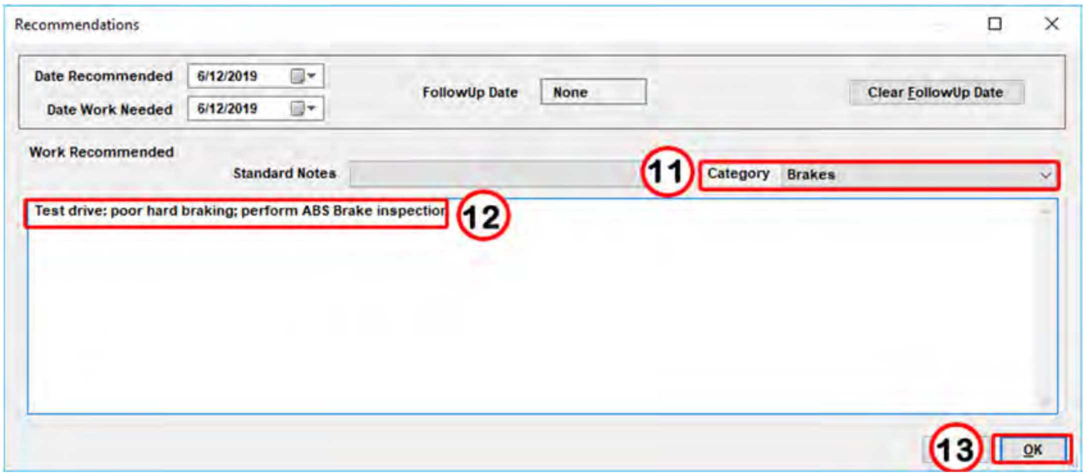
9. Click **OK** in Recommendations to save your first entry and proceed to begin entry of the second recommendation.

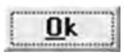
Note: By creating separate Recommendations for each identified repair issue, your follow-up marketing can be more precisely focused. The requirement to include a Category as a filter is part of this approach.

10. Click on  **(Alt + A)** again to enter a second Recommendation.

11. Press the Tab key to move down to the Category field. Scroll down the Category list and select Brakes. (**Or press the 'B' key 3 times**).

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



13. Click on 

to save this Recommendation; the two entries display.

Recommendations

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

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

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

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

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

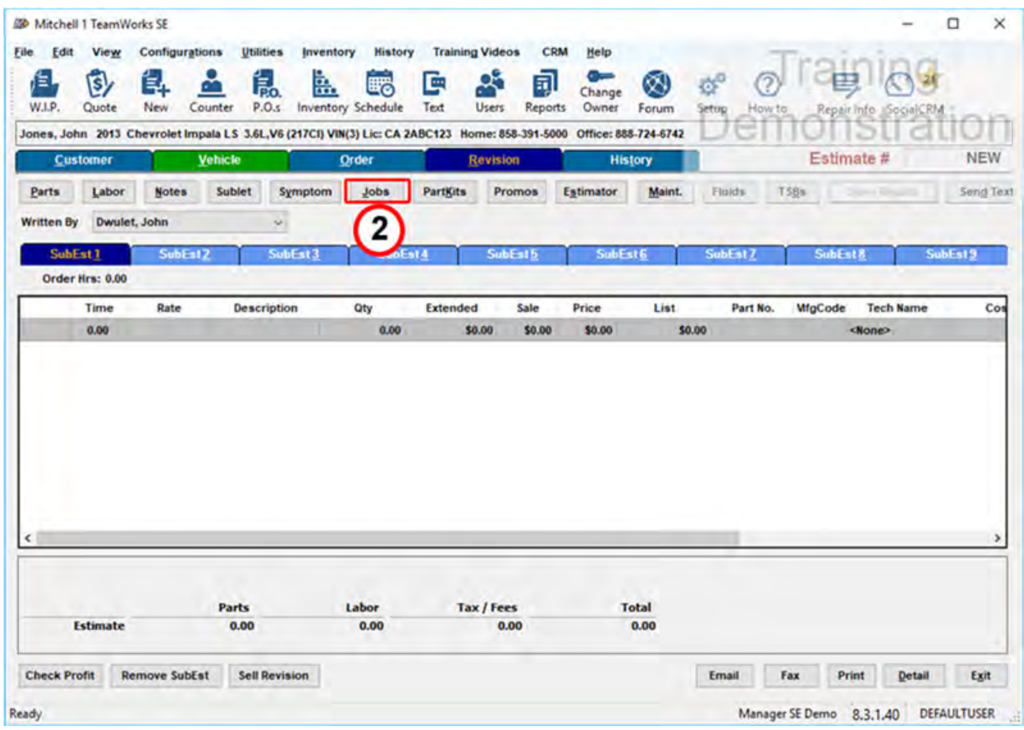
Entering Revisions

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

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

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

1. Go to 1 Revision screen **(Alt + R)** to create a Sub-Estimate.

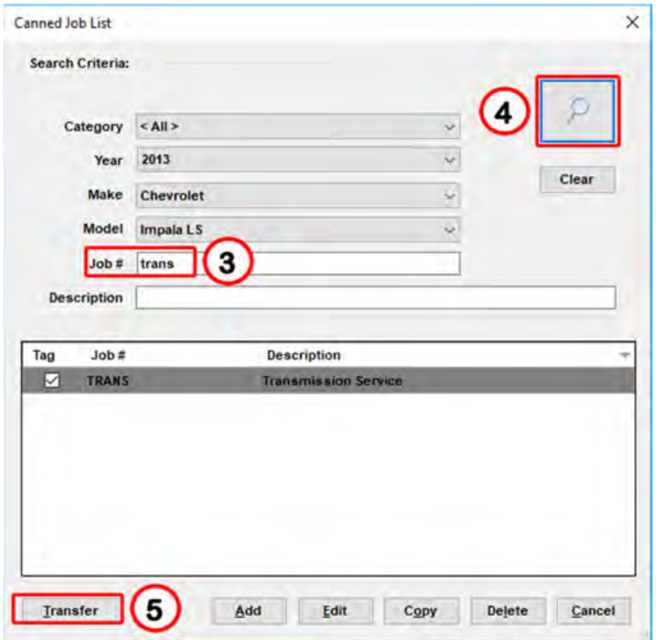


2. From Revisions screen, click Jobs **(Alt +J)** to open the Canned Job list.

Transferring a Canned Job into a (Revision) Sub-Est1 workspace:

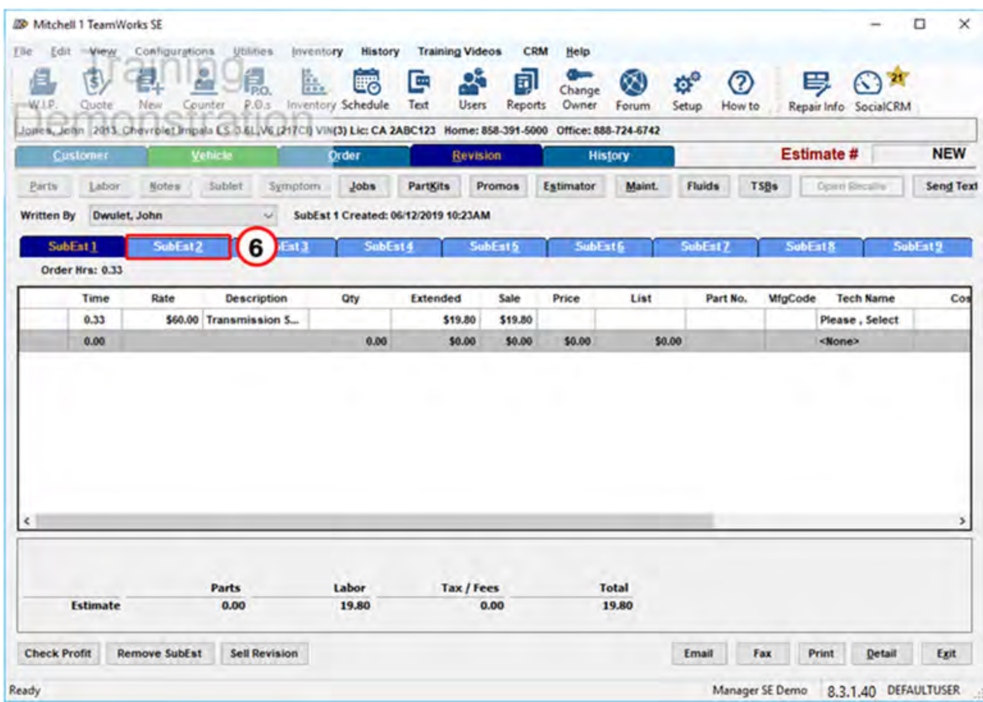
3. Tab down to Job # field and enter ‘**trans**’.

4. Click on **(or press Enter).** Program search finds a matching entry.

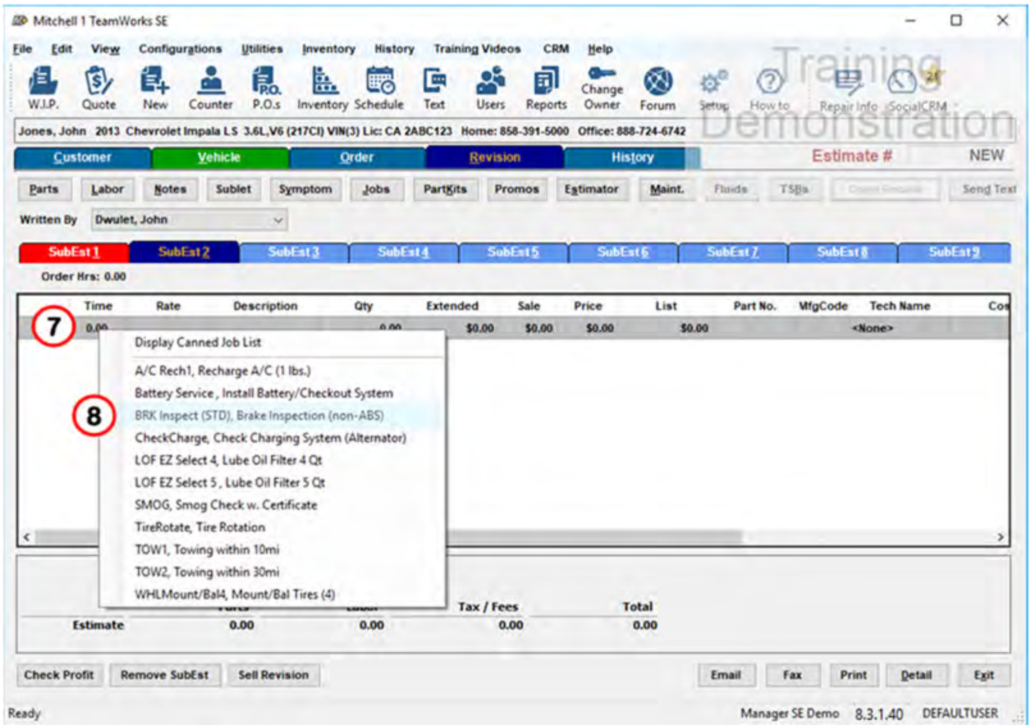


5. Click on Transfer **(Alt + T)** to copy into Revision (Sub-Estimate 1).

Revision screen now displays **SubEst1** with the TRANS Canned Job added.



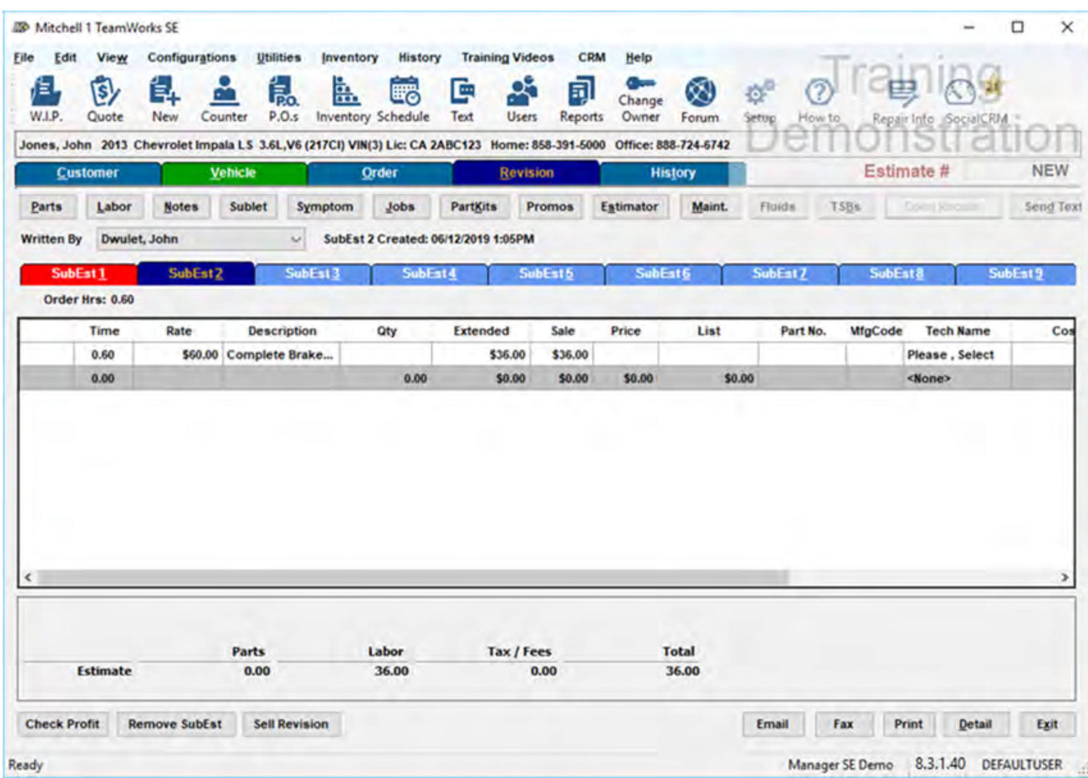
6. Click on SubEst 2 tab to open the **SubEst2** Revision workspace.



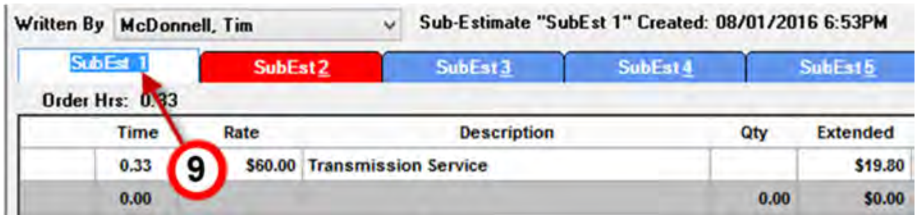
7. Right-click on the .00 line in SubEst2 grid to open the Quick Canned Job list.

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

Revision screen now displays **SubEst2** with the BRAKES Canned Job added.



TIP: Re-name each Sub-Estimate tab to identify work per job contents:



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

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

Revision screen - 2 Sub-Estimates; ready to transfer to Order, once approved.

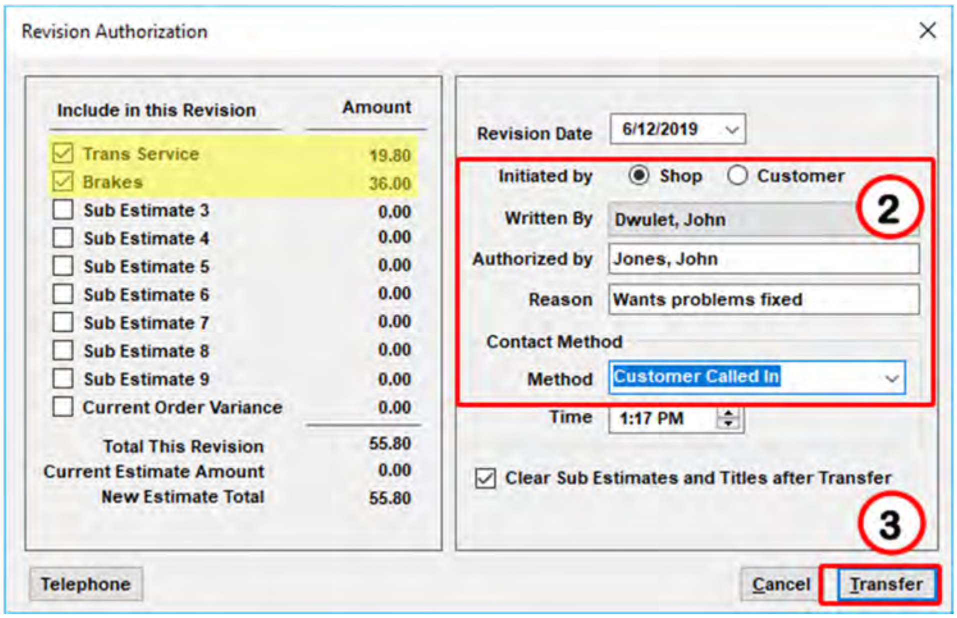
Sell (Transfer) Revisions

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

1. Click on Sell Revision (1) to display the Revision Authorization screen.

2. Select / input the following:

Initiated by: **Shop**
Authorized by: **Jones, John**
Reason: '**Wants problems fixed**'
Method: **Customer Called In**



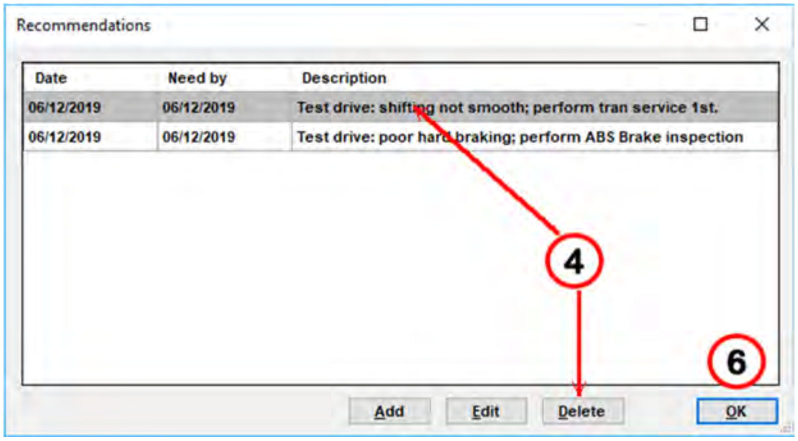
NOTE: It is recommended that 'Clear Sub Estimates after Transfer' remain checked to avoid later introducing work that has already been performed.

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

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

Clearing Related Recommendations During Revision Transfer Process

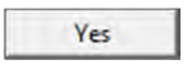
Transferring Revisions to Order screen automatically prompts user to review and clear any related Recommendations, IF any of these triggered the creation of specific Revisions to address. (which is true in this demo exercise)



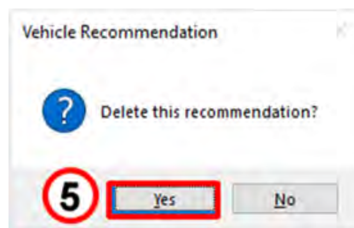
Note: Look at Recommendations very carefully. Delete only those taken care of by these transferred Revisions. Follow-up on Recommendations is a valuable tool driven by these entries; take care not to lose any new sales opportunities.

4. Highlight a Recommendation you wish to remove and click on 

(Alt + D). Repeat these steps as needed.

5. Click on 

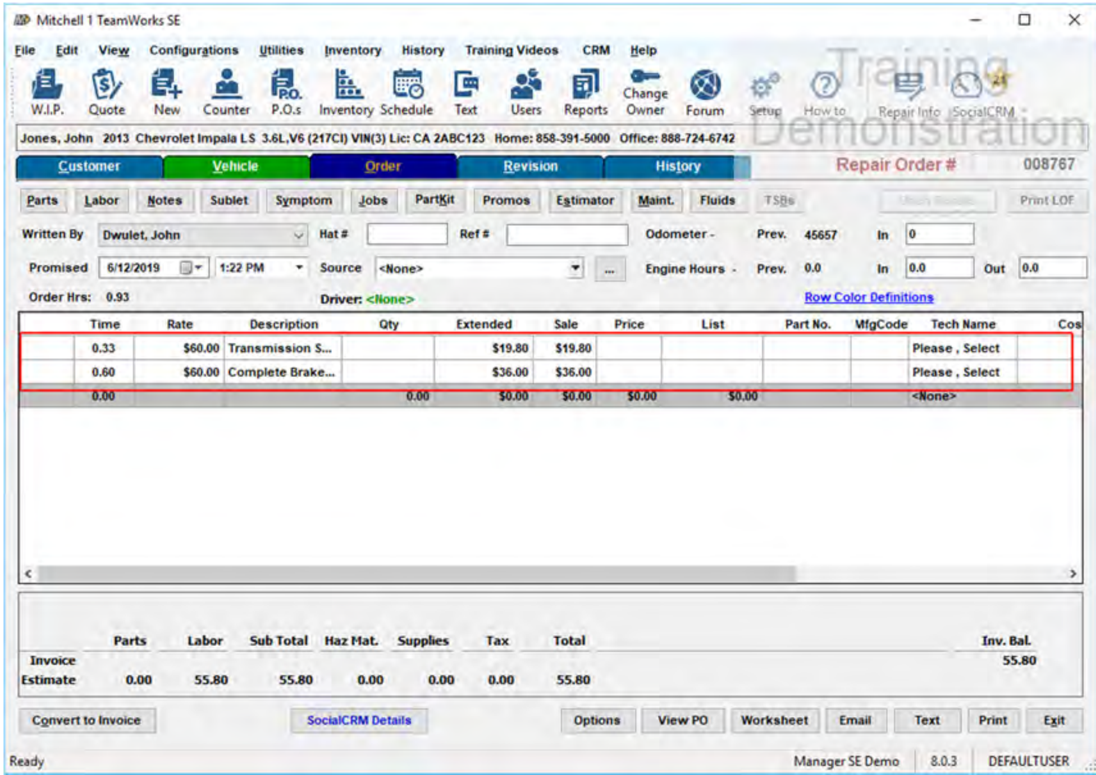
('Y' or press Enter) to confirm each deletion. Repeat steps 4-5 to remove the second Recommendation that is also being taken care of by a transferred Revision.



6. Once all appropriate Recommendations have been deleted, click on 

to close the Recommendations window.

Order Screen now displays with both transferred Sub-Estimates (Revisions).



Note: Recommendations are added on the Vehicle screen because they're linked to <u>each</u> specific Vehicle, not the Customer. This is very useful when generating Followup letters for Recommendations.

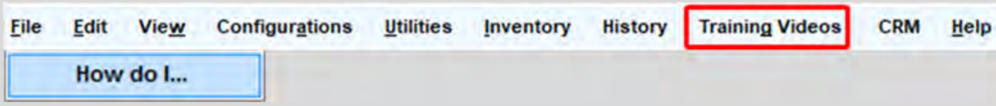
End of the Assisted Training section

This concludes the assisted portion of management training. Users should continue with this book (and videos below) to learn more about the software.

SE Training Videos

How to access 100+ Training Videos in Shop Management Online Help:

1. Click on **Training Videos** menu then **How do I…** to view the master list.

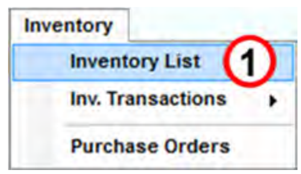


- Add Part to Inventory http://youtu.be/HrjHEqXLz34
- Appointment, Creating https://youtu.be/xVB-JvfDjzM
- Auto Updater https://youtu.be/KiPvfQVLc7Y
- Batch Payment [F5] https://youtu.be/WflX38REJDw
- Canned Job https://youtu.be/NhJP-08ffpU

2. Click on any video title (1-3 min. each) and it will playback in your browser.

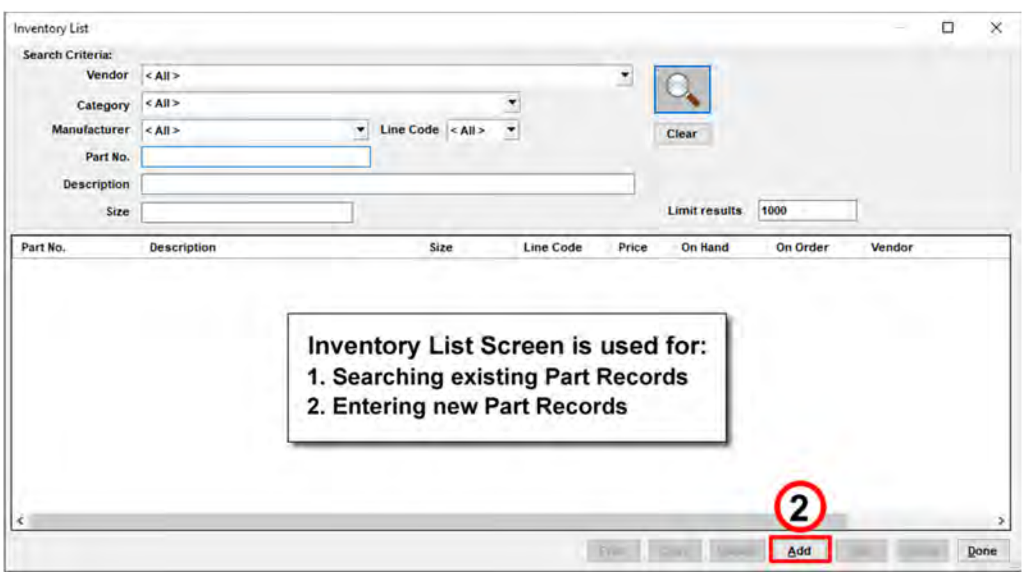
Adding a Part to Inventory *(Self-Instruction)*

Inventory List screen: two primary functions:



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. Using top screen menu bar, click on **Inventory**, **Inventory List**.



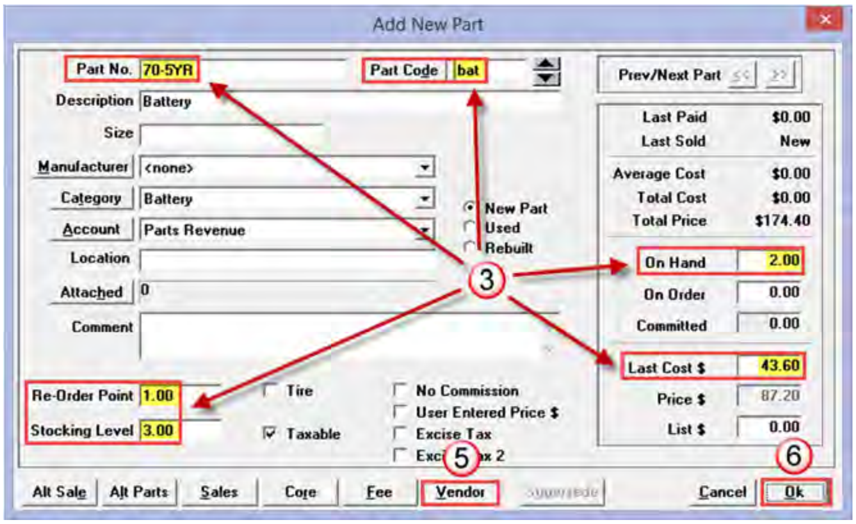
2. Click on Add **(Alt + A)** to begin the new part entry process.

3. Enter the following **(bold)**:

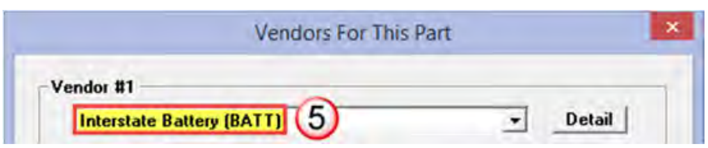
Part No.: **70-5YR**
Part Code: **bat** [*auto-fills Description + Category*]
Re-Order Point: **1** / Stocking Level: **3**

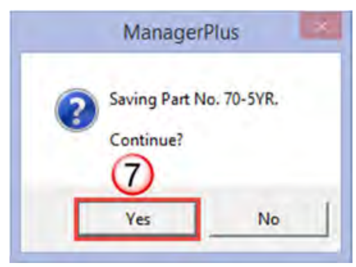
On Hand: **2**
Last Cost $: **43.60** *[Price $87.20 or similar]*

4. With Last Cost entered, press **Tab** key for Matrix to calcu[illegible]ce.



5a. Click on Vendor; select **Interstate Battery (BATT)** from list:



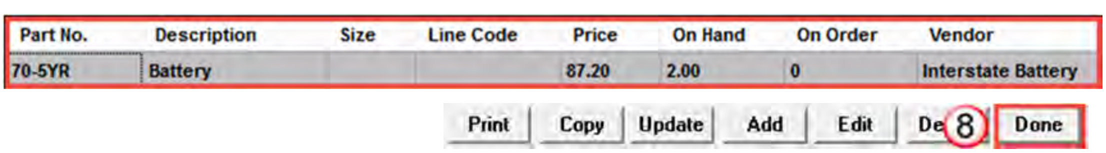


5b. Click  to Vendor For This Part selection.

6. Click on  in the Add New Part window; the Saving Part No 70-5YR box displays.

7. Click on Yes to complete the part entry process.

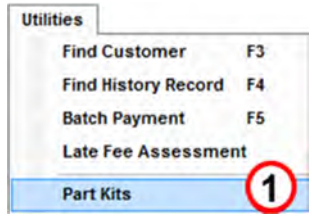
Inventory List screen displays with new part record.



8. Click on  to close Inventory List screen.

Creating a Part Kit *(Self-Instruction)*

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

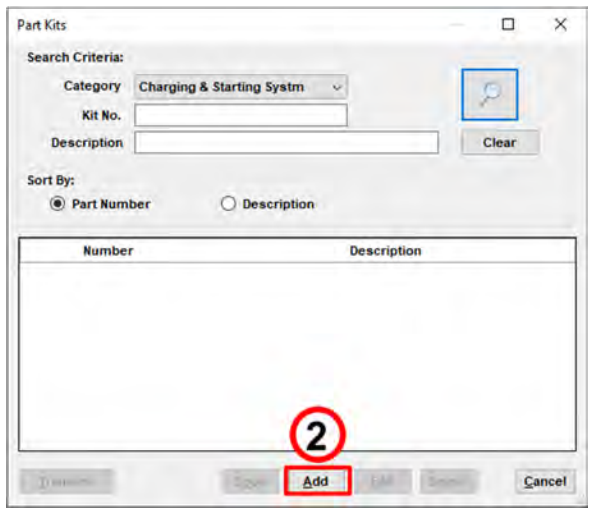


This exercise will create a 'Radiator Hose' Part Kit from part records existing in the Inventory List.

1. From top menu, click on **Utilities**, **Part Kits**.

Add a New Part Kit to the database.

2. Click on **Add** **(Alt + A)** to open the Add Kit screen.



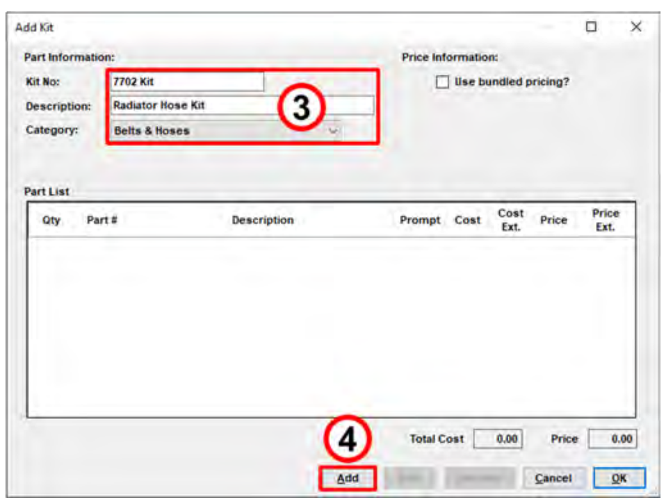
3. Enter Kit description:

Kit No.: **7202-Kit**

Description: **Radiator Hose Kit**

Category: **Belts & Hoses** (type 'B' twice)

Now that this part kit has a "name" (Kit No.), it's time to transfer parts into it.

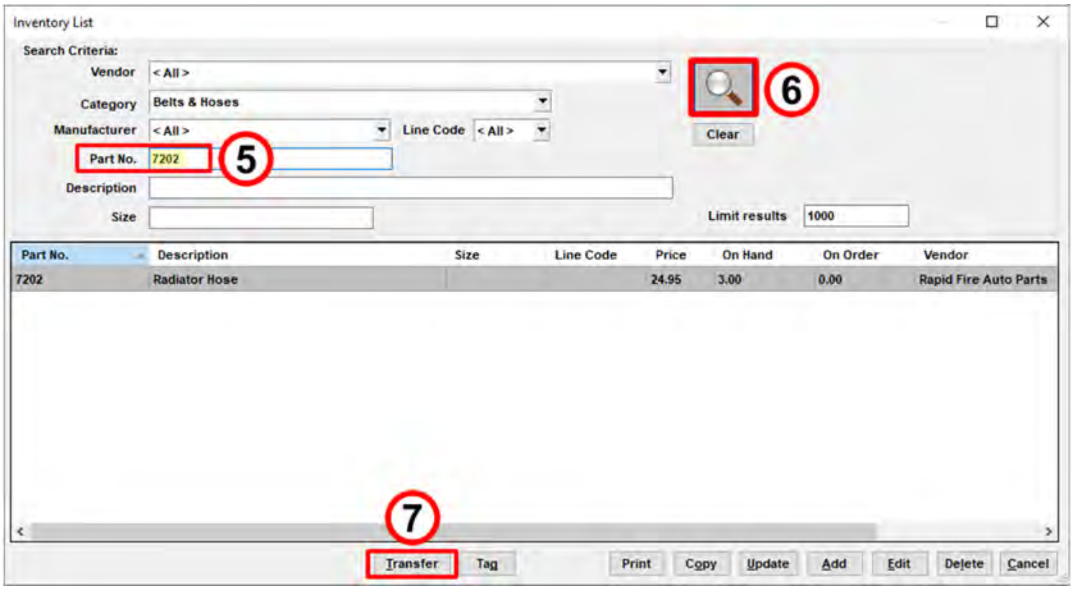


4. Click on **Add** **(Alt + A)** to open Inventory to add part to a new part kit.

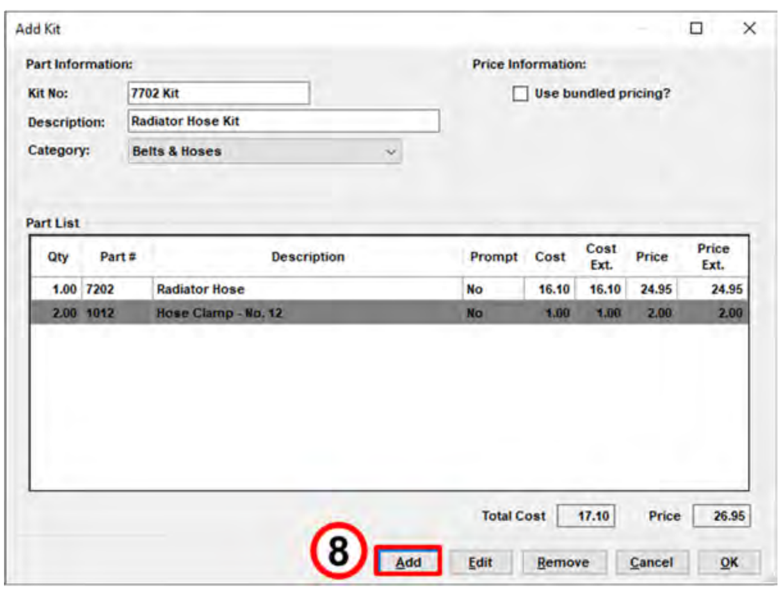
5. Enter the following: Part No.: **7202**

6. Click on  **(press Enter)**.

7. Click on Transfer **(Alt + T)** to place a copy in the Part Kit.



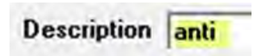
Note: Program also automatically transferred two hose clamps that had been "attached" to the radiator hose part record. See User Help text and SE videos for more details about 'Attached Parts'.



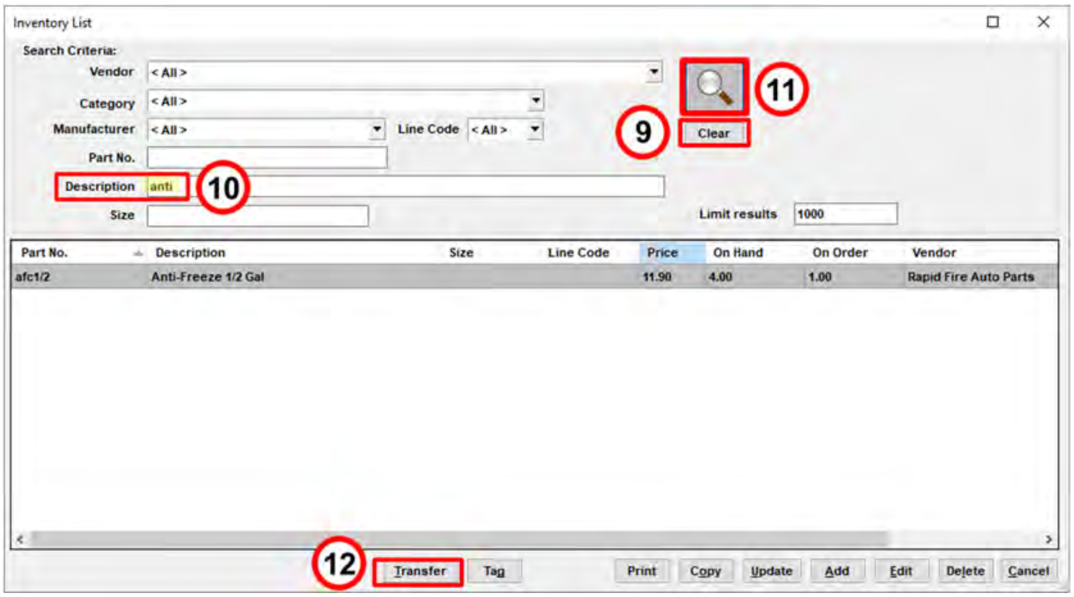
8. Click on Add **(Alt + A)** to open Inventory to transfer a 2nd part into kit.

9. Click on 'Clear' to add a part from a different category.

10. With Category cleared, enter '**anti**' in Description.

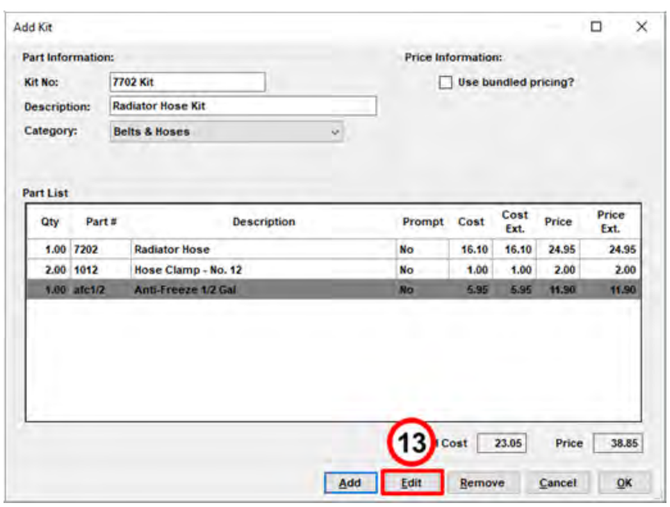


11. Click on Search **(press Enter)**; 'afc1/2 Anti-Freeze Coolant ½ Gal' is located automatically.



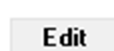
12. Click on  **(Alt + T)** to copy 'afc1/2' part record into the part kit.

Add Kit displays with transferred radiator hose, hose clamps and Anti-Freeze.

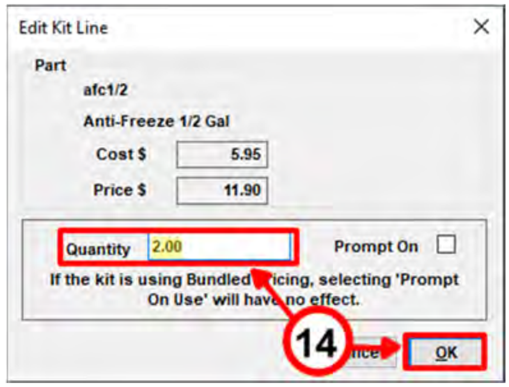


NOTE: Bundled Price option changes Part Kit content from transferring multi-line item details and prices to display as a SINGLE item with a single price.

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

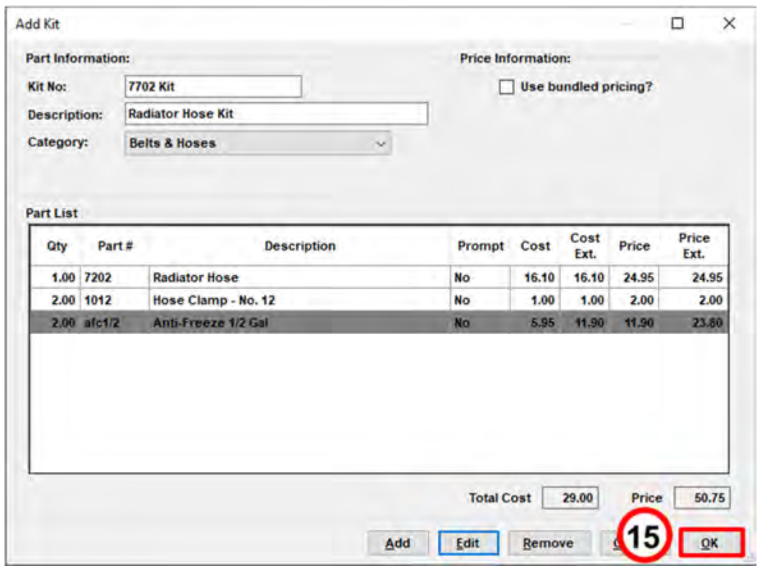
13. With 'afc½ Anti-freeze ½ Gal' highlighted, click  (**double-click line**); the Edit Kit Line box opens. (next page)

14. Change the Quantity to **2** **(2.00)** and click on Ok.



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

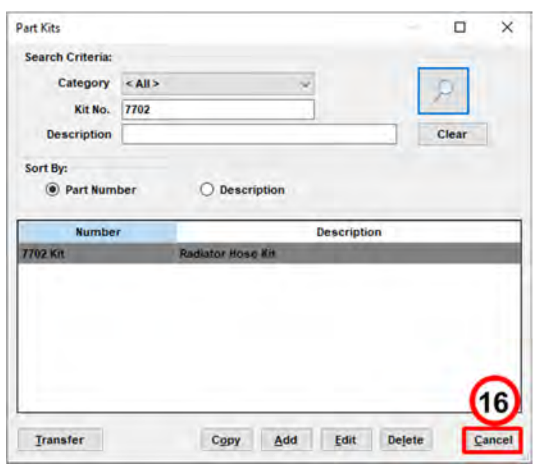
15. Click on Ok once more in the Add Kit window to save your input work.



16. Click on Cancel **(Alt + D)** in Part Kits window to close.

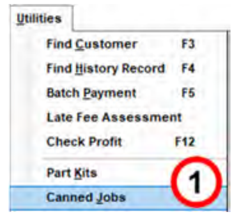
The 7202 Kit is now included in the Part Kit list and ready to use.

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



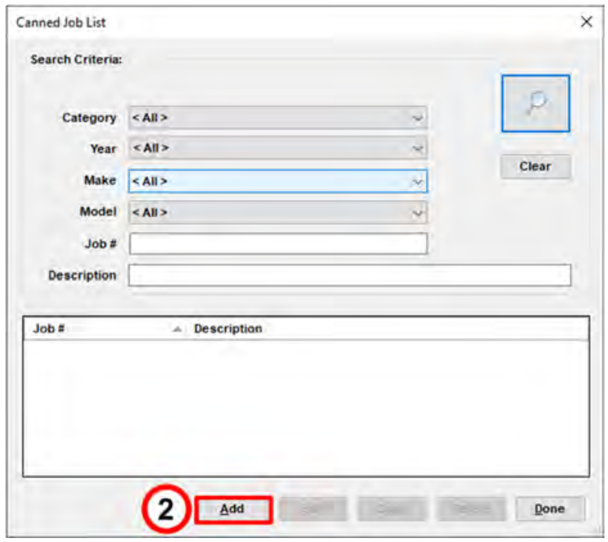
Creating a Canned Job *(Self-Instruction)*

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



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

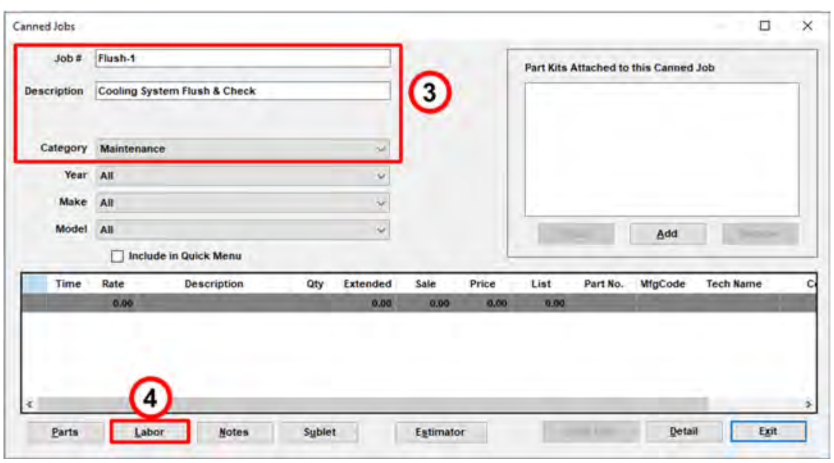
2. From the Canned Job List screen, click on **Add** **(Alt + A)** to open the Canned Jobs creation screen.



3. From Canned Job List screen, enter the following:

Job #: **Flush-1**, Description: **Cooling System Flush & Check**, Category: **Maintenance**

4. Click **Labor** **(Alt + L)** to add labor content.



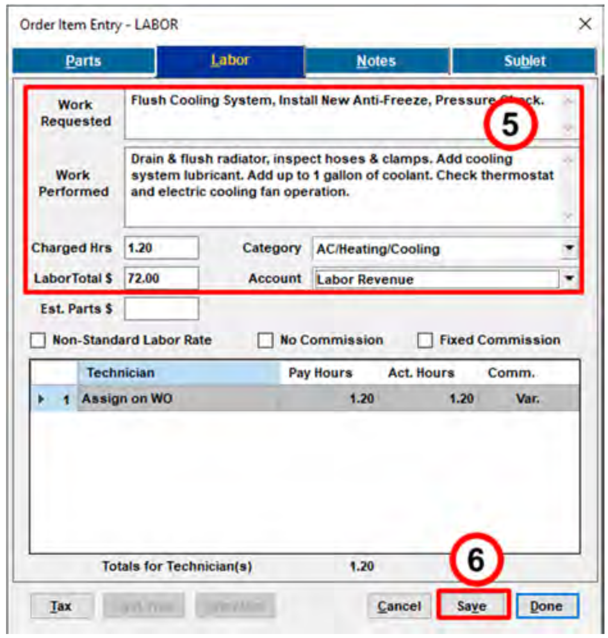
Add Labor to the Canned Job.

5. In Order item entry – LABOR screen enter the following:

Work Requested: Flush Cooling System, Install New Anti-Freeze, Pressure Check.

Work Performed: Drain & flush radiator, inspect hoses & clamps. Add cooling system lubricant. Add up to 1 gallon of coolant. Check thermostat and electric cooling fan operation.

Charged Hrs.: 1.2
Category: AC/Heating/Cooling
Account: Labor Revenue



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

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

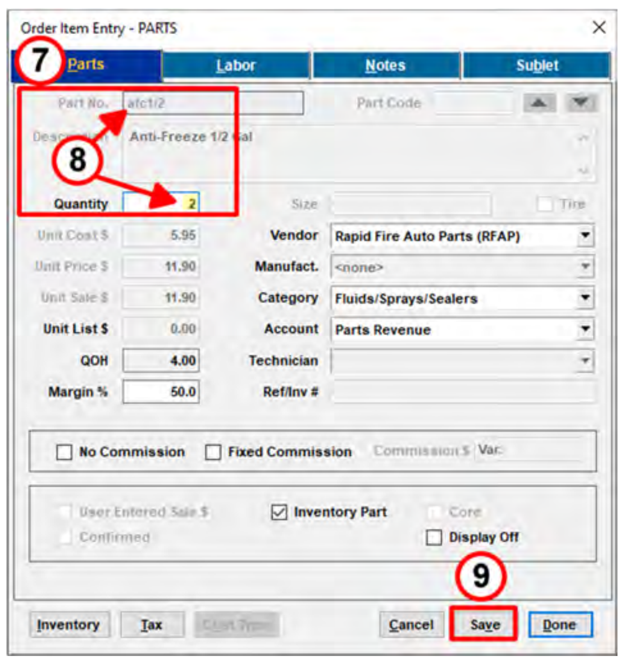
Now begin adding Part items to the Canned Job.

7. After saving the Labor item, click on the Parts tab to begin adding parts.

8. In the Order item entry – PARTS screen enter the following information:

Part No.: **afc1/2**
Press **Tab** key
Change Quantity to **2**

9. Click on Save **(Alt + V)**. This keeps the entry box open for the next part selection or entry.



10. Enter the following:

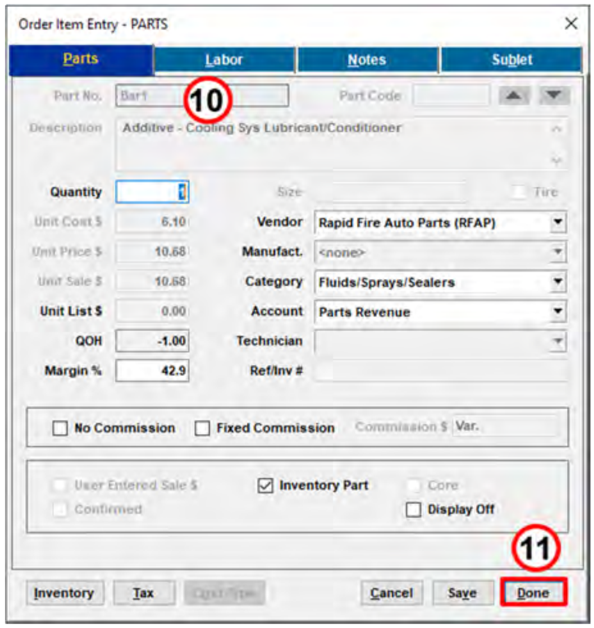
Part No.: **bar1**

Press **Tab** key and part details fill in automatically.

(Quantity: 1 is fine)

11. Click on 

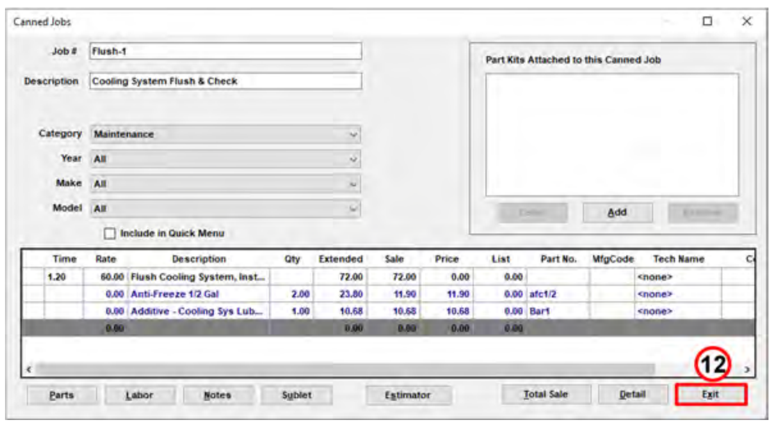
(Alt + D) to save the part and close entry screen.



The completed Canned Job displays.

12. Click on 

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



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.

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 *(Self-Instruction)*

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  **(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)

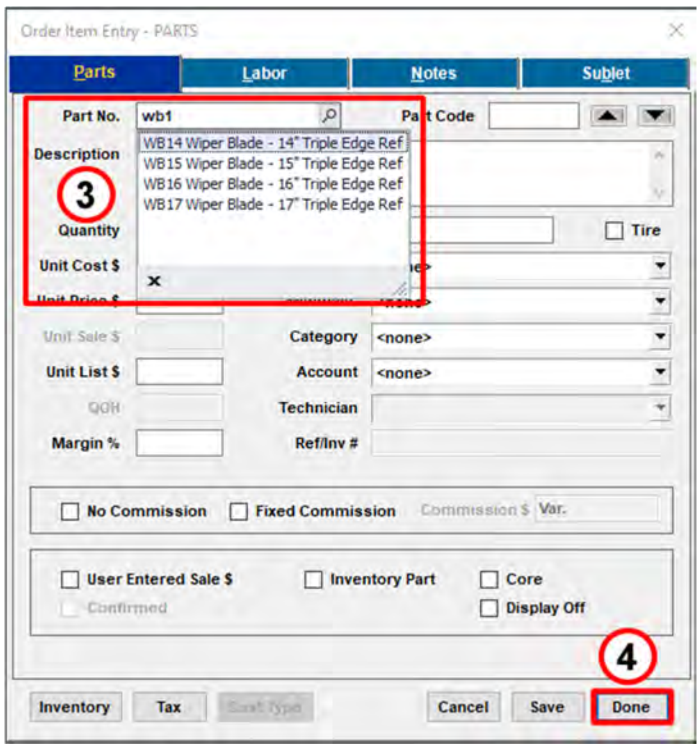
Change Quantity: **2**

Quantity 2.00

and press tab.

4. Click on Done **(Alt + D)** to save part to the sale & close the entry screen.

With part added to this Counter Sale, you could collect payment from this "Cash" customer, print an invoice and be done.

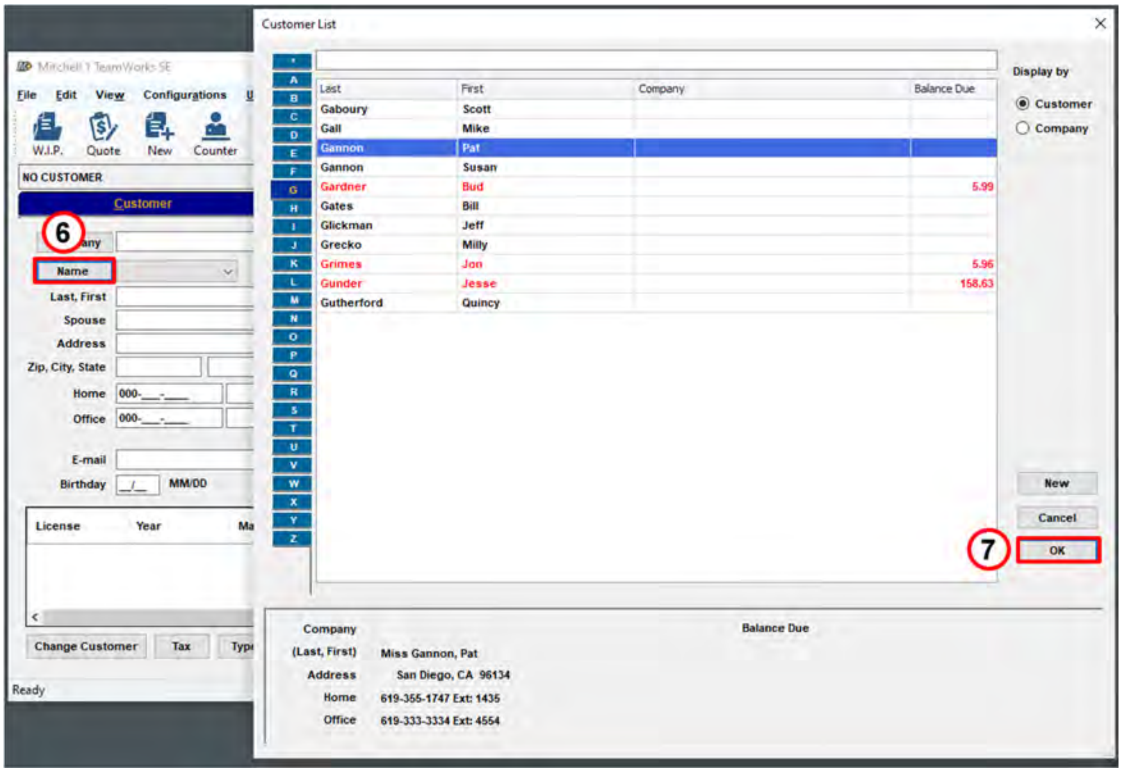


Next we're going to show how to add an existing customer's information; this is useful for tracking items with warranties, such as batteries.

5. Click on Customer tab to access list of existing customers.

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

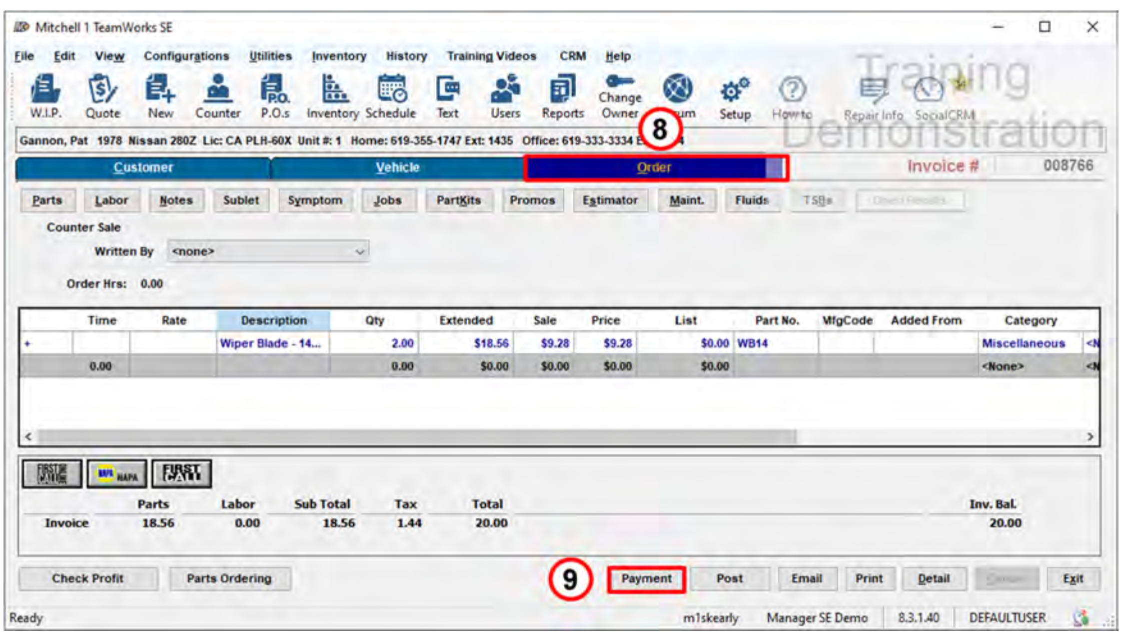
6. Click on Name **(Alt + A)** to open the list of existing customers.



Note: If the customer name was not found, click on **New** to add this name.

7. Select any name from the customer list and then click **Ok** or just double-click directly on the name itself, as this will also select it.

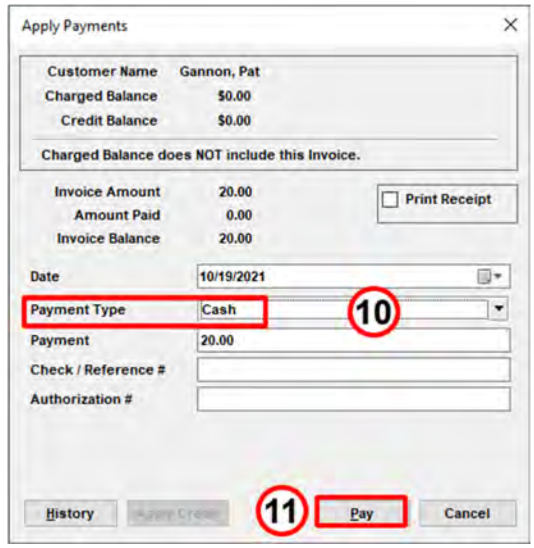
8. Click on **Order** **(Alt + O)** to Pay, Print & Post this Counter Sale.



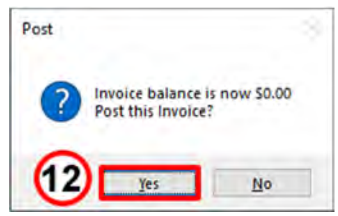
9. Click on **Payment** to process the customer payment.

10. In Payment Type, type a ‘**C’** (shortcut for Cash payment type)

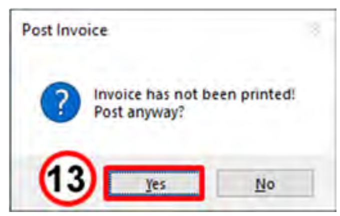
11. Click on **Pay** to record the payment.



12. Click on Yes **(‘Y’ or Enter)** to confirm posting.

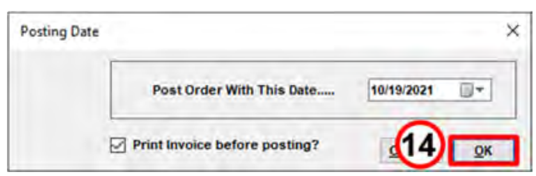


13. Click on Yes **(‘Y’ or Enter**) to answer Post printing question.

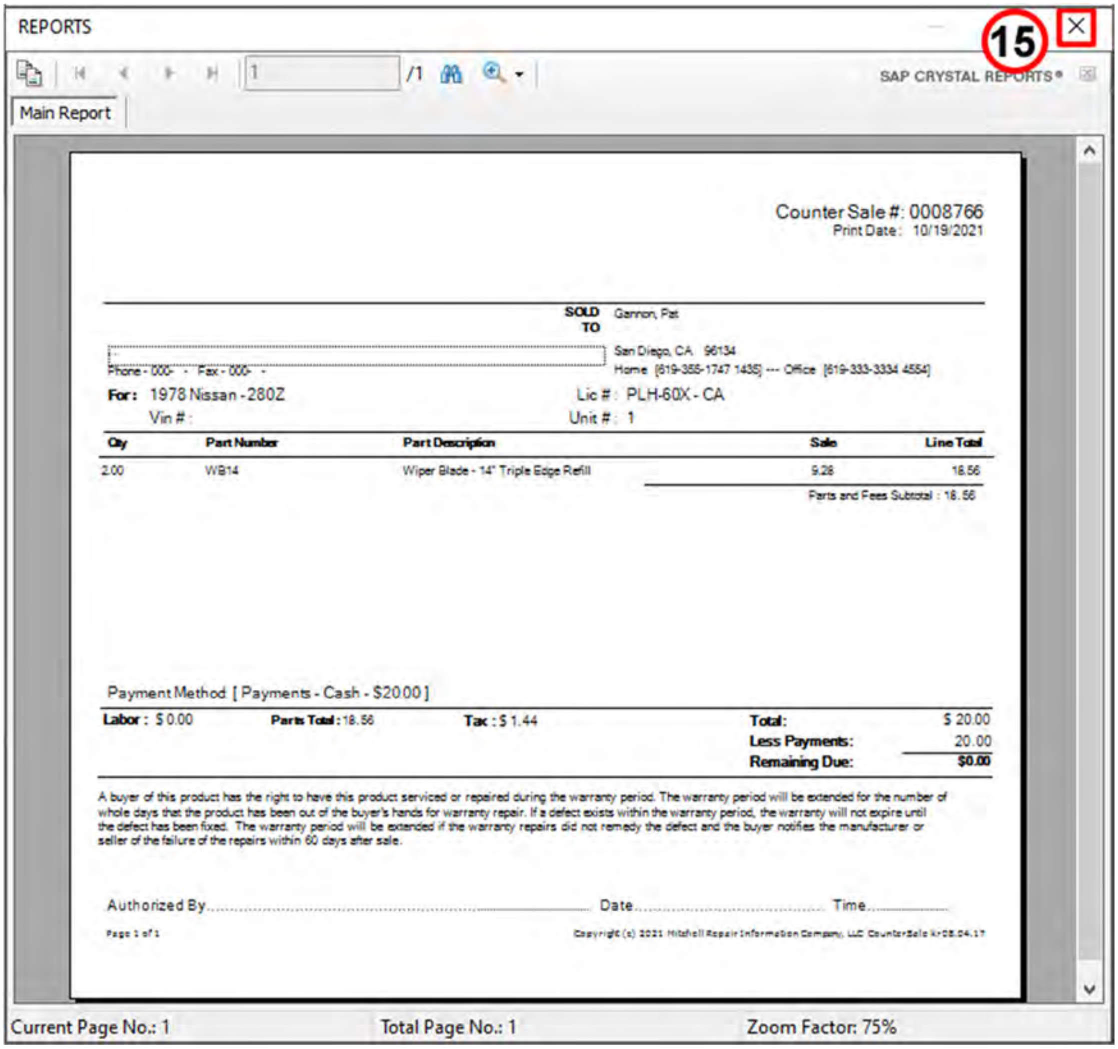


The system will display the Posting Date window.

<u>Make certain there is a check mark</u> in “Print Invoice before Posting?” box. (only has to be done once; users can print invoices reflecting payment info)

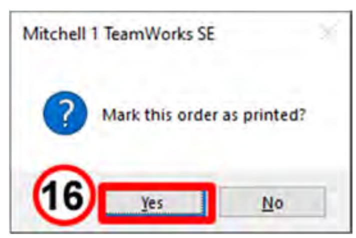


14. Click **Ok** to continue the process of Printing and Posting.



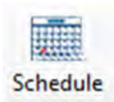
15. Click on  in upper RH corner of screen **(Alt + F4)** to close Preview.

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



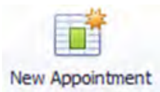
Counter Sale disappears from WIP & posted to History.

Create an Appointment *(Self-Instruction)*

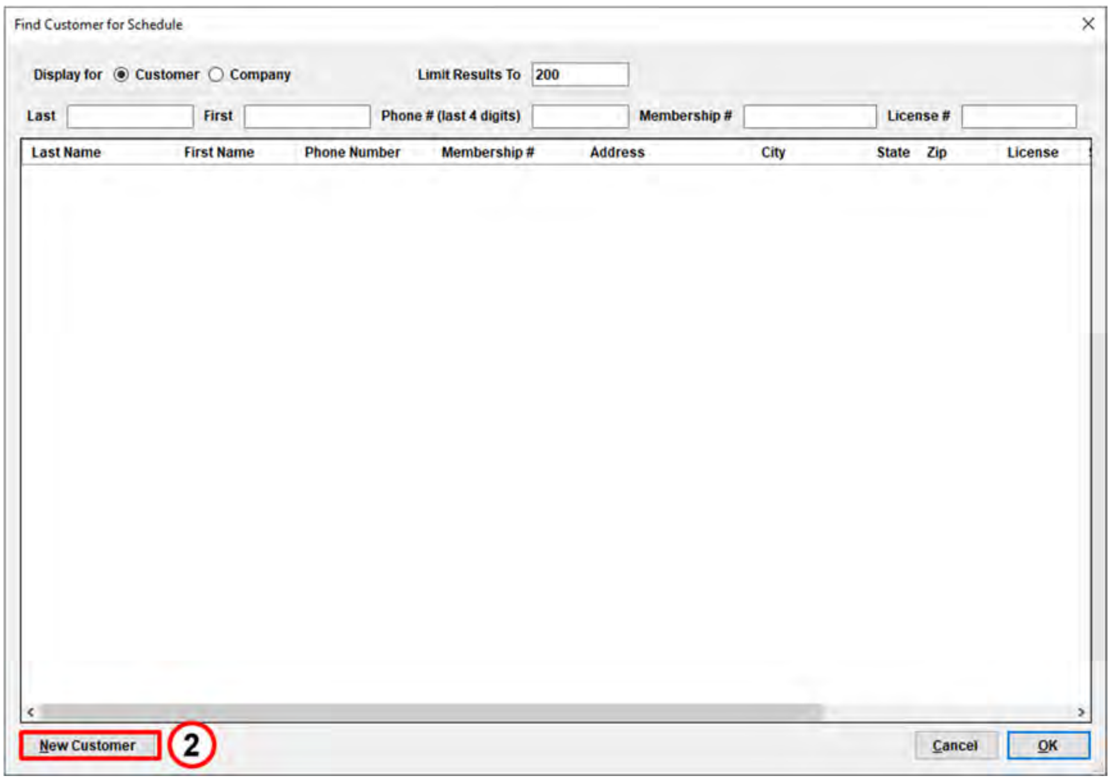


Scheduler events (appointments) are created when you start an Estimate or Repair Order. If you wish to schedule an appointment in advance of their appearing at the shop, use the steps below. The subsequent appointment can be converted to EST / RO from the Appointment Editor screen.

1. Click the Schedule button to open the Scheduler.



2. Click **New Appointment**. The Find Customer for Schedule dialog box displays.



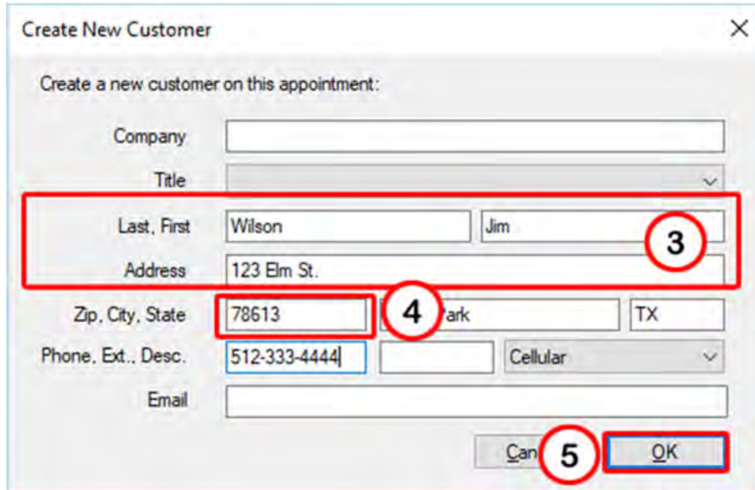
Click on **New Customer** to open the Create New Customer dialog box.

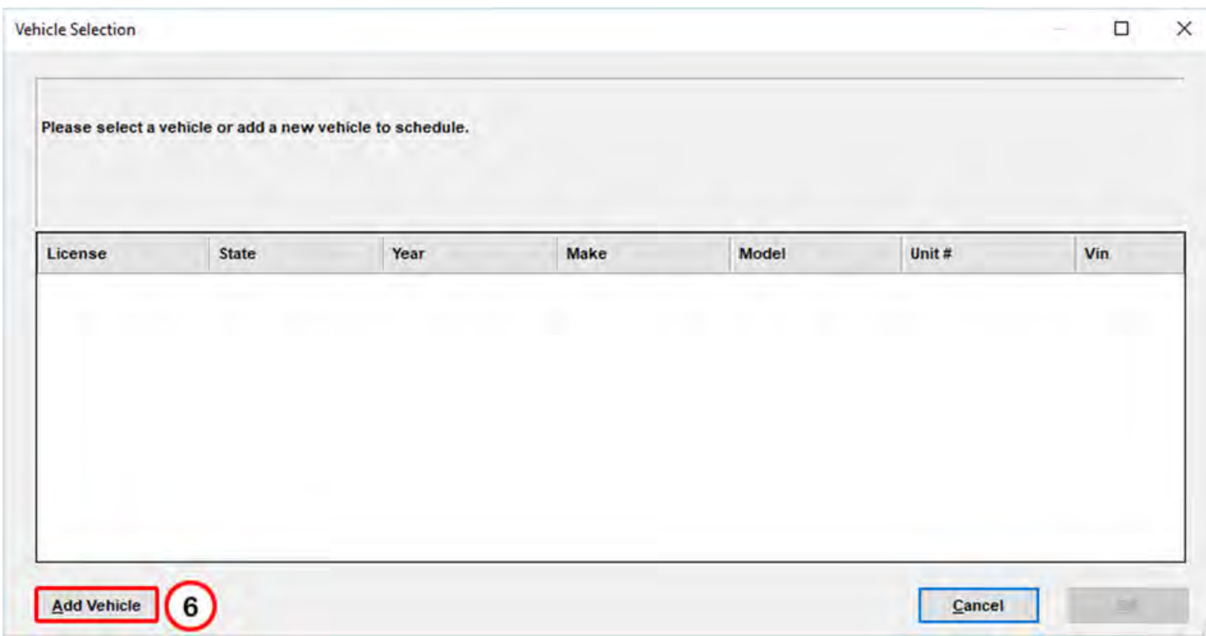
3. Type the Last and First Names and an Address.

4. Enter the **Zip Code** and press **TAB**. The City and State are entered automatically for you.

5. Click **OK**.

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



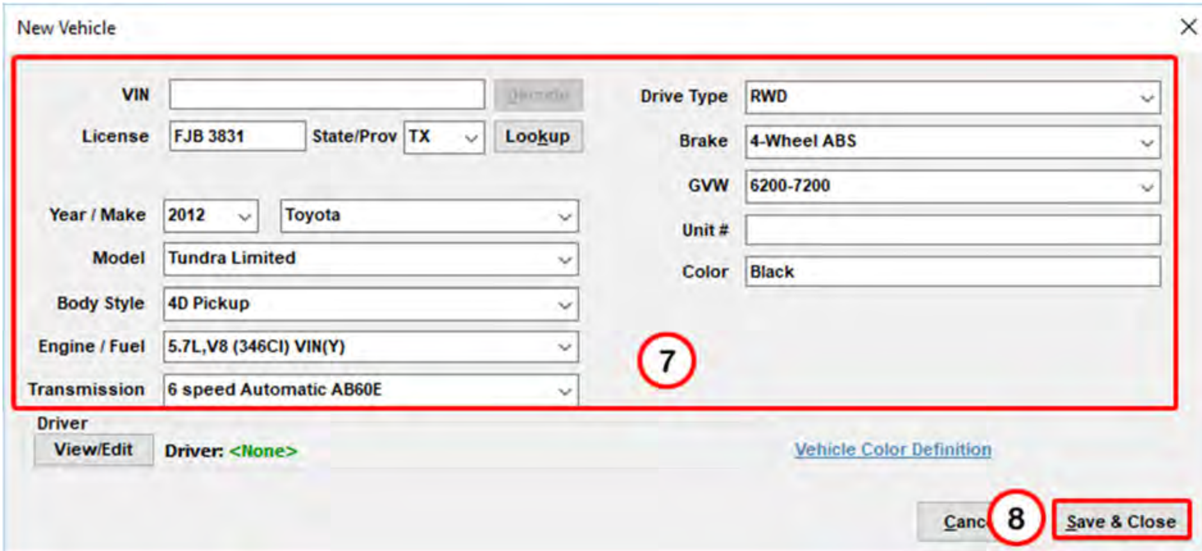


6. Click on **Add Vehicle**.

NOTE: If you prefer to create an appointment just by customer name and phone number or email address, you may click Cancel for vehicle information and proceed to Appointment Editor.

7. Fill in vehicle fields

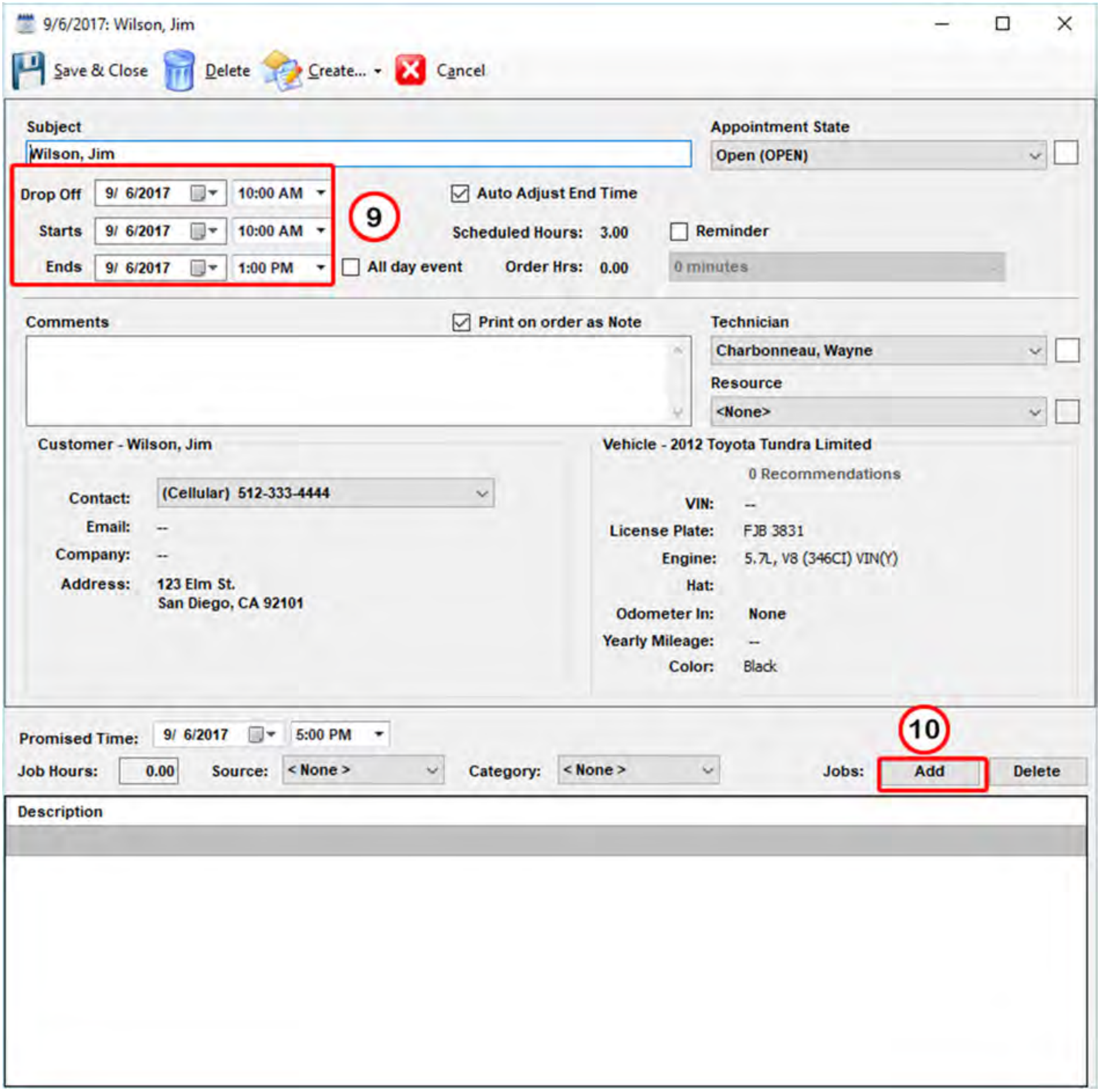
Note: VIN Decode and License lookup are not available in Demo mode, you must manually enter your vehicle.



8. Click **Save & Close**.

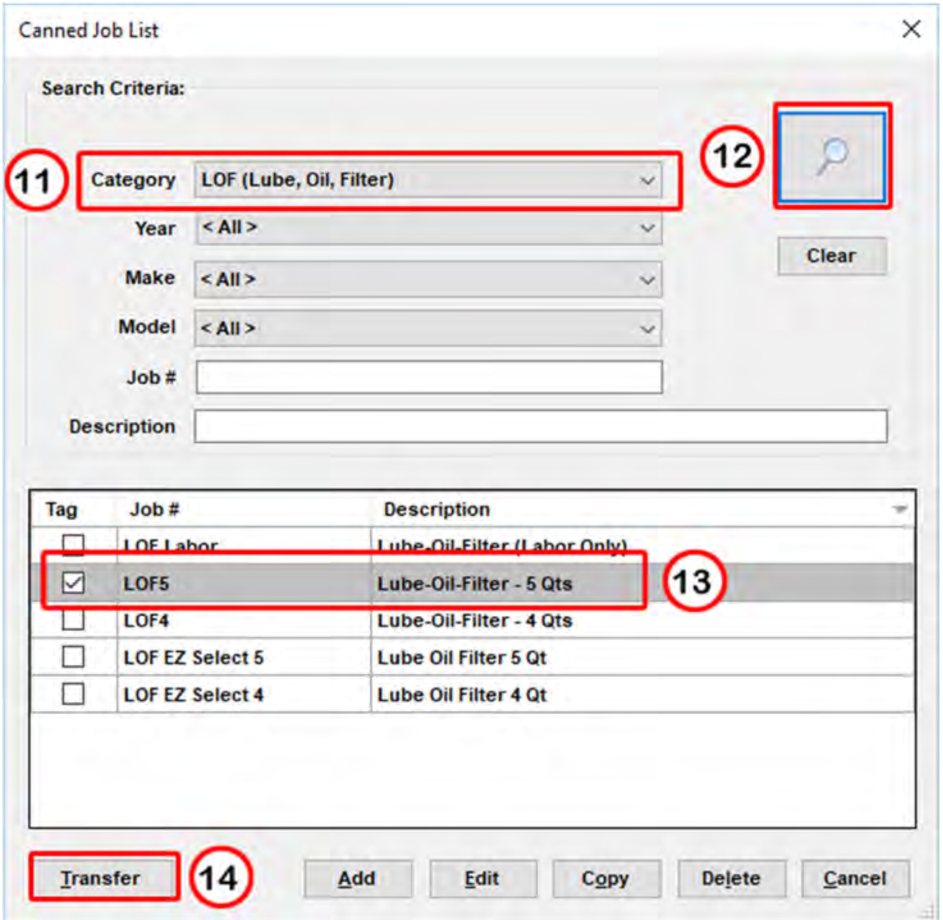
    The Appointment Editor dialog box displays.

9. Begin the new appointment input by selecting tomorrow's date from drop-down calendar tool (or type it in) and select 10:00am-1:00pm from drop-down lists (or type in manually).



Next we will add a Canned Job to the appointment.

10. Click **Add** (or right-click on gray bar below Description); the Canned Job List displays.

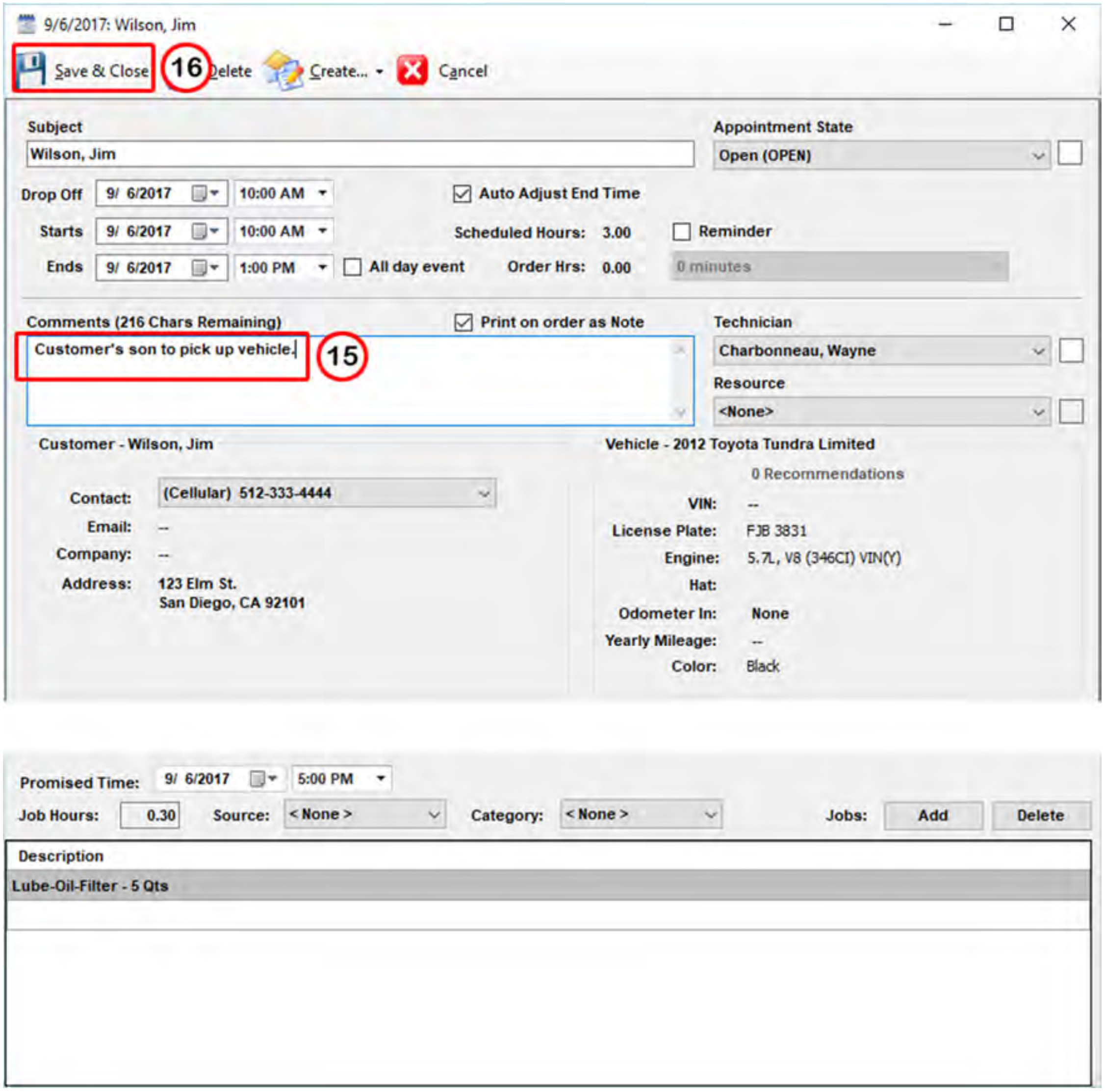


11. Choose **LOF** as your Category

12. Click the **Search** button

13. Choose **LOF5 Lube-Oil-Filter - 5 Qts**.

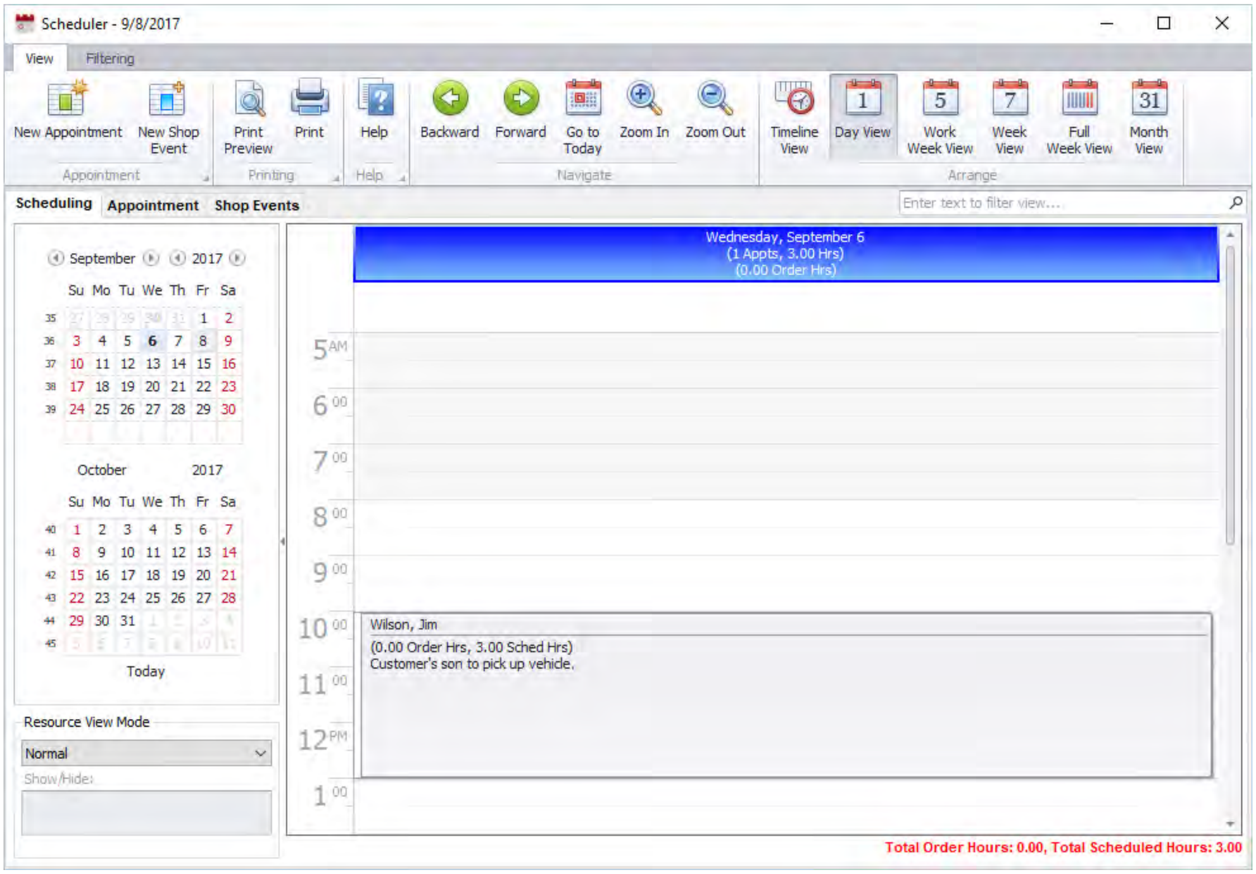
14. Click **Transfer**. The Canned Job is added to the Appointment detail.



15. Add a note **'Customer's son to pick up vehicle**' to the **Comment** section.

16. Click **Save and Close**.

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



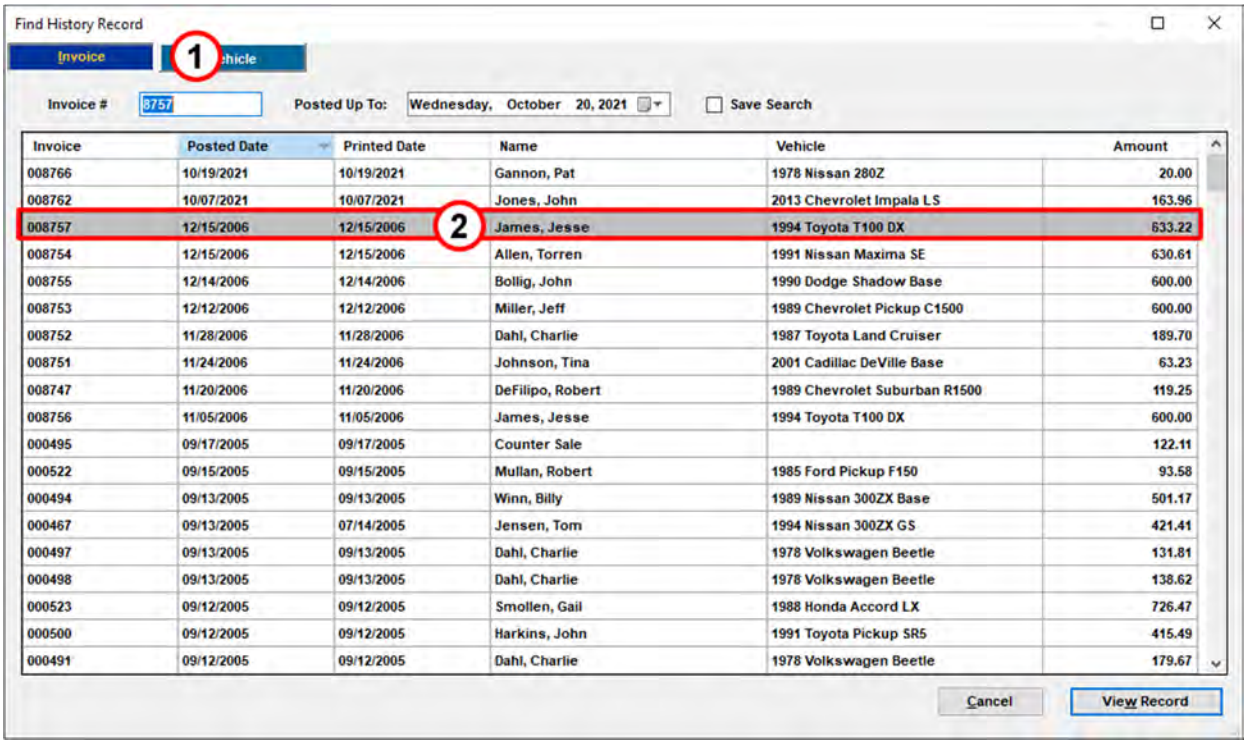
Note: This is an abbreviated demo procedure for setting up an appointment for a new customer and vehicle. It is going to be quicker once you're selecting an existing customer and vehicle.

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 *(Self-Instruction)*

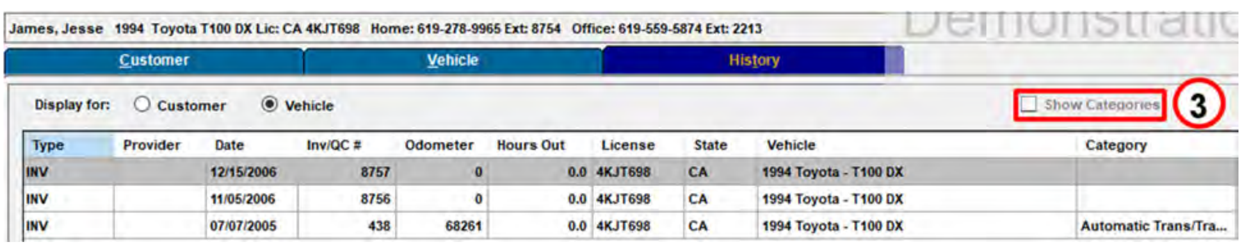
Press **F4** (Utilities–Find History Record); users can search for a specific invoice number or for history records on certain vehicles and/or repair work in history.

1. Choose Invoice View



Invoice	Posted Date	Printed Date	Name	Vehicle	Amount
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
000491	09/12/2005	09/12/2005	Dahl, Charlie	1978 Volkswagen Beetle	179.67

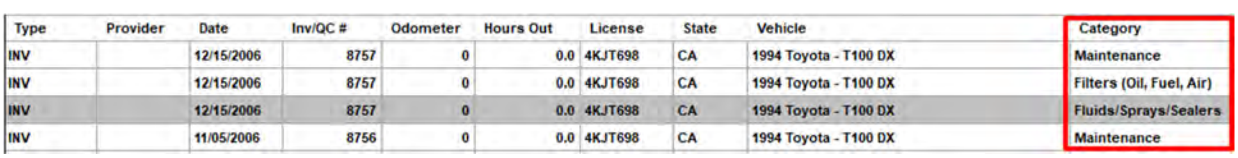
2. Double click on ***James, Jesse***; displays history records for his selected vehicle.



Type	Provider	Date	Inv/QC #	Odometer	Hours Out	License	State	Vehicle	Category
INV		12/15/2006	8757	0	0.0	4KJT698	CA	1994 Toyota - T100 DX	
INV		11/05/2006	8756	0	0.0	4KJT698	CA	1994 Toyota - T100 DX	
INV		07/07/2005	438	68261	0.0	4KJT698	CA	1994 Toyota - T100 DX	Automatic Trans/Tra...

Note: Changing to **Customer** setting will display history invoices for ALL of the customers vehicles.

3. ☑ Show Categories = to show all Categories included on each invoice.



Type	Provider	Date	Inv/QC #	Odometer	Hours Out	License	State	Vehicle	Category
INV		12/15/2006	8757	0	0.0	4KJT698	CA	1994 Toyota - T100 DX	Maintenance
INV		12/15/2006	8757	0	0.0	4KJT698	CA	1994 Toyota - T100 DX	Filters (Oil, Fuel, Air)
INV		12/15/2006	8757	0	0.0	4KJT698	CA	1994 Toyota - T100 DX	Fluids/Sprays/Sealers
INV		11/05/2006	8756	0	0.0	4KJT698	CA	1994 Toyota - T100 DX	Maintenance

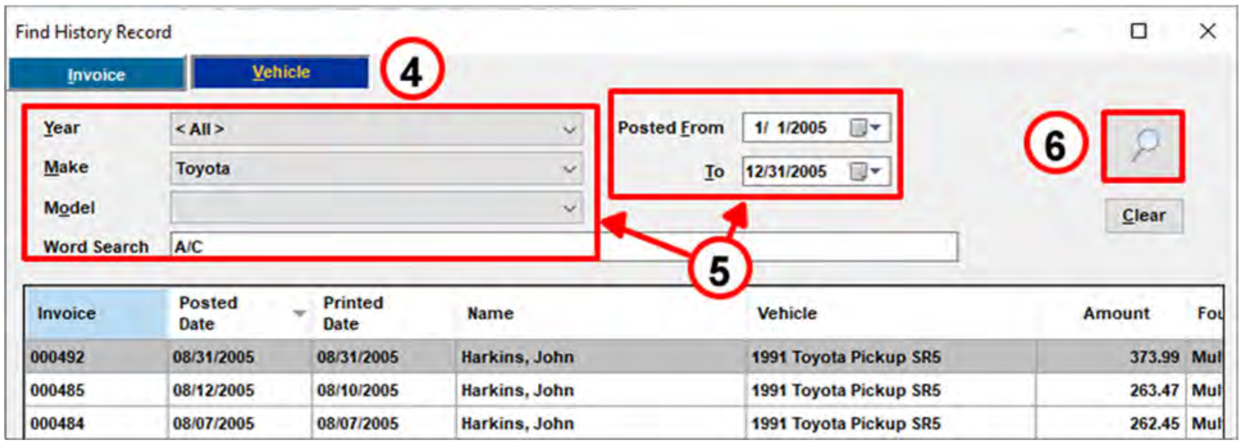
Vehicle View

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]

4. Select the Vehicle tab.

5. 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.**

6. Click the **Search** button. Your results display in the grid below.



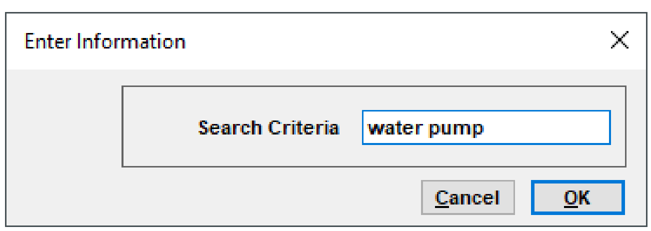
Press the **Esc** key to close the Find History Record screen and return to the History screen.

Other History screen options

Un-Post Invoice Allows un-posting an invoice for corrections. (Do NOT answer Yes to ‘use Current Rates’; may affect existing totals when reposted.)

NOTE: This function should be password protected in Setup - Program Security.

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.

Press the **Esc** key to return to the History screen.

That 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

Q. **What is a forum account?**

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

Q. **How do I get started?**

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

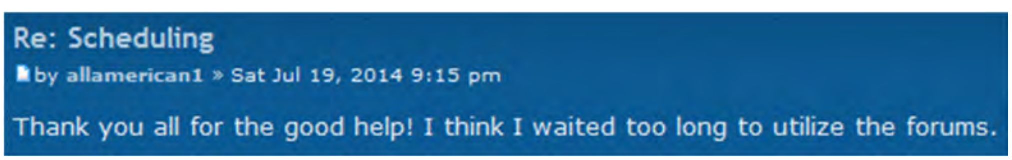
Q. **What happens after I click Register?**

A. You are sent an automated email with a link to "complete the circuit". Once you click that link, you may log into the forum. NOTE: If you do not see the activation email within a few minutes, please check your spam folder. If not found, click on Forum Administrator link found at the bottom of every forum page.

Q. **What do users say about using the Forum?**

A. "A meeting place where you can interact with others like yourself, get answers to questions and tips on how to use Manager to its fullest. It's one of the best tools in your toolbox."

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



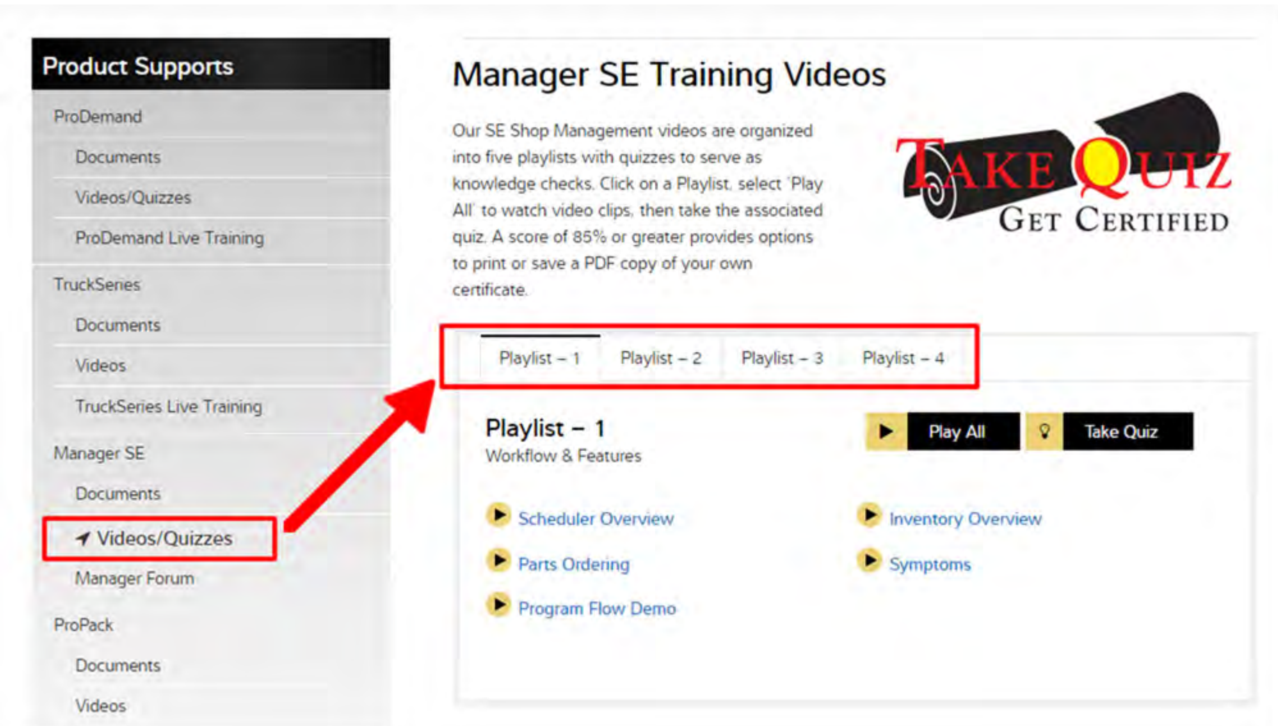
Shop Management Modules & Quizzes

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

Manager SE: http://m1training.net

ShopKey SE: http://sktraining.net

Select **Manager SE–Videos/Quizzes**



Complete the video modules and pass the quizzes. A certificate is available for each quiz passed with 85% or higher grade.

By taking advantage of all the training tools provided, you will unlock more of the potential of your shop management software.