



Mitchell 1 / ShopKey Management Solutions LEARN: SE Management Software

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

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

Assisted Program Basics

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

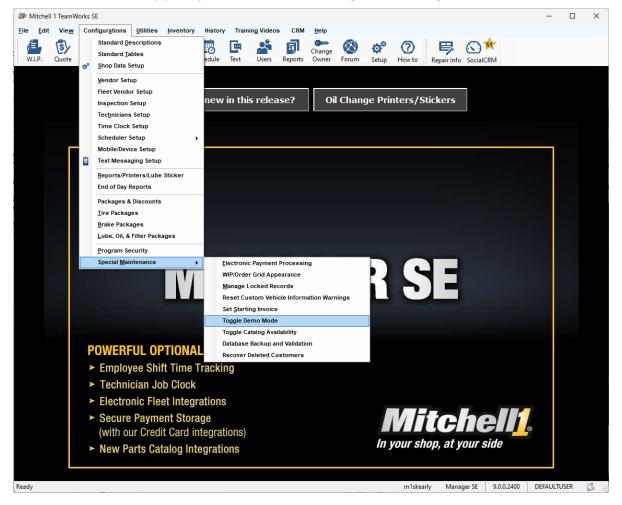
Once the SE software has been installed, change it to **DEMO** mode using the instructions on the next page. (Then you'll have samples to work with)

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

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

Switching SE live program to DEMO mode

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



Mitchell 1 Team	Works SE										
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Training	Demonst	ration	Over	rlay							

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

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

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

Entering Customer & Vehicle Information

Create a new customer / vehicle record as follows.

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



	Late Fee Assessi Check Profit Part Kits Canned Jobs Customer Screen Fiscal Year End Cl End of Day Notes/Name Notes/Name	F12		• Details	His <u>t</u> ory	Customer Lifetime \$ Spen Lifetime Invoice \$ Avg Avg Yearly Visit Last Visit Date Include in CR	t 0.00 0.00 s 0 12/2/2024	Payment S Cust # Charged Bal. Credit Bal. Sales YTD Charge Status Credit Late Fees Saved Payments	0.00 0.00 0.00 NA Current Apply No
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	_								

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

Tab key* automatically fills City + State fields)

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

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

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

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

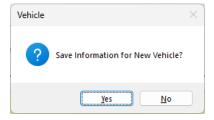
Edit View Configurations Utilities Inventory History Training Videos CRM Help Image: State Image: State	/itchell 1 TeamWorks SE			- 0 >
VIN Decode Drive Type FWD Vehicle 1 of 1 License 2ABC123 State/Prov CA Lookup Brake 4-Wheel ABS Vehicle 4 585 Last Service 11/27/2024 Prev Odom 45,657 Prev Odom 45,657 Prev Odom 45,657 Body Style 40 Sedan Init # Fleet # Ilife Avg Sper Inv 123,27 YDI Inv \$ 205.86 Lifetime Invisors 369.82 Engine / Fuel 3.6L, V6 VIN(3) Gas/Ethanol Immediation Free Priver Vehicle Color Definition 6/29/2021 Edit Origination WewEdit Driver: <none> Vehicle Color Definition 6/29/2021 Edit Origination</none>	A.P. Quote New Counter P.O.s Inventory Schedule Text	Reports Owner Forum Setu		ng tratior
View/Edit Driver: <none> Vehicle Color Definition 23/2021</none>	VIN Decode Drive Ty License 2ABC123 State/Prov CA Lookup Bra Year / Make 2013 Chevrolet Un Model Impala LS ✓ Co Body Style 4D Sedan Me ngine / Fuel 3.6L, V6 VIN(3) Gas/Ethanol ✓	Vheel ABS	Vehice # Last Service Prev Odom Prev Hours Lifetime Invoices Life Ang \$per Inv YTD Inv \$ Lifetime Inv \$ Est Daily Mileage Current Revisions	585 11/27/2024 45,657 0.0 3 123.27 205.86 369.82 32 0
	View/Edit Driver: <none></none>	Vehicle Color Definition		6/29/2021 T Add Edit Delete
	ehicle Notes Tax New Type SocialCRM Details Cl	wnership		253 TIM 🔮

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

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

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

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



ŕ	
W.I.	Ρ.

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

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This concludes the basic customer / vehicle entry exercise. Continue on to **Creating an Estimate** with this data entered.

Creating an Estimate

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

E+ New

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

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

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

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

Display for	Customer	Company		Limit Results To	200			Start Ne	w Orde	rAs: (🖸 Estimate	⊖ Repair	Order
ast jon		First	Phone #	(last 4 digits)		Members	hip #			License #			
ast Na 🔺	First N	Phone	Membership #	Address	City	St	Zip	License	St	Unit No.	VIN		
ones	John	619-391-5000		1544 Kingsla	Poway	CA	92064	2ABC	CA				

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

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

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

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<u>C</u> ustomer	<u>V</u> ehicle	<u>O</u> rder	<u> </u>	<u>R</u> evision	His <u>t</u> ory		Estimate	# NE
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Order Hrs: 0.00		Driver: <none></none>					Row	v Colors
✓ Type	Description	Hours Rate	Part # Qty C	Cost Sale P	rice Total	Tech	Category	List Mfg Code
Job Title								
Total: \$0.00	Parts: \$0.00) Labor: \$0.00	Tax: \$0.00	Category: <none></none>	· ·			
New Job Quick M	YN12 - 4							
New Job Quick Me								
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	PA FURST Mexpart. Multi-Seller		t. Supplies 00 0.00					
	PA FIRST Margaret Market Scalar Parts Labor 0.00 0.00			0.00 0.0		P0 Workshe	et Share V	0.00

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

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

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

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

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

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

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

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

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

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

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

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

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File Edit Vie		ations Utilities	Inventory	History Tra	ining Video	s CRM	Help					0	
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W.I.P. Quo		Counter P.O.s	· · · ·		Users		wner Forum	Setup	How to Rep	air Info SocialC	RM	+i/	or
		mpala LS 3.6L,V6								HUIK			
<u>C</u> ustom	er	<u>V</u> ehicle		<u>O</u> rder	<u>R</u>	evision	His	<u>t</u> ory		Estimat	te #	00)2353
Parts Labo	r <u>N</u> otes	Sublet Symp	ptom <u>J</u> obs	Part <u>K</u> it	Promos	E <u>s</u> timator	Maint. Fluids	s TS <u>B</u> s		Open Recalls	Print L	.OF	
Written By <r< td=""><td>none></td><td>~</td><td>Hat #</td><td>Ref</td><td>#</td><td></td><td>Odometer -</td><td>Prev.</td><td>0 In</td><td>45657</td><td></td><td></td><td></td></r<>	none>	~	Hat #	Ref	#		Odometer -	Prev.	0 In	45657			
Promised 12	/ 3/2024	5:00 PM -	Source <no< td=""><td>ne></td><td></td><td>•</td><td>Engine Hours</td><td>- Prev.</td><td>0.0 In</td><td>0.0 0</td><td>ut 0.0</td><td></td><td></td></no<>	ne>		•	Engine Hours	- Prev.	0.0 In	0.0 0	ut 0.0		
Order Hrs: 1.	.00		Driver: <non< td=""><td>e></td><td></td><td></td><td>0</td><td></td><td></td><td></td><td>Row Colors</td><td></td><td></td></non<>	e>			0				Row Colors		
✓ Type	Des	scription	Hours Rate	Part #	Qty C	ost Sale	Price	Total	Tech	Category	List	Mfg Code	
	ir conditioning :	custom										Code	:
Labor	-	onditioning system	1.00 \$60.0	0		\$60	.00	\$60.00		AC/Heating/C			•
I Total: \$60	-	Parts: \$0.00	Labor: \$6		: \$0.00		AC/Heating/Cooling	· ·					
New Job Quid	k Menu 🕴 📃												+
OReilly		nexpart, Multi-Seller											
Ann Rans Cr	Parts		Sub Total Ha	az Mat. So	upplies	Tax	Total				Inv.	Bal.	
Invoice											e	60.00	
Estimate	0.00	60.00	60.00	0.00	0.00	0.00	60.00						
							Outlong	View	00 Wester				E-site
C <u>o</u> nvert to Or	rder Parts	s Ordering	SocialCRM Deta	ils			Options	View	PO Worksh	eet Share	e 🗸 Pri	nt	E <u>x</u> it

The Canned Job List opens.

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

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

The Canned Job repair lines display in the Estimate.

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W.I.P	Qi	2/ 1	New Counter	P.O.s	Invento	ry Sched			s Repo	- Char		¢۵ Setup	O How to Re	epair Info SocialC	RM		
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rder	Hrs:	2.00			Driver:	<none></none>									Row Colo	rs	
~	Тур	e	Description		Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech	Category	List	Mfg Code	
	Labor	Diagn	ose air conditionin	g system	1.00	\$60.00				\$60.00		\$60.0	0	AC/Heating/C			-
	Labor	A/C R	echarge & Leak Te	est System	1.00	\$60.00				\$60.00		\$60.0	0	AC/Heating/C			
	Part	Freor					FREON	1.00	\$12.00	\$24.00	\$24.00	\$24.0	0	AC/Heating/C	\$0.00		
То	tal: \$	145.86	Parts	s: \$24.00	Lab	or: \$120.	.00 Ta:	x: \$1.86	Cat	egory: AC	/Heating/Coolir	ng 🔻					
ew J	ah Oi	uick Menu															
		and the field															
Re		NAPA	FIRST MUT	part. -Seller													
		Par	ts Labo	or Su	ub Total	Hazl	Mat. 9	Supplies	Тах	<u>د</u>	Total					v. Bal.	
Inv					144.00		0.00	0.00	1.8	_	45.86					145.86	

The Completed Estimate

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

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

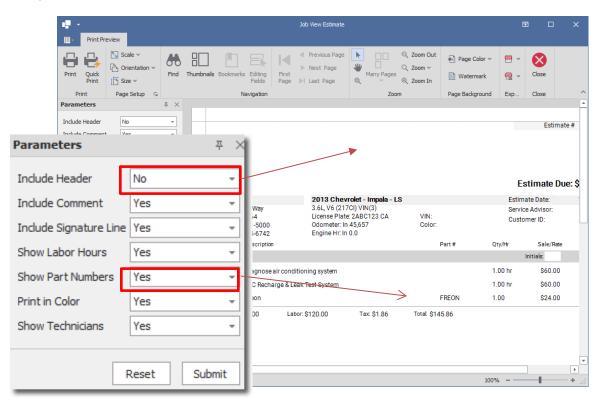
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	Invoice stimate	2	4.00 120.	.00	144.00	0.0	00	0.00	1.86	i 14	45.86					145.86	

The Print Preview displays how printed estimate appears.

• ·	doC	View Estimate		
Print Preview				
Print Quick Print Size ~	Thumbnails Bookmarks Editing First	Previous Page Next Page Last Page	Watermark	•
Print Page Setup 🕞	Navigation	Zoom	Page Background Exp	o Close
Parameters # >				
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Show Labor Hours Yes -		Phone: ()- Fax: ()-		
Show Part Numbers No *				
	Estimate			Estimate Due: \$
Show Technicians Yes -	Jones, John 1544 Kingsland Way	2013 Chevrolet - Impala - LS 3.6L, V6 (217CI) VIN(3)		stimate Date:
Reset Submit	Poway, CA. 92064 Home: (619) 391-5000 Office: (888) 724-6742	License Plate: 2ABC123 CA VI	MI-	ervice Advisor: ustomer ID:
	Type Description		Qty/Hr	Sale/Rate
	Job Title			Initials:
	Labor Diagnose air conditioni	ing system	1.00 hr	\$60.00
	Labor A/C Recharge & Leak T	est System	1.00 hr	\$60.00
	Part Freon		1.00	\$24.00
	Parts: \$24.00 Labor: \$	120.00 Tax: \$1.86 Tota	1 \$145.86	
	4			· ·
age 1 of 1 Printing			100% -	+

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

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



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

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

NEXT: F12 key = Check Profit

Using the Profit Wizard

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

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

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Reilly	Parts Labor	Sub Total Haz Mat.	Supplies	Tax To	otal					v. Bal. 145.86	

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

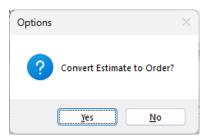
NEXT: With profit verified and customer approval, convert Estimate to R.O.

Converting an Estimate into a Repair Order

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

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

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



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

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

Mitchell 1 Te	amWorks SE									_		×
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Labor	A/C Recharge & Leak Test System	1.00 \$60.0)		\$60.00		\$60.00	<none></none>	AC/Heating/C			
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Assigning Techs to R.O. / Print Tech Worksheet

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

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

<none></none>	 AC/Heating/C
<none></none>	
Charbonneau,	, Wayne
Day, Raymond	d
DiVerde, Nick	
Johnson, Tina	
Please , Select	t

To Assign the Technician to a repair line:1. Right-click on the first Tech grid (highlighted).

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

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

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

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

You may get a validation warning.

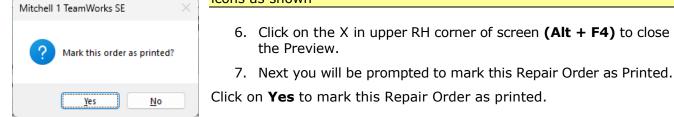
Warnings	
'Written by' not entered	<none></none>
Car	cel Print Continue <u>P</u> rint

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

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

Inspect the Repair Order content in the Print Preview window.

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



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

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

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

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

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

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

REPORTS				— 🗆 🗆
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VIN # :	ork Sheet Service Writer : #t - Impala LS FWD .6L,V6 (217Cl) VIN(3)	Hat # : Color : Location :	Print Date: 11/26/20 Repair Order # 008768	
Lic # : 2 Jones, John	ABC123 5000 Office 888-724-6742	Lic. State : CA Schedule : 10/09/24 3:00 Promised Date : 10/08/24 5:00 Status :		
Last Service : Current Odomei Previous Mileag Elapsed Mileag	10/08/24 ter: 45,657 ge: 45,657	Unit # : Unit # : Trans : 6 speed Auto Brakes : 4-Wheel ABS Manufacture Date : 6/29/21		
Part Numb	Freon	Qty 1.0	0	
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OUT ODOMETE Hours out: 0.00 Tech Notes		Total H	lours Charged : 2	2.00
-				
Current Page No.: 1	Total Page No.: 1		Zoom Factor: 100%	

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

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

NEXT: Converting a Repair Order to an Invoice

Converting the Repair Order to an Invoice

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

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



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

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

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Job	Title															:
	Labor	Diagnose air (conditioning system	1.00	\$60.00				\$60.00		\$60.00	Charbonneau,	AC/Heating/C			
	Labor	A/C Recharge	e & Leak Test System	1.00	\$60.00				\$60.00		\$60.00	Charbonneau,	AC/Heating/C			
+	Part	Freon				FREON	1.00	\$12.00	\$24.00	\$24.00	\$24.00	Charbonneau,	AC/Heating/C	\$0.00		
Tot	al: \$1	45.86	Parts: \$24.00	Lab	or: \$120.	00 Tax	\$1.86	Categ	ory: <none< td=""><td>></td><td>•</td><td></td><td></td><td>0.00%</td><td> Est: \$1</td><td>45.86</td></none<>	>	•			0.00%	Est: \$1	45.86
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Pay/F	P <u>o</u> st Inv	oice Pa	rts Ordering	SocialCR	A Details					Options	View	90 Worksh	eet Share	• • P	Print	E <u>x</u> it

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

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

Work in Progress Screen

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



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

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0				008769	J	ones, John	2ABC	123					2013 Chevrole	et Impala LS				
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٧V				000604	H	larkins, John	234A	вс		V1NNUM	6565656565	5656	1991 Toyota P	Pickup SR.5		10/12/2005 0	5:41 PM ((9.45 hr
W				000605	G	Grimes, Jon	504-T	DR					1983 Nissan M	laxima GL		11/2/2006 02	: 18 PM (9	9.45 hrs
W				008748	0	yson, Brian	BTO-E	046		1FTHX25	1XFKA9998	4	1985 Ford Pick	kup F250		11/20/2006 1	1:01 AM ((0.00 hr
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The WIP screen provides various tools for working with and making adjustments to orders; watch videos to learn more. Two of these options are discussed below:

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

10/9/2	024: Jones,	John										-		×
Save & Dele Close	ete Open Order	Cancel	Match I	djust End Tin Drop-Off to S ler None		Send Text ~								
Subject	Jones, Jo	hn												
Drop Off	10/ 9/2024		8:00 AM	- Schedu	uled Hours:	2.00	Order Hr	s: 2.00		Appointment State	Open (OPEN)		~	
Promised	10/ 8/2024		5:00 PM	Ŧ						Service Advisor	<none></none>		~	
Starts	10/ 9/2024		3:00 PM	-						Technician	Charbonneau	, Wayne	~	
Ends	10/ 9/2024		5:00 PM	- 🗌 All	day event					Resource	<none></none>		~	
Shop Cor	mments				Print	on order	as Note	Customer Co	mmer	nts/Special Requests	Pi	rint on oi	rder as N	ote
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Descriptio	'n													

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

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

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



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

Update these WIP Detail fields:

- Status: Completed
- Location: Front Lot

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

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

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

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

NEXT: Apply Payments & Post the Invoice

Apply Payments & Post the Invoice

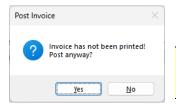
John Jones is here to pick up the vehicle and you will now complete the order cycle by collecting payment, printing a finished invoice and posting it to History.

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Elle Edit View Configurations Utilities W.I.P. Quote New Counter P.O.s Jones, John 2013 Chevrolet Impala CS 3.6L,V6	Inventory Sche		CRM Help Eports Change Source	(?) How to	P Repair Info	SocialCRM	
<u>C</u> ustomer <u>V</u> ehicle	<u>c</u>	Apply Payments		×		Invoice #	008768
Parts Labor Notes Sublet Symp Written By <none> v</none>	Hat #	Customer Name Jo Charged Balance Credit Balance	ones, John \$0.00 \$0.00		In 456	57	t LOF
Promised 10/ 8/2024 . 5:00 PM -	Source <nor< td=""><td>Charged Balance does</td><td>NOT include this Invoice.</td><td></td><td>In <u>0.0</u></td><td>Out 0.0</td><td></td></nor<>	Charged Balance does	NOT include this Invoice.		In <u>0.0</u>	Out 0.0	
V Type Description	Driver: <none Hours Rate</none 	Invoice Amount Amount Paid	0.00	Receipt	1 Ci	ategory List	Mfg Code
✓ Job Title		Invoice Balance	145.86				:
Labor Diagnose air conditioning system	1.00 \$60.00	Date	11/27/2024			leating/C	
Labor A/C Recharge & Leak Test System	1.00 \$60.00	Payment Type	Visa	*		leating/C	
+ Part Freon		Payment	145.86		au, AC/H	leating/C \$0.00	
Total: \$145.86 Parts: \$24.00	Labor: \$12	Check / Reference #				0.00%	6 Est: \$145.86
New Job Quick Menu 4		Authorization #	558163	Cancel			4
CREITY NAPA FRAN Multi-Seller		Apply cre		cancer			
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Invoice 24.00 120.00 Estimate 24.00 120.00	144.00 144.00	0.00 0.00 0.00 0.00	1.86 145.86 1.86 145.86				145.86
Pay/Post Invoice Parts Ordering Ready	SocialCRM Detail	s			orksheet nager SE Der		Print Exit

To Pay/Post Invoice:

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

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



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

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

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

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

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

Continue Print

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

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

Print Preview 88 ×, 6 Q QÐ **•** ID PDF \otimes * Scale Orientation Quick Print Size Find Thumbnails Bookmarks Editing First Previous Next Fields Page Page Page Last Page Many Pages Zoom Out Zoom Zoom In Page Color Watermark Export E-Mail To Y As Y Close Q Print Page Setup G Navigation 7000 Page Background Export Close Parameter Include Header Yes Invoice # 008768 Include Comment Original Est # 2350 Yes Include Signature Lin Yes Phone: ()- | Fax: ()-Show Labor Hours Yes No Show Part Numbers Invoice Paid Balance Due: \$0.00 Print in Color Yes Show Revisions on INV Yes 2013 Chevrolet - Impala - LS Estimate Date: 10/08/24 Jones, John 1544 Kingsland Way Show Technicians Yes 3.6L, V6 (217CI) VIN(3 Service Adviso Poway, CA. 92064 License Plate: 2ABC123 CA VIN: Customer ID: 6191 Home: (619) 391-5000 Odometer: In 45,657 Color: Reset Submit Office: (888) 724-6742 Engine Hr: In 0.0 Type Description Otv/Hr Sale/Rate Total \$145.86 Job Title 1.00 hr \$60.00 \$60.00 Labor Diagnose air conditioning system Labor A/C Recharge & Leak Test System 1.00 hr \$60.00 \$60.00 Part Freon 1.00 \$24.00 \$24.00 Parts: \$24.00 Labor: \$120.00 Tax: \$1.86 Total: \$145.86 Thank you for your business. Labo \$120.00 In hereby authorize the above repair work to be done along with the necessary material and hereby grant you and/or your employees permission to operate the car or truck herein described on street, highways or Parts \$24.00 Subtotal \$144.00 100% - -----Page 1 of 1

Print displays what your final printed invoice would look like.

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

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

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

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

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

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.I.P. Quot		J	ones,	John			Writt	ten By				Up	date Odom	eter	Inve	oice 00876
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NV				.abor I: \$60.	Diagnose air con 00	ditioning system Parts: \$0.00		\$60.00 oor: \$60.00	0 Tax:	\$0.00	Ca	\$60.00 tegory: <no< th=""><th>ne></th><th>\$60.00</th><th><none></none></th><th>AC/Heating/C</th></no<>	ne>	\$60.00	<none></none>	AC/Heating/C
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v		ıl. 	Tota	l: \$60. Invoice		Parts: \$0.00 Parts 0.00	Lab Labor 60.0	r 0 0	Sub To 6	otal 0.00 0.00		z Mat. 0.00	Supplie 0. 0.	25 00 00	Tax 0.00 0.00	Total 60.00

11. Click Details to view the Details of the Posted Invoice in History

Entering Recommendations

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



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

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

Mitchell 1 Tea File Edit Vie W.I.P. Quo	e <u>w</u> Configur <u>a</u> tions			s CRM Help	Forum Setup	Contraction of the second seco		9 ×
<u>C</u> ustor	D13 Chevrolet Impala LS Recommendations Date Recommended Date Work Needed	5 3.6L,V6 (217CI) VIN(3) Lie: C	A 2ABC123 Home: 619 FollowUp Date Create Future Ap	None	8-724-6742	Demor	e 15	NEW
Year / Mai Mod Body Sty Engine / Fu Transmissik Driver View/Edit	Work Recommended	Standard Notes		×	Category <	none>	0. 3 11: 24 34 35 29 29	.0 23.27 05.86 69.82 2
Recommen Date			_	_	_	Cancel	OK	Add Edit Delete
Vehicle Notes	s Tax New	Type SocialCRM De	tails				Next	t Exit

2. Go to Vehicle (Alt + V) screen.

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

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

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

Recommendations					- 0	×
Date Recommended Date Work Needed	11/27/2024	FollowUp Date None Create Future Appointment			Clear <u>F</u> ollowUp Date	
Work Recommended	Standard Notes		~	Category	Automatic Trans/Transaxle	~
Test drive: shifting no	ot smooth; perform trans	s service 1st.				A
						-
					Cancel	<u>о</u> к

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

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

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

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

Recommendations											×
Date Recommended			FollowUp Date Create Future Ap	None pointment	2			Clear <u>F</u> o	llowUp D	ate	
Work Recommended		rd Notes			~	Category	Brakes				~
Test drive: poor har	d braking; perfo	rm ABS Brake	inspection'								•
											Ŧ
									<u>C</u> ancel		<u>o</u> k

7. Click on **Ok** to save this Recommendation; the two entries display.

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

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

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

omer	<u>V</u> ehicle	<u>0</u>
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Note: The Vehicle tab will not turn green until you actually leave the Vehicle screen.

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

Entering Revisions

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



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

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

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

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

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

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				Canned Job List	×
W.I.P. Quote Nev	v Counter P.O.s	Inventory Schedu	ile Tex	Search Criteria:	
Jones, John 2013 Chevro	olet Impala LS 3.6L,V6 ((217CI) VIN(3) Lic: C	A 2ABC1		
<u>C</u> ustomer	<u>V</u> ehicle	<u>O</u> rd	er	Category	<all></all>
Parts Labor N	otes Sublet Sy	mptom Jobs	Par	Year	2013
Written By <none></none>	~			Make	Clear Clear
SubEst 1	SubEst2 S	SubEst 3	SubEst	Model	Impala LS V
Order Hrs: 0.00	Subest <u>z</u> S	SUDEST <u>S</u>	SUDESI		
				Job #	trans
✓ Type	Description	Hours Rate	Part #	Description	
🔻 Job Title					Use Advanced Quick Menu
II. Total: \$0.00	Parts: \$0.00	Labor: \$0.00	Ta	Tag Job #	Description
					Transmission Service
New Job Quick Menu					
	IRST nexpart		-		
MAPA NAPA	IRST <i>Nexpart</i> Multi-Seller				
	Parts	Labor		Transfer	Add Edit Copy Delete Cancel
Estimate	0.00	0.00			

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

Edit	View	Configurations U	tilities Invent	ory Hist	tory Tra	ining Vid	eos CR	M <u>H</u> elp							
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ew Job	\$19.80 Quick Me	D Parts: : enu 4 FMATI Maria Parts Parts	\$0.00 Lab	or: \$19.80	- Tax:	Tax / Fe		jory: Autom				Automatic Ira			

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

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nes, John 20 Custome	13 Chevrolet Impala LS 3.6L,V er Vehicle		:: CA 2ABC12 Order		91-5000 Office			Der	TION	517	allo	
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✓ Type	Description	Hours Rate	Part #	Qty Cos	t Sale	Price	Total	Tech	Category	List	Mfg Code	
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Es	TOW2, Towing within 30mi			Tax / Fees 0.00		0.00						

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

Revision screen now displays **SubEst**² with the BRAKES Canned Job added.

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	Labor	Compl	lete Brake Ins	pection	0.60	\$60.00				\$36.00		\$36.00) <none></none>	Brakes			
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Rename each Sub Estimate tab to identify work

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

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

Tra	ns Servic	e Brakes	SubE	st <u>3</u>	SubEst 4		SubE	st <u>5</u>	Sub
Ord	ler Hrs: (.60							
~	Туре	Description	° Ho	ırs Rate	Part #	Qty	Cost	Sale	Price
Bra	ke Inspe	ection (non-ABS)							
	Labor	Complete Brake Inspection	0.6	60.0	0			\$36.00	
То	tal: \$36	.00 Parts: \$0.0	0	Labor: \$3	5.00 Tax	: \$0.00	Ca	tegory: Brak	œs

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

Sell (Transfer) Revisions

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



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

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

	ntory Schedule Text Users Reports Ov		
Customer Vehicle Parts Labor Notes Sublet Written By Notes Sublet Written By Rakes Sublet Order Hrs: 0.60 Sublet Order Hrs: 0.60 ✓ Type Description He ✓ Brake Inspection (non-ABS) Labor Complete Brake Inspection 0 In Total: \$36.00 Parts: New Job Quick Menu 4	Order Revision Revision Authorization Amount 	Revision Date 11/29/2024 V Initiated by O Shop O Customer	NEW d Text SubEst9 Mfg Code
Estimate 0.00	Telephone 30.00 0.00	Cancel Transfer	
Check Profit Remove SubEst Sell Revision	Parts Ordering	Email Fax Print Deta m1skearly Manager SE Demo 9.1.0.3253	il Exit

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

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

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

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

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

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

	es. John	Quote New	Counter P.O.s let Impala LS 3.6L,V6	n	ry Sched		Use Home:					How to Re	pair Info SocialO	RM		
	<u>C</u> ust		<u>V</u> ehicle		<u>O</u> rc			<u>R</u> evisio			s <u>t</u> ory		Repair Orde	er#	0	0876
<u>P</u> ar	rts La	abor <u>N</u> otes	Sublet Symp	ptom ,	obs	Part <u>K</u> it	Promos	E <u>s</u> tim	ator <u>M</u>	aint. Flui	ds TS <u>B</u> s) [Open Recalls	Print	LOF	
Vrit	tten By	<none></none>	~	Hat #		Ref	#		C)dometer -	Prev.	45657 In	0			
Pro	omised	11/29/2024		Source	<none< th=""><th>></th><th></th><th>*</th><th> E</th><th>ngine Hours</th><th>- Prev.</th><th>0.0 In</th><th>0.0 O</th><th>ut 0.0</th><th></th><th></th></none<>	>		*	E	ngine Hours	- Prev.	0.0 In	0.0 O	ut 0.0		
Dro	der Hrs:	0.93		Driver:	<none></none>			_						Row Colo	rs	
	🗸 ту	pe	Description	Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech	Category	List	Mfg Code	
-	Transmi	ssion Service														:
	Labo	r Transmissi	on Service	0.33	\$60.00				\$19.80		\$19.80		Automatic Tra			
ŀ	Total:	\$19.80	Parts: \$0.00	Lab	or: \$19.8	0 Tax	\$0.00	Cat	egory: Au	tomatic Trans/	Transa 🔻					
r I	Brake In	spection (non	-ABS)													:
I.	Labo	r Complete i	Brake Inspection	0.60	\$60.00				\$36.00		\$36.00		Brakes			
h.	Total:	\$36.00	Parts: \$0.00	Lab	or: \$36.0	0 Tax	\$0.00	Cate	egory: Bra	kes	•					
Vev	w Job 🛛 🔾	Quick Menu 🔹														
ങ	Reilly/	MAPA E	ANT Mexpart													
e,	ette matts			oub Total			pplies	Тах		Total					v. Bal.	
		Parts	Labor	SUD TOLAT	Haz	1at. 51	ipplies	Tax	·					10	55.80	

End of the Assisted Program Basics section

This concludes the assisted portion of management training.

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

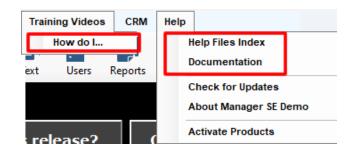
Self-Instruction

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

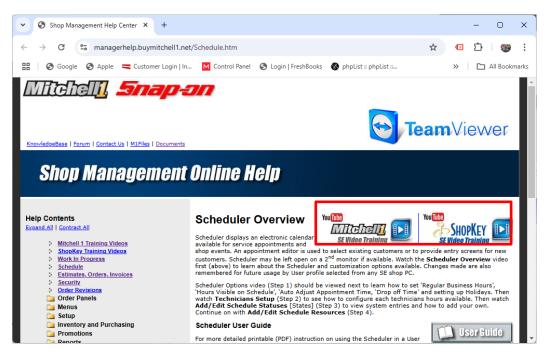
Help/Training Video Resources

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

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



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



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

Adding a Part to Inventory

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

- Searching existing Part records
- Entering new Part Records

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

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

III≫ Mitchel	I 1 TeamWorks SE		_	
File Edit	ē) 🛱	ations Utilities	Inventory History Training Videos CRM Help Inventory Schedule Text Users Reports Owner Forum Setup How to Repair Info. SocialCRM	
	Cate; Manufact Par Descrip	ndor < All > gory < All > urer < All > t No.	Add New Part X Part No. 70-5YR Part Code bat Description Battery Size I.ast Paid Manufacturer rone> Category Battery Category Battery Location Rebuilt Attached 0 Comment User Stocking Level 3.00 Tire No Commission User Entered Price \$ Stocking Level 3.00 Att Sale Alt Parts Sales Core Fee Vendor Supersede Cancel	
Ready	 Techni Electro 	yee Shift Ti ician Job Cl onic Fleet In Payment S	ntegrations Storage	Done

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



	Detail
~	Detail
~	Detail
\sim	Detail

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

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

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

	All >	Line Co		v v			1000		
Category < All Manufacturer < All Part No. Part No. Dess	All > All >	Line Co	ode <all></all>	•		Limit results	1000		
Manufacturer < All Part No. Description Size Part No. Des	All > escription	Line Co	ode <all></all>	•		Limit results	1000		
Part No. Description Part No.	escription	Line Co				Limit results	1000]	
Description Size Part No. Des						Limit results	1000]	
Size Part No. Des			Size	Line Code			1000]	
Size Part No. Des			Size	Line Code			1000		
Part No. Des			Size	Line Code				_	
			Size	Line Code	Delete				
Batte	ittery				Price	On Hand	On Order	Vendor	
					87.20	2.00	0.00	Interstate Battery	

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

Creating a Part Kit

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

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



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

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

Part Kits				$ \Box$ $>$
Search Criteria: Category Kit No. Description	< All >		~	Clear
Sort By: O Part Numl	ber	O Description		
Number	r		Descriptio	n

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

(it No:	7202-Kit					Use bu	undled p	ricing?	
escription:	Radiato	r Hose Kit			_			-	
ategory:	Belts &	Hoses	~						
art List									
	rt#		Description	Pror	npt	Cost	Cost Ext.	Price	Price Ext.
	rt#		Description	Pror	npt	Cost		Price	
	rt#		Description	Pror	npt	Cost		Price	

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

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

Enter the following: Part No.: 7202

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

nventory List								— 🗆	×
Search Criteria:									
Vendor	< All >				•	\odot			
Category	Belts & Hoses			•		\sim			
Manufacturer	< All >	+ Line Co	de < All >	•		Clear			
Part No.	7202								
Description									
Size						Limit results	1000		
Part No. 🔺	Description		Size	Line Code	Price	On Hand	On Order	Vendor	
7202	Radiator Hose				24.95	3.00	0.00	Rapid Fire Auto Par	ts

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

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

Inventory List								— D	×
Search Criteria:						_			
Vendor	< All >				•	\bigcirc			
Category	< All >			•					
Manufacturer	< All >	 Line C 	ode < All >	•		Clear			
Part No.					•				
Description	anti								
Size						Limit results	1000		
Part No. 🔺	Description		Size	Line Code	Price	On Hand	On Order	Vendor	
afc1/2	Anti-Freeze 1/2 Gal				11.90	4.00	1.00	Rapid Fire Auto Part	s
		Transfe	Tag		Print	Copy Update	Add E	dit De <u>l</u> ete <u>C</u> ar	ncel

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

transferred radiator hose, hose clamps and Anti-Freeze.

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

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

art Info	rmation:		Price Information:	
it No:	7	7202-Kit	Use bundled pricing?	
escript	ion: F	Radiator Hose Kit		
ategor	y: E	Belts & Hoses	Edit Kit Line X	
art List			Part afc1/2 Anti-Freeze 1/2 Gal	
Qty	Part #	2		rice xt.
1.00	7202	Radiator Hose		24.9
2.00	1012	Hose Clamp - No.	Quantity 200 Prompt On	2.0
1.00	afc1/2	Anti-Freeze 1/2 G	If the kit is using Bundled Pricing, selecting 'Prompt On Use' will have no effect.	11.9
			Cancel OK	
			Total Cost 23.05 Price	38.8

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

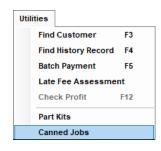
dit Kit Part Info Kit No: Descript	7	202-Kit adiator Hose Kit		Price Inf	_	n: Indled p	ricing?	
Category Part List Qty	y: B Part#	letts & Hoses	~	Prompt	Cost	Cost	Price	Price
1.00	7202	Radiator Hose		No	16.10	Ext. 16.10	24.95	Ext. 24.95
	1012	Hose Clamp - No. 12		No	1.00	2.00	2.00	4.00
2.00	afc1/2	Anti-Freeze 1/2 Gal		No	5.95	11.90	11.90	23.80
				Total C	ost	30.00	Price	52.75

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

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

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

Creating a Canned Job



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



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

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

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

Click on Save (Alt + V).

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

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

Now begin adding Part items to the Canned Job.

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

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

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

The completed Canned Job displays.

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

Canned Jobs										- 0	×
Job #	Flush-1					[Part Kits	Attached to	this Canne	ed Job	
Description	Cooling	ystem Flush & Check									
Category	Mainte	nance		~							
Year	All			~							
Make	All			~							
Model	All			~			D	etail	<u>A</u> dd	Remove	*
	<u> </u>	nclude in Quick Menu									
Time	Rate	Description	Qty	Extended	Sale	Price	List	Part No.	MfgCode	Tech Name	C
1.20	60.00	Flush Cooling System, Inst		72.00	72.00	0.00	0.00			<none></none>	
	0.00	Anti-Freeze 1/2 Gal	2.00	23.80	11.90	11.90	0.00	afc1/2		<none></none>	
	0.00	Additive - Cooling Sys Lub	1.00	10.68	10.68	10.68	0.00	Bar1		<none></none>	
	0.00			0.00	0.00	0.00	0.00				
								_			
<u>P</u> arts		abor <u>N</u> otes	S <u>u</u> blet			E <u>s</u> timat	or	<u>T</u> otal Sale		etail E <u>x</u>	it

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

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

Writing a Counter Sale



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



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

_	ll 1 TeamW	orks SE														- 0	×
File Edit		Configura	tions	Utilities	Inventory	History	Train	ing Videos	CR	M Help				_			
E.	S.	2 4	*	Ê.	0 A 4 0 B		G	C.	B	0	\otimes	¢°	(?)		r Alt	ng	
W.I.P.	Quote		Counter	P.O.s	Inventory Se		Text	Users	Repor	Change ts Owner	Forum	Setup	How to	Repair Ir	nfo SocialCRM		
NO CUSTO	OMER												D	em	onst	rati	<u>01</u>
	<u>C</u> u	stomer			Order Item Er	ntry - PART	S						\times		Invoice #		NEW
Parts	Labor	Notes	Suble	et 🕴	<u>P</u> arts			Labor		<u>N</u> otes		Su <u>b</u> le	t	Bs O	pen Recalls		
Cour	nter Sale				Part No.	WB14				Part Code							
	Writter		e>		Description	Wiper	Blade -	14" Triple E	dge Re	fill							
0	order Hrs:	0.00											w				
	Time	Rate	Descr	iption	Quantity		2.00		Size				Tire	Category	/ Tech Name	Cost	
	0.00				Unit Cost \$		5.30	Ver	ndor	Rapid Fire Aut	to Parts (R	RFAP)	•	<none></none>	<none></none>	\$	0.00
					Unit Price \$	1	0.60	Manu	fact.	<none></none>			Ŧ				
					Unit Sale \$	1	0.60	Categ	gory	Miscellaneou	8		•				
					Unit List \$		0.00			Parts Revenue	e		•				
					QOH		3.00	Techni					•				
					Margin %		50.0	Ref/I	Inv #								
					No C	commissio	on 🗌	Fixed Con	nmissi	on Commis	ssion \$ V	ar.					
					Use	r Entered	Sale \$		Invent	ory Part	Core	y Off					
	7. Mar Nap		_	_		Tax		ist Type		Cance	el Sav	ve D	one		-		+
Invoi	ice	Parts 0.00	Labo 0.0		5ub Total 0.00	Tax 0.00		Total 0.00							Inv	v. Bal. 0.00	
Che	ck Profit	Pa	rts Order	ring						Paym	ent	Post	Ema	il Print	Detail	Cancel	Exit
Ready												m1ske	arly N	/lanager SE D	emo 9.1.0.32	53 TIM	<u>\$</u>

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

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

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

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

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

W.I.P. Quote New Co					Display by
D CUSTOMER	B	First	Company	Balance Due	O Custome
Customer	c Dahl	Charlie		A	
Customer	D Daniel	Carney			Company
Company	E Darrin	Dan			
	E Darrin	Daniel			
Name	G Darrin	John			
Last, First	Davidson	Julie			
Spouse	J Davies	Bart		1.00	
Address	K Dawson	Gary			
Zip, City, State	L Day	Sam			
Home 000	DeFilipo	Robert			
	Derringer	John			
Office 000	P Deshane	Monique		32.63	
E-mail	Q Diez	Dito			
	R Ditman	Wes			
Birthday _/ MM/DD	Doe-Jones	Jane		809.37	
No.	Dolf	Norm			
License Year	Duffy	Frank			
	W Duke	Barbara			New
	X Dukmagian	Barbara		88.93	
	Y Dwulet	Doug			Cancel
	Z Dwulet	Fred	Hill Country Motor Inn		ОК
	Dwulet	John		8.65	
		2011]
		arrin, Dan	Balance Due		
	Address 1902	S.Hy 121 916 Spring Valley	, CA 92131		
	Office 619-8	16-3925 Ext: 363			

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

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

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

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

Mitch	ell 1 Team ¹ lit =Vie w		ations Utilities	Invent	ory History Training V	ideos CRM	Help				-	- 🗆
W.I.P.	Quote	New	Counter P.O.s	Invento	🛱 🖪 🛔	ers Reports	Change	orum Setu		Repair Info	SocialCRM	
Parts Cou	C Labo Inter Sale	ustomer r Notes	Sublet Sy	ymptom	Customer Name Dar Charged Balance Credit Balance	rin, Dan \$0.00 \$0.00			T	SBs Ope	Invoice #	00877
	Writte Order Hrs		ne>		Charged Balance does M Invoice Amount Amount Paid	IOT include this 22.84 0.00	s Invoice.] Print Receip	it			
	Time	Rate	Description Wiper Blade - 1	Qt	Invoice Balance Date	22.84 11/30/2024		[lded ∙om	Category Miscellaneous	Tech Name	Cost
	0.00				Payment Type Payment Check / Reference # Authorization #	Cash 22.84				<none></none>	<none></none>	\$0.00
Reil		APA Parts 21.20		5ub Tot 21.2	History Apply Credi		Pay	Canc	el		Inv. I 2	3al. 2.84
Ch	ieck Profit	<u>Р</u>	arts Ordering				Paymer	nt Post	Em	ail Print	Detail	nncel Exit
dy								m1	skearly	Manager SE Der	no 9.1.0.3253	тім 🔮

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

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

Post)	$\langle \rangle$			
?	Invoice balance i Post this Invoice				~	
		Post Invoice		\times	1	
	<u>Y</u> es		voice has not be st anyway?	(
				Posting Date		×
			<u>Y</u> es			
					Post Order With This Date	11/30/2024
					Print Invoice before posting?	Cancel OK

The Counter Sale displays in Print Preview [next page]

ſS					—
	▶ 1 /1	M 💐 -			SAP CRYSTAL R
ort					
				Counter Sale	#: 0008770
				Print Date	e : 11/30/2024
			SOLD Darrin, Dan TO 1902 S.Hy 121	010	
			Spring Valley, C		
	00 Fax-000			-3925 363] Home [619-315-08	42]
	89 Ford - Tempo		Lic # : DFG-O2K -	CA	
Vir	n # :IFAPP31X6KK124598		Unit # :		
Qty	Part Number	Part Description		Sale	Line Total
2.00	WB14	Wiper Blade - 14" Triple Ed	lge Refill	10.60	21.20
Payment	t Method: [Payments - Cash ·	\$22 84 1			
Labor: \$		-		Total:	\$ 22.84
Lador. 🤉		.0 Idx. \$ 1.04		Less Payments:	22.84
				Remaining Due:	\$0.00
				Nerhaining Due.	.00
∆ buver of thi	is product has the right to have this p	roduct serviced or repaired durin	o the warranty period. The w	arranty period will be extended fo	r the number of
whole days t	that the product has been out of the l	ouver's hands for warranty repair.	If a defect exists within the w	arranty period, the warranty will n	iot expire until
the defect ha	as been fixed. The warranty periody	will be extended if the warranty rep	pairs did not remedy the defe	ct and the buyer notifies the manu	facturer or
une delectria	C 1 CI - 1 - 10 - 00 - 1	0 1	-		
seller of the f	failure of the repairs within 60 days a	after sale.	-		

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

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

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

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

Create an Appointment



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



1. Click the Schedule button to open the Scheduler.

😁 Scheduler - 12/1/2024		– 🗆 X
Filtering		
New Appointment New Shop Event Preview	int Help Settings Backward Forward Go to Zoom In Zoom Out	Timeline View View Week View View View View View View View View
Operations Printing	Scheduler Navigate	Arrange
Scheduling Appointment Shop Event	s Requests	Enter text to filter view
▲ December ▶ ▲ 2024 ▶	C > December 2, 2024	
Su Mo Tu We Th Fr Sa 49 2 3 4 5 6 7 50 8 9 10 11 12 13 14	(0 Appts,	ecember 2 0.00 Hrs) rder Hrs)
51 15 16 17 18 19 20 21 52 22 23 24 25 26 27 28 1 29 30 31	7 AM	
January 2025	8 AM	
Su Mo Tu We Th Fr Sa	9 AM	
2 5 6 7 8 9 10 11 3 12 13 14 15 16 17 18 4 19 20 21 22 23 24 25	10 AM	
5 26 27 28 29 30 31 1	11 AM	
6 2 3 4 5 6 7 8 Today	12 PM	
Resource View Mode	12 PM	
Show/Hide:		•
		Total Order Hours: 0.00, Total Scheduled Hours: 0.00

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

😁 Sc	:hea	duler	- 13	2/1/2	2024	1																			-	_		×
١		View		Filte	ring																							
New Ap	poi	intme	nt				Drint	Prir	nt	Help	کې Settings	G	erd Forward	d Go		(+) Zoom I	T Zoom C	•		Day Vie	ew	5 Work	7 Week	F	ill.	31 Month		
				Eve	ent		Preview							To	oday				View			Veek Viev	View	Weel	k View	View		
	C	pera	tions	S			Printi	ng		Sch	eduler			Nav	vigate							Arra	-					^
Sched	lulii	ng	Арр	oint	mer	nt :	Shop Eve	ents	Ree	quests											E	nter text	to filter v	iew				Q
4	D)ecen	nber	Þ	4	202	4 ⊧		<	Creat	e New Cus	tomer									×							
	Su	u Ma	Ти	We	e Th	Fr	Sa			Crea	ate a new ci	stomer	on this app	ointme	nt:													
49	1	2	3	4	5	6	7																					
50	8	9	10	11	12	13	14				Compa	ny									_							
51	15			18							т	tle									~							_
52	22			25	26	27	28		7 A		Last, F	rst Wi	son			Jim												
1	29	9 30	31													-					-							
									8 A		Addre	ss <u>12</u>	3 Elm St.								_							
		Janua	ary			202	5				Zip, City, Sta	te 78	613		Leand	der	T	Κ										
	Su	u Ma	Tu	We	: Th	Fr	Sa		9 A	Pho	one, Ext., De	sc. 51	2-333-4444				Home			,	~							
1				1	2	3	4	4			En	ail																
2	5		7		9		11		10 A												- 1	_						_
3	12			15		17			10 A								C	ncel		ОК								
4	19			22													La	ncei		UK								
	26			29					11 A	M																		
6	2	3		5		1	8																					_
			Т	oday	/				12 P	м																		
Reso	urce	e Viev	v Mo	de																								
Norm	al						~		1 P	м																		
Show	/Hic	de:																										-
																					Tota	l Order	lours: O	.00, To	tal Sc	hedule	d Hour	rs: 0.00

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

9. Click on Add Vehicle.

The New Vehicle dialog box displays.

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

10. Fill in the vehicle fields:

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

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

11. Click Save & Close.

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

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

📅 12/2/2024: Wilson, Jim	- 🗆 X
Save & Create Delete Cancel Close Value Auto Adjust End Time	
Subject Wilson, Jim	
Drop Off 12/02/2024 10:00 AM Scheduled Hours: 3.00 Order	Hrs: 0.00 Appointment State Open (OPEN)
Promised 12/ 2/2024 🗐 🔻 5:00 PM 👻	Service Advisor </th
Starts 12/ 2/2024 🗐 🔻 10:00 AM 👻	Technician <none> ~</none>
Ends 12/ 2/2024 T:00 PM - All day event	Resource <none> \</none>
Shop Comments Shop Comments	Customer Comments/Special Requests 🛛 🕑 Print on order as Note
Customer - Wilson, Jim Phone: (Home) 512-333-4444 V Prefers: <none> V Email:</none>	Vehicle - 2012 Toyota Tundra Limited 0 Recommendations VIN:
Company:	License Plate: FJB3831 Color:
Address: 123 Elm St. Leander, TX 78613 Membership #:	Engine: 5.7L, V8 (346CI) VIN(W) Unit #: Hat: Odometer In: None Yearly Mileage:
Job Hours: 0.00 Source: < None > Category: < None > Description	Jobs: Add Delete

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

		12/2/2024: Wilso	on, Jim	M_	_		-	
	Canned Job List			×	<			
w Appointment New Sho Event	Search Criteria:							
Operations								
heduling Appointme				\sim				
	Category	LOF (Lube, Oil, Filt	er) ~		Hrs: 0.00	Appointment State	Open (OPEN)	\sim
December	Year	< All >	~			Service Advisor	<none></none>	~
Su Mo Tu We Ti	Make	< All >	~	Clear		Technician	<none></none>	~
49 1 2 3 4 5	Model	< All >						
50 8 9 10 11 1	Model	< All >	~			Resource	<none></none>	~
51 15 16 17 18 1	Job #				Customer Com	ments/Special Requests	🕑 Print on	order as No
52 22 23 24 25 2 1 29 30 31	Description							
1 29 30 31		Use Advanced (Quick Monu					
January	Tag Job #		Description		Vehicle - 2012	Toyota Tundra Limited		
Su Mo Tu We Ti	LOF EZ	Z Select 4	Lube Oil Filter 4 Qt			0 Recommendations		
1 1 2 2 5 6 7 8 9	LOF EZ	Z Select 5	Lube Oil Filter 5 Qt		VIN			
3 12 13 14 15 1	LOF La	abor	Lube-Oil-Filter (Labor Only)		License Plate			
4 19 20 21 22 2	LOF4		Lube-Oil-Filter - 4 Qts		Engine			
5 26 27 28 29 3	LOF5		Lube-Oil-Filter - 5 Qts		Unit #			
6 2 3 4 5 6					Hat			
Today					Odometer In:			
esource View Mode					Yearly Mileage			
								-
ormal	L				· · ·		Jobs: Add	d Dele
now/Hide:	Transfer	Add	Edit Copy Del	lete Cancel				

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

🗮 12/2/2024: Wilson, Jim				-		×
Image: Save & Create Delete Cancel ✓ Auto Adjust End Time ✓ Save & Create Delete Cancel ✓ Match Drop-Off to Start Time Send Close ✓ None ✓ Text ✓						
Subject Wilson, Jim						
Drop Off 12/02/2024 10:00 AM Scheduled Hours: 3.00 Order Hrs	s: 0.00	Appointment State	Open (OPEN)		\sim	
Promised 12/ 2/2024		Service Advisor	<none></none>		~	
Starts 12/ 2/2024 🔍 🔻 10:00 AM 👻		Technician	<none></none>		~	
Ends 12/ 2/2024 🗐 🔻 1:00 PM 🔹 🗋 All day event		Resource	<none></none>		\sim	
Comments (217 Chars Remaining)	order as Note	Customer Comments/Special Requests	🛃 Pri	nt on or	derasNo	ote
Customer's son to pick up vehicle	▲ ▼					•
Customer - Wilson, Jim	Vehicle - 2012 T	oyota Tundra Limited				
Phone: (Home) 512-333-4444 V Prefers: < None > V		0 Recommendations				
Email:	VIN:					
Company:	License Plate: Engine:					
Address: 123 Elm St. Leander, TX 78613	Unit #:					
	Hat:					
Membership #:	Odometer In: Yearly Mileage:					
Job Hours: 0.20 Source: < None > < Category: < None >	~		Jobs:	Add	Dele	ete
Description						
Lube Oil Filter 5 Qt						
						_

18. Click Save and Close.

Sc.																																-			×
-	Vi	ew	F	ilter	ing																			_		_									
ew Ap	poin	: tmer		ew S Eve	Shop		Prir	nt	Pri	nt	Н	? elp	Setting		G		Tward	Go to	o Zo	oom In	_	n Out	Timelin View		1 ay Vie		Work		7 Week View		Full Full	Mo	81 Inth		
	00	erat		LVC	inc.			Print	00			Sche	eduler					Naviga	·				VICVV					rang		we			CVV		
ched				intr	nen	t :			-	s R	eau							Naviga	ite.							En	ter tex			ew					_
_							_		1		•	_																							
4	De	cem	ber	Þ	4	202	4 ⊧			<		>	Dece	emb	er 2,	, 20	24																		
	Su	Мо	Tu	We	Th	Fr	Sa														М	londay,	Decemb	er 2											
49	1	2	3	4	5	6	7														((1 Appts)	, 3.00 H Order Hr	irs) s)											
50	8	9	10	11	12	13	14															(0100 (or eler min	-7											-
51		16								-	AM																								-
		23 30		25	26	27	28				AM																								
1	29	30	51																																
										8	AM																								
	Ja	anua	y			202	5																												
	Su	Мо	Tu	We	Th	Fr	Sa			9	AM																								
1				1	2	3	4		4																										
2	5	6	7				11			10	AM	Wil	son, Jim	1																					
3	12 19	13 20	14 21									(0.	00 Orde	r Hrs,																					
5		20										Cu	stomer's	son t	o pick u	ıp veh	ide																		L
6		3								11	AM																								
				day																															L
										12	PM																								
Reso	irce '	View	Mod	e																															
Norm	al							\sim		1	PM																								
Show	/Hide	2:																																	
									1																1	Fotal	Order	r Hou	urs: 0.	00, T	otal S	ched	uled H	lours	s: 3

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

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



Invoice History

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

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

The Find History Record screen displays in Invoice view.

Find History Record					— 🗆
Invoice	<u>V</u> ehicle				
Invoice #	8757 Po	sted Up To: Monda	y , December 2, 2024 🗐 🔻	Save Search	
Invoice	Posted Date	Printed Date	Name	Vehicle	Amount
008767	10/08/2024	10/08/2024	Jones, John	2013 Chevrolet Impala LS	60.0
008766	10/19/2021	10/19/2021	Gannon, Pat	1978 Nissan 280Z	20.0
008762	10/07/2021	10/07/2021	Jones, John	2013 Chevrolet Impala LS	163.9
008757	12/15/2006	12/15/2006	James, Jesse	1994 Toyota T100 DX	633.2
008754	12/15/2006	12/15/2006	Allen, Torren	1991 Nissan Maxima SE	630.6
008755	12/14/2006	12/14/2006	Bollig, John	1990 Dodge Shadow Base	600.0
008753	12/12/2006	12/12/2006	Miller, Jeff	1989 Chevrolet Pickup C1500	600.0
008752	11/28/2006	11/28/2006	Dahl, Charlie	1987 Toyota Land Cruiser	189.7
008751	11/24/2006	11/24/2006	Johnson, Tina	2001 Cadillac DeVille Base	63.2
008747	11/20/2006	11/20/2006	DeFilipo, Robert	1989 Chevrolet Suburban R1500	119.2
008756	11/05/2006	11/05/2006	James, Jesse	1994 Toyota T100 DX	600.0
000495	09/17/2005	09/17/2005	Counter Sale		122.1
000522	09/15/2005	09/15/2005	Mullan, Robert	1985 Ford Pickup F150	93.5
000494	09/13/2005	09/13/2005	Winn, Billy	1989 Nissan 300ZX Base	501.1
000467	09/13/2005	07/14/2005	Jensen, Tom	1994 Nissan 300ZX GS	421.4
000497	09/13/2005	09/13/2005	Dahl, Charlie	1978 Volkswagen Beetle	131.8
000498	09/13/2005	09/13/2005	Dahl, Charlie	1978 Volkswagen Beetle	138.6
000523	09/12/2005	09/12/2005	Smollen, Gail	1988 Honda Accord LX	726.4
000500	09/12/2005	09/12/2005	Harkins, John	1991 Toyota Pickup SR5	415.4
				Cancel	View Record
	Reset Layout	Columns Send	Text Purge Ests Display	Appointment Payment Post	Detail

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

Ja	mes, Jesse 1	1994 Toyota T	100 DX Lic: CA	4KJT698 Hor	me: 619-278-99	65 Ext: 8754 0	ffice: 619-559-	5874 Ext: 2213		Demonstr	atio
		<u>C</u> ustomer		Ĭ	<u>V</u> ehicle			His <u>t</u> or	y		
	Display for:	○ Custon	ner 🔾 Ve	hicle						Show Categories	
	Туре	Provider	Date Posted	Inv/QC #	Odometer	Hours Out	License	State	Vehicle	Category	Customer
	INV		12/15/2006	8757	0	0.0	4KJT698	CA	1994 To		James, Jess
	INV		11/05/2006	8756	0	0.0	4KJT698	CA	1994 To		James, Jess
	INV		07/07/2005	438	68261	0.0	4KJT698	CA	1994 To	Automatic Trans/Transaxle	James, Jess

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

Display for	r: O Custo	mer 🔾 V	ehicle						Show Categories	
Туре	Provider	Date Posted	Inv/QC #	Odometer	Hours Out	License	State	Vehicle	Category	Custome
INV		12/15/2006	8757	0	0.0	4KJT698	CA	1994 To	Maintenance	James, Je
INV		12/15/2006	8757	0	0.0	4KJT698	CA	1994 To	Filters (Oil, Fuel, Air)	James, Jo
INV		12/15/2006	8757	0	0.0	4KJT698	CA	1994 To	Fluids/Sprays/Sealers	James, J
INV		11/05/2006	8756	0	0.0	4KJT698	CA	1994 To	Maintenance	James, J
INV		07/07/2005	438	68261	0.0	4KJT698	CA	1994 To	Attached Items	James, J
INV		07/07/2005	438	68261	0.0	4KJT698	CA	1994 To	Engine Cooling	James, J

Vehicle View

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

Find History Record	d						
Invoice	<u>V</u> ehicle						
<u>Y</u> ear	< All >		~	Posted <u>F</u> rom	1/ 1/2005		
<u>M</u> ake	Toyota		~	<u>T</u> o	12/31/2005		
M <u>o</u> del			~				Clear
Word Search	A/C						
Invoice	Posted Date	Printed Date	Name		Vehicle	Amount	Found In
000492	08/31/2005	08/31/2005	Harkins, John		1991 Toyota Pickup SR5	373.99	Multiple
000485	08/12/2005	08/10/2005	Harkins, John		1991 Toyota Pickup SR5	263.47	Multiple
000484	08/07/2005	08/07/2005	Harkins, John		1991 Toyota Pickup SR5	262.45	Multiple
						<u>C</u> ancel	Vie <u>w</u> Record

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

Other History screen options

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

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

Managerforum.net Discussion Board

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

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



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

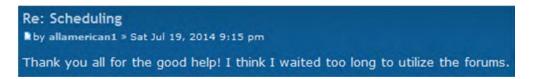


- Q. What happens after I click Register?
- A. You are sent an automated email with a link to "complete the circuit". Once you click that link, you may log into the forum.

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

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

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



Shop Management Modules & Quizzes

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

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

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



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

Get2Know - Manager SE

