

Mitchell 1 / ShopKey Management Solutions

LEARN: SE Management Software

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

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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)

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.

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

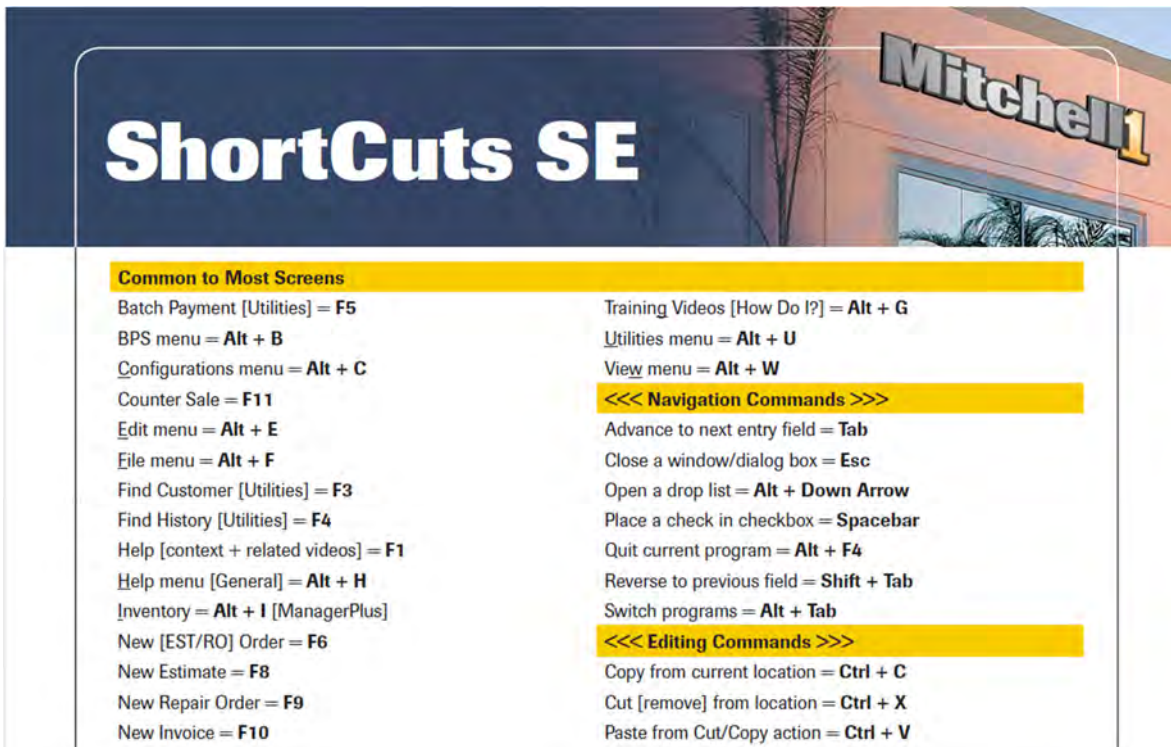
NOTE: Do NOT enter data you wish to keep while in Demo mode; data added in Demo CANNOT be transferred into your LIVE version of SE.

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 + O)** to advance to the Order Screen.

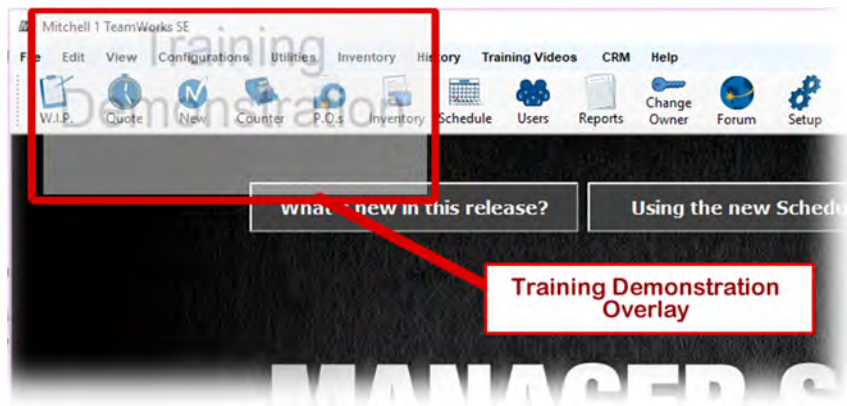
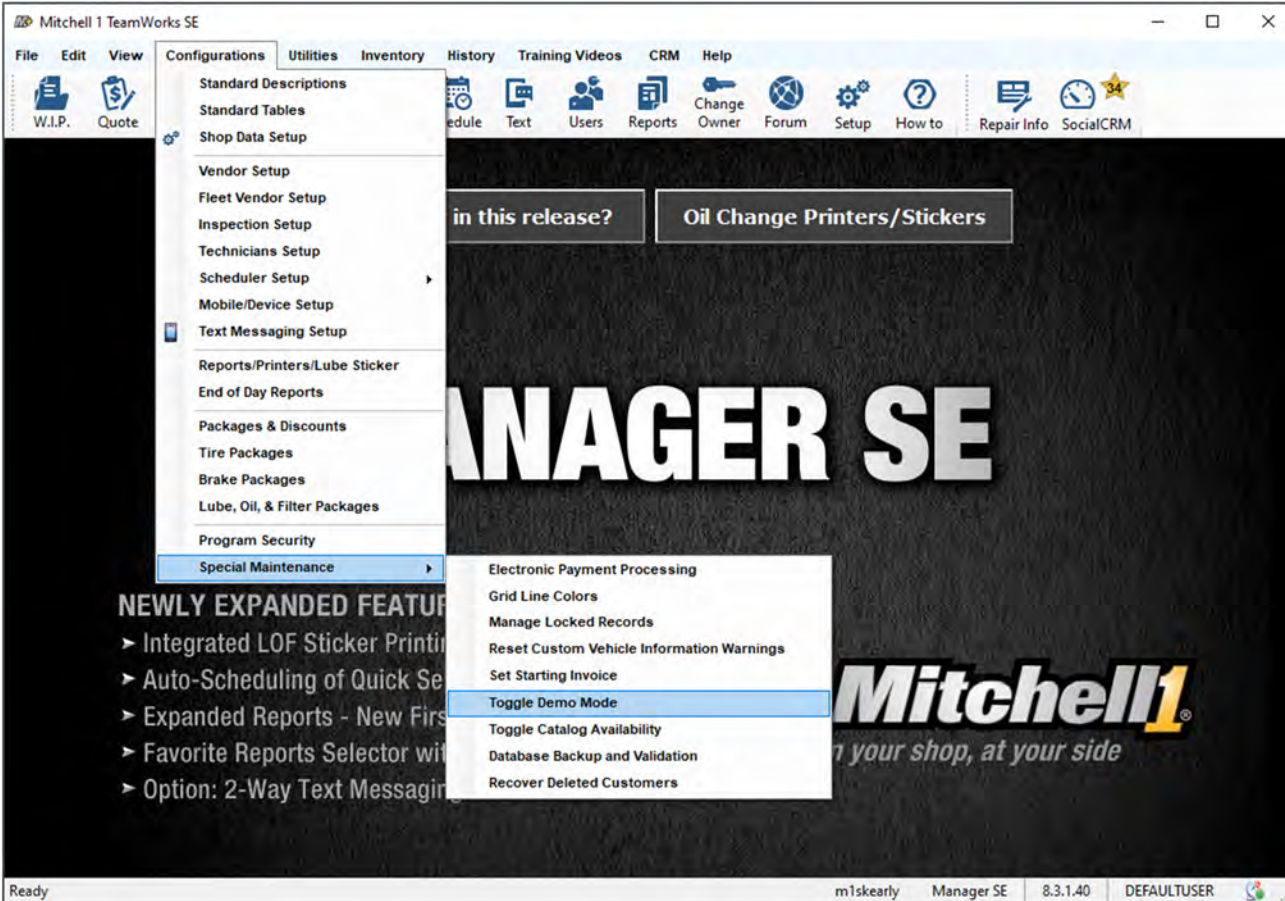
NOTE: All keyboard shortcuts are listed on the **Shortcuts SE**.



Common to Most Screens	
Batch Payment [Utilities] = F5	Training Videos [How Do I?] = Alt + G
BPS menu = Alt + B	Utilities menu = Alt + U
Configurations menu = Alt + C	View menu = Alt + W
Counter Sale = F11	
Edit menu = Alt + E	<<< Navigation Commands >>>
File menu = Alt + F	Advance to next entry field = Tab
Find Customer [Utilities] = F3	Close a window/dialog box = Esc
Find History [Utilities] = F4	Open a drop list = Alt + Down Arrow
Help [context + related videos] = F1	Place a check in checkbox = Spacebar
Help menu [General] = Alt + H	Quit current program = Alt + F4
Inventory = Alt + I [ManagerPlus]	Reverse to previous field = Shift + Tab
New [EST/RO] Order = F6	Switch programs = Alt + Tab
New Estimate = F8	<<< Editing Commands >>>
New Repair Order = F9	Copy from current location = Ctrl + C
New Invoice = F10	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.



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

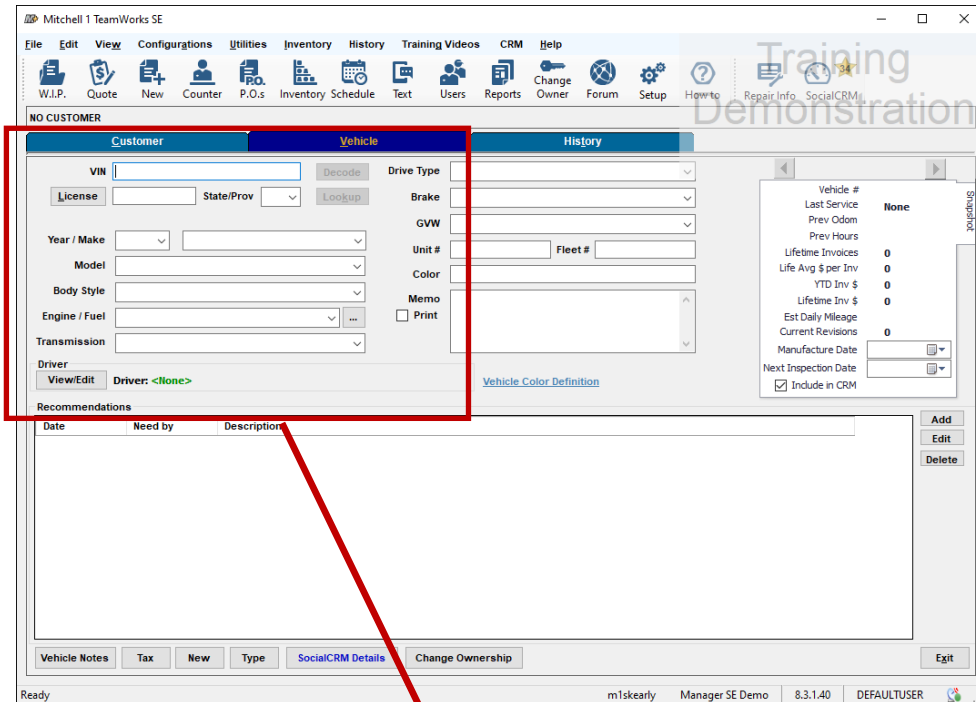
2. Type the highlighted text below into your Customer screen: (entering Zip Code then pressing the Tab key* automatically fills City + State fields)

Tip: Use **Tab** key to advance to next field; use Shift + Tab to reverse. **Do NOT** 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  **Vehicle** (Alt + V).

Vehicle screen displays for vehicle entry.

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



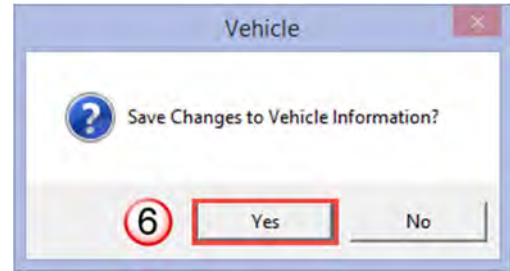
4. Type in the license plate and select Year / Make / Model, Body Style & Engine/Fuel vehicle data from the drop-down menus.

5. Then click on  **Exit** (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 **Yes** (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.

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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		1B4FK5439KX817037	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	Blackledge, 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		JAACH8EOJ7819005	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)

Ready m1skearly Manager SE Demo 8.3.1.40 DEFAULTUSER

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.

Start New ☒ Estimate ☐ Repair Order

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

Customer List for Start Order

Display for ☒ Customer ☐ Company Limit Results To 200 Start New Order As: ☐ Estimate ☒ Repair Order

Last jon First Phone # (last 4 digits) Membership # License #

Last Name	First Name	Phone Number	Membership #	Address	City	State	Zip	License
Jones	John	619-391-5000		1544 Kingsland Way	Poway	CA	92064	2ABC123

New Customer Cancel OK

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 List for Start Order

Display for ☒ Customer ☐ Company

Last jon First Ph

Last Name	First Name	Phone Number
Jones	John	619-391-5000

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.

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File Edit View Configurations Utilities Inventory History Training Videos CRM Help

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

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

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

Parts Labor Notes **Symptom** Jobs PartKit Promos Estimator Maint. Fluids TSBs

Written By: Dwulet, John Hat # Ref # Odometer - Prev. 0 45657

Promised 9/30/2021 5:00 PM Source <None> Engine Hours - Prev. 0.0 In 0.0 Out 0.0

Order Hrs: 0.00 Driver: <None>

Time	Rate	Description	Qty	Extended	Sale	Price	List	Part No.	MfgCode	Added From	Category
0.00			0.00	\$0.00	\$0.00	\$0.00	\$0.00				<None>

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

Invoice Estimate 0.00 0.00 0.00 0.00 0.00 0.00 0.00

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

Ready m1s Kearly Manager SE Demo 8.3.1.40 DEFAULTUSER

4. Enter the vehicle In Mileage as shown here:

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.

Symptoms Reported by Customer

Sort by ☒ Description ☐ Category

Short Description	Category	Hours	Labor	Parts
AC Won't Cool	AC/Heating/Cooling	1.00	\$60.00	\$0.00
Backfires	Engine Performance/Fuel	1.00	\$60.00	\$0.00
Battery Dead	Charging & Starting System	1.00	\$60.00	\$0.00
Belt Squeal	Belts & Hoses	0.50	\$30.00	\$0.00
Brake Noise	Brakes	0.50	\$30.00	\$0.00
Brake Pedal Soft-Sinks	Brakes	0.50	\$30.00	\$0.00
Brake Warning Light On	Brakes	0.50	\$30.00	\$0.00
Charge Light on	Charging & Starting System	1.00	\$60.00	\$0.00
Check Engine Light	Engine Performance/Fuel	0.00	\$50.00	\$0.00
Electrical Problem	Electrical	0.00	\$50.00	\$0.00
Engine Miss	Engine Performance/Fuel	1.00	\$60.00	\$0.00
Engine Noise	Engine Mechanical	1.00	\$60.00	\$0.00
Engine Overheats	AC/Heating/Cooling	0.75	\$45.00	\$0.00
Engine Stalls	Engine Performance/Fuel	1.00	\$60.00	\$0.00
Hard Shifting (MT)	Clutch	0.50	\$30.00	\$0.00
Hesitate, Stumble or Sag	Engine Performance/Fuel	1.00	\$60.00	\$0.00
Idle Too High	Engine Performance/Fuel	1.00	\$60.00	\$0.00

6

Select Symptom View Symptoms on Order

Short Desc. AC Won't Cool

Symptom Description Air conditioning is not cooling properly

Work Requested Diagnose air conditioning system

Charged Hrs 1.00 ☐ Non-Standard Labor Rate

Labor Total \$ 60.00 ☐ Save as Standard Symptom

Est. Parts \$ 0.00 ☐ Come Back Invoice #

Category AC/Heating/Cooling

Account Labor Revenue Non-Taxable

Cancel 7 Done

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.

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File Edit View Configurations Utilities Inventory History Training Videos CRM Help

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

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

Customer Vehicle **Order** Revision History Repair Order # 008762

Parts Labor Notes Sublet Syn **8 Jobs** PartKit Promos Estimator Maint. Fluids TSGs

Written By Dwulet, John Hat # Ref # Odometer - Prev. 0 In 45657

Promised 9/30/2021 5:00 PM Source <None> Engine Hours - Prev. 0.0 In 0.0 Out 0.0

Order Hrs: 1.00 Driver: <None> Row Colors

Time	Rate	Description	Qty	Extended	Sale	Price	List	Part No.	MfgCode	Added From	Category
1.00	\$60.00	Diagnose air con...		\$60.00	\$60.00						AC/Heating/Co... xx
0.00			0.00	\$0.00	\$0.00	\$0.00	\$0.00				<None> <N

Parts Labor Sub Total Haz Mat. Supplies Tax Total Inv. Bal. 60.00

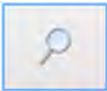
Invoice Estimate 0.00 60.00 60.00 0.00 0.00 0.00 60.00

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

Ready m1sleary Manager SE Demo 8.3.1.40 DEFAULTUSER

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.

Canned Job List

Search Criteria:

Category < All > 10 

Year 2013

Make Chevrolet

Model Impala LS

Job #

Description **rec** 9

Tag	Job #	Description
<input type="checkbox"/>	A/C Rech1	Recharge A/C (1 lbs.)
<input checked="" type="checkbox"/>	A/C Rech2	Recharge A/C (2 lbs.)

11

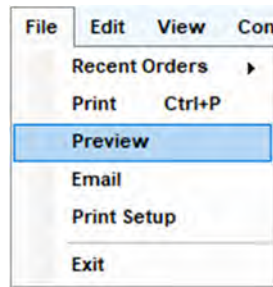
Transfer Add Edit Copy Delete Cancel

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.



A screenshot of the main software interface. At the top, there's a menu bar with File, Edit, View, Configurations, Utilities, Inventory, History, Training Videos, CRM, and Help. Below the menu bar is a toolbar with various icons. The main area displays a form for a vehicle estimate. The vehicle is a 2003 Chevrolet Impala LS. The estimate includes a list of services and parts, such as 'Replace Timing Belt', 'Lube, Oil & Filter', 'Engine Oil - Castrol', 'Oil Filter - Fram', 'Sublet Work Req.', 'Diagnose engine', and 'labor work req.'. The total estimate is \$636.11. At the bottom, there are buttons for 'Convert to Order', 'Parts Ordering', 'SocialCRM Details', 'Options', 'View PO', 'Worksheet', 'Share', 'Print', and 'Exit'.

2. The Print Preview displays how printed estimate appears.

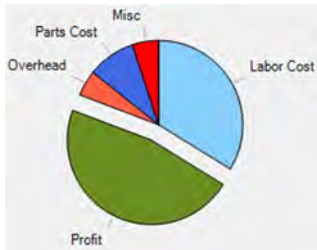
3. Click on  (press **Alt + F4**) to close Print Preview window.

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

NEXT: F12 key = Check Profit

A screenshot of the 'Print Preview' window. The window title is 'REPORTS'. It shows a preview of the estimate for 'Forward Thinking Automotive'. The estimate includes a list of services and parts, such as 'Diagnose air conditioning system', 'A/C Recharge & Leak Test System', and 'Sublet Work Req.'. The total estimate is \$636.11. At the bottom, there are buttons for 'Print', 'Close', and 'Exit'.

Using the Profit Wizard



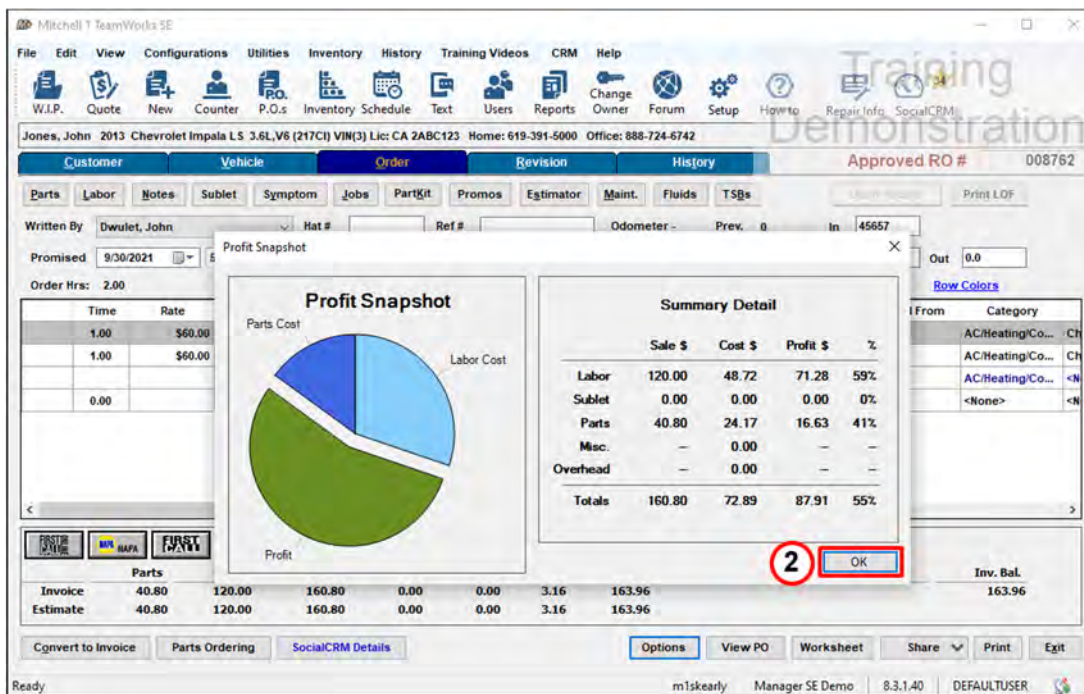
Profit Wizard provides an overview of your costs and profit on this order in the form of a pie chart. Use the **F12** key as a shortcut to look at this order data.

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



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

Note: To get accurate numbers, use the Profit Wizard after 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.

	Parts	Labor
Invoice		
Estimate	20.40	120.00
Convert to Order		

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).

Options

? Convert Estimate to Order?

2 Yes No

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.

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File Edit View Configurations Utilities Inventory History Training Videos CRM Help

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

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

Customer Vehicle Order Revision History

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

Written By: Dwulet, John Hat # Ref # Odometer - Prev. 0 In 45657

Promised 9/30/2021 5:00 PM Source <None> Engine Hours - Prev. 0.0 In 0.0 Out 0.0

Order Hrs: 2.00 Driver: <None>

Approved RO # 008762

Time	Rate	Description	Qty	Extended	Sale	Price	List	Part No.	MfgCode	Added From	Category	Tech Name
1.00	\$60.00	Diagnose air con...		\$60.00	\$60.00						AC/Heating/Co...	Please , Select
1.00	\$60.00	A/C Recharge & ...		\$60.00	\$60.00						AC/Heating/Co...	Please , Select
		Freon	2.00	\$40.80	\$20.40	\$20.40	\$0.00	FREON			AC/Heating/Co...	Please , Select
0.00			0.00	\$0.00	\$0.00	\$0.00	\$0.00				<None>	<None>

	Parts	Labor	Sub Total	Haz Mat.	Supplies	Tax	Total	Inv. Bal.
Invoice	40.80	120.00	160.80	0.00	0.00	3.16	163.96	163.96
Estimate	40.80	120.00	160.80	0.00	0.00	3.16	163.96	

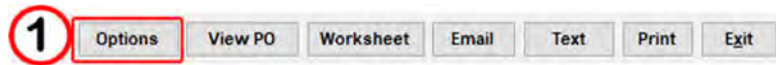
Convert to Invoice Parts Ordering SocialCRM Details

Options View PO Worksheet Share Print Exit

Ready m1skearly Manager SE Demo 8.3.1.40 DEFAULTUSER

Assigning Techs to R.O. / Print Tech Worksheet

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



1. Click on **Options** to access the drop-down lists for technicians.

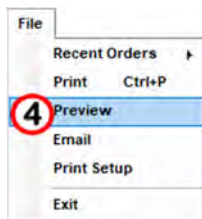
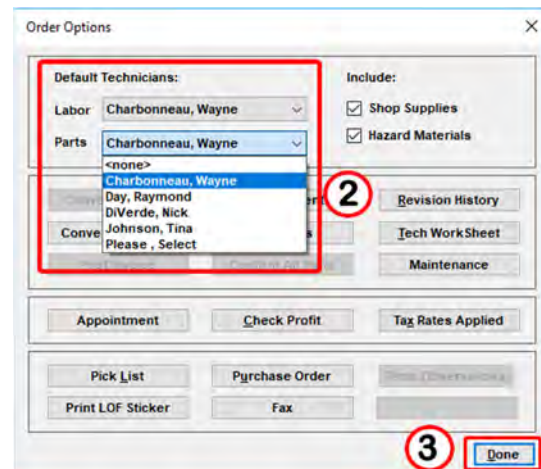
While you may change each line one at a time, a selection here change all order lines at once.

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

Labor: 'Charbonneau, Wayne'

Parts: 'Charbonneau, Wayne'

3. Click **Done** 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 **Continue Print** (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.

REPORTS

SAP CRYSTAL REPORTS

Main Report

REPAIR ORDER #
008762

Phone: 000- - Fax: 000- -

REPAIR ORDER - RO Scheduled : 09/30/2021 01:08 PM Print Date : 10/4/2021

Jones, John and Kathy
1544 Kingsland Way
Poway, CA 92064
Home 619-391-5000 --- Office 888-724-6742
Cust ID : 6191
Last Service : No History

2013 Chevrolet - Impala LS - 3.6L, V6 (217CI) VIN(3)
Lic # : 2ABC123 - CA
VIN # :
MFG Date : 6/29/2021
Current Odom : 45657
Elapsed: 0


Labor Requested / Part SubTotal	Extended
Diagnose air conditioning system	60.00
Symptom: Airconditioning is not cooling properly	60.00
A/C Recharge & Leak Test System	40.80
Parts Subtotal	40.80

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


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



the value

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.

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Mark this order as printed?

7 Yes No

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 **Configurations** then select **Screen View** and check the box as shown.



This time-saving setting bypasses 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.



REPORTS 9

SAP CRYSTAL REPORTS*

Main Report

Technician Work Sheet Service Writer : Dwulet, John Print Date: 6/11/2019

2013 Chevrolet - Impala LS Hat # : Repair Order #

VIN # : Color : 008765

Engine : 3.6L V6 (217CI) VIN(3) Location :

Lic # : 2ABC123 Lic. State : CA

Jones, John Schedule :
 Home 858-391-5000 --- Office 888-724-6742 Promised Date : 5/28/19 5:00 P.M.
 Inspection Date : 8/29/17 Status :
 Last Service : 9/11/17 Unit # :
 Current Odometer : 45,657 Trans : 6 speed Automatic 6T70/MH2
 Previous Mileage : 45,657 Brakes : 4-Wheel ABS
 Elapsed Mileage : 0 Manufacture Date : 8/29/17

Part Number	Part Description	Qty	Part Location
<input type="checkbox"/> FREON	Freon	1.00	

Labor Description	Charged Hours
<input type="checkbox"/> Diagnose air conditioning system	1.00
Symptom: Air conditioning is not cooling properly	
Technician: Charbonneau	
<input type="checkbox"/> A/C Recharge & Leak Test System	1.00
Technician: Charbonneau	

Recommendations :
 09/11/2017 Test drive: poor hard braking; perform ABS Brake Inspection.
 01/07/2019 Next oil change occurs at 48,657 Miles - Std Motor Oil


OUT ODOMETER : Total Hours Charged : 2.00

Hours out: 0.00

Tech Notes

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

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.

Options View PO **Worksheet** Share ▼ Print Exit

Note: Invoices use same # assigned during R.O. An INV can 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.

	Parts	Labor
Invoice	30.00	120.00
Estimate	30.00	120.00

1. Click on **Convert to Invoice** **1** (**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.

Options

Are you sure you want to convert this Order to an Invoice?
All parts on this Order will be confirmed.

2

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

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File Edit View Configurations Utilities Inventory History Training Videos CRM Help

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

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

Customer Vehicle Order Revision History **Invoice # 008762**

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

Written By Dwyer, John Hat # Ref # Odometer - Prev. 0 In 45657

Promised 9/30/2021 5:00 PM Source <None> Engine Hours - Prev. 0.0 In 0.0 Out 0.0

Order Hrs: 2.00 Driver: <None> Row Colors

Time	Rate	Description	Qty	Extended	Sale	Price	List	Part No.	MfgCode	Added From	Category
1.00	\$60.00	Diagnose air con...		\$60.00	\$60.00						AC/Heating/Co...
1.00	\$60.00	A/C Recharge & ...		\$60.00	\$60.00						AC/Heating/Co...
+		Freon	2.00	\$40.80	\$20.40	\$20.40	\$0.00	FREON			AC/Heating/Co...
0.00			0.00	\$0.00	\$0.00	\$0.00	\$0.00				<None>

	Parts	Labor	Sub Total	Haz Mat.	Supplies	Tax	Total	Inv. Bal.
Invoice	40.80	120.00	160.80	0.00	0.00	3.16	163.96	163.96
Estimate	40.80	120.00	160.80	0.00	0.00	3.16	163.96	

Pay/Post Invoice Parts Ordering SocialCRM Details Options View PO Worksheet Share **3** **Exit**

Ready m1skeyrly Manager SE Demo 8.3.1.40 DEFAULTUSER

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 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  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.

The screenshot shows the Mitchell 1 TeamWorks SE interface. The 'Apply Payments' dialog box is open, displaying the following information:

- Customer Name: Jones, John
- Charged Balance: \$0.00
- Credit Balance: \$0.00
- Charged Balance does NOT include this Invoice.
- Invoice Amount: 152.33
- Amount Paid: 0.00
- Invoice Balance: 152.33
- Date: 6/11/2019
- Payment Type: Visa
- Payment: 152.33
- Check / Reference #:
- Authorization #: 558163

At the bottom of the dialog box, the 'Pay' button is highlighted with a red circle and the number 3. In the main window, the 'Pay/Post Invoice' button is highlighted with a red circle and the number 1.

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

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

This close-up shows the 'Apply Payments' dialog box with the following fields filled:

- Date: 08/30/2017
- Payment Type: Visa
- Payment Amount: 152.33
- Check / Reference #:
- 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.

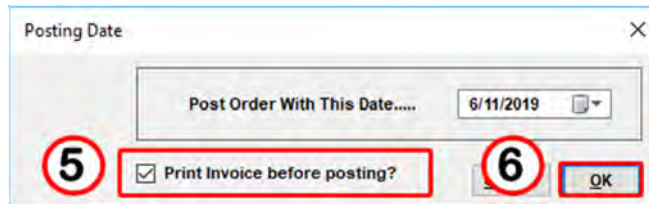
TIP: When work is completed but customer is not there to pick up the vehicle, post the invoice as Charge to keep the invoice off of your WIP screen. Then use Batch Payment (F5) when they arrive to pay the Invoice.

The 'Post Invoice' dialog box is shown with the following text:

Invoice has not been printed!
Post anyway?


The 'Yes' button is highlighted with a red circle and the number 4.


System will automatically display the Posting Date dialog window below.



The 'Posting Date' dialog box contains a date field set to '6/11/2019'. Below the date field, there is a checkbox labeled 'Print Invoice before posting?' which is checked. To the left of the checkbox is a red circle with the number '5'. To the right of the checkbox is a red circle with the number '6'. To the right of the checkbox is an 'OK' button, which is also highlighted with a red box.

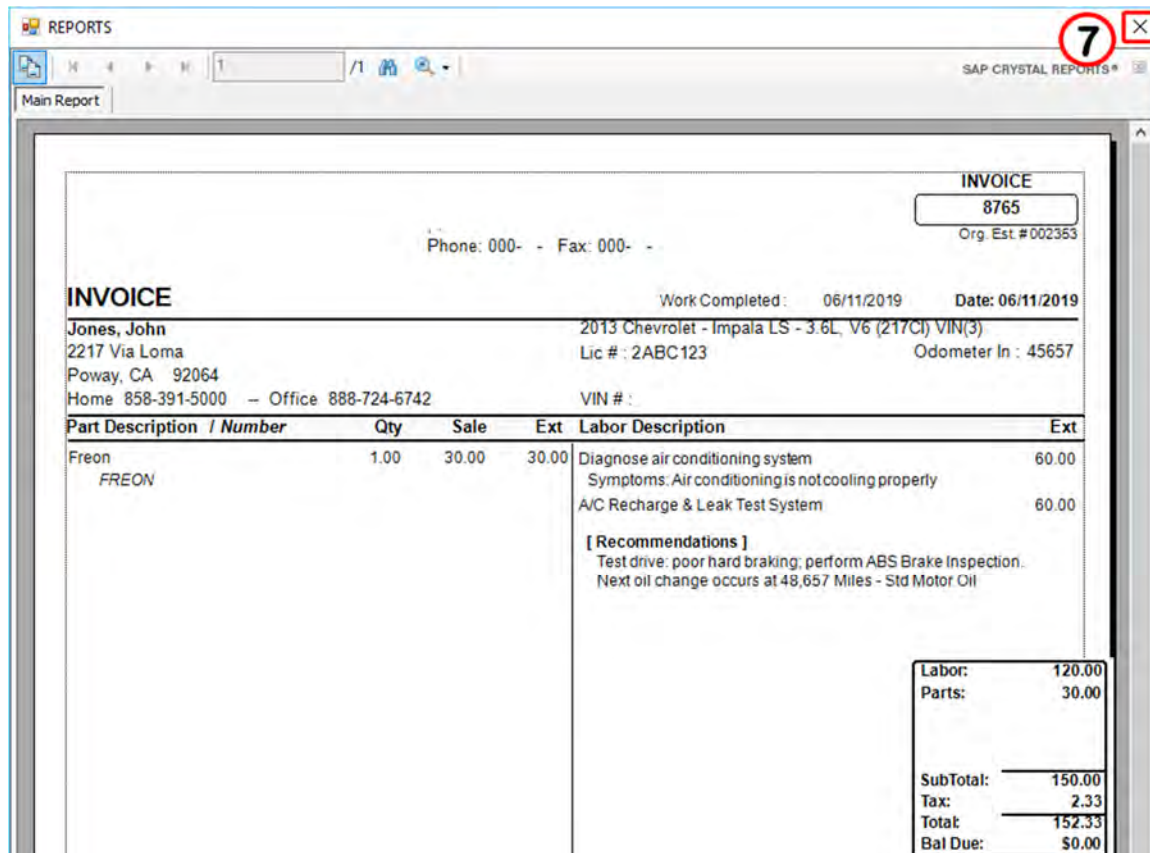
5. Click to place a check in the **Print Invoice before Posting** checkbox. This box only needs to be checked once; the system will *remember* this preference.

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

Depending on system settings, there may be further Validations; just click on  (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.



The screenshot shows the 'Main Report' window of SAP Crystal Reports. The report is titled 'INVOICE' and displays the following information:

INVOICE
8765
Org. Est # 002353
Phone: 000- - Fax: 000- -
Work Completed: 06/11/2019 Date: 06/11/2019

INVOICE
Jones, John
2217 Via Loma
Poway, CA 92064
Home 858-391-5000 - Office 888-724-6742
VIN # :
2013 Chevrolet - Impala LS - 3.6L V6 (217Cl) VIN(3)
Lic # : 2ABC123
Odometer In : 45657

Part Description / Number	Qty	Sale	Ext	Labor Description	Ext
Freon FREON	1.00	30.00	30.00	Diagnose air conditioning system Symptoms: Air conditioning is not cooling properly A/C Recharge & Leak Test System	60.00 60.00

[Recommendations]
Test drive: poor hard braking; perform ABS Brake Inspection.
Next oil change occurs at 48,657 Miles - Std Motor Oil

Labor:	120.00
Parts:	30.00
SubTotal:	150.00
Tax:	2.33
Total:	152.33
Bal Due:	\$0.00

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.

Find History Record

Invoice **Vehicle**

Invoice # Posted Up To: Tuesday, June 11, 2019 ☐ Save Search




Invoice	Posted Date	Printed Date	Name	Vehicle	Amount
008765	06/11/2019	06/11/2019	Jones, John	2013 Chevrolet Impala LS	152.33
008761	08/30/2017	08/30/2017	Jones, John	2013 Chevrolet Impala LS	152.33
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

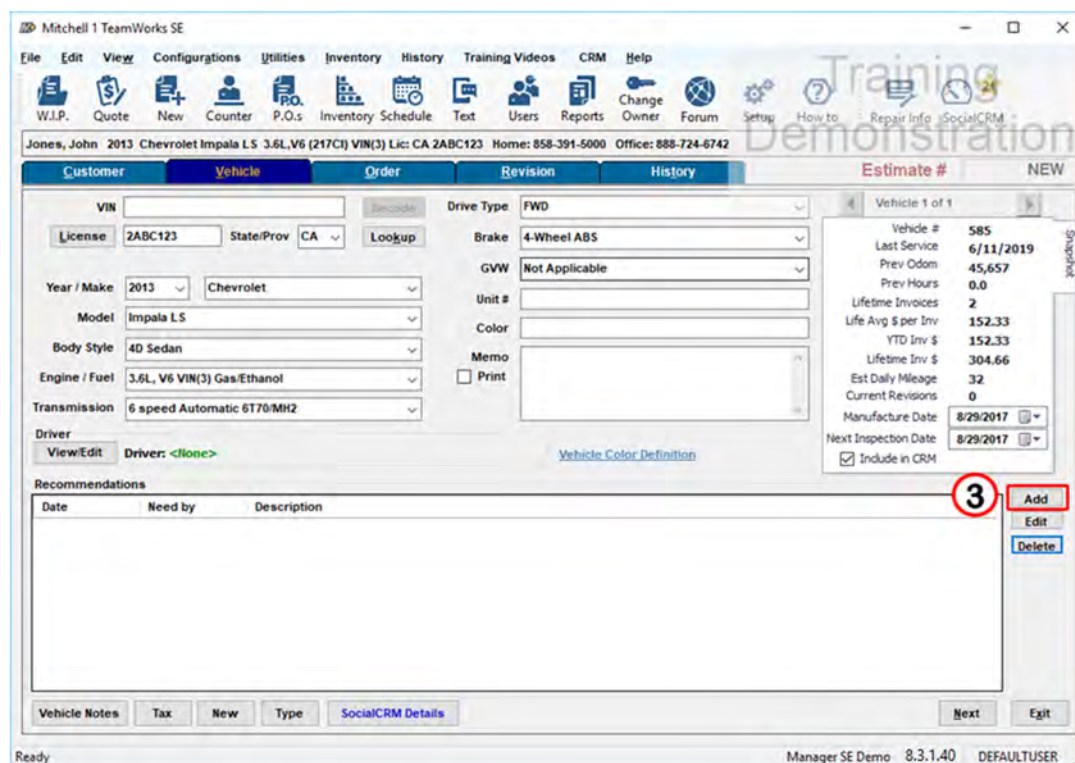
Entering Recommendations



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.**'

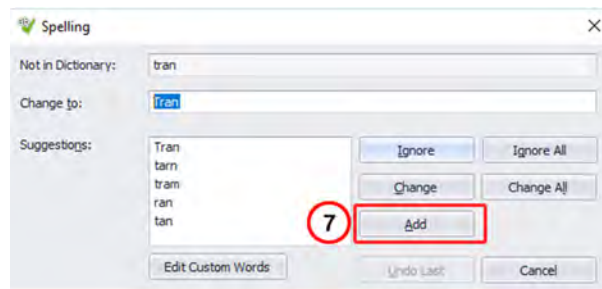
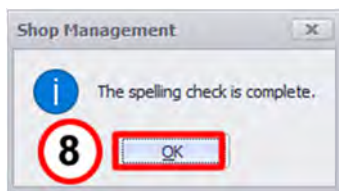
6. When Recommendation text entry is finished, press **F2** to check spelling. Dictionary will display options and suggest other word(s) to replace 'tran'.

Note: tran is now underlined in red, this is because it is not yet recognized by the spell check.

th; perform tran service first

7. Select **Add** 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 **Add** (**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

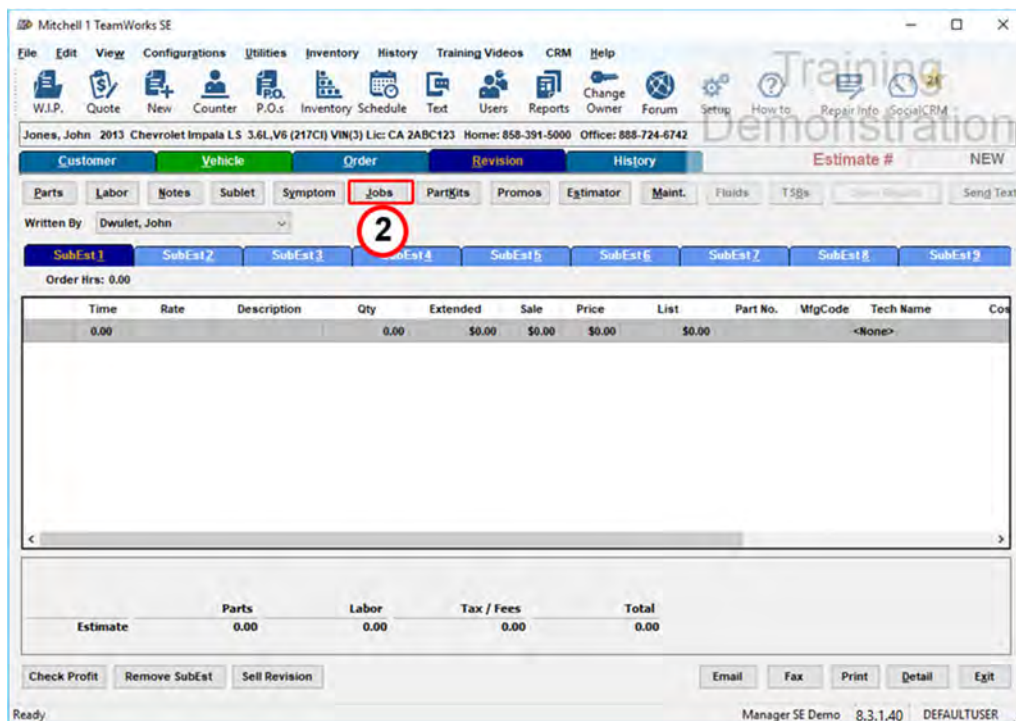


While a test drive triggered Recommendations to describe problems seen, it's time to work up actual repair costs. Revision has 9 separate Sub-Estimates tabs for transfer to Order, pending customer approval. This provides an ability to perform "what-if" pricing options of original repairs along with various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



2. From Revisions screen, click  (**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.

Canned Job List

Search Criteria:

Category: < All > 4 🔍

Year: 2013

Make: Chevrolet

Model: Impala LS

Job #: trans 3

Description:

Tag	Job #	Description
<input checked="" type="checkbox"/>	TRANS	Transmission Service

Transfer 5 Add Edit Copy Delete Cancel

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

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

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File Edit View Configurations Utilities Inventory History Training Videos CRM Help

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

James, John 2013 Chevrolet Impala LS 0-ALL-V6 (217CI) VIN(3) Lic: CA 2ABC123 Home: 858-391-5000 Office: 888-724-6742

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

Parts Labor Notes Sublet Symptom Jobs Part Kits Promos Estimator Maint. Fluids TS&S Open Recall Send Text

Written By Dwslet, John SubEst 1 Created: 06/12/2019 10:23AM

SubEst 1 SubEst 2 6 SubEst 3 SubEst 4 SubEst 5 SubEst 6 SubEst 7 SubEst 8

Order Hrs: 0.33

Time	Rate	Description	Qty	Extended	Sale	Price	List	Part No.	MfgCode	Tech Name	Cost
0.33	\$60.00	Transmission S...		\$19.80	\$19.80					Please, Select	
0.00			0.00	\$0.00	\$0.00	\$0.00	\$0.00			<None>	

	Parts	Labor	Tax / Fees	Total
Estimate	0.00	19.80	0.00	19.80

Check Profit Remove SubEst Sell Revision Email Fax Print Detail Exit

Ready Manager SE Demo 8.3.1.40 DEFAULTUSER

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

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

Jones, John 2013 Chevrolet Impala LS 3.6L V6 (217CI) VIN(3) Lic: CA 2ABC123 Home: 858-391-5000 Office: 888-724-6742

Customer Vehicle Order Revision History Estimate # NEW

Parts Labor Notes Sublet Symptom Jobs Part Kits Promos Estimator Maint. Fluids TSBs Copy to Invoice Send Text

Written By Dwulet, John

SubEst 1 SubEst 2 SubEst 3 SubEst 4 SubEst 5 SubEst 6 SubEst 7 SubEst 8 SubEst 9

Order Hrs: 0.00

Time	Rate	Description	Qty	Extended	Sale	Price	List	Part No.	MfgCode	Tech Name	Cost
7	0.00		0.00	\$0.00	\$0.00	\$0.00	\$0.00			<None>	

Display Canned Job List

A/C Recl1, Recharge A/C (1 lbs.)

Battery Service, Install Battery/Checkout System

BRK Inspect (STD), Brake Inspection (non-ABS)

CheckCharge, Check Charging System (Alternator)

LOF EZ Select 4, Lube Oil Filter 4 Qt

LOF EZ Select 5, Lube Oil Filter 5 Qt

SMOG, Smog Check w. Certificate

TireRotate, Tire Rotation

TOW1, Towing within 10mi

TOW2, Towing within 30mi

WHLMount/Bal4, Mount/Bal Tires (4)

Estimate 0.00 0.00 0.00 0.00

Check Profit Remove SubEst Sell Revision Email Fax Print Detail Exit

Ready Manager SE Demo 8.3.1.40 DEFAULTUSER

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.

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File Edit View Configurations Utilities Inventory History Training Videos CRM Help

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

Jones, John 2013 Chevrolet Impala LS 3.6L V6 (217CI) VIN(3) Lic: CA 2ABC123 Home: 858-391-5000 Office: 888-724-6742

Customer Vehicle Order Revision History Estimate # NEW

Parts Labor Notes Sublet Symptom Jobs Part Kits Promos Estimator Maint. Fluids TSBs Copy to Invoice Send Text

Written By Dwulet, John SubEst 2 Created: 06/12/2019 1:05PM

SubEst 1 SubEst 2 SubEst 3 SubEst 4 SubEst 5 SubEst 6 SubEst 7 SubEst 8 SubEst 9

Order Hrs: 0.60

Time	Rate	Description	Qty	Extended	Sale	Price	List	Part No.	MfgCode	Tech Name	Cost
0.60	\$60.00	Complete Brake...		\$36.00	\$36.00					Please, Select	
0.00			0.00	\$0.00	\$0.00	\$0.00	\$0.00			<None>	

Estimate 0.00 36.00 0.00 36.00

Check Profit Remove SubEst Sell Revision Email Fax Print Detail Exit

Ready Manager SE Demo 8.3.1.40 DEFAULTUSER

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

Written By: McDonnell, Tim Sub-Estimate "SubEst 1" Created: 08/01/2016 6:53PM

SubEst1 SubEst2 SubEst3 SubEst4 SubEst5

Order Hrs: 0.33

Time	Rate	Description	Qty	Extended
0.33	\$60.00	Transmission Service		\$19.80
0.00			0.00	\$0.00

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:

Written By: Dwulet, John Sub-Estimate "Brakes" Created: 08/01/2016 7:22PM

Trans Service Brakes SubEst3 SubEst4 SubEst5

Order Hrs: 0.60

Time	Rate	Description	Qty	Extended
0.60	\$60.00	Complete Brake Inspection		\$36.00

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**

Reason: **'Wants problems fixed'**

Authorized by: **Jones, John**

Method: **Customer Called In**

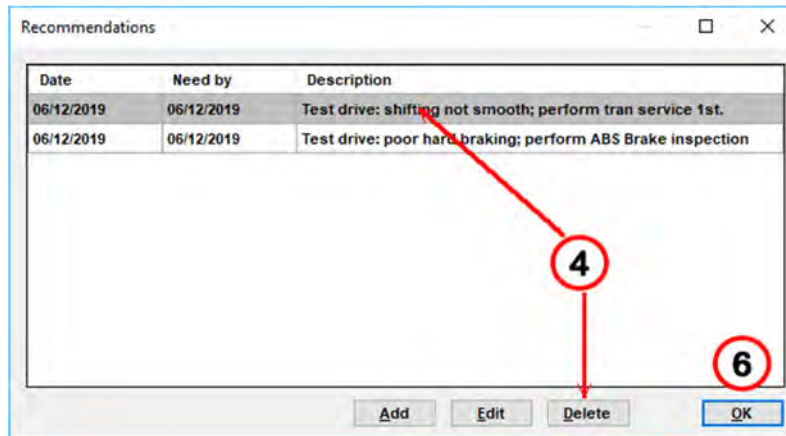
NOTE: It is recommended that 'Clear Sub Estimates after Transfer' remain checked to avoid later introducing work that has already been performed.

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

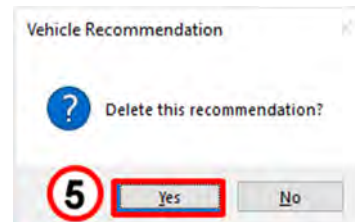
Transferring Revisions to Order screen automatically prompts user to review and clear any related Recommendations, IF any of these triggered the creation of specific Revisions to address. (which is true in this demo exercise)



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

5. Click on **Yes** (**'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 **Ok** to close the Recommendations window.

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

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

Jones, John 2013 Chevrolet Impala LS 3.6L V6 (217CI) VIN(3) Lic: CA 2ABC123 Home: 858-391-5000 Office: 888-724-6742

Customer **Vehicle** **Order** **Revision** **History** **Repair Order #** 008767

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

Written By Dwulet, John Hat # Ref # Odometer - Prev. 45657 In 0

Promised 6/12/2019 1:22 PM Source <None> Engine Hours - Prev. 0.0 In 0.0 Out 0.0

Order Hrs: 0.93 Driver: <None> [Row Color Definitions](#)

Time	Rate	Description	Qty	Extended	Sale	Price	List	Part No.	MfgCode	Tech Name	Cost
0.33	\$60.00	Transmission S...		\$19.80	\$19.80					Please, Select	
0.60	\$60.00	Complete Brake...		\$36.00	\$36.00					Please, Select	
0.00			0.00	\$0.00	\$0.00	\$0.00	\$0.00			<None>	

	Parts	Labor	Sub Total	Haz Mat.	Supplies	Tax	Total	Inv. Bal.
Invoice								55.80
Estimate	0.00	55.80	55.80	0.00	0.00	0.00	55.80	

Convert to Invoice SocialCRM Details Options View PO Worksheet Email Text Print Exit

Ready Manager SE Demo 8.0.3 DEFAULTUSER

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

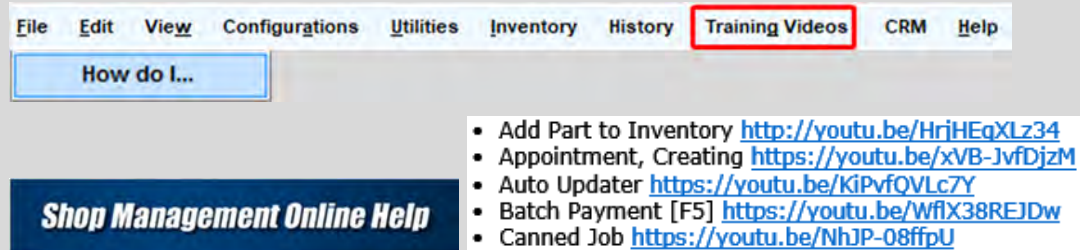
End of the Assisted Training section

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.



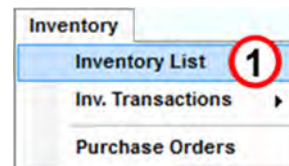
2. Click on any video title (1-3 min. each) and it will playback in your browser.

Adding a Part to Inventory (Self-Instruction)

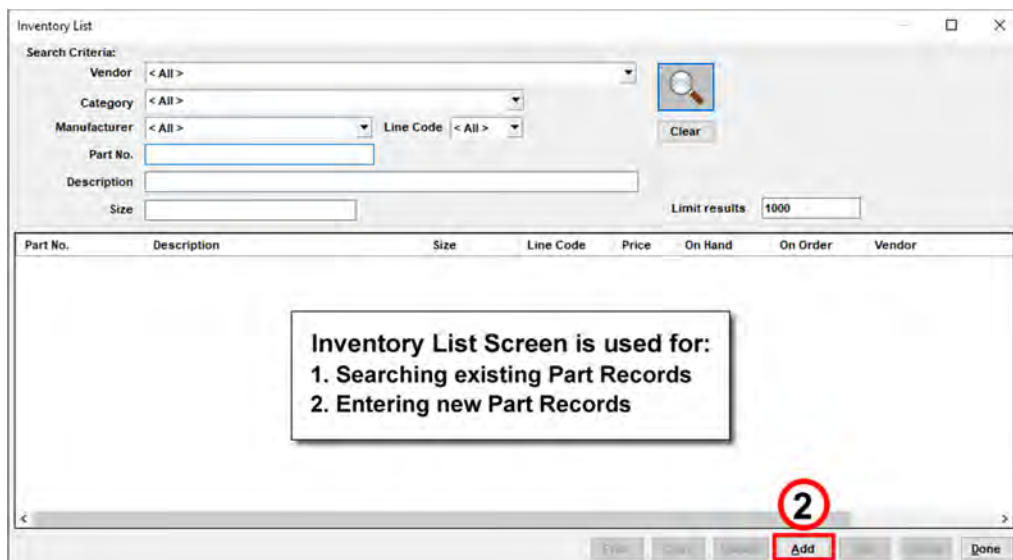


Inventory List screen: two primary functions:

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



4. With Last Cost entered, press **Tab** key for Matrix to calculate the sell price.

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

5b. Click **Ok** to Vendor For This Part selection.

6. Click on **Ok** 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.

Part No.	Description	Size	Line Code	Price	On Hand	On Order	Vendor
70-5YR	Battery			87.20	2.00	0	Interstate Battery

8. Click on **Done** to close Inventory List screen.

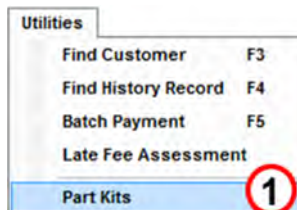
Creating a Part Kit (Self-Instruction)



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)

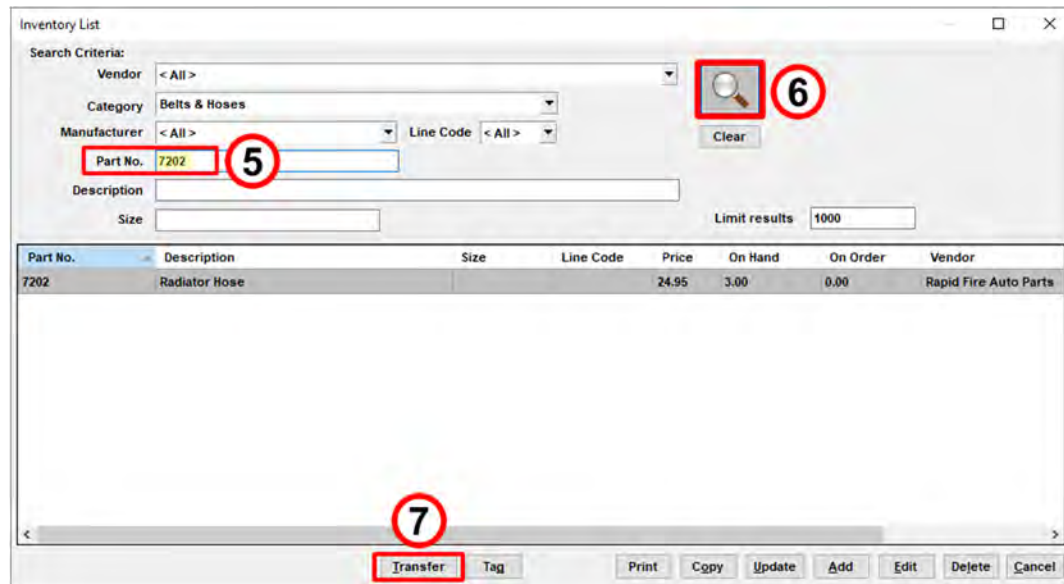
Now that this part kit has a "name" (Kit No.), it's time to transfer parts into it.

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.



Inventory List

Search Criteria:

Vendor: < All >

Category: Belts & Hoses

Manufacturer: < All >

Part No.: 7202

Description:

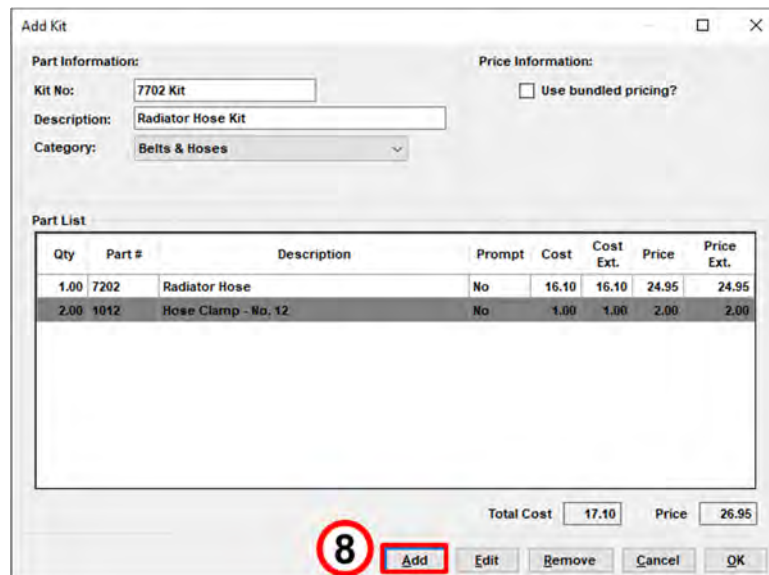
Size:

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 Parts

Transfer Tag Print Copy Update Add Edit Delete Cancel

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'.



Add Kit

Part Information:

Kit No.: 7702 Kit

Description: Radiator Hose Kit

Category: Belts & Hoses

Price Information:

☐ Use bundled pricing?

Part List

Qty	Part #	Description	Prompt	Cost	Cost Ext.	Price	Price Ext.
1.00	7202	Radiator Hose	No	16.10	16.10	24.95	24.95
2.00	1012	Hose Clamp - No. 12	No	1.00	1.00	2.00	2.00

Total Cost: 17.10 Price: 26.95

Add Edit Remove Cancel OK

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.

Clear

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

Description anti

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

The screenshot shows the 'Inventory List' window. The 'Search Criteria' section has 'Vendor' set to '< All >', 'Category' set to '< All >', 'Manufacturer' set to '< All >', 'Line Code' set to '< All >', 'Part No.' empty, 'Description' containing 'anti', and 'Size' empty. A 'Limit results' field is set to '1000'. A table below shows one result: 'afc1/2 Anti-Freeze 1/2 Gal' with a price of 11.90, 4.00 on hand, and 1.00 on order. The vendor is 'Rapid Fire Auto Parts'. At the bottom, there are buttons for 'Transfer', 'Tag', 'Print', 'Copy', 'Update', 'Add', 'Edit', 'Delete', and 'Cancel'. Red circles and numbers 9, 10, 11, and 12 highlight the 'Clear' button, the 'Description' field, the search icon, and the 'Transfer' button respectively.

Part No.	Description	Size	Line Code	Price	On Hand	On Order	Vendor
afc1/2	Anti-Freeze 1/2 Gal			11.90	4.00	1.00	Rapid Fire Auto Parts

12. 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.

The screenshot shows the 'Add Kit' window. The 'Part Information' section has 'Kit No.' set to '7702 Kit', 'Description' set to 'Radiator Hose Kit', and 'Category' set to 'Belts & Hoses'. The 'Price Information' section has a checkbox for 'Use bundled pricing?'. Below is a 'Part List' table with columns: Qty, Part #, Description, Prompt, Cost, Cost Ext., Price, and Price Ext. The table contains three rows: '1.00 7202 Radiator Hose', '2.00 1012 Hose Clamp - No. 12', and '1.00 afc1/2 Anti-Freeze 1/2 Gal'. At the bottom, there are buttons for 'Add', 'Edit', 'Remove', 'Cancel', and 'OK'. Red circles and numbers 13 highlight the 'Edit' button.

Qty	Part #	Description	Prompt	Cost	Cost Ext.	Price	Price Ext.
1.00	7202	Radiator Hose	No	16.10	16.10	24.95	24.95
2.00	1012	Hose Clamp - No. 12	No	1.00	1.00	2.00	2.00
1.00	afc1/2	Anti-Freeze 1/2 Gal	No	5.95	5.95	11.90	11.90

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 2 units.

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

Edit

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

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

14

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

15

Qty	Part #	Description	Prompt	Cost	Cost Ext.	Price	Price Ext.
1.00	7202	Radiator Hose	No	16.10	16.10	24.95	24.95
2.00	1012	Hose Clamp - No. 12	No	1.00	1.00	2.00	2.00
2.00	afc1/2	Anti-Freeze 1/2 Gal	No	5.95	11.90	11.90	23.80

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.

16

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

Technician	Pay Hours	Act. Hours	Comm.
1 Assign on WO	1.20	1.20	Var.

Totals for Technician(s)		1.20
--------------------------	--	------

6. Click on  (**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.

Unit Cost \$	5.95	Vendor	Rapid Fire Auto Parts (RFAP)
Unit Price \$	11.90	Manufact.	<none>
Unit Sale \$	11.90	Category	Fluids/Sprays/Sealers
Unit List \$	0.00	Account	Parts Revenue
QOH	4.00	Technician	
Margin %	50.0	Ref/Inv #	

10. Enter the following:

Part No.: **bar1**

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

(Quantity: 1 is fine)

11. Click on **Done** (**Alt + D**) to save the part and close entry screen.

The completed Canned Job displays.

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

Time	Rate	Description	Qty	Extended	Sale	Price	List	Part No.	MfgCode	Tech Name
1.20	60.00	Flush Cooling System, Inst...		72.00	72.00	0.00	0.00			<none>
	0.00	Anti-Freeze 1/2 Gal	2.00	23.80	11.90	11.90	0.00	af1/2		<none>
	0.00	Additive - Cooling Sys Lub...	1.00	10.68	10.68	10.68	0.00	Bar1		<none>
	0.00			0.00	0.00	0.00	0.00			

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 **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)

Change Quantity: **2**

Quantity

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.

Customer List

Display by
☒ Customer
☐ Company

New
Cancel
OK

Last	First	Company	Balance Due
Gaboury	Scott		
Gall	Mike		
Gannon	Pat		
Gannon	Susan		
Gardner	Bud		5.99
Gates	Bill		
Glickman	Jeff		
Greco	Milly		
Grimes	Jon		5.96
Gunder	Jesse		158.63
Gutherford	Quincy		

Company
(Last, First) Miss Gannon, Pat
Address San Diego, CA 96134
Home 619-355-1747 Ext: 1435
Office 619-333-3334 Ext: 4554

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.

Order # 008766

Counter Sale
Written By <none>
Order Hrs: 0.00

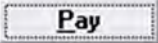
Time	Rate	Description	Qty	Extended	Sale	Price	List	Part No.	MfgCode	Added From	Category
+		Wiper Blade - 14...	2.00	\$18.56	\$9.28	\$9.28	\$0.00	WB14			Miscellaneous
	0.00		0.00	\$0.00	\$0.00	\$0.00	\$0.00				<None>

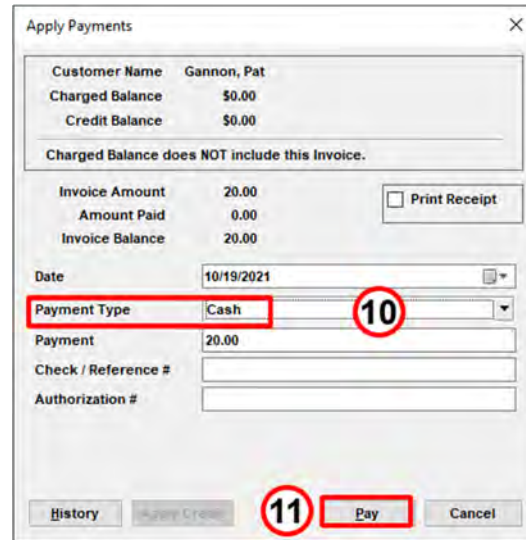
	Parts	Labor	Sub Total	Tax	Total	Inv. Bal.
Invoice	18.56	0.00	18.56	1.44	20.00	20.00

Check Profit
Parts Ordering
Payment
Post
Email
Print
Detail
Cancel
Exit

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

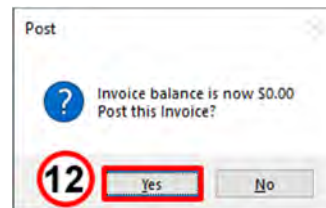
10. In Payment Type, type a 'C' (shortcut for Cash payment type)

11. Click on  to record the payment.



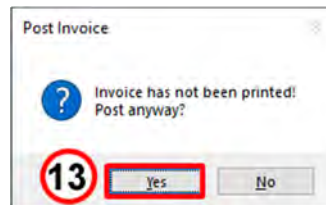
The 'Apply Payments' dialog box shows customer information for 'Gannon, Pat' with a charged balance of \$0.00 and a credit balance of \$0.00. It indicates that the charged balance does not include this invoice. The invoice amount is \$20.00, the amount paid is \$0.00, and the invoice balance is \$20.00. There is a 'Print Receipt' checkbox. The date is set to 10/19/2021. The 'Payment Type' is set to 'Cash' (highlighted with a red box and circled with a red 10). The payment amount is \$20.00. There are fields for 'Check / Reference #' and 'Authorization #'. At the bottom, there are buttons for 'History', 'Apply Credits', 'Pay' (highlighted with a red box and circled with a red 11), and 'Cancel'.

12. Click on Yes ('Y' or Enter) to confirm posting.



The 'Post' dialog box asks 'Invoice balance is now \$0.00. Post this invoice?' with a question mark icon. There are 'Yes' and 'No' buttons. The 'Yes' button is highlighted with a red box and circled with a red 12.

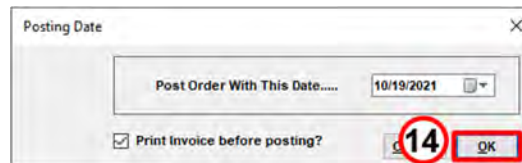
13. Click on Yes ('Y' or Enter) to answer Post printing question.




The 'Post Invoice' dialog box asks 'Invoice has not been printed! Post anyway?' with a question mark icon. There are 'Yes' and 'No' buttons. The 'Yes' button is highlighted with a red box and circled with a red 13.

The system will display the Posting Date window.

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



The 'Posting Date' dialog box shows a date field set to 10/19/2021. Below it, there is a checkbox labeled 'Print Invoice before posting?' which is checked. There are 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red box and circled with a red 14.

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

REPORTS

SAP CRYSTAL REPORTS

Main Report

Counter Sale #: 0008766
Print Date: 10/19/2021

SOLD TO: Gannon, Pat
San Diego, CA 96134
Home: (619) 355-1747 1435 --- Office: (619) 333-3334 4554
Phone: 000- Fax: 000-
For: 1978 Nissan -280Z Lic #: PLH-60X- CA
Vin #: Unit #: 1

Qty	Part Number	Part Description	Sale	Line Total
2.00	WB14	Wiper Blade - 14" Triple Edge Refill	9.28	18.56
			Parts and Fees Subtotal : 18.56	

Payment Method [Payments - Cash - \$20.00]


Labor: \$ 0.00	Parts Total: 18.56	Tax: \$ 1.44	Total:	\$ 20.00
			Less Payments:	20.00
			Remaining Due:	\$0.00

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

Authorized By: Date: Time:

Page 1 of 1 Copyright (c) 2021 Mitchell Repair Information Company, LLC CounterSale.k:08.04.17

Current Page No.: 1 Total Page No.: 1 Zoom Factor: 75%

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.

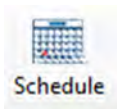
Counter Sale disappears from WIP & posted to History.

Mitchell 1 TeamWorks SE

Mark this order as printed?

16

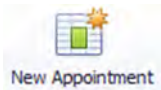
Create an Appointment (Self-Instruction)



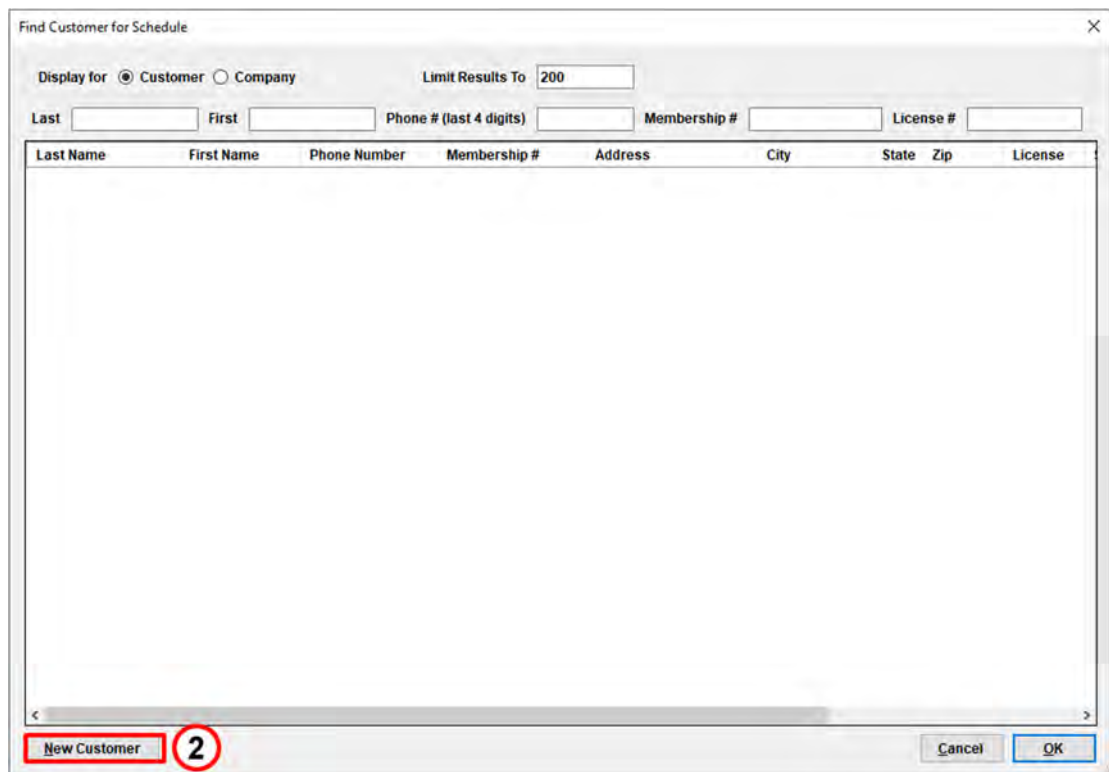
Scheduler events (appointments) are created when you start an Estimate or Repair Order. If you wish to schedule an appointment in advance of their appearing at the shop, use the steps below. The subsequent appointment can be converted to EST / RO from the Appointment Editor screen.



1. Click the Schedule button to open the Scheduler.



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

A screenshot of the "Find Customer for Schedule" dialog box. It has a title bar with a close button. Inside, there are radio buttons for "Display for" with "Customer" selected and "Company" unselected. A "Limit Results To" field is set to "200". Below these are input fields for "Last", "First", "Phone # (last 4 digits)", "Membership #", and "License #". A table with columns "Last Name", "First Name", "Phone Number", "Membership #", "Address", "City", "State", "Zip", and "License" is shown, but it is empty. At the bottom, there is a "New Customer" button (highlighted with a red box and a red circle with the number 2), a "Cancel" button, and an "OK" button.

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.

Create New Customer

Create a new customer on this appointment:

Company

Title

Last, First Wilson Jim

Address 123 Elm St.

Zip, City, State 78613 ark TX

Phone, Ext., Desc. 512-333-4444 Cellular

Email

Cancel OK

Vehicle Selection

Please select a vehicle or add a new vehicle to schedule.

License	State	Year	Make	Model	Unit #	Vin
---------	-------	------	------	-------	--------	-----

Add Vehicle Cancel

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.

New Vehicle

VIN

License State/Prov

Year / Make

Model

Body Style

Engine / Fuel

Transmission

Drive Type

Brake

GVW

Unit #

Color

Driver

Driver: <None>

[Vehicle Color Definition](#)

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).

9/6/2017: Wilson, Jim

Save & Close Delete Create... Cancel

Subject: Wilson, Jim

Appointment State: Open (OPEN)

Drop Off: 9/ 6/2017 10:00 AM

Starts: 9/ 6/2017 10:00 AM

Ends: 9/ 6/2017 1:00 PM

9

☒ Auto Adjust End Time

Scheduled Hours: 3.00

☐ All day event

Order Hrs: 0.00

☐ Reminder

0 minutes

Comments

☒ Print on order as Note

Technician: Charbonneau, Wayne

Resource: <None>

Customer - Wilson, Jim

Contact: (Cellular) 512-333-4444

Email: --

Company: --

Address: 123 Elm St.
San Diego, CA 92101

Vehicle - 2012 Toyota Tundra Limited

0 Recommendations

VIN: --

License Plate: FJB 3831

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

Hat: --

Odometer In: None

Yearly Mileage: --

Color: Black

Promised Time: 9/ 6/2017 5:00 PM

Job Hours: 0.00

Source: <None>

Category: <None>

Jobs: **10** Add Delete

Description

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.

Canned Job List X

Search Criteria:

11 Category LOF (Lube, Oil, Filter)


Year < All >

Make < All >

Model < All >

Job #

Description

12 

Clear

Tag	Job #	Description
<input type="checkbox"/>	LOF Labor	Lube-Oil-Filter (Labor Only)
<input checked="" type="checkbox"/>	LOF5	Lube-Oil-Filter - 5 Qts
<input type="checkbox"/>	LOF4	Lube-Oil-Filter - 4 Qts
<input type="checkbox"/>	LOF EZ Select 5	Lube Oil Filter 5 Qt
<input type="checkbox"/>	LOF EZ Select 4	Lube Oil Filter 4 Qt

14 Transfer

Add Edit Copy Delete Cancel

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.

9/6/2017: Wilson, Jim

Save & Close 16 Delete Create... Cancel

Subject: Wilson, Jim

Appointment State: Open (OPEN)

Drop Off: 9/ 6/2017 10:00 AM

Starts: 9/ 6/2017 10:00 AM

Ends: 9/ 6/2017 1:00 PM

Auto Adjust End Time: ☒

Scheduled Hours: 3.00

Reminder: ☐

Order Hrs: 0.00

0 minutes

Comments (216 Chars Remaining):

Customer's son to pick up vehicle. 15

Print on order as Note: ☒

Technician: Charbonneau, Wayne

Resource: <None>

Customer - Wilson, Jim

Contact: (Cellular) 512-333-4444

Email: --

Company: --

Address: 123 Elm St.
San Diego, CA 92101

Vehicle - 2012 Toyota Tundra Limited

0 Recommendations

VIN: --

License Plate: FJB 3831

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

Hat: --

Odometer In: None

Yearly Mileage: --

Color: Black

Promised Time: 9/ 6/2017 5:00 PM

Job Hours: 0.30

Source: <None>

Category: <None>

Jobs: Add Delete

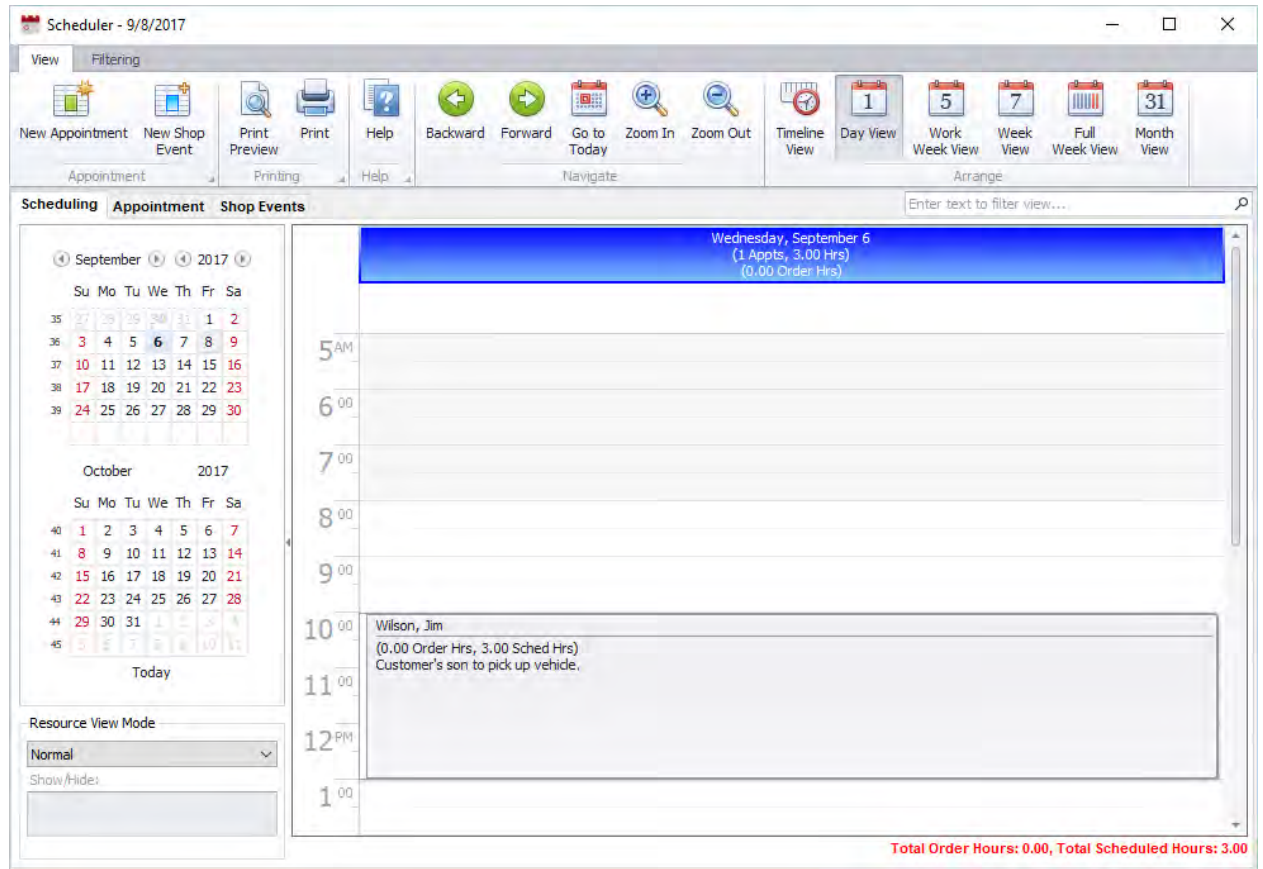
Description

Lube-Oil-Filter - 5 Qts

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

Find History Record

1 Invoice

Invoice # Posted Up To: Wednesday, October 20, 2021 ☐ Save Search

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

Cancel View Record

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

James, Jesse 1994 Toyota T100 DX Lic: CA 4KJT698 Home: 619-278-9965 Ext: 8754 Office: 619-559-5874 Ext: 2213

Customer Vehicle History

Display for: ☐ Customer ☒ Vehicle ☐ Show Categories **3**

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.

Find History Record

Invoice Vehicle **4**

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

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

6 **5** Clear

Invoice	Posted Date	Printed Date	Name	Vehicle	Amount	Fou
000492	08/31/2005	08/31/2005	Harkins, John	1991 Toyota Pickup SR5	373.99	Mul
000485	08/12/2005	08/10/2005	Harkins, John	1991 Toyota Pickup SR5	263.47	Mul
000484	08/07/2005	08/07/2005	Harkins, John	1991 Toyota Pickup SR5	262.45	Mul

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.

Enter Information

Search Criteria water pump

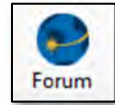
Cancel OK

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.

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!"

Re: Scheduling

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

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

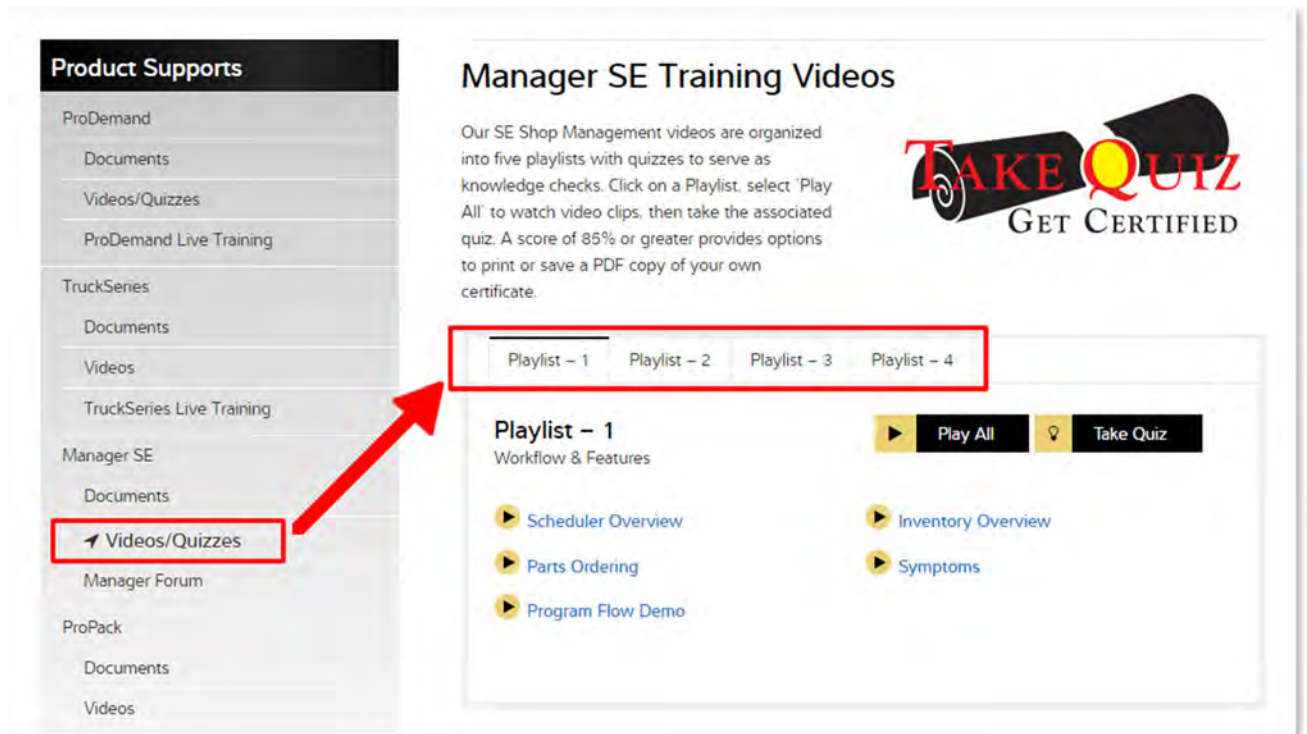
Shop Management Modules & Quizzes

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

Manager SE: <http://m1training.net>

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

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.