

# MANAGER SE

## POWERFUL NEW ENHANCEMENTS AVAILABLE INTRODUCING JOB VIEW

- By-the-Job Order / Revision Screens
- By-the-Job Estimate / Invoice Documents
- 1 Click Move Deferred Work to Revisions
- Instant Canned Jobs

**Mitchell1**  
*In your shop, at your side*

# SHOP MANAGEMENT

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- By-the-Job Estimate / Invoice Documents
- 1 Click Move Deferred Work to Revisions
- Instant Canned Jobs

 **SHOPKEY**

Mitchell 1 / ShopKey Management Solutions

## LEARN: SE Management Software

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

Published by Mitchell 1 San Diego, CA

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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: <https://kb.mitchell1.com/manager-files/>. [SE update is always line item #1]

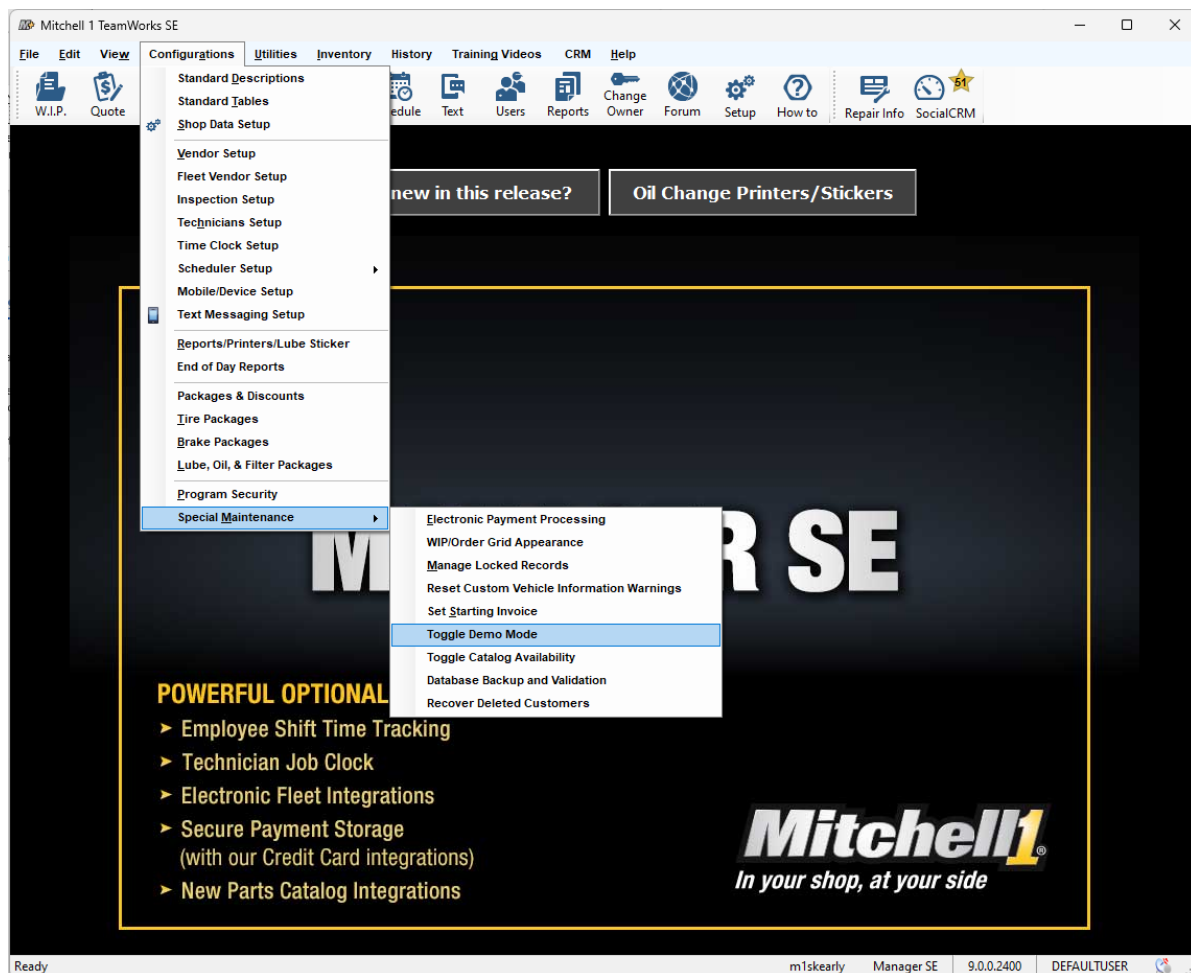
Once the SE software has been installed, change it to **DEMO** mode using the instructions on the next page. (Then you'll have samples to work with)

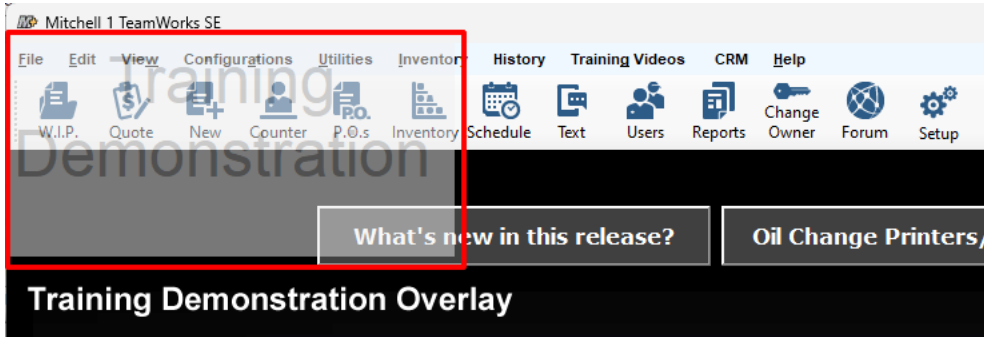
**IMPORTANT: Always use this book with the DEMO version.** It will be easier to understand the concepts working with sample customers, vehicles, parts, orders and jobs. Be sure to switch back to LIVE mode once you start entering data you wish to keep. **Data added in DEMO mode cannot be transferred into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





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.

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



**Customer Screen**

NO CUSTOMER

**Customer**

Company:

Name:

Last, First:

Spouse:

Address:

Zip, City, State:

Home: 000-\_\_\_\_  Notes/Name:  Telephone List:

Office: 000-\_\_\_\_  Notes/Name:  SMS Allowed: ☒

E-mail:  Email List:  Remarks:

Birthdate: \_\_/\_\_/MM/DD Referred By:  Membership #:

**Customer Snapshot**

Lifetime \$ Spent	0.00	Cust #	
Lifetime	0	Charged Bal.	0.00
Invoice \$ Avg	0.00	Credit Bal.	0.00
Avg Yearly Visits	0	Sales YTD	0.00
Last Visit Date	12/2/2024	Charge Status	NA
<input checked="" type="checkbox"/> Include in CRM Campaign		Credit	Current
		Late Fees	Apply
		Saved Payments	No

[SocialCRM Details](#) [Update Customer Status](#) [Set Flag](#)

License	Year	Make	Model	Vin	Color	Unit #	Recommendation

[Change Customer](#) [Tax](#) [Type](#) [Market](#) [Exit](#)

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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

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

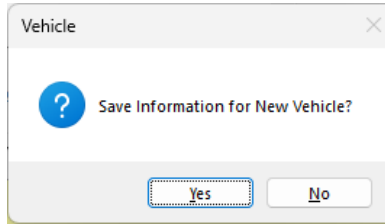
Vehicle screen displays for vehicle entry. Type in the license plate and select Year / Make / Model, Body Style & Engine/Fuel vehicle data from the drop-down menus to match the values in the screen below.

**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.**



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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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 Social CRM

Type	Recalls	Messages	Number	Customer	License	Color	Vin	Vehicle	
RO			000603	Iverson, Fred	123QER			1984 Cadillac DeVille	10/10/2005 01:59 PM (1.00 hr)
RO			008761	Konstantine, Doug	WDS-54Y		IB4FK5439KX617037	1989 Dodge Caravan	10/12/2005 03:11 PM (7.48 hr)
RO			008763	Labelle, Patty	FDK 89S		3FAPP15J3MR172228	1992 Ford Escort LX	11/15/2006 02:50 PM (11.00 hr)
RO			008765	Mack, Peter	MACKONE			1991 Dodge Dakota	
RO			008769	Jones, John	2ABC123			2013 Chevrolet Impala LS	
INV			000496	Dahl, Charlie	BIGRED			1987 Toyota Land Cruiser	10/13/2005 11:26 AM (1.32 hr)
INV			000501	Harper, Phil	98W2831			1986 Toyota Camry DX	10/21/2005 07:35 AM (6.50 hr)
INV			000596	Thomson, Bruce	697 3NV		JAACHI8EOJ7819005	1988 Isuzu Trooper II S	08/30/2005 08:50 AM (1.80 hr)
INV			000601	Harkins, John	234ABC		V1NNUM65656565656...	1991 Toyota Pickup SR5	10/2/2005 11:38 AM (9.45 hrs)
INV			000604	Harkins, John	234ABC		V1NNUM65656565656...	1991 Toyota Pickup SR5	10/12/2005 05:41 PM (9.45 hrs)
INV			000605	Grimes, Jon	504-TDR			1983 Nissan Maxima GL	11/2/2006 02:18 PM (9.45 hrs)
INV			008748	Dyson, Brian	BTO-D46		1FTHX251XFKA99984	1985 Ford Pickup F250	11/20/2006 11:01 AM (0.00 hr)
INV			008749	Diez, Dito	DITO D			1990 Toyota Celica GT	11/20/2006 11:26 AM (0.00 hr)
INV			008750	Eric, Walker	PZY-52J			1976 Chevrolet Nova	11/20/2006 11:28 AM (0.00 hr)
INV			008764	Dwulet, Fred	HGK-786			1989 Geo Tracker	10/12/2005 03:12 PM (3.00 hr)
EST			002213	Harkins, John	789GHI			1991 Toyota Pickup SR5	10/20/2005 10:08 AM (7.48 hr)
EST			002270	Ingerson, Ralph	FLAT55			1998 Audi A6 Quattro	10/26/2005 08:54 AM (10.00 hr)
EST			002274	Read-Me, First	CLICK HERE			2000 Chevrolet Blazer	10/25/2005 11:26 AM (0.00 hr)
EST			002281	Mack, Peter	MACKONE			1991 Dodge Dakota	10/27/2005 10:13 AM (1.00 hr)
EST			002283	Quote Customer					10/31/2005 11:05 AM (0.00 hr)
EST			002297	Quote Customer					08/8/2005 11:17 AM (0.00 hrs)

Record 13 of 39

Reset Layout Columns Send Text Purge Ests Display Appointment Payment Post Detail Order

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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)

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 Order As: ☒ 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.

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

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 Na...	First N...	Phone	Membership #	Address	City	St...	Zip	License	St...	Unit No.	VIN
Jones	John	619-391-5000		1544 Kingsla...	Poway	CA	92064	2ABC...	CA		

Customer 1 of 1

New Customer Cancel OK

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**

**Note:** Enter mileage; program warns later if it's missing. It is crucial for your customer communications and SocialCRM reminders to have accurate mileage.

In **45657**

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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: 619-391-5000 Office: 888-724-6742

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

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

Written By <none> Hat # Ref # Odometer - Prev. 45657 In **45657**

Promised 12/ 2/2024 5:00 PM Source <None> Engine Hours - Prev. 0.0 In 0.0 Out 0.0

Order Hrs: 0.00 Driver: <None> Row Colors

Type	Description	Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech	Category	List	Mfg Code
Job Title													
Total: \$0.00 Parts: \$0.00 Labor: \$0.00 Tax: \$0.00 Category: <None>													

New Job Quick Menu

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

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

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**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.

- 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.

- 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.

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

Select Symptom View Symptoms on Order

Cancel Save Done

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

LaborTotal \$ 60.00 ☐ Save as Standard Symptom

Est. Parts \$ 0.00 ☐ Come Back Invoice #

Category AC/Heating/Cooling

Account <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	Category
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>

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

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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 Estimate # 002353

Parts Labor Notes Sublet Symptom **Jobs** PartKit Promos Estimator Maint. Fluids TS&S

Written By <none> Hat # Ref # Odometer - Prev. 0 In 45657

Promised 12/ 3/2024 5:00 PM Source <None> Engine Hours - Prev. 0.0 In 0.0 Out 0.0

Order Hrs: 1.00 Driver: <None> Row Colors

Type	Description	Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech	Category	List	Mfg Code
Diagnose air conditioning system													
Labor	Diagnose air conditioning system	1.00	\$60.00					\$60.00	\$60.00		AC/Heating/C...		
Total: \$60.00		Parts: \$0.00		Labor: \$60.00		Tax: \$0.00		Category: AC/Heating/Cooling					

New Job Quick Menu

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

Invoice Estimate 0.00 60.00 60.00 0.00 0.00 0.00 60.00 60.00

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

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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:

Category: < All >

Year: 2013

Make: Chevrolet

Model: Impala LS

Job #:

Description: rec

☐ Use Advanced Quick Menu

☒ A/C Rech1 Recharge A/C (1 lbs.)

☐ A/C Rech2 Recharge A/C (2 lbs.)

The Canned Job repair lines display in the Estimate.

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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: 619-391-5000 Office: 888-724-6742

Customer Vehicle Order Revision History Estimate # 002353

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

Written By <none> Hat # Ref # Odometer - Prev. 0 In 45657

Promised 12/ 3/2024 5:00 PM Source <None> Engine Hours - Prev. 0.0 In 0.0 Out 0.0

Order Hrs: 2.00 Driver: <None> Row Colors

Type	Description	Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech	Category	List	Mfg Code
Labor	Diagnose air conditioning system	1.00	\$60.00				\$60.00		\$60.00		AC/Heating/C...		
Labor	A/C Recharge & Leak Test System	1.00	\$60.00				\$60.00		\$60.00		AC/Heating/C...		
Part	Freon			FREON	1.00	\$12.00	\$24.00	\$24.00	\$24.00		AC/Heating/C...	\$0.00	
Total:			\$145.86								Category: AC/Heating/Cooling		

Parts: \$24.00 Labor: \$120.00 Tax: \$1.86

New Job Quick Menu

Parts	Labor	Sub Total	Haz Mat.	Supplies	Tax	Total	Inv. Bal.
Invoice							145.86
Estimate	24.00	120.00	144.00	0.00	0.00	1.86	145.86

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

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## 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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File Edit View Configurations Utilities Inventory History Training Videos CRM Help

Recent Orders Print Ctrl+P Preview Email Print Setup Exit

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

Vehicle Order Revision History Estimate # 002350

Sublet Symptom Jobs PartKit Promos Estimator Maint. Fluids TSBs Open Recalls Print LOF

Written By <none> Hat # Ref # Odometer - Prev. 0 In 45657

Promised 10/ 8/2024 5:00 PM Source <None> Engine Hours - Prev. 0.0 In 0.0 Out 0.0

Order Hrs: 2.00 Driver: <None> Row Colors

Type	Description	Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech	Category	List	Mfg C
Labor	Diagnose air conditioning ...	1.00	\$60...				\$60.00		\$60.00		AC/Heatin...		
Labor	A/C Recharge & Leak Test...	1.00	\$60...				\$60.00		\$60.00		AC/Heatin...		
Part	Freon			FREON	1.00	\$12.00	\$24.00	\$24.00	\$24.00		AC/Heatin...	\$0.00	
Total:			\$145.86								Category: <None>		

Parts: \$24.00 Labor: \$120.00 Tax: \$1.86

New Job Quick Menu

Parts	Labor	Sub Total	Haz Mat.	Supplies	Tax	Total	Inv. Bal.
Invoice							145.86
Estimate	24.00	120.00	144.00	0.00	0.00	1.86	145.86

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

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The Print Preview displays how printed estimate appears.

**Parameters**

Include Header: Yes  
 Include Comment: Yes  
 Include Signature Line: Yes  
 Show Labor Hours: Yes  
 Show Part Numbers: No  
 Print in Color: Yes  
 Show Technicians: Yes

Reset Submit

**Estimate**

Jones, John  
 1544 Kingsland Way  
 Poway, CA 92064  
 Home: (619) 391-5000  
 Office: (888) 724-6742

**2013 Chevrolet - Impala - LS**  
 3.6L V6 (217CI) VIN(3)  
 License Plate: 2ABC123 CA  
 Odometer: In 45,657  
 Engine Hr: In 0.0

Estimate Due: \$  
 Estimate Date:  
 Service Advisor:  
 Customer ID:

Type	Description	Qty/Hr	Sale/Rate
Labor	Diagnose air conditioning system	1.00 hr	\$60.00
Labor	A/C Recharge & Leak Test System	1.00 hr	\$60.00
Part	Freon	1.00	\$24.00
Parts: \$24.00		Labor: \$120.00	Tax: \$1.86
		Total: \$145.86	

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

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

**Parameters**

Include Header: No  
 Include Comment: Yes  
 Include Signature Line: Yes  
 Show Labor Hours: Yes  
 Show Part Numbers: Yes  
 Print in Color: Yes  
 Show Technicians: Yes

Reset Submit

**Estimate**

Way  
 4  
 -5000  
 i-6742

**2013 Chevrolet - Impala - LS**  
 3.6L V6 (217CI) VIN(3)  
 License Plate: 2ABC123 CA  
 Odometer: In 45,657  
 Engine Hr: In 0.0

Estimate Due: \$  
 Estimate Date:  
 Service Advisor:  
 Customer ID:

Type	Description	Part #	Qty/Hr	Sale/Rate
Labor	Diagnose air conditioning system		1.00 hr	\$60.00
Labor	A/C Recharge & Leak Test System		1.00 hr	\$60.00
Part	Freon		1.00	\$24.00
Parts: \$24.00		Labor: \$120.00	Tax: \$1.86	Total: \$145.86

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.

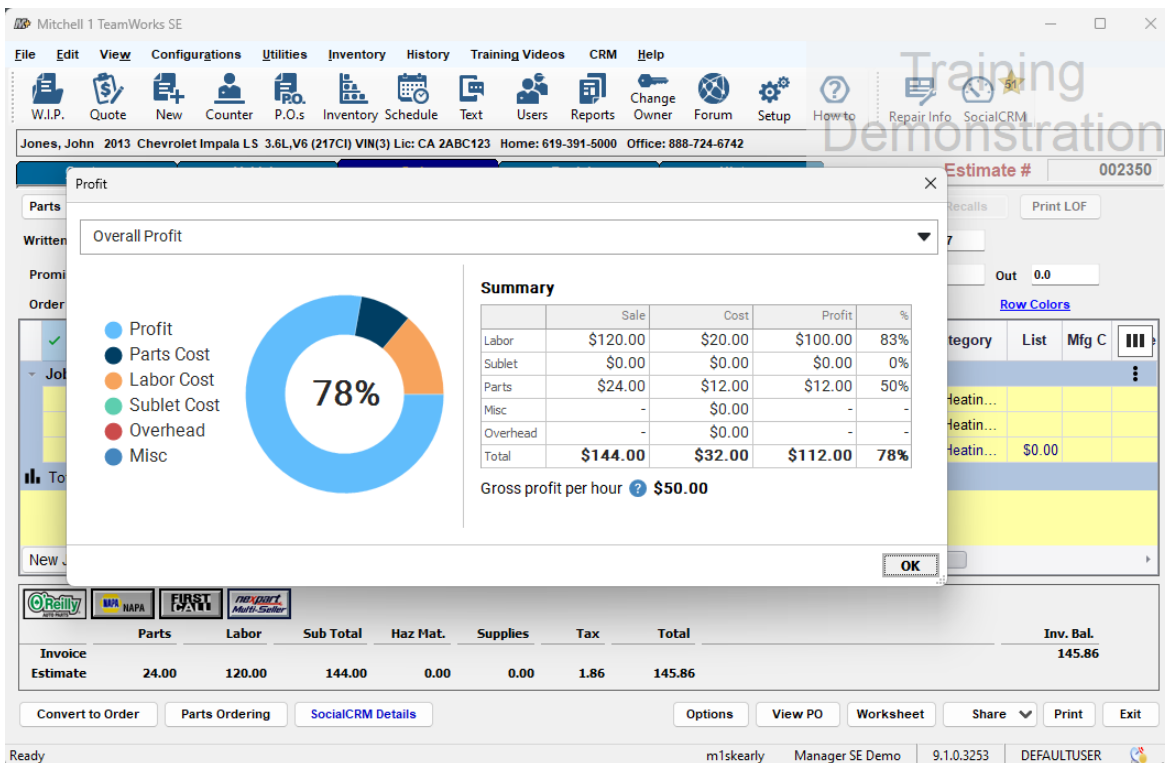
14. Closing the Print Preview **X** returns you to the estimate on Order screen.

**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 after actual labor & parts costs have been entered. 'Please, Select' labor tech entry provide a sample labor cost.



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

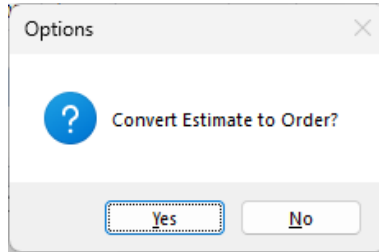
**NEXT:** With profit verified and customer approval, convert Estimate to R.O.

## 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.

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



- 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.

## Assigning Techs to R.O. / Print Tech Worksheet

Now that we have an active Repair Order, we need to assign technicians. Drop-downs 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).

### To Assign the Technician to a repair line:

- Right-click on the first Tech grid (highlighted).
- Choose Charbonneau, Wayne from the Dropdown.
- 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.



Repair Order Validations

Warnings.....

'Written by' not entered .....

'Inspection Date' is prior to today's date .....

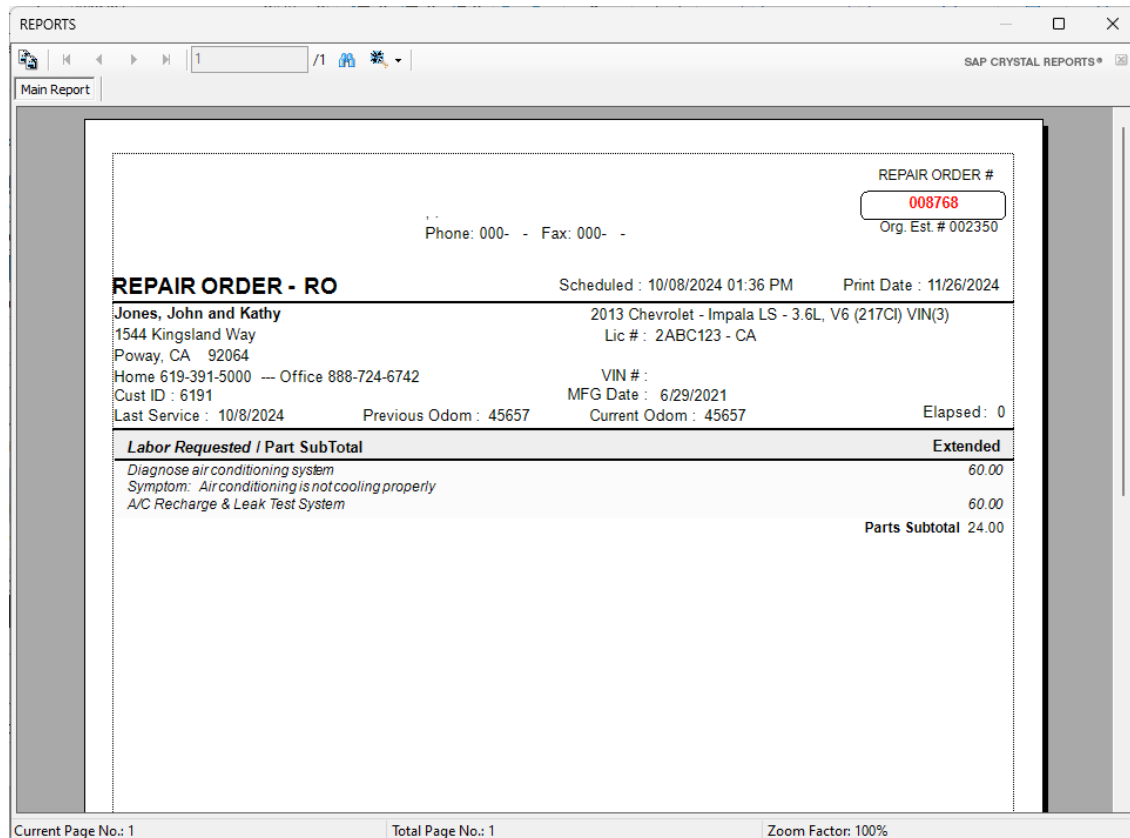
<none>

6/29/2021

Cancel Print Continue Print

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.

Inspect the Repair Order content in the Print Preview window.



REPORTS

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SAP CRYSTAL REPORTS

Main Report

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 # :

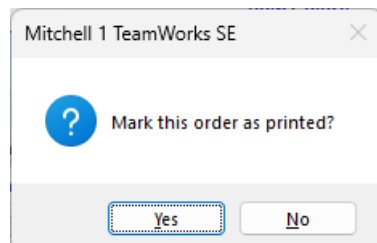
Cust ID : 6191 MFG Date : 6/29/2021

Last Service : 10/8/2024 Previous Odom : 45657 Current Odom : 45657 Elapsed : 0

Labor Requested / Part SubTotal	Extended
Diagnose air conditioning system	60.00
Symptom: Air conditioning is not cooling properly	
A/C Recharge & Leak Test System	60.00
Parts Subtotal	24.00

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



Mitchell 1 TeamWorks SE

Mark this order as printed?

Yes No

6. Click on the X in upper RH corner of screen (**Alt + F4**) to close the Preview.
7. Next you will be prompted to mark this Repair Order as Printed. Click on **Yes** to mark this Repair Order as printed.



**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 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.

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

1 / 1

SAP CRYSTAL REPORTS

Main Report

---

Technician Work Sheet      Service Writer :      Print Date: 11/26/2024

2013 Chevrolet - Impala LS FWD      Hat # :      Repair Order #

VIN # :      Color :      008768

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

Lic # : 2ABC123      Lic. State : CA     

---

Jones, John      Schedule : 10/09/24 3:00 P.M.

Home 619-391-5000 --- Office 888-724-6742      Promised Date : 10/08/24 5:00 P.M.

Inspection Date : 6/29/21      Status :     

Last Service : 10/08/24      Unit # :     

Current Odometer : 45,657      Trans : 6 speed Automatic 6T70/MH2

Previous Mileage : 45,657      Brakes : 4-Wheel ABS

Elapsed Mileage : 0      Manufacture Date : 6/29/21

---

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			
OUT ODOMETER : <input type="text"/>		Total Hours Charged :	2.00
Hours out: 0.00			
Tech Notes			
<hr/>			
<hr/>			
<hr/>			

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

You can close the window by clicking the **X** in the right corner of the screen.

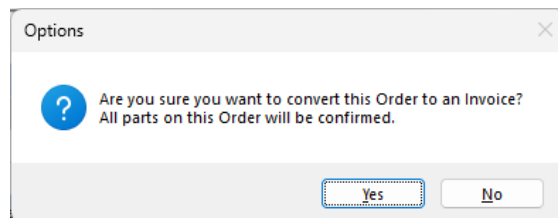
**Note:** Invoices use the same # assigned during R.O. An INV can be changed back to an R.O. if last minute items are added.(Configurations > Shop Data > Default Settings tab option)

**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.

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



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.

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

A screenshot of the Mitchell 1 TeamWorks SE software interface. The 'Invoice #' field is highlighted with a red box and contains the value '008768'. The interface shows various tabs like Customer, Vehicle, Order, Revision, and History. Below these, there are fields for Written By, Hat #, Ref #, Odometer, Prev., In, and Out. A table lists job items with columns for Type, Description, Hours, Rate, Part #, Qty, Cost, Sale, Price, Total, Tech, Category, List, and Mfg Code. The total invoice amount is \$145.86. At the bottom, there are buttons for Pay/Post Invoice, Parts Ordering, SocialCRM Details, Options, View PO, Worksheet, Share, Print, and Exit.

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 on Order screen. When finished, press ESC key to return to the WIP screen.

Mitchell 1 TeamWorks SE

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 Social CRM

Type	Recalls	Messages	Number	Customer	License	Color	Vin	Vehicle	MPI Progress	Sched
RO			000603	Iverson, Fred	123QER			1984 Cadillac DeVille		10/10/2005 01:59 PM (1.00 hr)
RO			008761	Konstantine, Doug	WDS-54Y		1B4FK5439K0617037	1989 Dodge Caravan		10/12/2005 03:11 PM (7.48 hr)
RO			008763	Labelle, Patty	FDK 89S		3FAPP1533MR172228	1992 Ford Escort LX		11/15/2006 02:50 PM (11.00 hr)
RO			008765	Mack, Peter	MACKONE			1991 Dodge Dakota		
RO			008769	Jones, John	2ABC123			2013 Chevrolet Impala LS		
INV			000496	Dahl, Charlie	BIGRED			1987 Toyota Land Cruiser		10/13/2005 11:26 AM (1.32 hr)
INV			000501	Harper, Phil	98W2831			1986 Toyota Camry DX		10/21/2005 07:35 AM (6.50 hr)
INV			000596	Thomson, Bruce	697 3NV		JAACHI8EOJ7819005	1988 Isuzu Trooper II S		08/30/2005 08:50 AM (1.80 hr)
INV			000601	Harkins, John	234ABC		V1NNUM6565656565656...	1991 Toyota Pickup SR5		10/2/2005 11:38 AM (9.45 hrs)
INV			000604	Harkins, John	234ABC		V1NNUM6565656565656...	1991 Toyota Pickup SR5		10/12/2005 05:41 PM (9.45 hrs)
INV			000605	Grimes, Jon	504-TDR			1983 Nissan Maxima GL		11/2/2006 02:18 PM (9.45 hrs)
INV			008748	Dyson, Brian	BTO-D46		1FTHX251XFKA99984	1985 Ford Pickup F250		11/20/2006 11:01 AM (0.00 hr)
INV			008749	Diez, Dito	DITTO D			1990 Toyota Celica GT		11/20/2006 11:26 AM (0.00 hr)
INV			008750							1.00 hr
INV			008764							7.48 hr
EST			002213							0.00 hr
EST			002270							0.00 hr
EST			002274	Read-Me, First	CLICK HERE			2000 Chevrolet Blazer		10/25/2005 11:26 AM (0.00 hr)
EST			002281	Mack, Peter	MACKONE			1991 Dodge Dakota		10/27/2005 10:13 AM (1.00 hr)
EST			002283	Quote Customer						10/31/2005 11:05 AM (0.00 hr)
EST			002297	Quote Customer						08/8/2005 11:17 AM (0.00 hrs)

Record 13 of 39

Reset Layout Columns Send Text Purge Ests Display

Appointment Payment Post Detail Order

Ready m1sksarly Manager SE Demo 9.1.0.3253 TIM

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.

10/9/2024: Jones, John

Save & Close Delete Open Order Cancel Auto Adjust End Time Match Drop-Off to Start Time Reminder None Send Text

Subject: Jones, John

Drop Off: 10/ 9/2024 8:00 AM Scheduled Hours: 2.00 Order Hrs: 2.00 Appointment State: Open (OPEN)

Promised: 10/ 8/2024 5:00 PM Service Advisor: <None>

Starts: 10/ 9/2024 3:00 PM Technician: Charbonneau, Wayne

Ends: 10/ 9/2024 5:00 PM All day event Resource: <None>

Shop Comments Print on order as Note Customer Comments/Special Requests Print on order as Note

Customer - Jones, John

Phone: (Home) 619-391-5000 Prefers: <None >

Email: jsjones@cox.net

Company: --

Address: 1544 Kingsland Way  
Poway, CA 92064

Membership #: --

Vehicle - 2013 Chevrolet Impala LS

0 Recommendations

VIN: --

License Plate: 2ABC123 Color: --

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

Unit #: --

Hat: --

Odometer In: None

Yearly Mileage: --

Technician is not available during appointment time.

Job Hours: 0.00 Source: <None > Category: <None > Jobs: Add Delete

Description

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

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.



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

Update these WIP Detail fields:

- Status:** Completed
- Location:** Front Lot

Work In Progress Detail

Invoice 008768	
Name Jones, John License 2ABC123 (CA) Year/Make/Model 2013 Chevrolet Impala LS Service Writer	
Phone Numbers Home 619-391-5000 Office 888-724-6742	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

Update Fields  
 Status Completed  
 Location Front Lot  
 Hat # Reference #

☒ Repair Order Printed
 ☐ Invoice Printed

- Click on **OK** to save.

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

- 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.

**Apply Payments**

Customer Name: Jones, John  
Charged Balance: \$0.00  
Credit Balance: \$0.00  
Charged Balance does NOT include this Invoice.

Invoice Amount: 145.86  
Amount Paid: 0.00  
Invoice Balance: 145.86

Date: 11/27/2024  
Payment Type: Visa  
Payment: 145.86  
Check / Reference #:   
Authorization #: 558163

☐ Print Receipt

Buttons: History, Apply Credit, Pay, Cancel

Type	Description	Hours	Rate
Labor	Diagnose air conditioning system	1.00	\$60.00
Labor	A/C Recharge & Leak Test System	1.00	\$60.00
Part	Freon		
Total: \$145.86		Parts: \$24.00	Labor: \$121.86

	Parts	Labor	Sub Total	Haz Mat.	Supplies	Tax	Total	Inv. Bal.
Invoice	24.00	120.00	144.00	0.00	0.00	1.86	145.86	145.86
Estimate	24.00	120.00	144.00	0.00	0.00	1.86	145.86	

Buttons: Pay/Post Invoice, Parts Ordering, SocialCRM Details, Options, View PO, Worksheet, Share, Print, Exit

### To Pay/Post Invoice:

1. Click on **Pay/Post Invoice (Alt + Q)** 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.
2. 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

**Post Invoice**

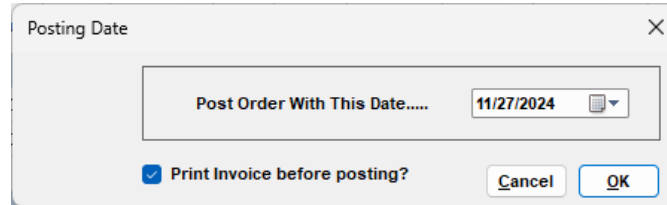
Invoice has not been printed!  
Post anyway?

Buttons: Yes, No

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?

Cancel OK

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

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

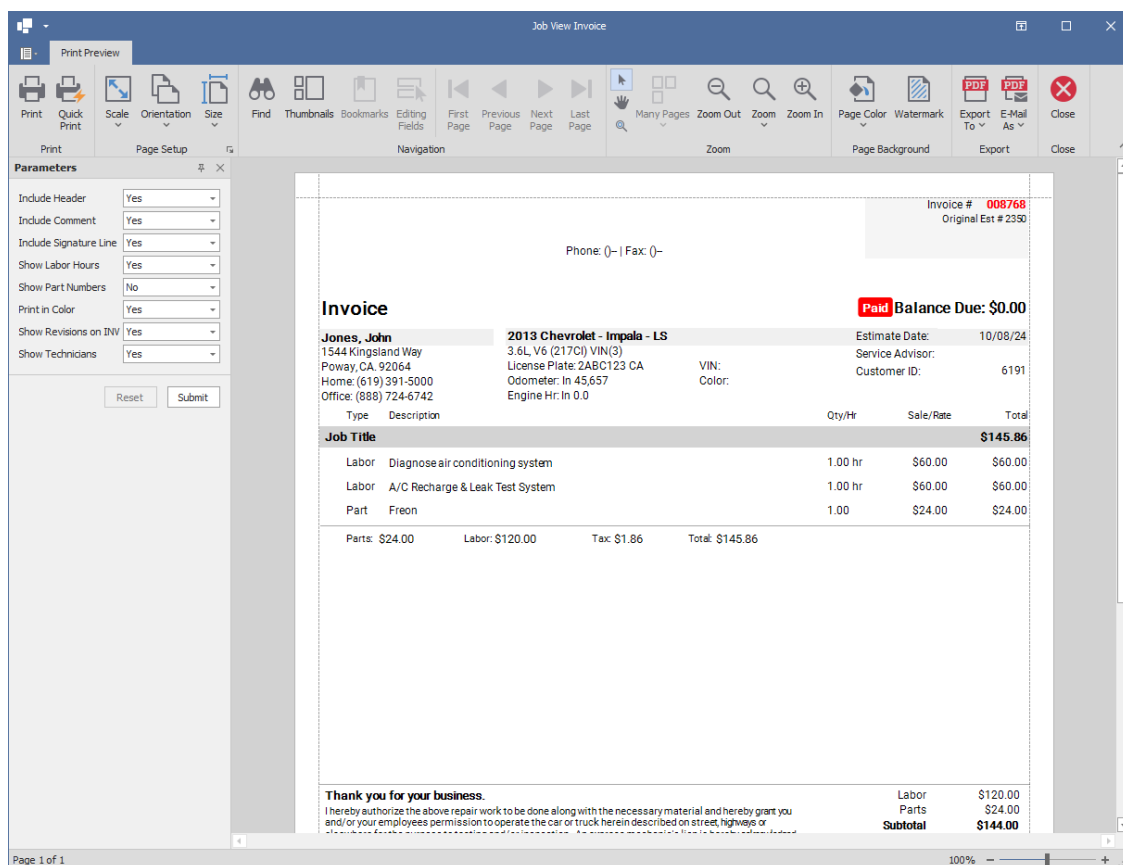
7. Depending on system settings, there may be further Validations; just click on



(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** displays what your final printed invoice would look like.



Job View Invoice

Print Preview

Parameters

Include Header: Yes  
Include Comment: Yes  
Include Signature Line: Yes  
Show Labor Hours: Yes  
Show Part Numbers: No  
Print in Color: Yes  
Show Revisions on INV: Yes  
Show Technicians: Yes

Reset Submit

Invoice # 008768  
Original Est # 2330

Phone: ()- | Fax: ()-

**Invoice**

**Paid Balance Due: \$0.00**

**Jones, John**  
1544 Kingsland Way  
Poway, CA. 92064  
Home: (619) 391-5000  
Office: (888) 724-6742

**2013 Chevrolet - Impala - LS**  
3.6L V6 (217CJ) VIN(3)  
License Plate: 2ABC123 CA  
Odometer: In 45,657  
Engine Hr: In 0.0

Estimate Date: 10/08/24  
Service Advisor:  
Customer ID: 6191

Type	Description	Qty/Hr	Sale/Rate	Total
<b>Job Title</b>				<b>\$145.86</b>
Labor	Diagnose air conditioning system	1.00 hr	\$60.00	\$60.00
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.

I hereby authorize the above repair work to be done along with the necessary material and hereby grant you and/or your employees permission to operate the car or truck herein described on street, highways or elsewhere for the purpose of diagnosis, repair, maintenance and/or replacement. As service materials, their use is hereby authorized.

Labor \$120.00  
Parts \$24.00  
**Subtotal \$144.00**

Page 1 of 1 100%

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**).

Find History Record

**Invoice** **Vehicle**

Invoice #  Posted Up To:  ☐ 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.

Mitchell 1 TeamWorks SE

File Edit View Configurations Utilities Inventory History Training Videos CRM Help

W.I.P. Quote

Jones, John 2013

Jones, John 2013  
Impala LS  
2ABC123  
CA

Display for:

Type Pr

IN V

IN V

History Detail

Jones, John

Written By

Promised 5:00 PM 10/7/2024

Hat # / Ref #

Source

Update Odometer

Invoice 008767

Odom. - In 0 Out 0

Eng. Hrs. - In 0.0 Out 0.0

Type	Description	Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech	Cat
Job Title											
Labor	Diagnose air conditioning system	1.00	\$60.00					\$60.00	\$60.00	<None>	AC/Heating/C.
Total:	\$60.00										
	Parts: \$0.00										
	Labor: \$60.00										
	Tax: \$0.00										
	Category: <None>										

	Parts	Labor	Sub Total	Haz Mat.	Supplies	Tax	Total
Invoice	0.00	60.00	60.00	0.00	0.00	0.00	60.00
Estimate	0.00	60.00	60.00	0.00	0.00	0.00	60.00

Search Criteria: None

Ready m1s Kearly Manager SE Demo 9.1.0.3253 TIM

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

The screenshot shows the Mitchell1 TeamWorks SE software interface. The main window displays customer information for Jones, John, a 2013 Chevrolet Impala LS. A 'Recommendations' dialog box is open, allowing the user to enter new recommendations. The dialog box includes fields for 'Date Recommended' (11/27/2024), 'FollowUp Date' (None), 'Date Work Needed' (11/27/2024), and a checkbox for 'Create Future Appointment' (checked). There is also a 'Clear FollowUp Date' button. The 'Work Recommended' section has a 'Standard Notes' dropdown and a 'Category' dropdown (currently set to '<none>'). A large text area for notes is visible. The 'Add' button is highlighted with a red box. The background shows the main software interface with various menu options and a sidebar with vehicle details.

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

Date Recommended: 11/27/2024    FollowUp Date: None    Clear FollowUp Date

Date Work Needed: 11/27/2024    Create Future Appointment: ☒

Work Recommended

Standard Notes:     Category: Automatic Trans/Transaxle

Test drive: shifting not smooth; perform trans service 1st.

Cancel    OK

- 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.

- Click on **Add** button (**Alt + A**) again to enter a second Recommendation.
- 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: 11/28/2024    FollowUp Date: None    Clear FollowUp Date

Date Work Needed: 11/28/2024    Create Future Appointment: ☒

Work Recommended

Standard Notes:     Category: Brakes

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

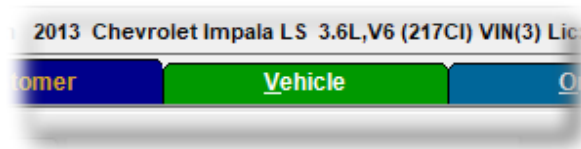
Cancel    OK

- 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.



**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. This provides an ability to perform "what-if" pricing options of original repairs along with various Sub-Estimate (repair job) combinations.



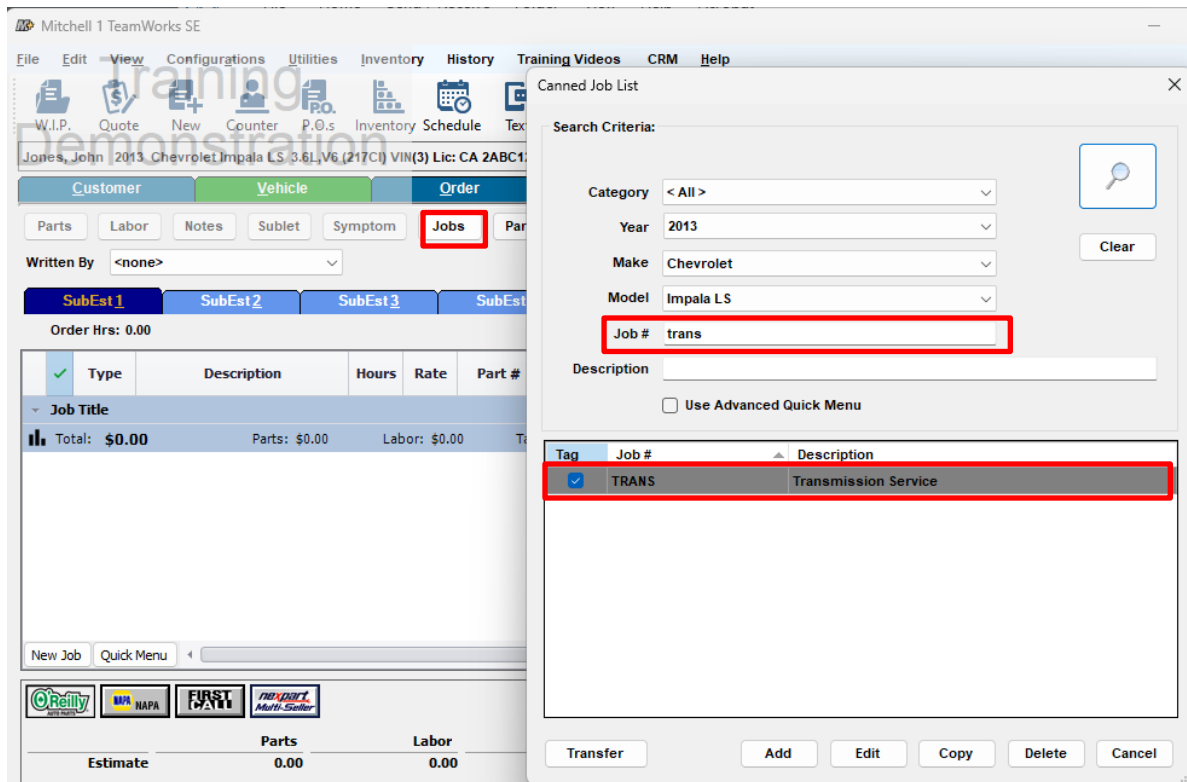
Revisions can contain all parts and labor detail for additional work discovered. These can be transferred to an existing estimate or order, once your customer approves them. Sub-Estimates not approved and sold today will remain on file (with reminders) on future repair visits.

**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.

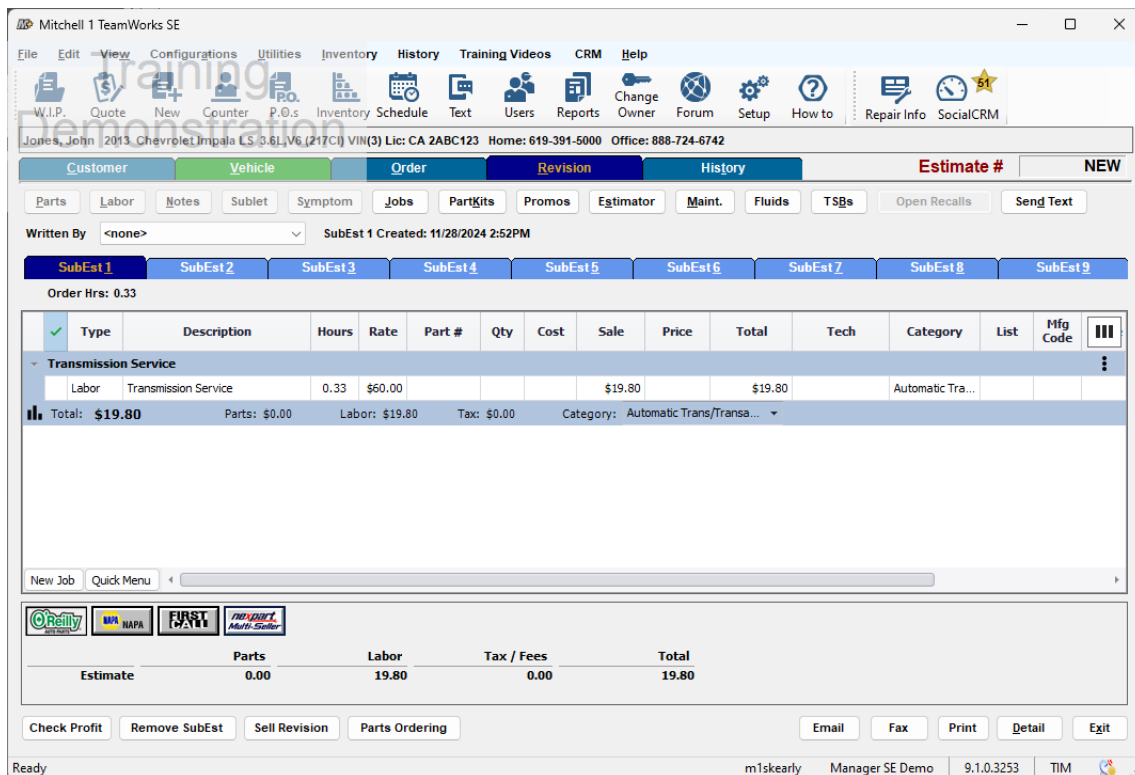
1. Go to **Revision** screen (**Alt + R**) to create a Sub-Estimate.
2. From Revision screen, click **Jobs (Alt + J)** to open the Canned Job list.

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

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



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



6. Click on **SubEst 2** tab to open the **SubEst2** Revision workspace.
7. Right-click on the .00 line in SubEst2 grid to open the Quick Canned Job list.

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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 Estimate # NEW

Parts Labor Notes Sublet Symptom Jobs Part Kits Promos Estimator Maint. Fluids TSBs Open Recalls Send Text

Written By <none> SubEst 2 Created: 11/28/2024 3:04PM

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

Order Hrs: 0.00

Type	Description	Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech	Category	List	Mfg Code
Job Title													
Total: Tax: \$0.00 Category: <None>													
<ul style="list-style-type: none"> <li>Display Canned Job List</li> <li>A/C Recl1, Recharge A/C (1 lbs.)</li> <li>Battery Service , Install Battery/Checkout System</li> <li><b>BRK Inspect (STD), Brake Inspection (non-ABS)</b></li> <li>CheckCharge, Check Charging System (Alternator)</li> <li>LOF EZ Select 4, Lube Oil Filter 4 Qt</li> <li>LOF EZ Select 5, Lube Oil Filter 5 Qt</li> <li>SMOG, Smog Check w. Certificate</li> <li>TireRotate, Tire Rotation</li> <li>TOW1, Towing within 10mi</li> <li>TOW2, Towing within 30mi</li> <li>WHLMount/Bal4, Mount/Bal Tires (4)</li> </ul>													
Tax / Fees										Total			
0.00										0.00			

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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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 Estimate # NEW

Parts Labor Notes Sublet Symptom Jobs Part Kits Promos Estimator Maint. Fluids TSBs Open Recalls Send Text

Written By <none> SubEst 2 Created: 11/28/2024 3:04PM

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

Order Hrs: 0.60

Type	Description	Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech	Category	List	Mfg Code
Brake Inspection (non-ABS)													
Labor	Complete Brake Inspection	0.60	\$60.00					\$36.00	\$36.00	<None>	Brakes		
Total: \$36.00 Parts: \$0.00 Labor: \$36.00 Tax: \$0.00 Category: Brakes													

New Job Quick Menu

Estimate

Parts	Labor	Tax / Fees	Total
0.00	36.00	0.00	36.00

Check Profit Remove SubEst Sell Revision Parts Ordering Email Fax Print Detail Exit

Ready m1skearly Manager SE Demo 9.1.0.3253 TIM

### **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:

Written By: <none> Sub-Estimate "Brakes" Created: 11/28/2024 3:04PM

Order Hrs: 0.60

Type	Description	Hours	Rate	Part #	Qty	Cost	Sale	Price
<b>Brake Inspection (non-ABS)</b>								
Labor	Complete Brake Inspection	0.60	\$60.00					\$36.00
<b>Total: \$36.00</b> Parts: \$0.00      Labor: \$36.00      Tax: \$0.00      Category: Brakes								

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.

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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 Setup Estimate # NEW

Parts Labor Notes Sublet Symp Revision Authorization

Written By <none>

Trans Service Brakes Sublet

Order Hrs: 0.60

Type	Description	Amount
✓	Brake Inspection (non-ABS)	
Labor	Complete Brake Inspection	0.00
Total: \$36.00		Parts: \$0.00

New Job Quick Menu

Estimate 0.00

Check Profit Remove SubEst Sell Revision Parts Ordering

Ready m1skearly Manager SE Demo 9.1.0.3253 TIM

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

- 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.

Recommendations

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.

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

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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 **Repair Order #** 008769

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

Written By <none> Hat # Ref # Odometer - Prev. 45657 In 0

Promised 11/29/2024 8:56 AM Source <None> Engine Hours - Prev. 0.0 In 0.0 Out 0.0

Order Hrs: 0.93 Driver: <None> Row Colors

Type	Description	Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech	Category	List	Mfg Code
<b>Transmission Service</b>													
Labor	Transmission Service	0.33	\$60.00					\$19.80	\$19.80		Automatic Tra...		
<b>Total: \$19.80</b>		Parts: \$0.00	Labor: \$19.80	Tax: \$0.00		Category: Automatic Trans/Transa...							
<b>Brake Inspection (non-ABS)</b>													
Labor	Complete Brake Inspection	0.60	\$60.00					\$36.00	\$36.00		Brakes		
<b>Total: \$36.00</b>		Parts: \$0.00	Labor: \$36.00	Tax: \$0.00		Category: Brakes							

New Job Quick Menu

	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 Parts Ordering SocialCRM Details Options View PO Worksheet Share Print Exit

Ready m1skearly Manager SE Demo 9.1.0.3253 TIM

## 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..



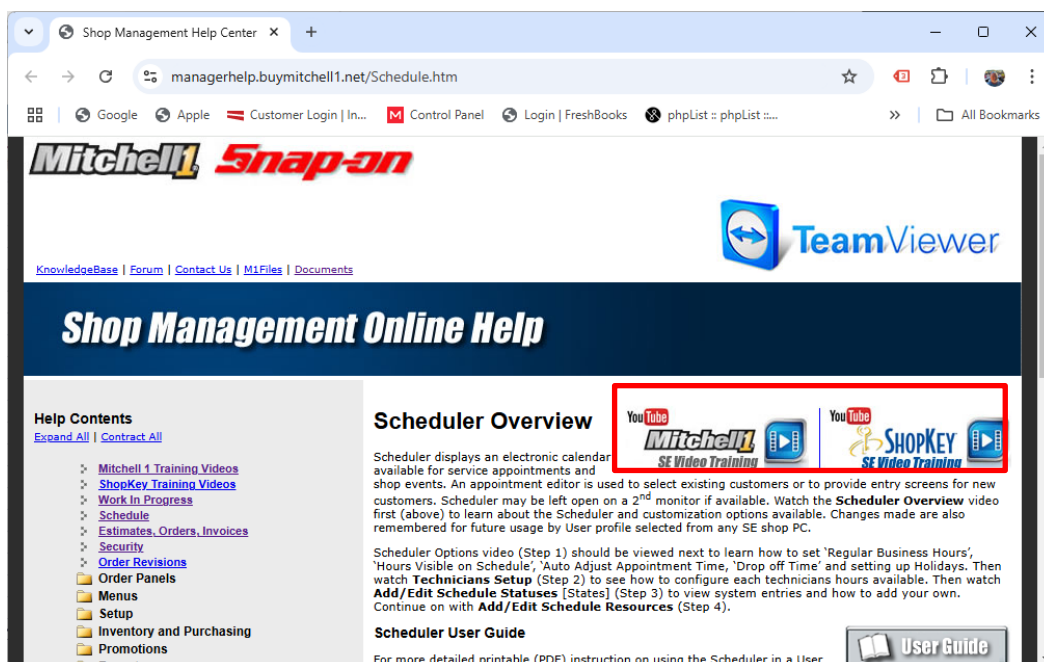
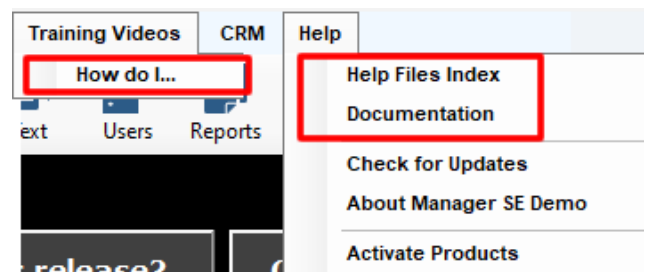
## Self-Instruction

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.)

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

Vendors For This Part

**Vendor #1**  
 Interstate Battery (BATT) Detail  
 Phone: 619-569-7541 : 619-555-1212

**Vendor #2**  
 <none> Detail  
 Phone:

**Vendor #3**  
 <none> Detail  
 Phone:

Add Vendor Cancel OK

- 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?

Yes No

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

Inventory List

Search Criteria:  
 Vendor < All >  
 Category < All >  
 Manufacturer < All > Line Code < All >  
 Part No.  
 Description  
 Size  
 Limit results 1000

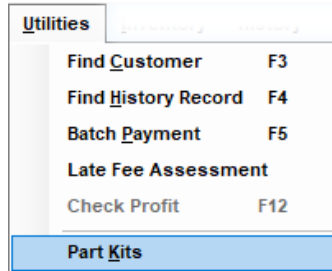
Clear

Part No.	Description	Size	Line Code	Price	On Hand	On Order	Vendor
70-5YR	Battery			87.20	2.00	0.00	Interstate Battery

Print Cgpy Update Add Edit Delete Done

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

## Creating a Part Kit



Utilities

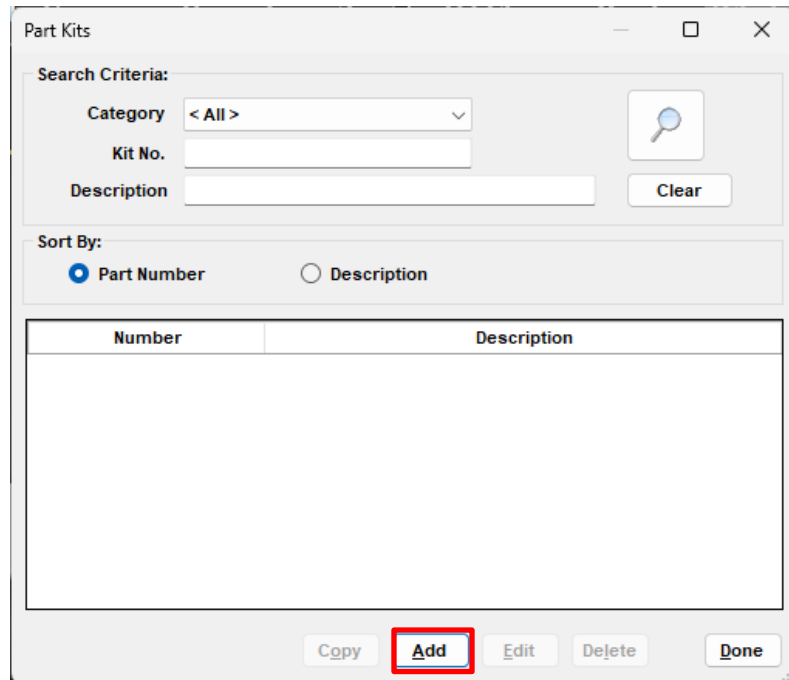
- Find Customer F3
- Find History Record F4
- Batch Payment F5
- Late Fee Assessment
- Check Profit F12
- Part Kits**

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 where you go to add, edit, or delete a Part Kit. In this Exercise we will be adding a new Part Kit.



Part Kits

Search Criteria:

Category: < All >

Kit No.:

Description:

Clear

Sort By:

☒ Part Number ☐ Description

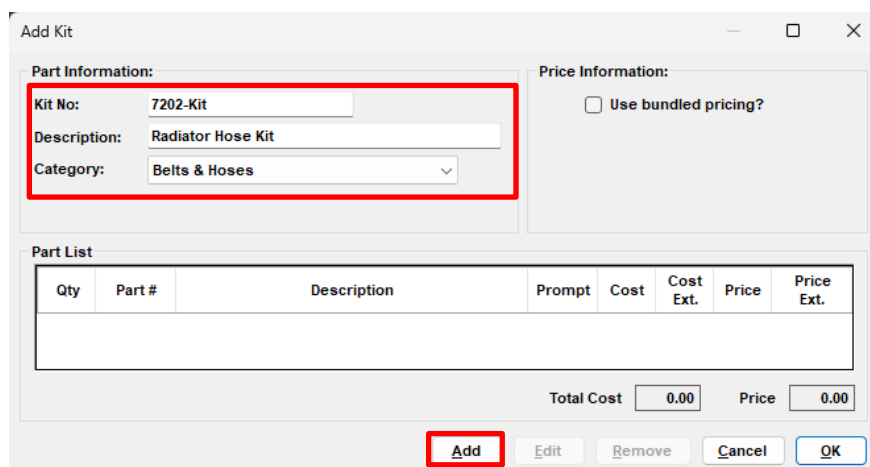
Number	Description
--------	-------------

Copy Add Edit Delete Done

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)



Add Kit

Part Information:

Kit No.: 7202-Kit

Description: Radiator Hose Kit

Category: Belts & Hoses

Price Information:

☐ Use bundled pricing?

Qty	Part #	Description	Prompt	Cost	Cost Ext.	Price	Price Ext.
-----	--------	-------------	--------	------	-----------	-------	------------

Total Cost: 0.00 Price: 0.00

Add Edit Remove Cancel OK

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

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

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

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

The screenshot shows the 'Inventory List' window. In the 'Search Criteria' section, 'Part No.' is set to '7202'. The 'Search' button, represented by a magnifying glass icon, is highlighted with a red box. Below the search criteria, a table displays the search results:

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

At the bottom of the window, the 'Transfer' button is highlighted with a red box.

**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 2<sup>nd</sup> part into kit. Click on 'Clear' to add a part from a different category. **Clear**
- With Category cleared, enter 'anti' in Description.
- Click on **Search (press Enter)**; 'afc1/2 Anti-Freeze Coolant 1/2 Gal' is located automatically.

The screenshot shows the 'Inventory List' window. In the 'Search Criteria' section, 'Description' is set to 'anti'. The 'Search' button (magnifying glass icon) and the 'Clear' button are both highlighted with red boxes. Below the search criteria, a table displays the search results:

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

At the bottom of the window, the 'Transfer' button is highlighted with a red box.

- 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 2 units.**

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 .

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

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

Utilities	
Find Customer	F3
Find History Record	F4
Batch Payment	F5
Late Fee Assessment	
Check Profit	F12
Part Kits	
<b>Canned Jobs</b>	

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.



- Using the menu bar at top of screen, click on **Utilities, Canned Jobs**.
- 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**
- Click Labor (**Alt + L**) to add labor content to the Canned Job.
- 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)**.

The screenshot shows two overlapping windows. The background window is 'Canned Jobs' with a search criteria field and a table of canned jobs. The foreground window is 'Order Item Entry - LABOR' with tabs for Parts, Labor, Notes, and Sublet. The Labor tab is selected, showing fields for Work Requested, Work Performed, Charged Hrs (1.20), Labor Total (\$72.00), Category (AC/Heating/Cooling), and Account (Labor Revenue). A table at the bottom shows Pay Hours, Technician, Act. Hours, and Comm. for 1.20 hours. The 'Save' button is highlighted in red.

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**

Order Item Entry - PARTS

**Parts** Labor Notes Sublet

Part No.  Part Code

Description

Quantity  Size  ☐ Tire

Unit Cost \$  Vendor

Unit Price \$  Manufact.

Unit Sale \$  Category

Unit List \$  Account

QOH  Technician

Margin %  Ref/Inv #

☐ No Commission ☐ Fixed Commission Commission \$

☐ User Entered Sale \$ ☒ Inventory Part ☐ Core

☐ Confirmed ☐ Display Off

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

Job #

Description

Category

Year

Make

Model

☐ Include in Quick Menu

Part Kits Attached to this Canned Job

Detail Add Remove

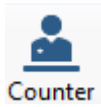
Time	Rate	Description	Qty	Extended	Sale	Price	List	Part No.	MfgCode	Tech Name	C
1.20	60.00	Flush Cooling System, Inst...		72.00	72.00	0.00	0.00			<None>	
	0.00	Anti-Freeze 1/2 Gal	2.00	23.80	11.90	11.90	0.00	afc1/2		<None>	
	0.00	Additive - Cooling Sys Lub...	1.00	10.68	10.68	10.68	0.00	Bar1		<None>	
	0.00			0.00	0.00	0.00	0.00				

Parts Labor Notes Sublet Estimator Total Sale Detail Exit

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

The screenshot displays the Mitchell1 TeamWorks SE interface. The top menu bar includes File, Edit, View, Configurations, Utilities, Inventory, History, Training Videos, CRM, and Help. The 'Counter' button is highlighted in the 'Utilities' section. The 'Order Item Entry - PARTS' window is open, showing the 'Parts' tab. The 'Part No.' field contains 'WB14' and the 'Quantity' field contains '2.00'. The 'Description' field shows 'Wiper Blade - 14" Triple Edge Refill'. The 'Unit Cost' is \$5.30, 'Unit Price' is \$10.60, and 'Unit Sale' is \$10.60. The 'Vendor' is 'Rapid Fire Auto Parts (RFAP)'. The 'Category' is 'Miscellaneous' and the 'Account' is 'Parts Revenue'. The 'Margin %' is 50.0. The 'Done' button is highlighted with a red box. The background shows a 'Counter Sale' form with 'Written By <none>' and 'Order Hrs: 0.00'.

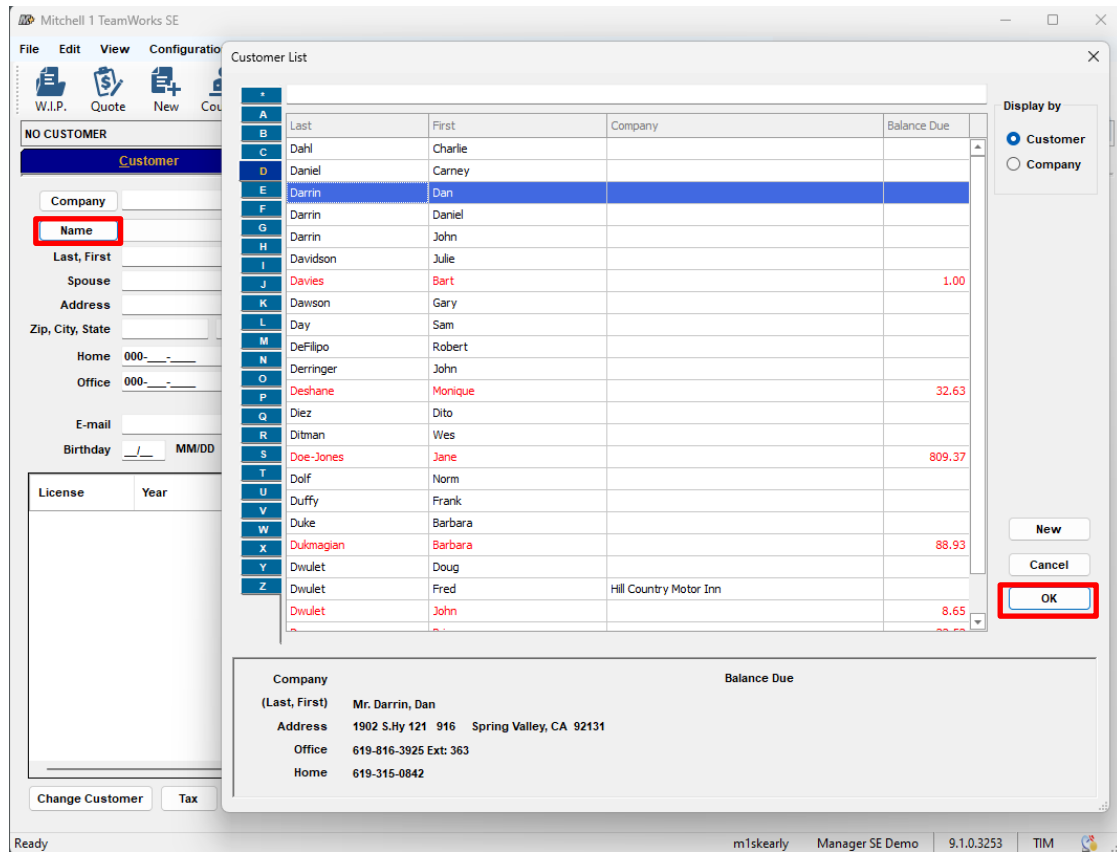
5. Click on Done (**Alt + D**) to save part to the sale & close the entry screen. With the part added to this Counter Sale, you could collect payment from this "Cash" customer, print an invoice and be done.

**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).

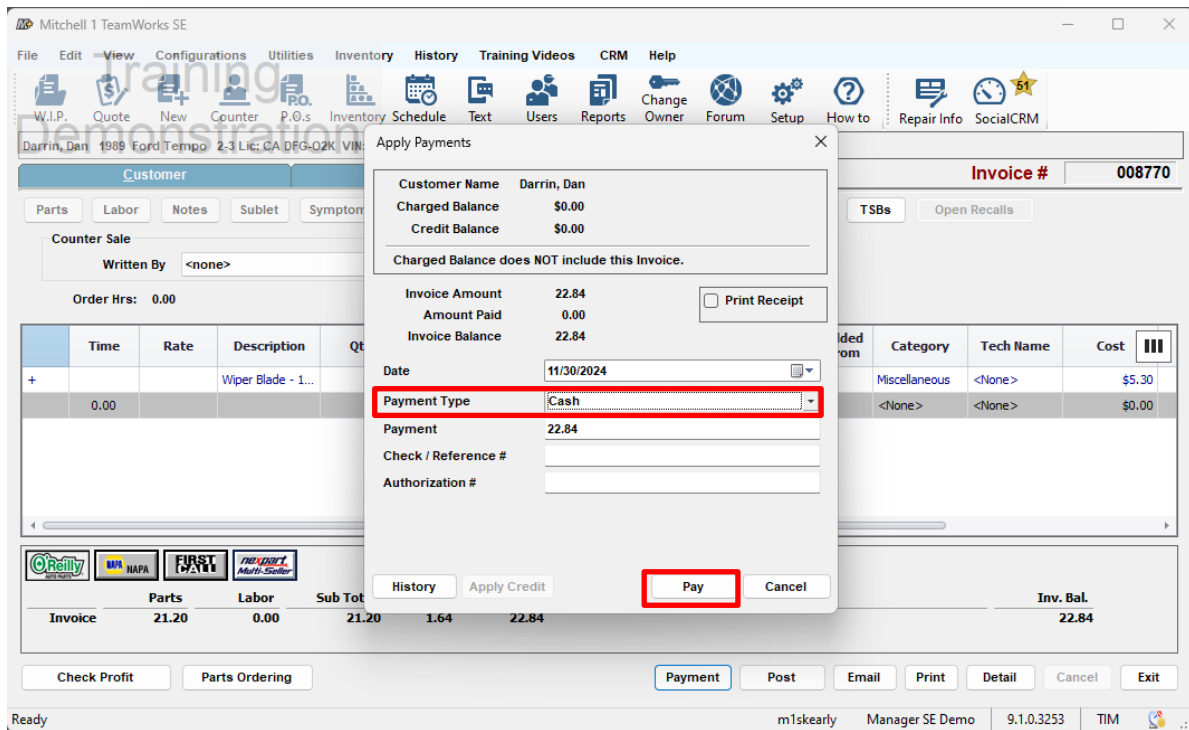
- Click on Name (**Alt + A**) to open the list of existing customers.



- 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.

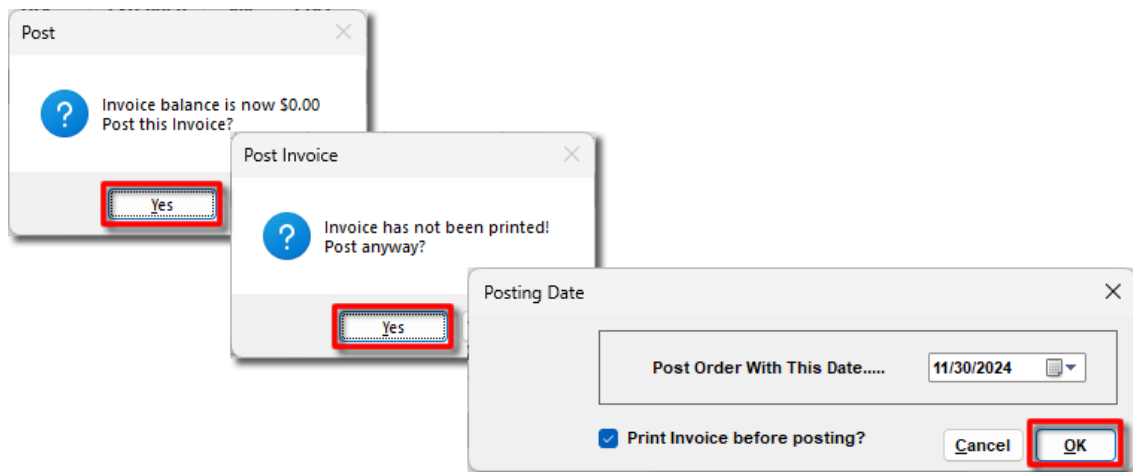
- Click on Order (**Alt + O**) to Pay, Print & Post this Counter Sale.
- Click on Payment to process the customer payment. In Payment Type, type a 'C' (shortcut for Cash payment type or select Cash from the menu.



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)



The Counter Sale displays in Print Preview [next page]

REPORTS

SAP CRYSTAL REPORTS

Main Report

Counter Sale #: 0008770  
Print Date : 11/30/2024

SOLD TO: Darrin, Dan  
1902 S.Hy 121 916  
Spring Valley, CA 92131  
Office [619-816-3925 363] --- Home [619-315-0842]

Phone - 000- - Fax - 000- -  
For: 1989 Ford - Tempo  
Vin # :IFAPP31X6KK124598  
Lic #: DFG-O2K - CA  
Unit # :

Qty	Part Number	Part Description	Sale	Line Total
2.00	WB14	Wiper Blade - 14" Triple Edge Refill	10.60	21.20

Payment Method: [ Payments - Cash - \$22.84 ]

Labor : \$ 0.00      Parts Total : 21.20      Tax : \$ 1.64      Total: \$ 22.84  
Less Payments: 22.84  
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.

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

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).

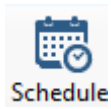
Mitchell 1 TeamWorks SE

Mark this order as printed?

Yes No

14. Click on Yes (**'Y' or Enter**) to mark Counter Sale as printed.  
The Counter Sale is removed from WIP & posted to History.

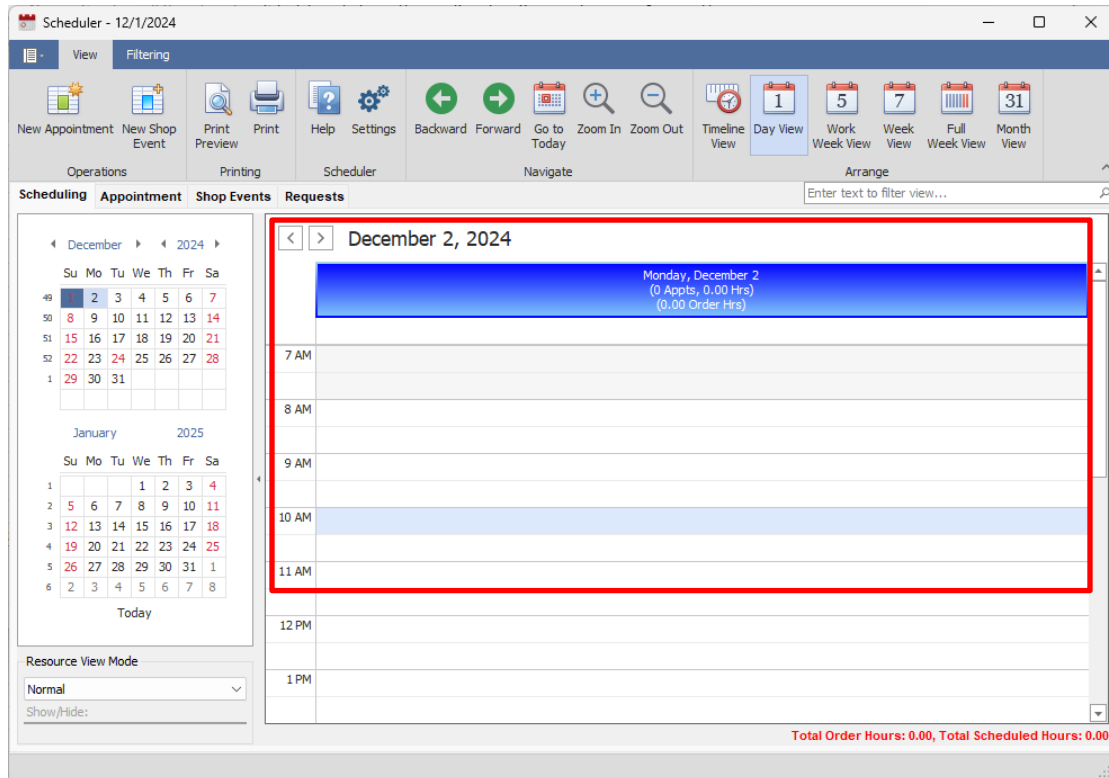
## Create an Appointment



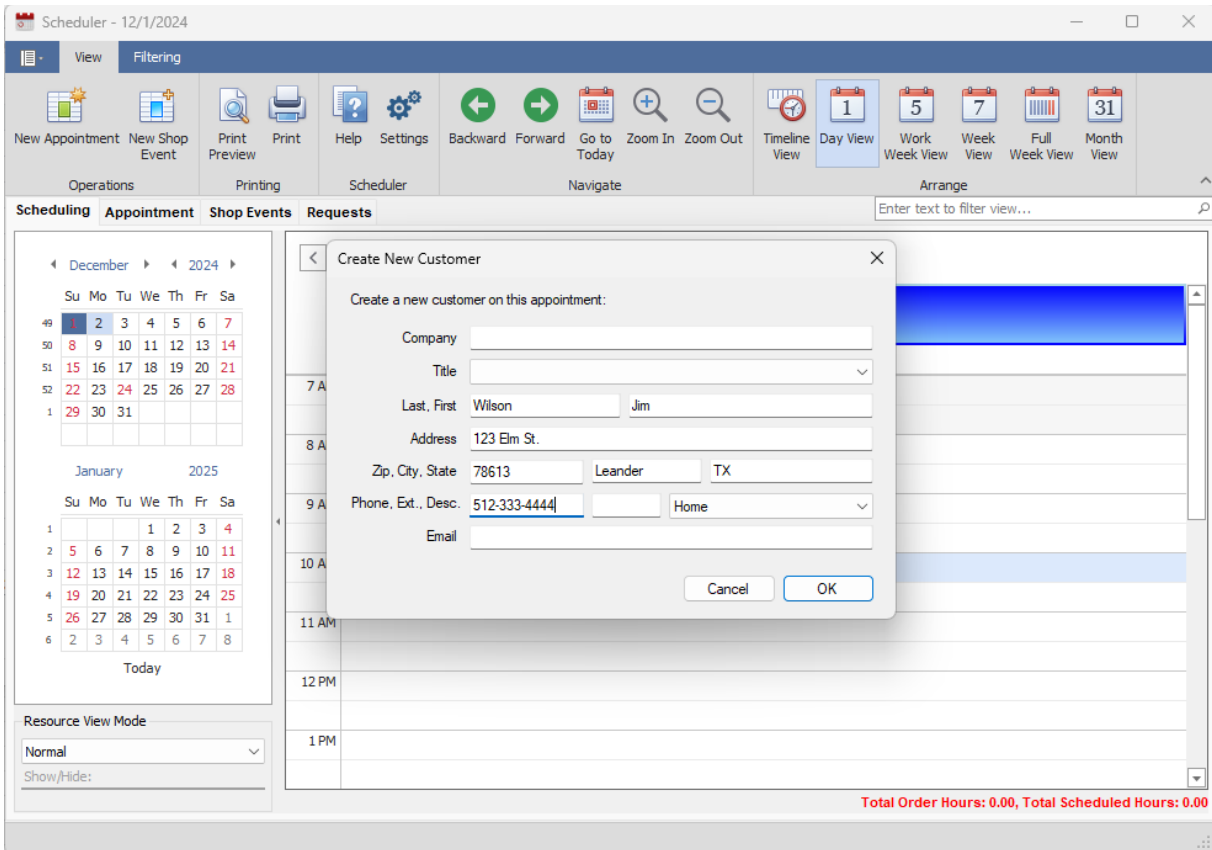
Scheduler events (appointments) are created when you start an Estimate or Repair Order. The exercise below demonstrates how you can create an appointment for a customer in advance of their visit to the shop. The subsequent appointment can be converted to EST / RO from the Appointment Editor screen.



1. Click the Schedule button to open the Scheduler.



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**.



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

VIN  Decode

License FJB 3831 State/Prov TX

Year / Make 2012 Toyota

Model Tundra Limited

Body Style 4D Pickup Extra Cab

Engine / Fuel 5.7L, V8 VIN(W) Gas/Ethanol

Transmission

Drive Type

Brake 4-Wheel ABS

GVW 6200-7200

Unit #  Fleet #

Color

Driver View/Edit Driver: <None> [Vehicle Color Definition](#)

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

Save & Close Create... Delete Cancel ☒ Auto Adjust End Time ☒ Match Drop-Off to Start Time  Reminder None

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 <None>

Starts 12/ 2/2024 10:00 AM Technician <None>

Ends 12/ 2/2024 1:00 PM All day event Resource <None>

Shop Comments ☒ Print on order as Note Customer Comments/Special Requests ☒ Print on order as Note

Customer - Wilson, Jim

Phone: (Home) 512-333-4444 Prefers: <None >

Email: --

Company: --

Address: 123 Elm St.  
Leander, TX 78613

Membership #: --

Vehicle - 2012 Toyota Tundra Limited

0 Recommendations

VIN: --

License Plate: FJB3831 Color: --

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

Unit #: --

Hat: --

Odometer In: None

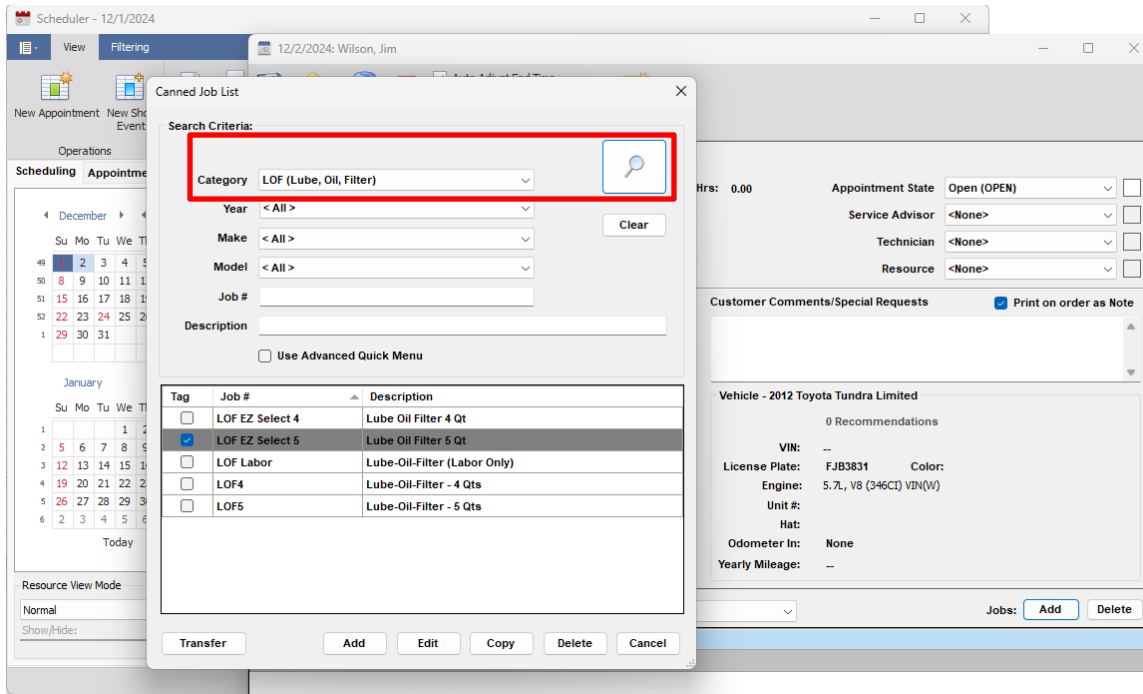
Yearly Mileage: --

Job Hours: 0.00 Source: <None > Category: <None > Jobs:

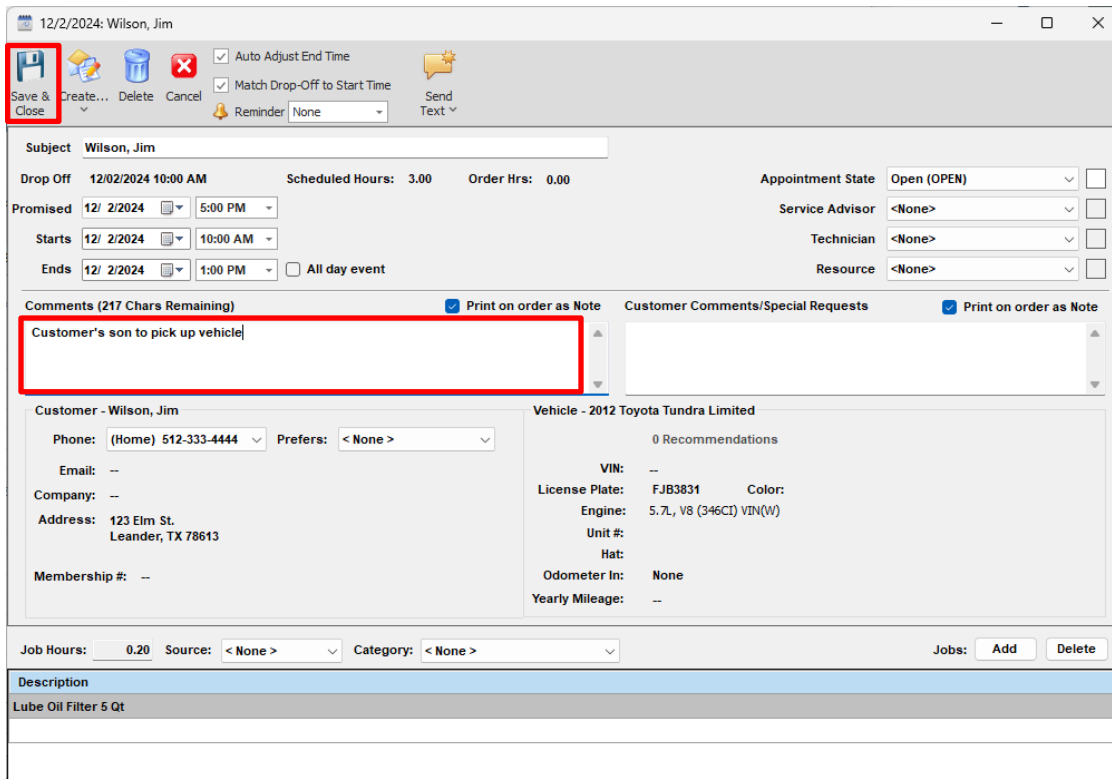
Description

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



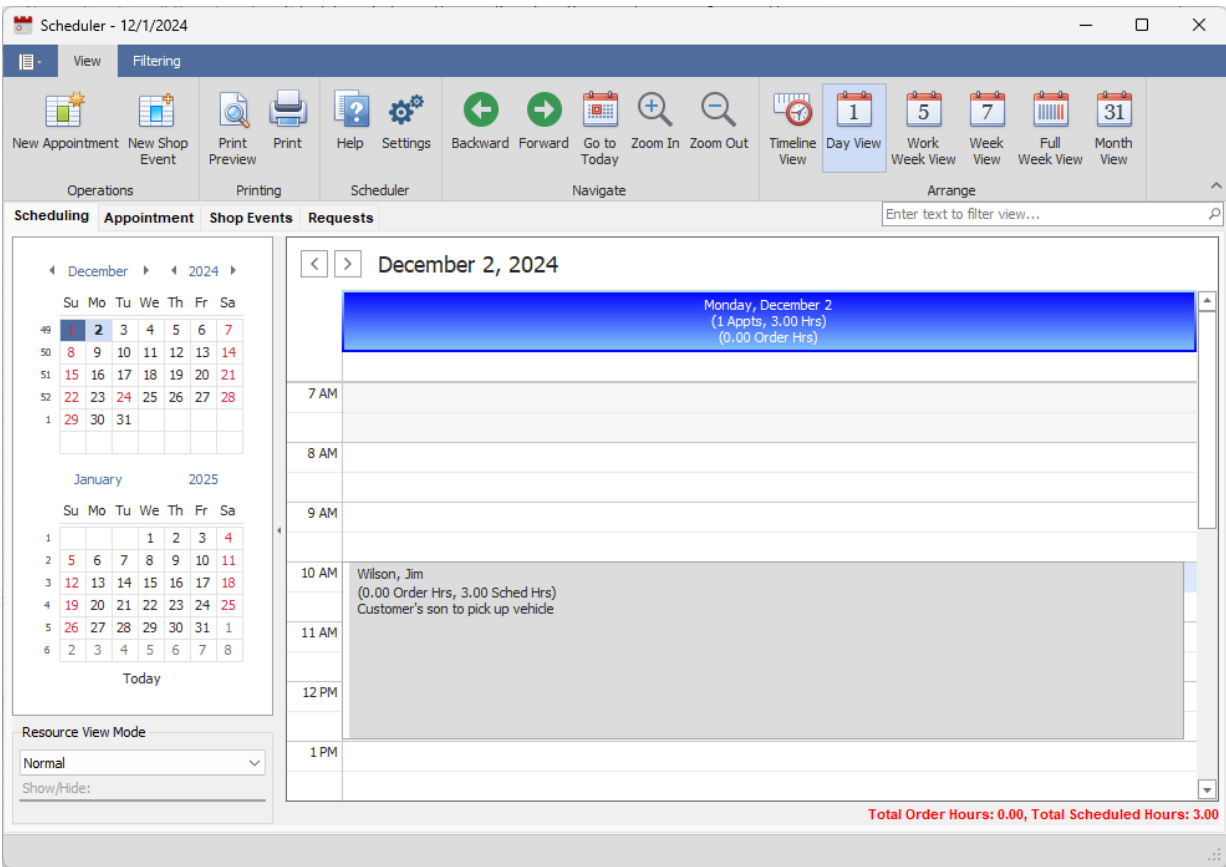


14. Choose **LOF** as your Category and click the **Search** button. Matching jobs displays in the lower grid area.
15. Choose **LOF EZ Select 5**.
16. Click **Transfer**. The Canned Job is added to the Appointment detail.
17. Add a note **Customer's son to pick up vehicle** to the Shop Comment section.



18. Click **Save and Close**.

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.

Mitchell 1 TeamWorks SE

File Find History Record

Invoice # 8757 Posted 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

Cancel View Record

Reset Layout Columns Send Text Purge Ests Display Appointment Payment Post Detail Order

Ready m1skeyrly Manager SE Demo 9.1.0.3253 TIM

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

Type	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: ☐ Customer ☒ Vehicle ☒ Show Categories

Type	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...	Maintenance	James, Jess
INV		12/15/2006	8757	0	0.0	4KJT698	CA	1994 To...	Filters (Oil, Fuel, Air)	James, Jess
INV		12/15/2006	8757	0	0.0	4KJT698	CA	1994 To...	Fluids/Sprays/Sealers	James, Jess
INV		11/05/2006	8756	0	0.0	4KJT698	CA	1994 To...	Maintenance	James, Jess
INV		07/07/2005	438	68261	0.0	4KJT698	CA	1994 To...	Attached Items	James, Jess
INV		07/07/2005	438	68261	0.0	4KJT698	CA	1994 To...	Engine Cooling	James, Jess

## 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

Invoice Vehicle

Year < All > Posted From 1/ 1/2005 To 12/31/2005

Make Toyota

Model

Word Search A/C

Clear

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

Cancel View 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

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Answers, Tips and Ideas 24/7, Visit [Managerforum.net](http://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!"*

Re: Scheduling

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

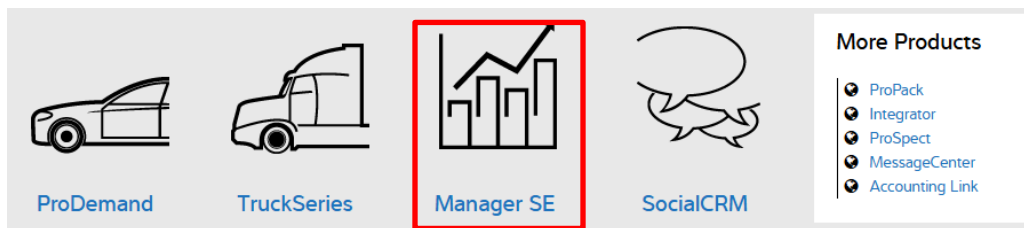
Thank you all for the good help! I think I waited too long to utilize the forums.

## 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>

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

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  - Documents
  - Videos/Quizzes
  - ProDemand Live Training
- TruckSeries
  - Documents
  - Videos
  - TruckSeries Live Training
- Manager SE
  - Documents
  - Videos/Quizzes**
  - Manager Forum

### Manager SE Training Videos

Our SE Shop Management videos are organized into five playlists with quizzes to serve as knowledge checks. Click on a Playlist, select 'Play All' to watch video clips, then take the associated quiz. A score of 85% or greater provides options to print or save a PDF copy of your own certificate.



Playlist – 1	Playlist – 2	Playlist – 3	Playlist – 4
<b>Playlist – 1</b> Workflow & Features			
<div><div>▶ Play All</div><div>💡 Take Quiz</div></div>			
▶ Scheduler Overview		▶ Inventory Overview	
▶ Parts Ordering		▶ Symptoms	

