Mitchell 1 / ShopKey Management Solutions

SETUP: Configuring Your LIVE SE Software

The Guide to system settings setup for the LIVE version of SE 9.x program

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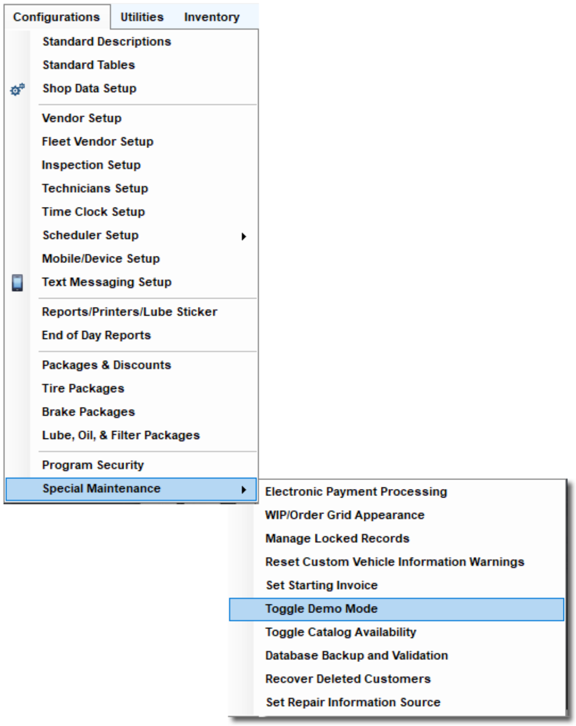
• Contents

Preparing Your SE Program to Write Actual Orders

Switching from Demo Mode to LIVE

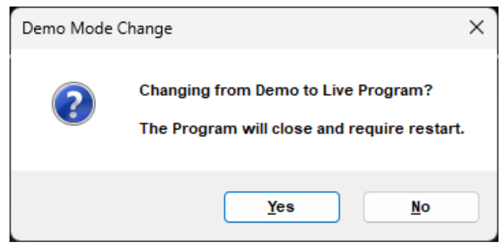
Before doing any setup and configuration work it is absolutely essential to switch from the DEMO to the LIVE Program if you haven't already done so.



To Switch from Demo to LIVE view:

1. At the front screen, choose Configurations/Toggle Demo Mode.

A Message Box confirms that you want to switch from Demo To Live program.



2. Confirm that you want to run the Live Program by clicking **Yes.**

Important Note: Make **ABSOLUTELY sure** you are in LIVE Program View before entering any shop data or settings. Otherwise, anything entered in DEMO mode will have to be re-entered in the LIVE Program Version.

Configuring the LIVE SE Program for Your Shop

It's time to start customizing the LIVE version of SE software to match your business using this workbook. You'll save a lot of time later and also improve accuracy by completing as much setup detail as possible now.

NOTE This book is intended to help new users prep the LIVE version of SE to write live invoices. It's arranged by **Basic Setup** (assisted by independent sales contractors) to get shop's SE launched successfully. This is followed by **Additional Setup** options that we strongly recommend users then complete as soon as possible. Users may not use all of Additional Setup items provided.

Review Program Setup Options

Basics (Assisted):

Default Settings, Labor Rate, Tax Rate, Shop Supplies, HazMat, Accounts, Payment Types, Markup, Technicians, Reports/Printers, Disclaimers

Additional (User Self-Instruction):

Category, Location, Status, Followup, Packages, Symptoms, Notes, End-Of-Day Reports, Validations, Screenview options, Program Security, etc.

BONUS: SE LIVE Checklist

This checklist helps you to be sure you're ready to go live. By now setup is completed for a successful launch. Set your Starting Invoice and begin!

Tips for a Better Startup Experience

- Consider ALL Program Settings Very Carefully Now.

Many settings require a decision, configuration or data entry BEFORE using SE LIVE to write your orders. You'll be very glad later you did.

- Don't Rush Yourself!

The more prep work you get completed now, will improve your comfort level and speed, making your LIVE SE experience better right away.Database Backup and Validation

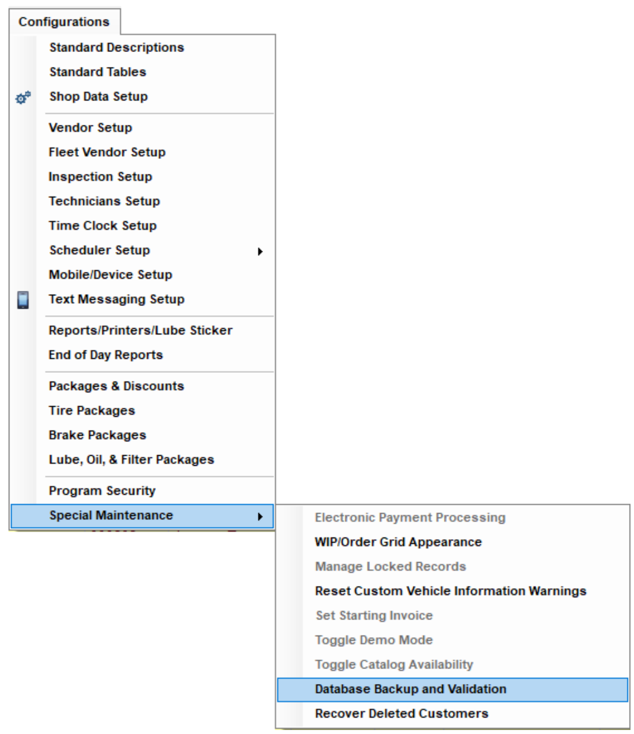
Backup: It is CRUCIAL to keep up-to-date copies of your SE database just in case something goes wrong and it becomes necessary to restore it. There is an internal backup function (to USB flash drives) in the management program and we have also added a MSEC remote backup service as explained below.

Your Database Backup Strategy

Database Backup and Validation is a selection under Special Maintenance from the Configurations menu

Database Validations are a quick check against the physical consistency of the database and ensures the ability to stay synchronized with SE Connection (or MSEC) for server-side backups and other features. The **Weekly Validation** is much more thorough and will catch items that wouldn't normally be found without a thorough review by technical support agent.

This is good for SE shop management systems users as the physical "check-in" will alert them to a potential problem, hopefully prior to any permanent data loss. If a problem is found, a message for the user to call technical support would be displayed on the screen. This situation would not prevent users from working in Manager SE; however, we'd still suggest contacting technical support at the first opportunity.



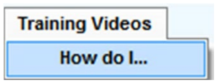
NOTE: We still recommend shops continue using local backups to external flash drives to provide your shop with an extra measure of protection.

SE Setup Information Gathering Checklist

This document is intended to inform new users of the extent of shop information required to gather in preparing the SE software to write actual invoices that match your business specifics. You should have received a copy of the checklist with your information packet. Once you've had a chance to review what is required, you can decide whether to input the details into this document or enter it directly into the SE Setup or Configuration screens, using the document as a checklist.

We recommend that you fill out the checklist *before* completing this workbook to make more efficient use of your setup time investment. For your convenience, the two documents are cross- referenced where practical.

Learn more with 100+ SE Training Videos!



Manager SE comes equipped with more than 100 training videos covering virtually every aspect of the management software. Click the Training Videos link on the menu bar and then "How do I…" to access the Training Video master list.

Note: Within this guide, when you see the training video icon, you can go directly to the relevant video by clicking on the Training Video icon for that section.

Context-sensitive Training Videos can also be accessed via the online help system. Simply click F1 in any screen to access help specific to that screen. Most major screens and dialog boxes also have Training Videos specific to the area you are working in. Click the Training Video icon to run the video.

Mitchell 1 Shop Management Video Training Assets

Start Here? to access SE Shop Mgmt. videos as 5 playlists/quizzes. Click on a Playlist, select 'Play All' to watch clips, then take the associated quiz as a knowledge check. An 85% or greater score provides options to print or save a PDF copy of a certificate.

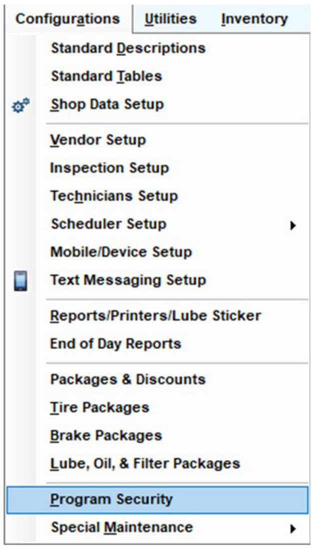
Your shop management software comes with a comprehensive set of multimedia (audio + video) demonstrations on how to use program basics. Simply click on any title below to start the brief training video demonstration. Click on the YouTube Video link in any help topic to access a video specific to the help area you are working in. NOTE: Clicking a video link will cause this window to change to YouTube for playback; click your Back button to return to this list in the online help system.

Alphabetical List of Video Training Assets

- Add Part to Inventory http://youtu.be/HrjHEqXLz34
- Appointment, Creating https://youtu.be/erkDajnCoWk
- Auto Updater https://youtu.be/TyadPxxUVKg
- Batch Payment [F5] https://youtu.be/WflX38REJDw
- Canned Job https://youtu.be/NhJP-08ffpU
- Catalog Part Pricing Options https://youtu.be/Ifx_r38bxZY
- Category http://youtu.be/QOWe6sqym0A
- Change Ownership http://youtu.be/M-jqc2jCtZI
- Comebacks https://youtu.be/RnniA7J4hZs
- Counter Sale https://youtu.be/j9tGXuLef90
- Creating a User Profile https://youtu.be/vaV25FIDj2M
- Customer Entry https://youtu.be/JeVi1RVyfpA
- Customer Screen https://youtu.be/W_Ok_sci-38

• Setup-Assisted Basics

Create a User (Profile)

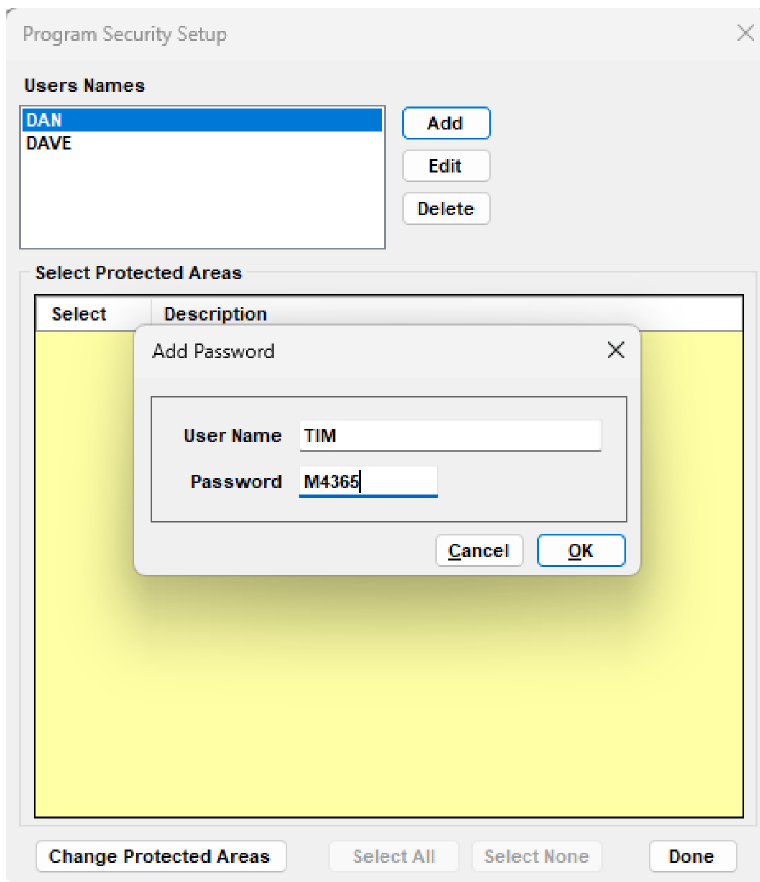


To store and recall your WIP and Order screen layout preferences, create at least one User profile. This is accomplished through the **Configurations > Program Security** menu option.

Enter user names with passwords to create User profiles. You may also enter job functions or filtered (EST only, etc.) screen views to meet your needs.

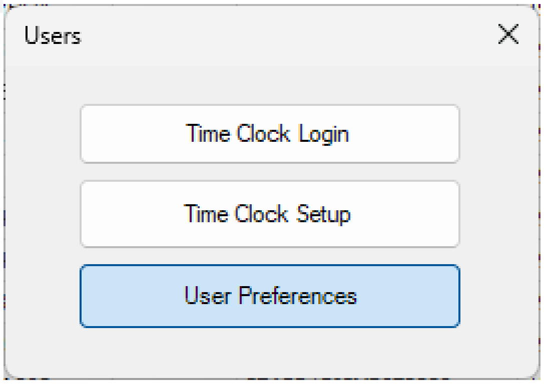
NOTE: Program Security is discussed at greater length in the Additional Self-Setup section. Visit https://managerhelp.buymitchell1.net/Programsecurity.htm for a detailed description of Program Security and video links to Program Security setup and a Demo of how program security works.

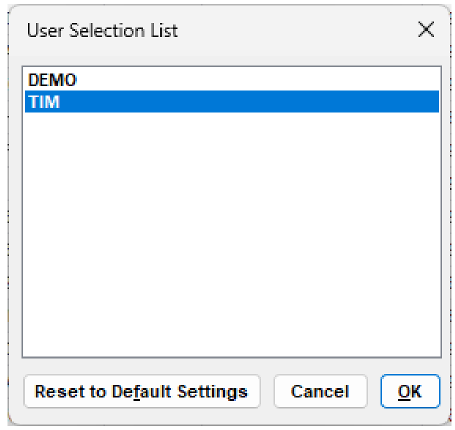
In Program Security Setup, click on **Add** to enter a name & password to create a profile. Do this for each user as required.



Choose the User

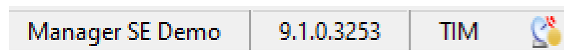
Click on **Users** icon and select **User Preferences**. This opens the **User Selection List**. Click on the User you wish to use the preferences for and click OK.





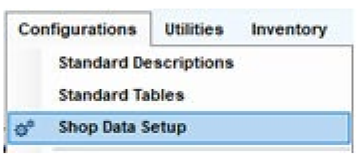
The WIP Grid and Order Screen Preferences of the selected user will be reflected in your screen display.

User selection is confirmed by the display of the User name in the lower right-hand corner of the program screen.

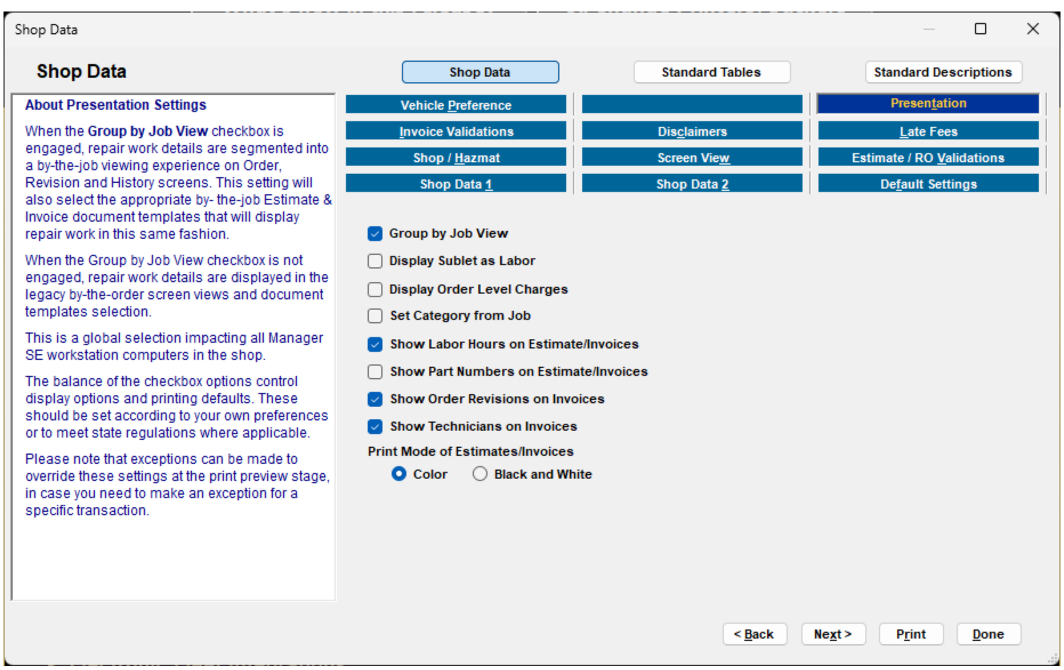


See https://managerhelp.buymitchell1.net/wipgridsettings.htm for details about WIP and Order Screen layout preferences.

Presentation Settings



The Presentation Settings control order display options and printing defaults. Most importantly, this is where you specify whether to display orders in **Job View** vs. **Legacy View**. Presentation Settings are opened by choosing **Shop Data Setup** from **Configurations** menu and then clicking on the **Presentation** tab.



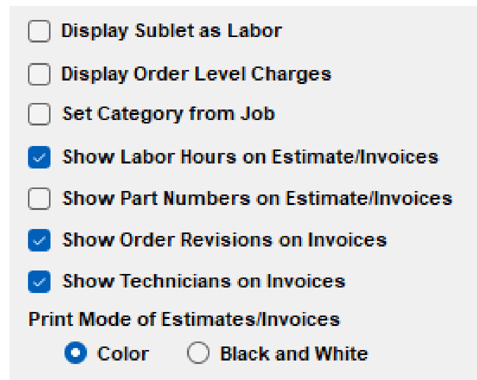
Group by Job View:

- **Group by Job View** - When the **Group by Job View** checkbox is selected, repair work details are segmented into a rich by-the-job viewing experience on Order, Revision and History screens (click the video icon to the right for full details). This setting will also select the appropriate Job View Estimate & Invoice document templates that will display repair work in this same fashion. Unchecking this box restores the setting for the legacy view.

Note: Group by Job View is a GLOBAL setting (all users). The default setting for new SE Customers is ON. You may deselect the setting to restore the legacy view, if desired.

Additional Print and Display options:

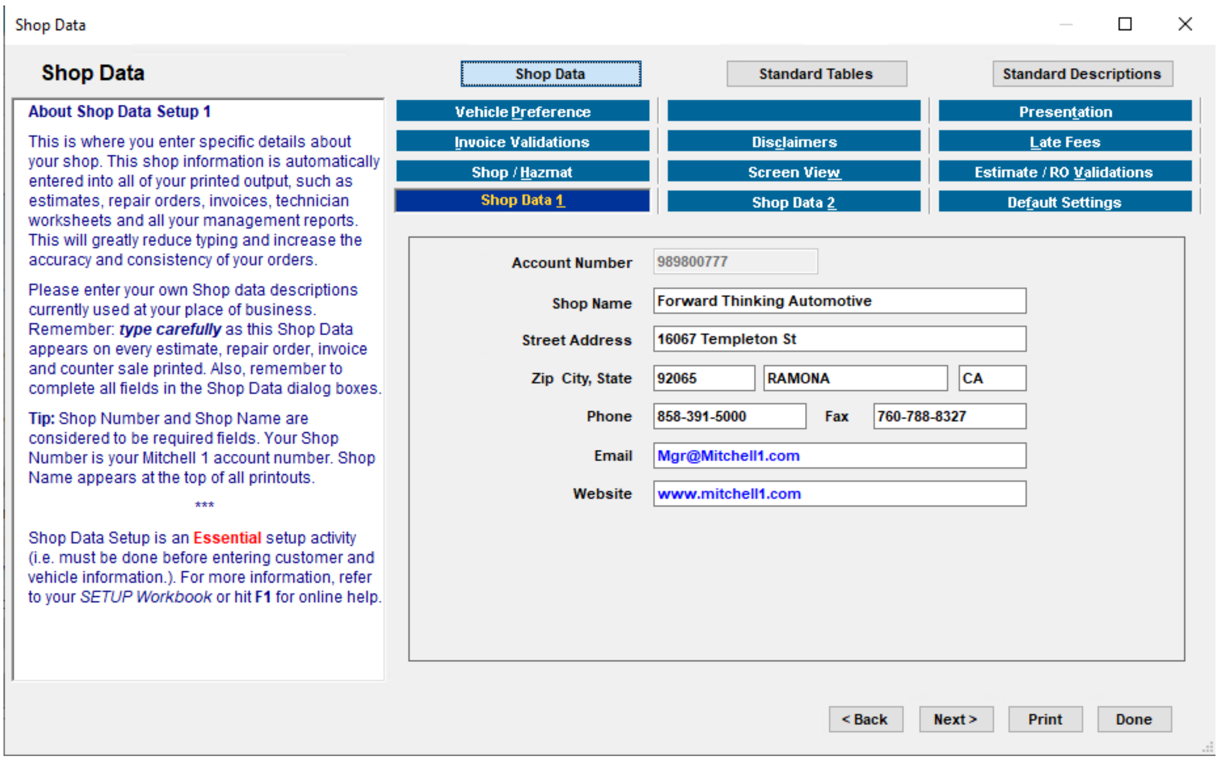
Note: Make sure that these options conform to your shop policy and State and Local Regulations.

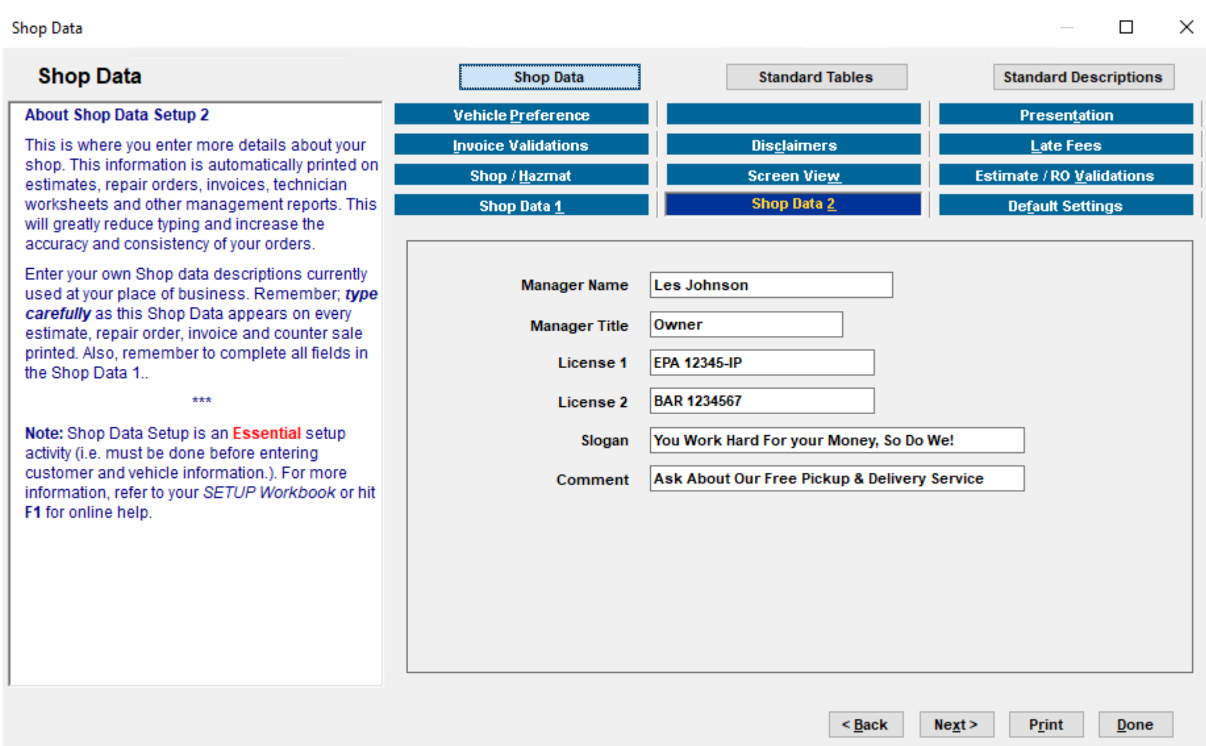


- **Display Sublet as Labor** - This option sets the default setting for the Display as Labor checkbox. Un-checking that box at the Sublet level reverts that Sublet to display/print as a 'Sublet.'
- **Display Order Level Charges** - Generates 'Order' box on customer documents to display fees and order discounts, as applicable.
- **Set Category from Job** - Copies Job Category to any container items lacking category information.
- **Show Labor Hours on Estimates/Invoices** - Choose whether to display labor hours on screen display and printouts of Estimates and Invoices by default. Note: this can be overwritten in print preview window.
- **Show Part Numbers on Estimates/Invoices** - Choose whether to display part numbers on Estimates and Invoices, by default. Note: this can be overwritten in print preview window.
- **Show Order Revisions on Invoices** - Choose if you want to include Order Revisions on display and printouts of Invoices, by default. Note: this can be overwritten in print preview window.
- **Show Technicians on Invoices** - Choose if you want to include the name of the Technician(s) on printed invoices. Note: this can be overwritten in print preview window.
- **Print Mode of Estimates/Invoices** - Choose whether you'd like to print in Color or Black and White by default.

Shop Data 1 & 2

Enter your Shop Data specifics [recorded in the Information Gathering Checklist] into these screens; this data appears on all printed output (EST / RO / INV, reports, etc.) *NOTE: Account # is automatically filled from Help - Activate Products.*

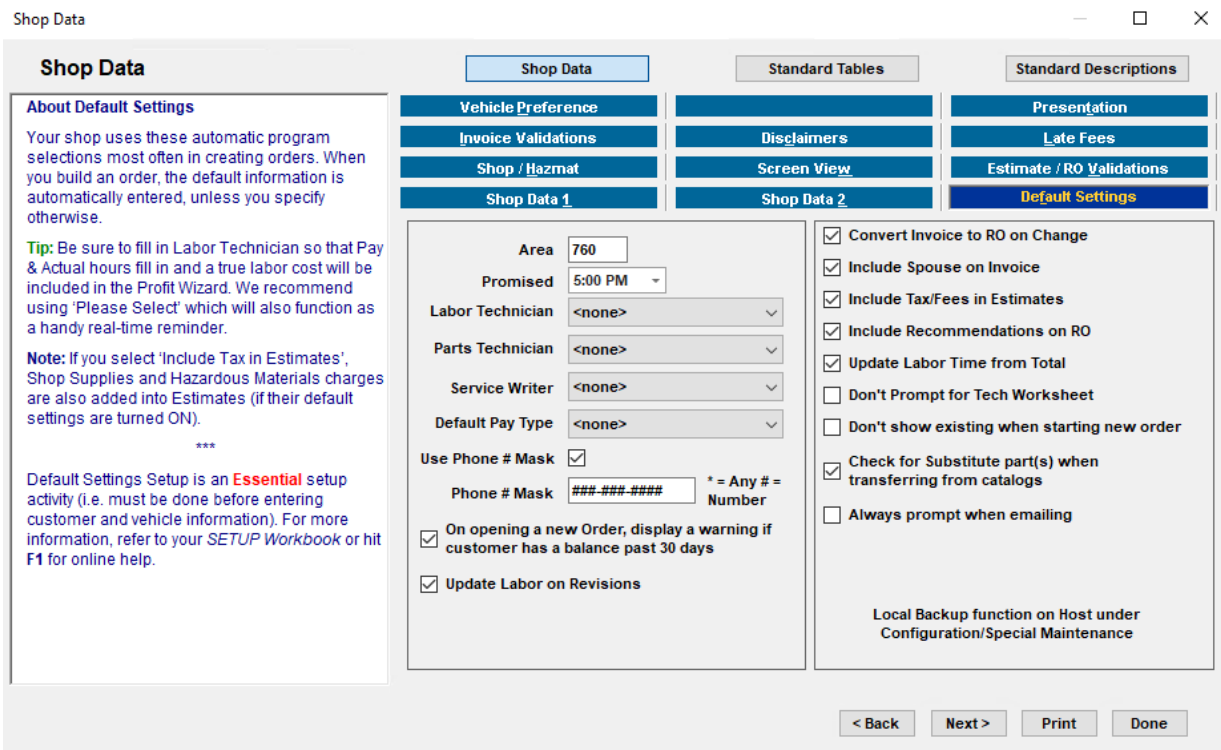




Default Settings

Enter your own Default Settings preferences (recorded back on page **vii**) into the screen shown below. **Default Settings** allow you to automate settings / values to be applied. You'll build faster, more accurate orders, as this default information is automatically entered for you.

NOTE: We recommend using '**Please Select**' as default Labor Technician, as this provides a labor cost for F12 Profit Wizard calculations. See Tech Setup.

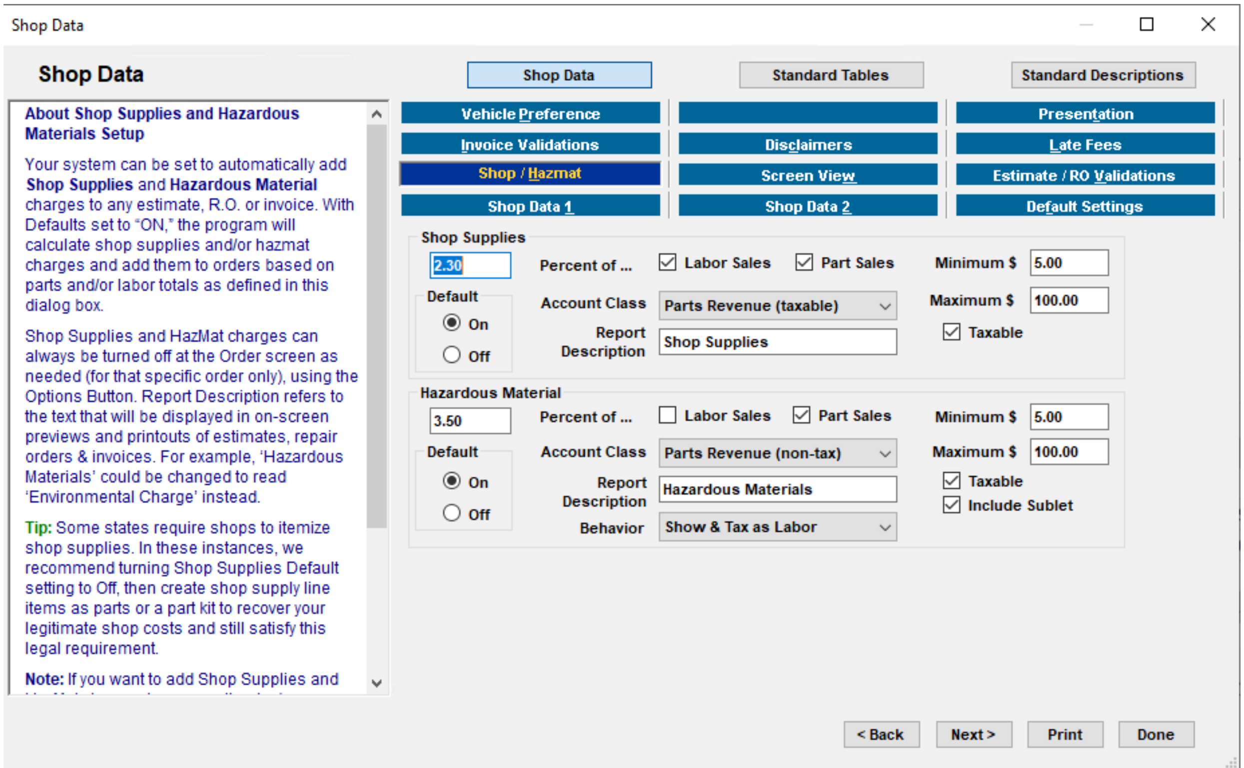


You MUST backup your management program on a daily basis.
The overview of how to setup local protection of your data is shown back on page '**vi**'. Please also review the training video for full setup of database backup under **Training Videos** -> **How Do I?**-> **Database Backup and Validations**.

Shop/Hazmat

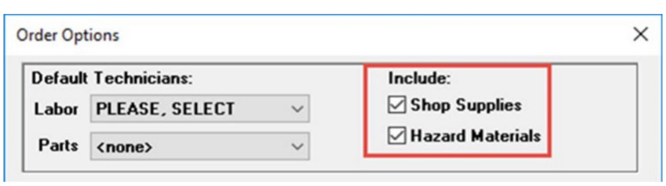
Shop Supplies
HazMat

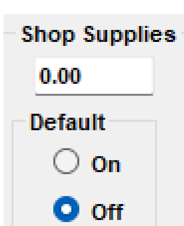
With Defaults set to 'ON', Shop Supplies and/or Hazmat (hazardous materials) can be automatically calculated by labor or parts order totals (or use both) and added to estimates and repair orders.



NOTE: Behavior option is provided for instances where the HazMat is to be taxed differently from Labor. This also determines where HazMat is displayed in document totals.

Note: While these are defaults to use for all orders, they can be removed (from specific order only) by unchecking the boxes found in **Order Options**.



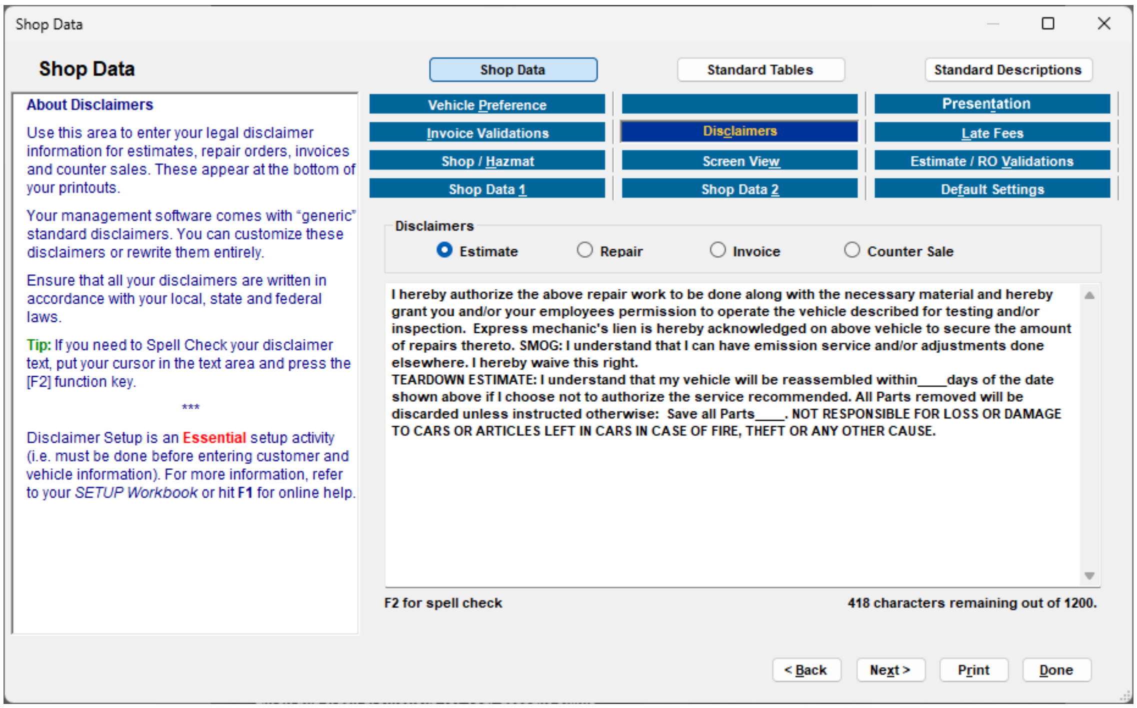


NOTICE: States may require itemized shop supplies; if so, set Shop Supplies **Default** to **Off**; create a parts kit of shop supply items to recover costs and satisfy legal requirements.

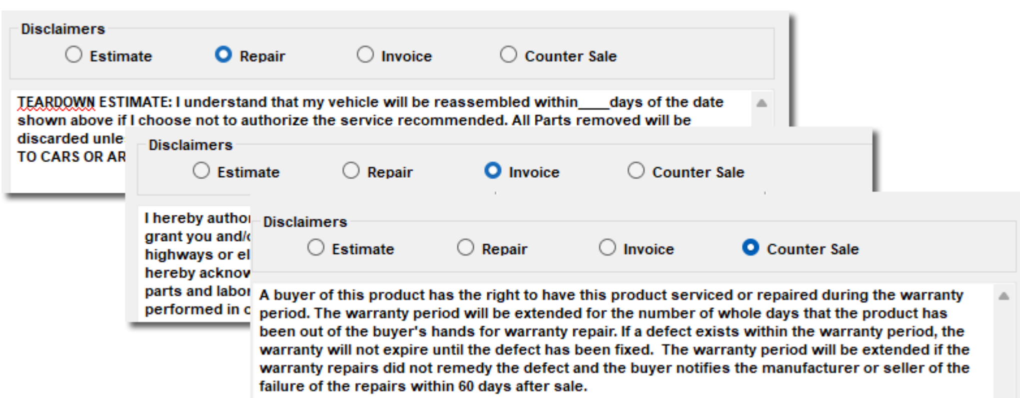
Disclaimers

Disclaimers provide placeholders for your "business language" on Estimates, Repair Orders, Invoices and Counter Sales. These will appear at the bottom of printed documents. SE comes with "generic" standard disclaimers; customize these or rewrite them entirely. For Spell Check, press the F2 key. Below is a sample; you'll want to write your disclaimer to reflect your business policies:

Important NOTE: Make sure all of your disclaimers are written in accordance with local, state and federal regulations. In some instances, it may also be necessary to use specific Estimate or Invoice templates to fully comply with state and local requirements. These template options will be listed in Configurations –> Reports/Printers –> Select Report drop-down list.



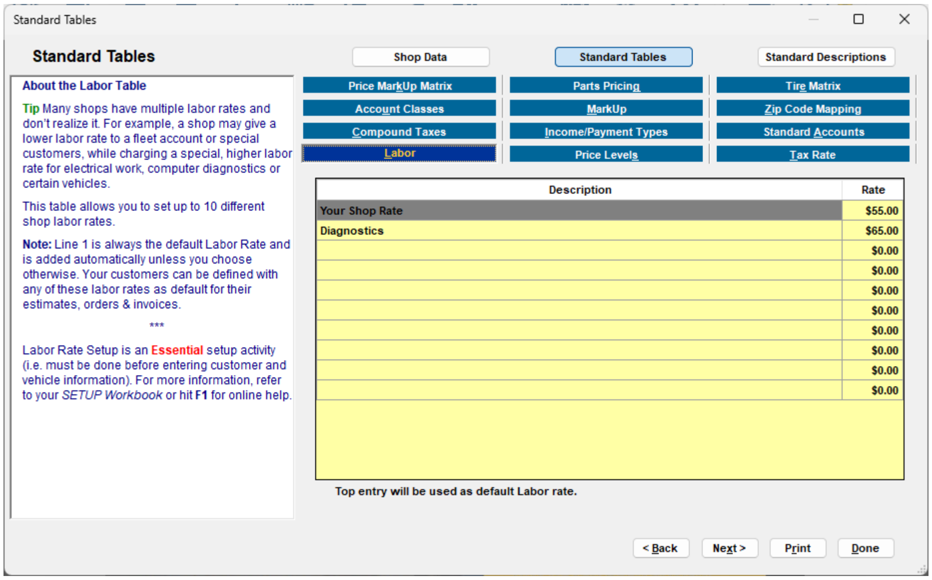
The **Estimate** disclaimer text is displayed first. Edit the Estimate disclaimer text as needed. Repeat for each of the rest of the order states: **Repair**, **Invoice**, and **Counter Sale** by toggling the radio buttons.



Labor Rates

Labor table stores up to 10 different shop labor rates. Customers can be assigned (using Customer Type) to any of these labor rates as default for their estimates & orders

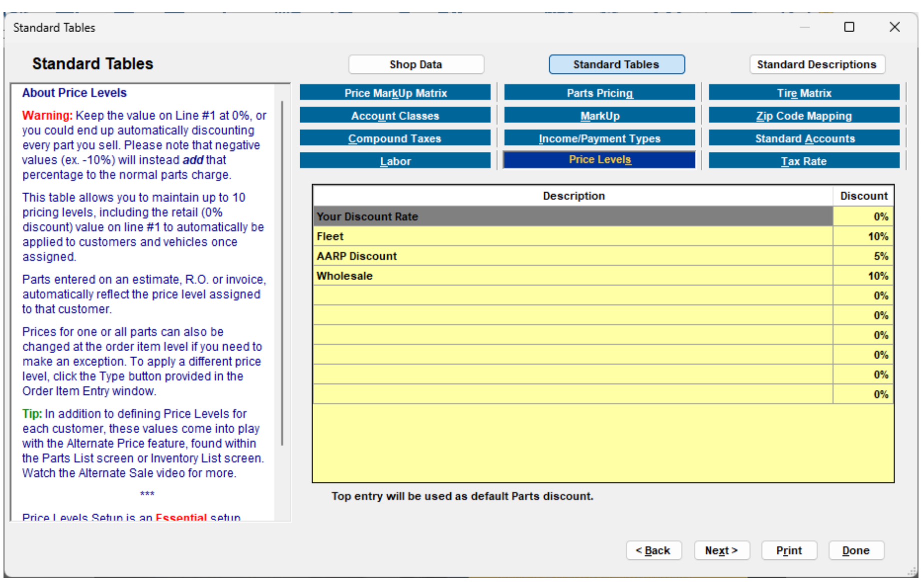
NOTE: Labor rate can also be assigned ***per vehicle*** as well, should the need arise.



NOTE: Line 1 is DEFAULT LABOR RATE (automatic) and will be applied unless another rate is selected.

Price Levels

Price Levels table allows storage of up to 10 levels of parts pricing. Parts entered on an estimate or RO reflect any price level defined (selected by Customer Type). Prices for any or all parts can also be changed (exceptions) at the order item level.

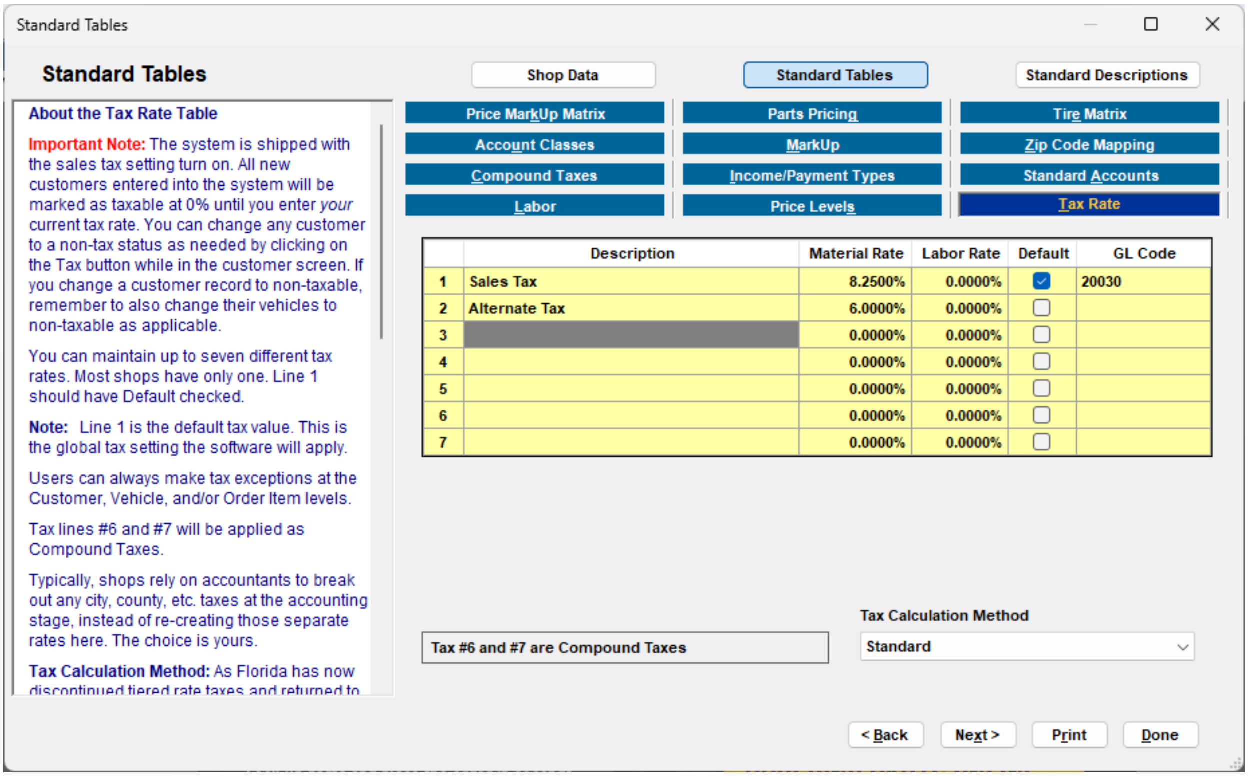


Important! **<u>Keep Line #1 at 0%</u>** or you'd automatically discount every part sold! Negatives values (ex. -10%) will instead <u>add</u> percentage to parts prices.

Tax Rate

Tax Rate Table supports up to seven different tax rates. Most shops have only one. Line 1 should have 'X' in Default. (Most shops can enter a single tax rate)

Note 1: Line #1 default value is a global tax setting SE will apply. Tax exceptions (selecting alternate rates listed here) can be made at Customer, Vehicle, Order or even the Order Item line levels.

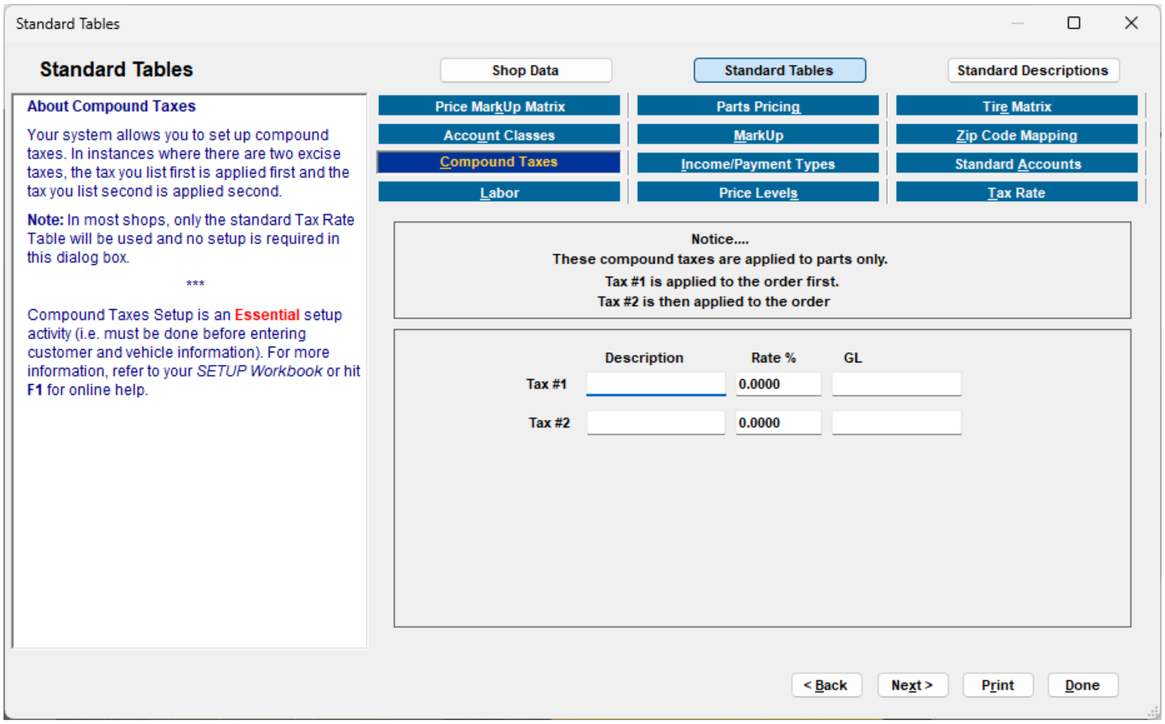


Note 2: The **Shop Management System** ships with Tax flag **on**. Tax is set to **0%** until your tax is entered. Customers can be set to be non-taxable during entry.

Note 3: The NEW Tax Calculation Method selector should be set to **Standard.** Other calculations options are not in play at this time. (alternate Florida tax method was rescinded)

Compound Taxes

Compound Taxes Table allows you to set up compound or excise taxes if you are required to do so.



NOTE: In most shops, only the standard Tax Rate Table (above) is used; this provision is included for special situations that may. Please watch the Training Video if you have questions about Compound Taxes.

Income / Payment Types

Income Accounts are General Ledger (GL) account #s where revenues are grouped for accounting purposes. Finalize before going LIVE.

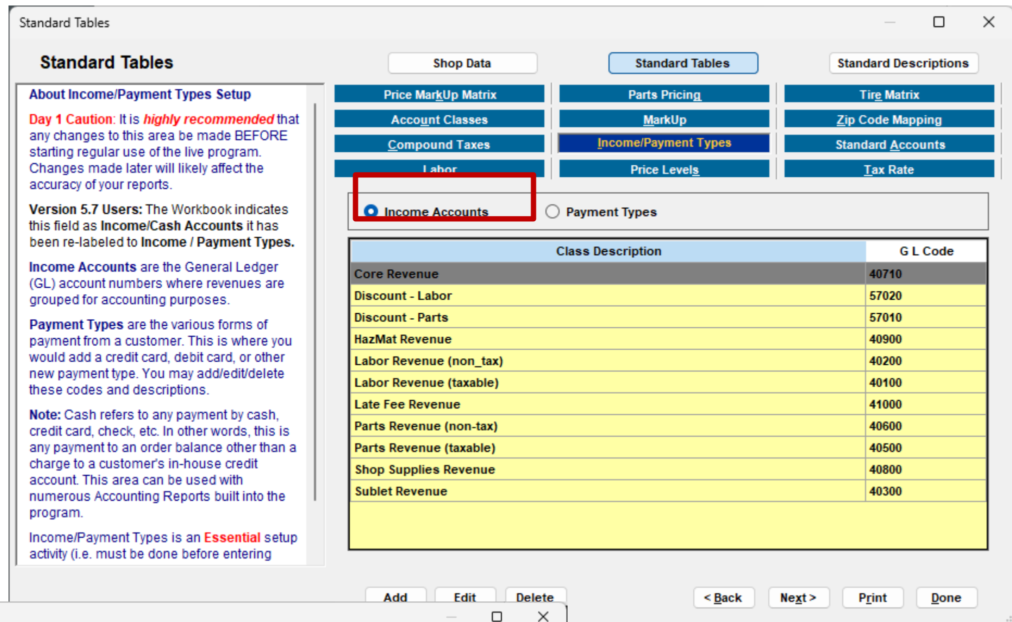
Payment Types - This is where you add a credit card, debit card, or any new payment type for inclusion in the drop-down list.

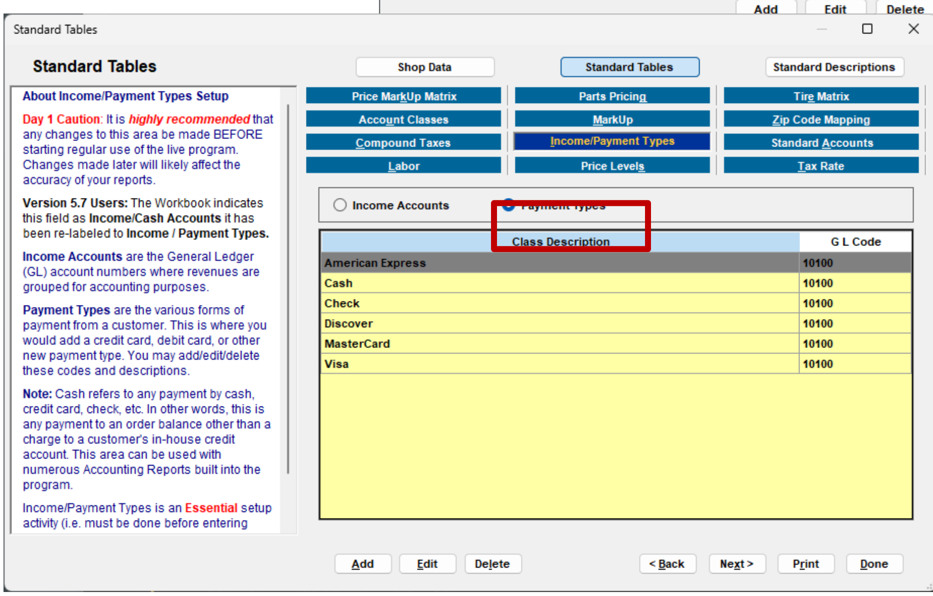
Important: Think very carefully about your payment types/accounts before you start creating live orders! Once a payment type has been used, it **CANNOT** be deleted.

Note 1: Payment is funds received as cash, credit card, check, etc. These are reflected on Accounting Reports.

Note 2: This is where you would click Add to enter any Electronic Payment types – such as Debit Cards or additional credit cards.

Note 3: To set a single default payment type – go to Setup > Shop Data > Default Settings and enter that's in Default Payment Types field.

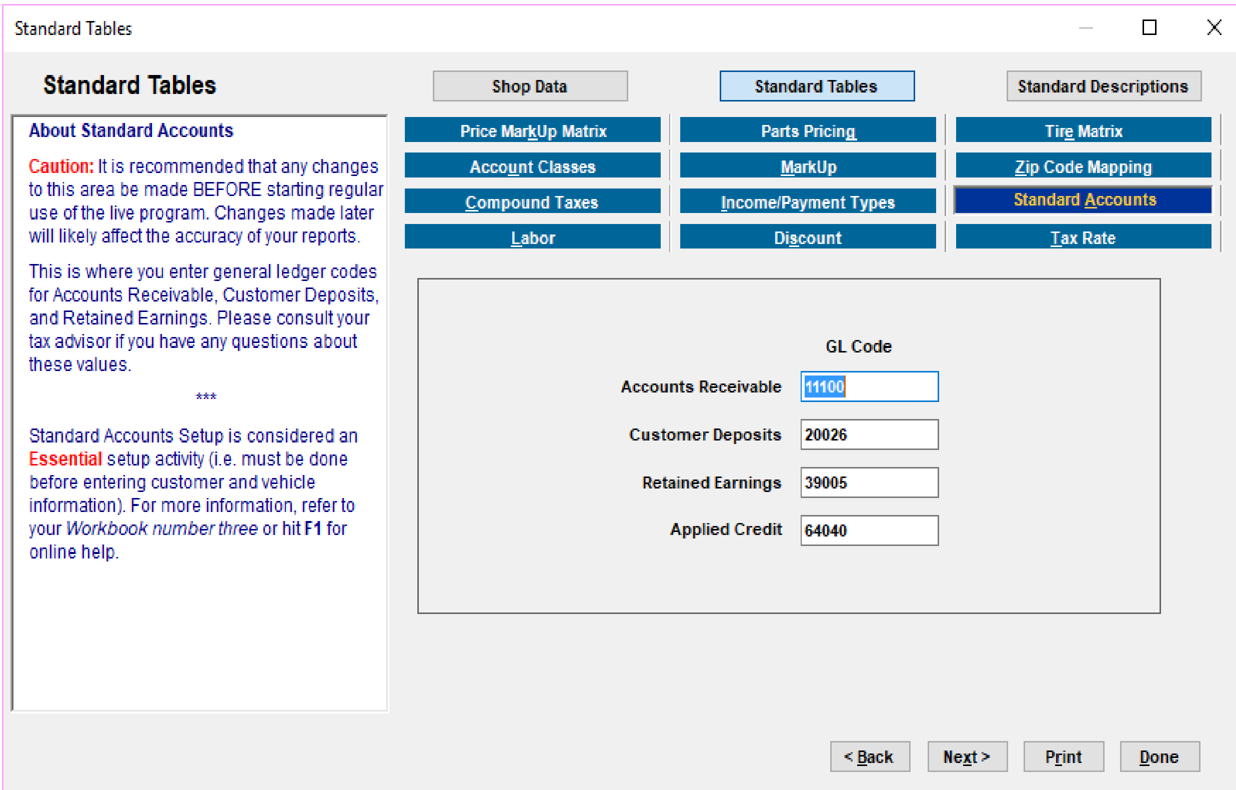




Standard Accounts

Standard Accounts is where you enter general ledger codes for Accounts Receivable, Customer Deposits, and Retained Earnings.

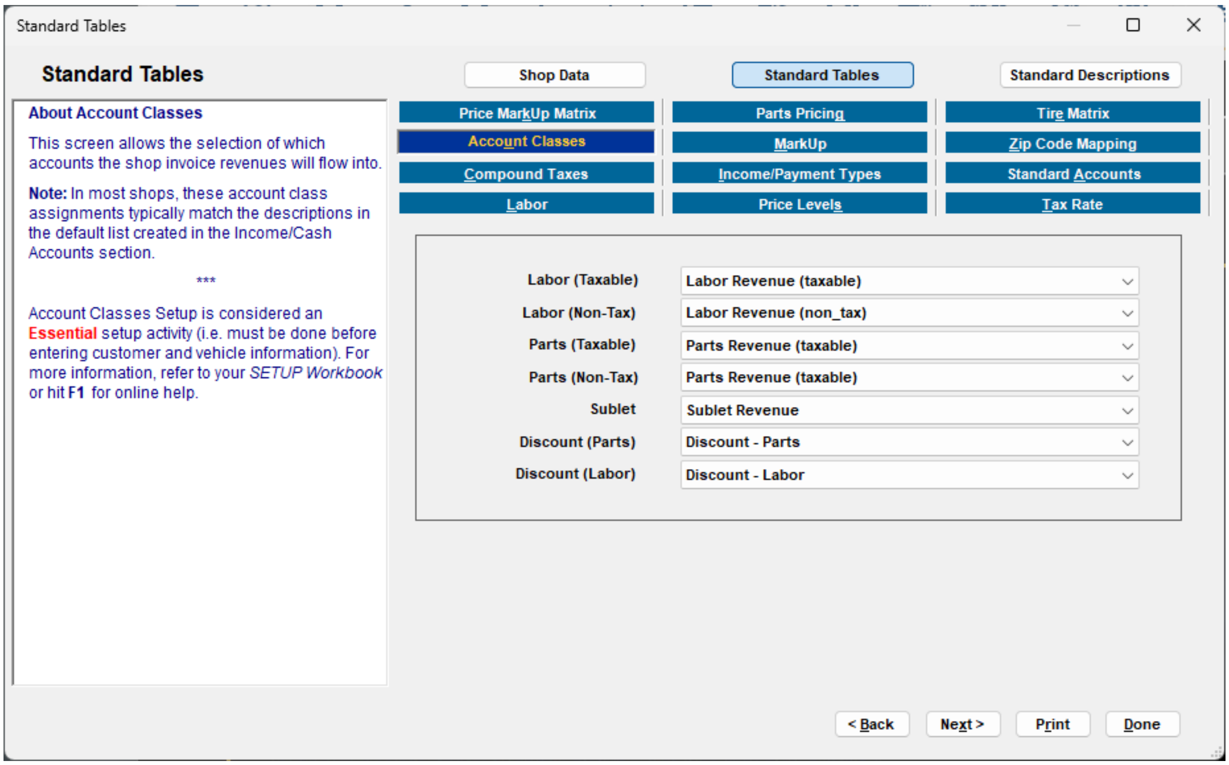
NOTE: Most shops will use the default GL Codes; you should too, unless your accountant wants to change any of these. It is recommended to discuss and confirm **BEFORE** you begin your live invoicing.



Account Classes

The **Account Classes** area allows the selection of the specific accounts that each type of revenue from shop invoices will flow into and accumulate for accurate reporting.

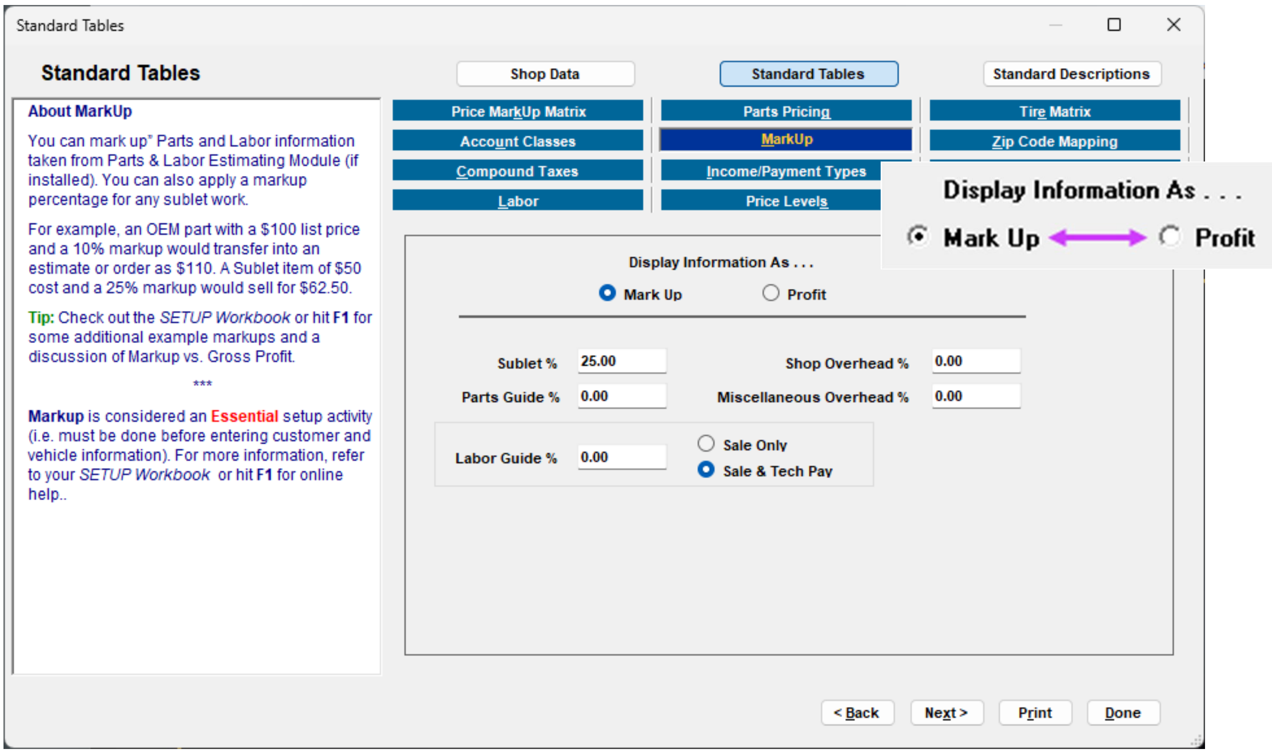
NOTE: In most shops, account class assignments typically match descriptions seen on the left-hand side, one-for-one. This screen supplies some latitude in case shops need some flexibility. Confirm all these account assignments **BEFORE** going live. Changes made later will impact your reporting accuracy.



Markup

In **Markup**, you can enter your shop's Markup percentage. In the example, Sublet items will be marked up 25% (which in turn, provides a 20% profit).

You can also markup **OE** Parts and Labor time transferred from Estimator. An OEM part with a list price of $100 would transfer into an estimate as $110 (@10% Markup). Labor hours (@10% Markup) would transfer 1.0 hr. as 1.1 hrs.



NOTE: Shop Overhead % + Misc. Overhead % DO NOT affect prices on estimates and repair orders. These are used internally to give the Profit Wizard realistic numbers to reflect true cost of doing business.

Business Tip: Be sure to review the **Markup Percentage vs. Gross Profit** discussion on the following pages for a story contrasting these two very different approaches.

Markup Percentage vs. Gross Profit Examples

Example 1: Markup Part by Percentage

- Joe the owner buys an alternator for $100 and wants to "mark it up" 40%.
- Joe's selling price for the alternator is now "marked up" to $140.
- Joe is convinced that this 40% Markup is "*fair*" to his customers.

Part Cost	Markup Percentage	Retail Selling Price
$100	**40%**	**$140**

Example 2: Discounting "Marked Up" Parts

- Joe's best customer Bill needs to buy that same $140 alternator. Bill gets a 30% discount on his parts. (hefty discount with company fleet business)
- Joe discounts the $140 retail-selling price by 30% and takes off $42.
- Joe doesn't realize that he is selling the part ($100 cost) for $98 ($2 less than what he paid). Instead of still making 10% on the part, he lost 2%.

Retail Selling Price	Bill's Discou	Joe's Discount Price
$140	**30% (-$42**	**$98($2 net loss**

Rhetorical Question: Is this perhaps why Joe has such a hard time turning a profit?

Example 3: Using Gross Profit to Determine Retail Selling Price

- Joe, the shop owner/service writer, wants to make a 40% gross profit on every part he sells.
- To do this, Joe must add 66% to his cost on the alternator and sets the retail-selling price at $166.

Part Cost	% Added to C	Retail Price	Gross Pro
$10(	**66%**	**$166**	**40%**

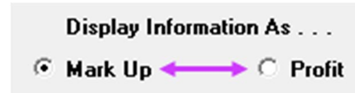
Example 4: Discounting After Using Proper Gross Profit

- Ben comes into the shop and needs to buy that same alternator. Loyal customer Ben gets a 30% discount on his parts.
- Joe discounts the $166 selling price by 30% and takes $49.80 off the retail-selling price.
- Joe's not making much money this time, but at least he isn't losing any money selling the alternator to Ben at a 30% discount.

Retail Selling Price	Discount %	Discounted Price
$166	**30% (-$49.8**	**$116.20**

Parts Markup & Gross Profit Projections Table

Markup is the percentage of the amount you earn on the cost of an item purchased. Gross Profit is the percentage of the amount you earn on the selling price of the item. Gross profit tells you what you retain on each sale.



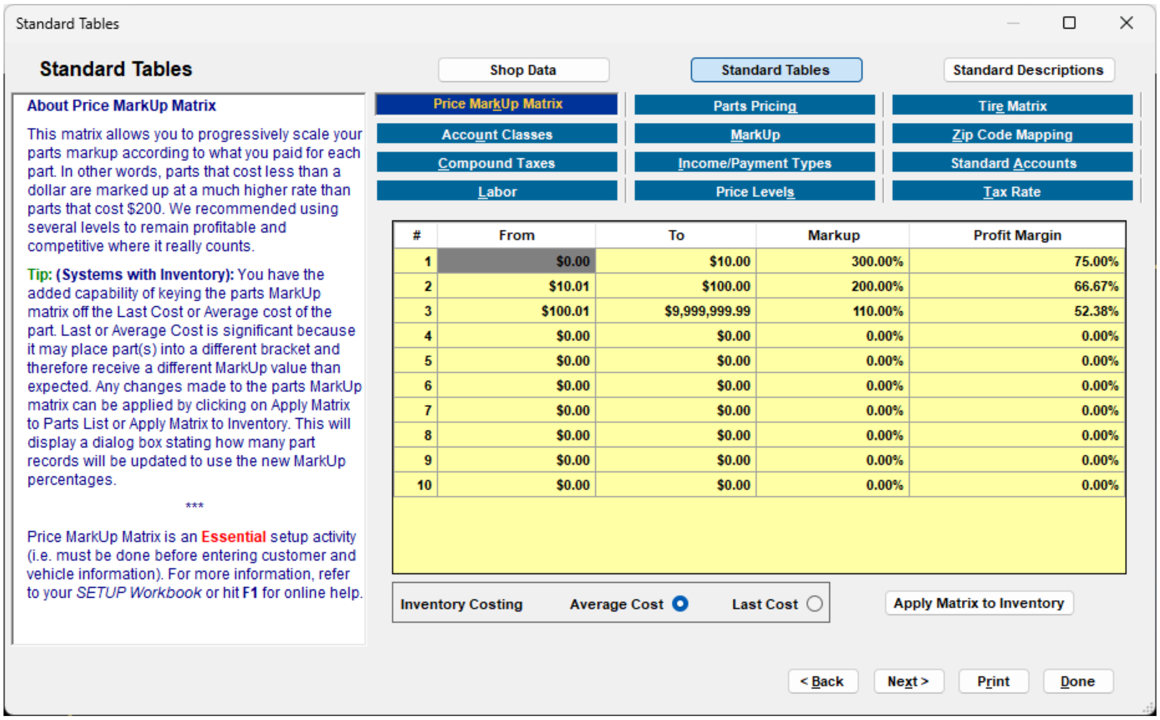
% Added to Cos	Gross Profit Part Sale
30%	23.1%
31%	23.7%
32%	24.2%
33%	24.8%
34%	25.4%
35%	25.9%
36%	26.5%
37%	27.1%
38%	27.5%
39%	28.1%
40%	28.6%
41%	29.1%
42%	29.6%
43%	30.1%
44%	30.6%
45%	31.0%
46%	31.5%
47%	32.0%
48%	32.4%
49%	32.9%

% Added to Co	Gross Profit Part Sale
50%	33.3%
51%	33.8%
52%	34.2%
53%	34.6%
54%	35.1%
55%	35.5%
56%	35.9%
57%	36.3%
58%	36.7%
59%	37.1%
60%	37.5%
61%	37.9%
62%	38.2%
63%	38.6%
64%	39%
65%	39.4%
66%	39.8%
67%	40.1%
68%	40.5%
69%	40.8%

% Added to Co	Gross Profit Part Sale
70%	41.2%
75%	42.9%
80%	44.4%
85%	45.9%
90%	47.4%
95%	48.7%
100%	50%
125%	55.6%
150%	60%
175%	63.6%
200%	66.6%
225%	69.2%
250%	71.4%
275%	73.3%
300%	75%
325%	76.5%
350%	77.8%
375%	78.9%
400%	80%
500%	83.3%

Price Markup Matrix

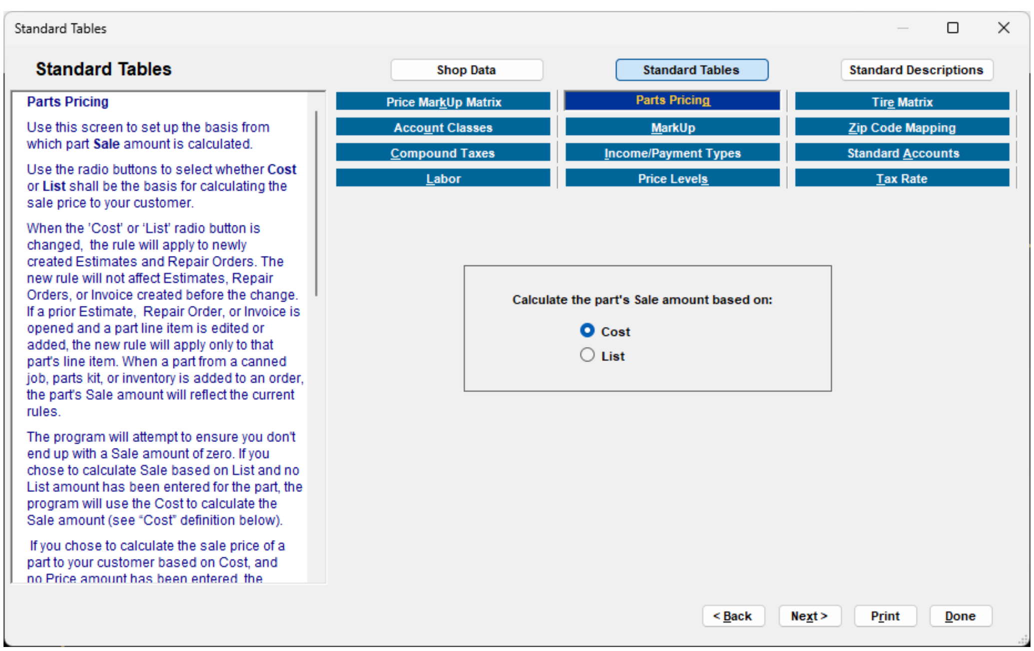
Price Matrix supports up to 10 levels of markup according to cost $ range:



NOTE: Last Cost / Average Cost is a GLOBAL decision impacting ALL part sales profitability reporting.

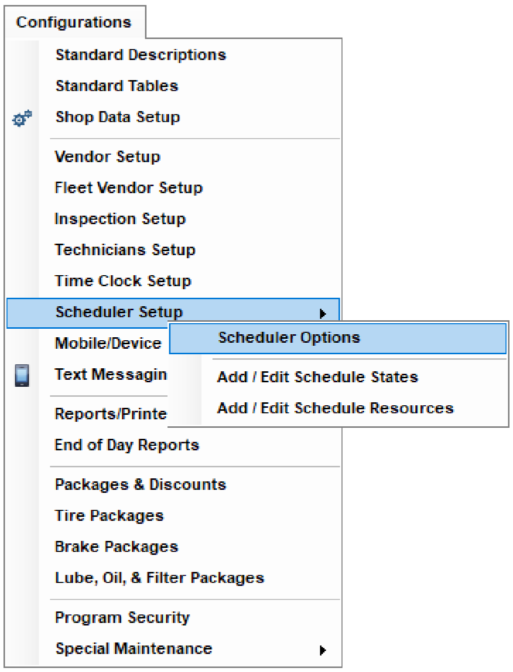
Parts Pricing

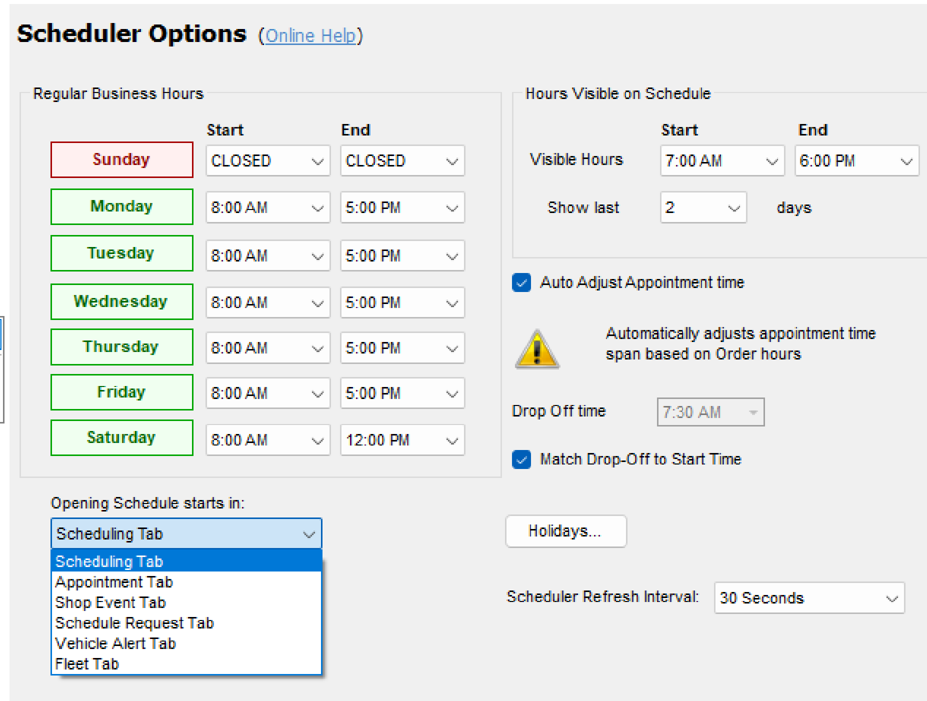
We *strongly recommend* the **Price** option so that the Price Markup Matrix can calculate your selling prices.



Scheduler Options

Schedule options are found under **Configuration/Scheduler Setup/ Schedule Options**. These options include defining regular business hours, the range of hours to be shown in the calendar, number of previous days displayed by default, and selecting any recurring holidays or special events.

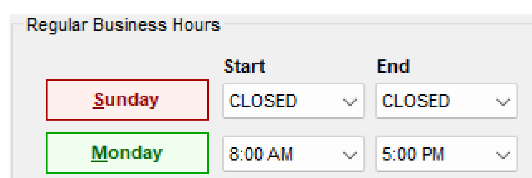




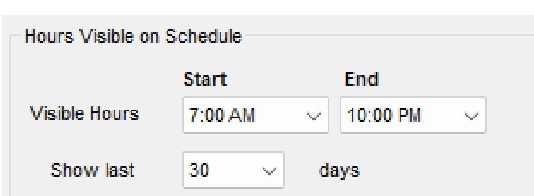
Opening Schedule starts in – Select default opening view when Scheduler is opened. Users can choose Scheduler, Appointment and Shop Event Tabs; others are reserved for future use.

Regular Business Hours

Each day of the week must be setup as either CLOSED or with Start / End times. To set the start time for Monday, left-click on the Monday button, doing so will set the initial Start and end Times as 8:00 AM to 5:00 PM and paint the button green. Set the time for each day of the week, then if required modify the times for each day by clicking on the down arrows.



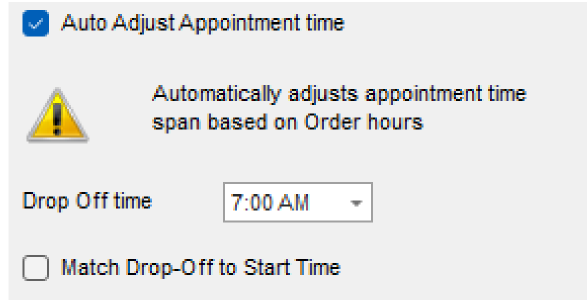
Hours Visible on Schedule



Visible Hours - Sets system display for the part of the day you want to see in the calendar view. Typically, this would be set to an hour before and after your regular business hours.

Show Last (number of days) - This controls the range to display in the calendar previous to the current date. Experiment with this setting to meet your specific needs.

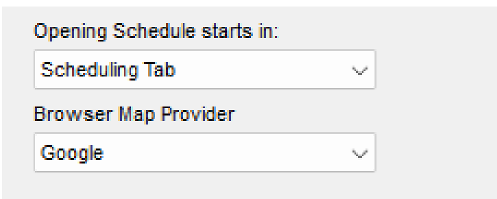
Auto Adjust Appointment Time - This default setting is provided to save user time and effort if actual Order Hours increase, due to additional work being sold. The appointment time will automatically be extended in the Scheduler to reflect this change. While this can be turned off at the individual appointment level, it’s probably a good idea to leave it turned on.



Drop Off Time - Set a default Drop Off time to have this automatically filled in, saving time as you create a new appointment in the Scheduler. Select the most popular drop off time and enter it here. It can always be updated at the individual appointment level.

Match Drop-Off to Start Time: Check this box to automatically match the Drop-Off time to the Order Start Time if you prefer a simpler approach.

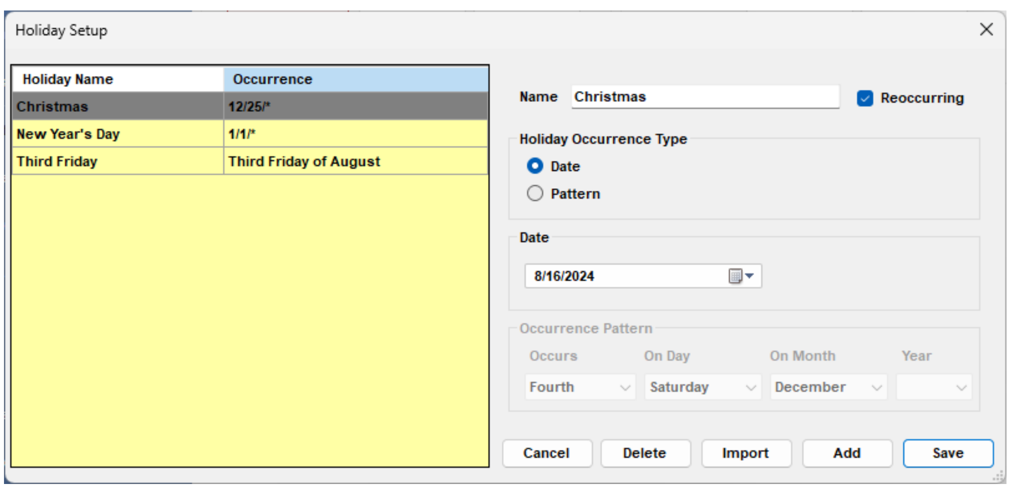
Browser Map Provider: Choose between available browser maps (Google or Bing).



Scheduler Refresh Interval – The update frequency of Scheduler related columns on WIP screen is defaulted to 30 seconds; this can be slowed to every 5 minutes, if the refresh is distracting. Set a longer time on PCs where appointments are not made. Changes to Scheduler items will simply not appear in the WIP screen data as quickly.

Holiday Setup

Click the Holiday button to set up days that the shop is closed for business.



Name and Occurrence type, date and Occurrence define holidays. The **Import** button presents you with a list of standard US Holidays to be auto-imported into the yearly calendar. Simply choose the holidays from the list to enter it into your Holiday list.

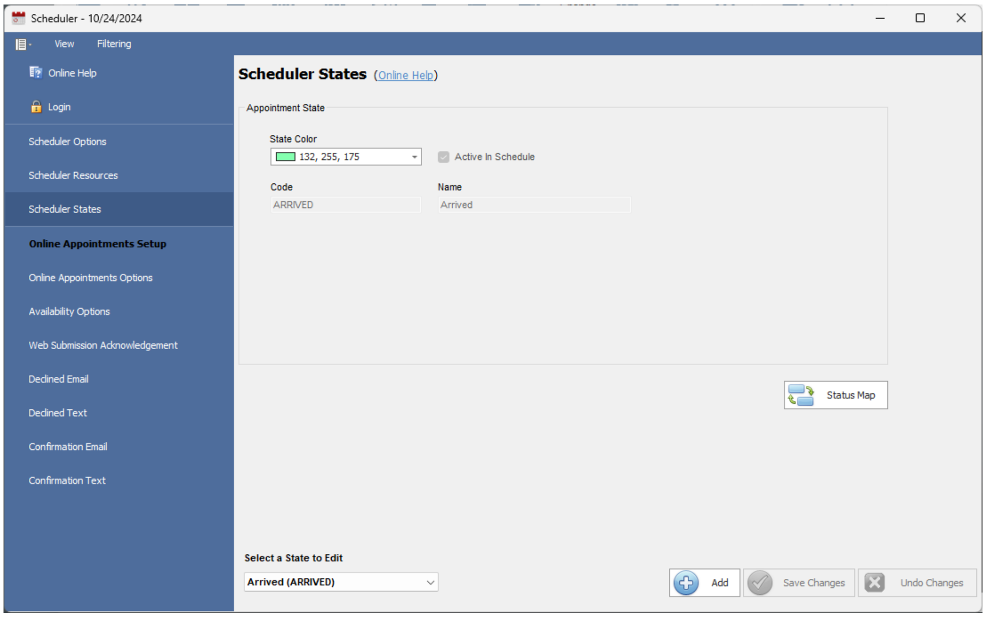
To enter an additional Holiday or special event not listed, click on **Add** button, then Name the holiday or event by typing text into the Name field.

Holiday Occurrence Type defaults to today’s date; you may overtype this or use the calendar tool to enter a specific date. **If this is a recurring event**, change to Pattern mode and enter parameters such as ‘Fourth Wednesday of October’ for example. Be sure to click Save for any holidays created and then click the Red X to close the Holiday Setup window when finished.

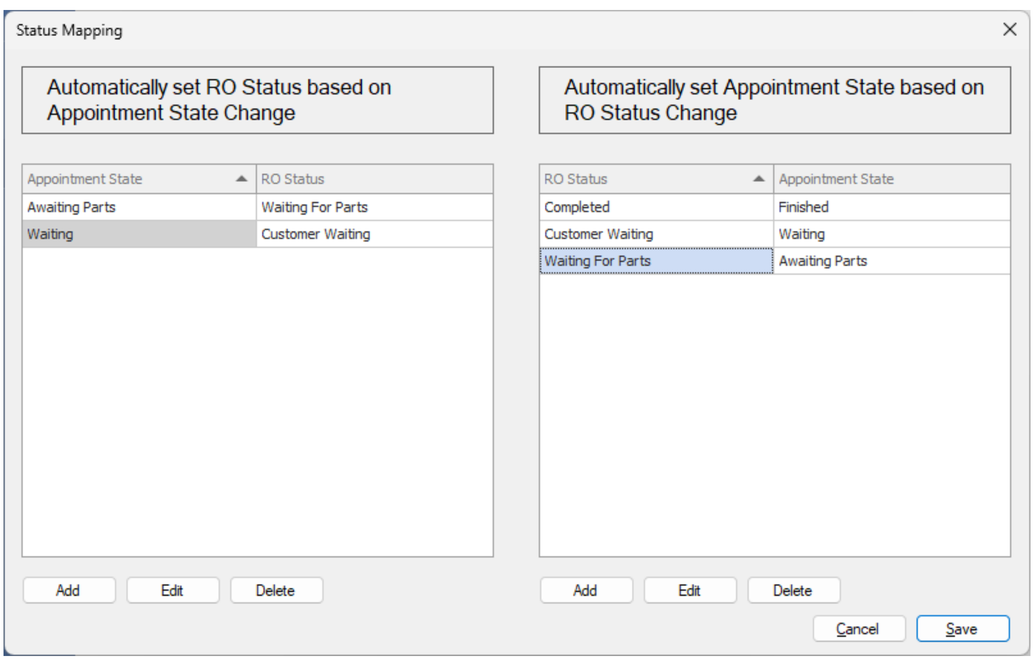
Scheduler *States*

Configurations > Scheduler Setup > Add/Edit Schedule States

Appointment states are used to represent the current state of the appointment. Several common appointment states are provided as system defaults; these cannot be changed. These include Waiting, Arrived, Awaiting Parts, Call and Remind, Call Customer, Cancelled, Closed, Finished, No Show and Open.



Status Map – Provides the ability to map Appointment States to Order Statuses. With relationships in place, any changes to Appointments will automatically change the WIP screen order Status entries or vice-versa. This saves time and prevents errors.



Tip: Mapping Repair Order Statuses and Appointment States improves efficiency and accuracy and eliminates conflicting information from manually trying to keep two program areas in agreement.

Schedule Resources

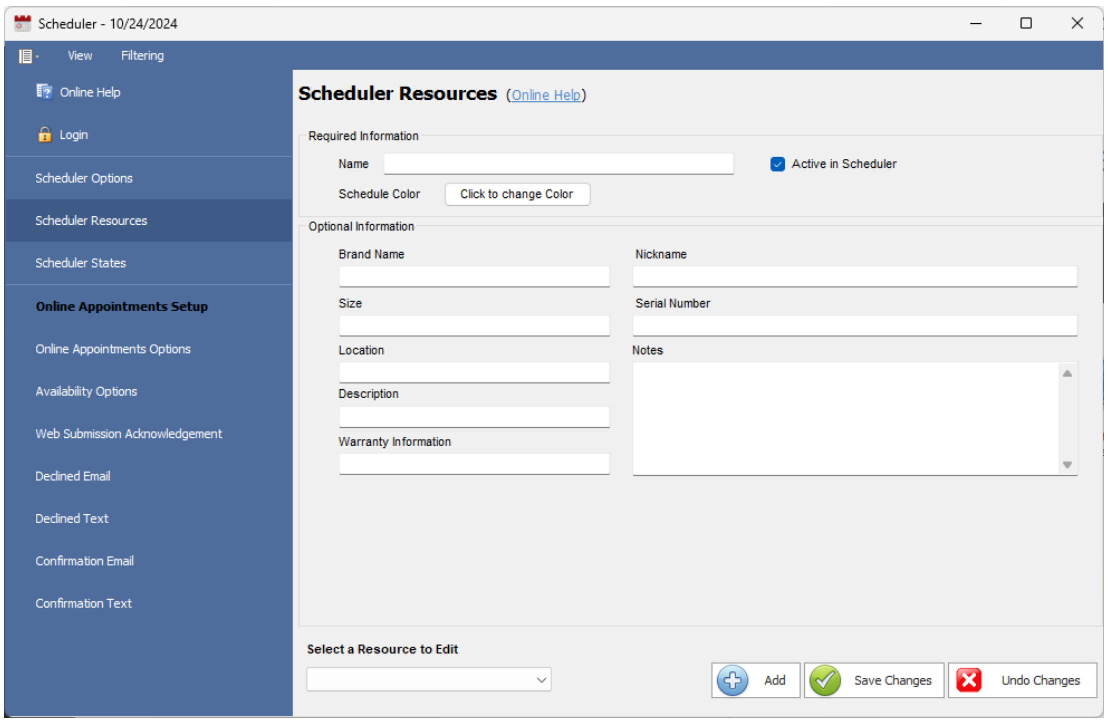
Configurations > Scheduler Setup > Add/Edit Schedule Resources

Schedule Resources allows you to catalog your bays, pieces of equipment, scan tools, lifts, tire machines, locations or anything specifically required for certain types of appointments. Each resource is defined by ***Name***, ***Schedule Color*** (easier to identify on the calendar), ***Brand Name***, ***Nickname***, ***Size***, ***Serial Number***, ***Location***, ***Description***, ***Warranty Information***, and ***Notes***.

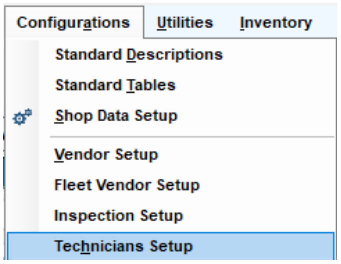
Add/Edit Schedule Resources

Catalog a new resource by clicking on the ***Add*** button and complete any or all fields. The ***Active in Scheduler*** checkbox controls visibility of the resource for potential assignment; it is checked by default. Remember to click on ***Save*** when finished.

NOTE: At this time, only one resource may be associated with an appointment or shop event.



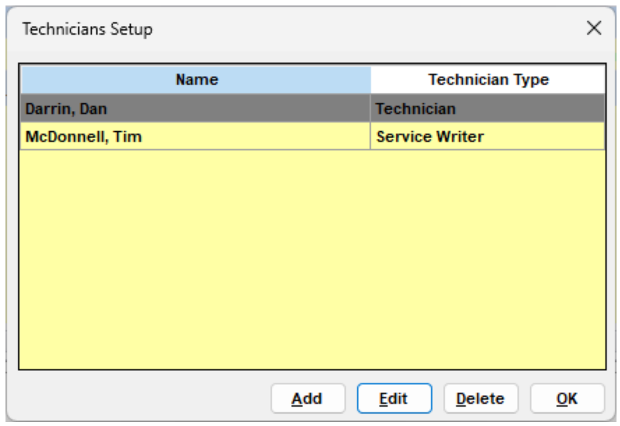
Technicians Setup



Technicians Setup is selected from the Configurations menu.

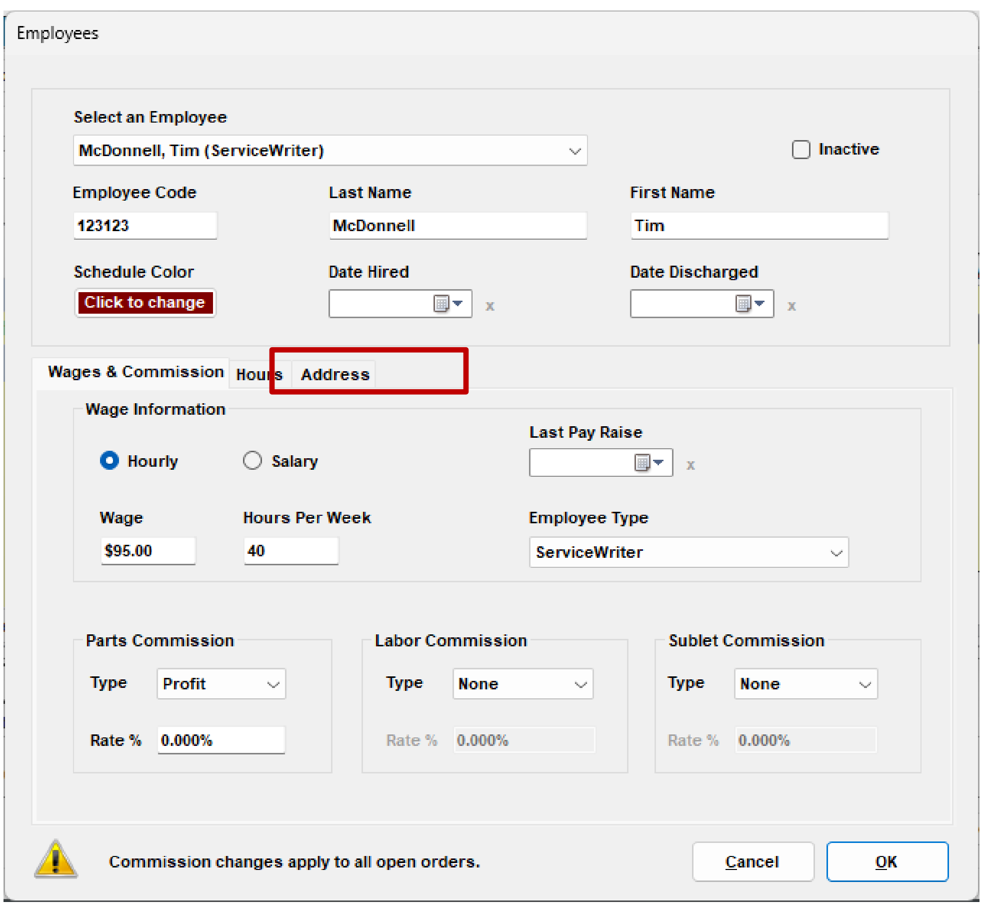
There are three areas to fill out in Technicians setup: Wages and Commissions, Hours, and Address. This is used to create data for Tech Commissions Report and figuring shop's profit margin on work performed (F12 Check Profit function).

NOTE: If a service writer sometimes also performs labor, they would be set up twice; once as a Service Writer and also as a Technician. This ensures the name(s) appear in both the Labor Technician and Service Writer drop lists.



Click on **Add** to create a new tech or **Edit** to edit an existing tech. This opens the Employees dialog box.

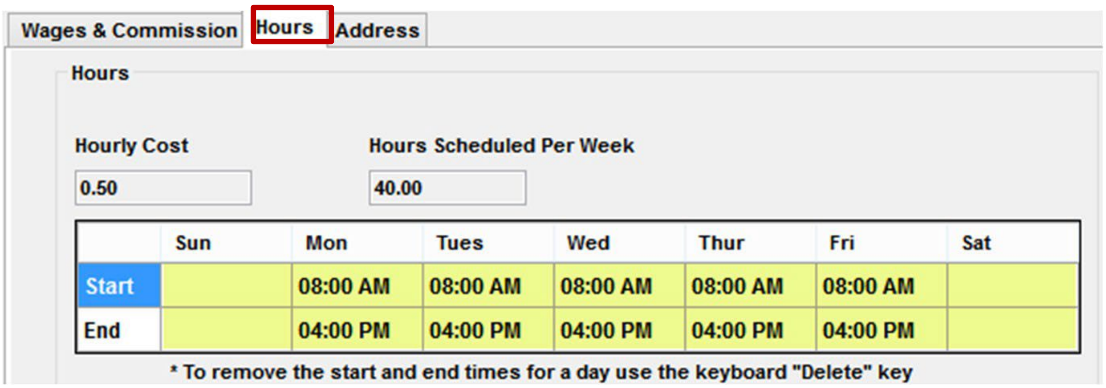
Wages & Commissions



Input: Space is provided in SE Setup Information Gathering pages to record multiple Technician(s) & Service Writer(s) details; fill in the data or enter it directly into this SE program technician screen.

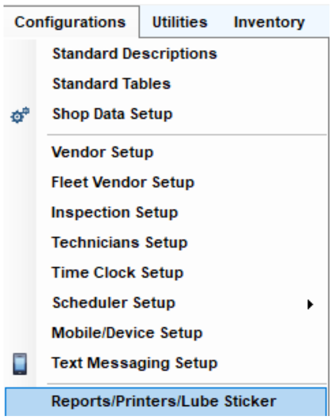
Hours of Availability

Click in each cell to enter the appropriate Start and End times. If this person is not available on certain days, you may highlight the times in cells and press Delete to make those cells blank.



Employee Address

Enter any appropriate details in the fields provided.



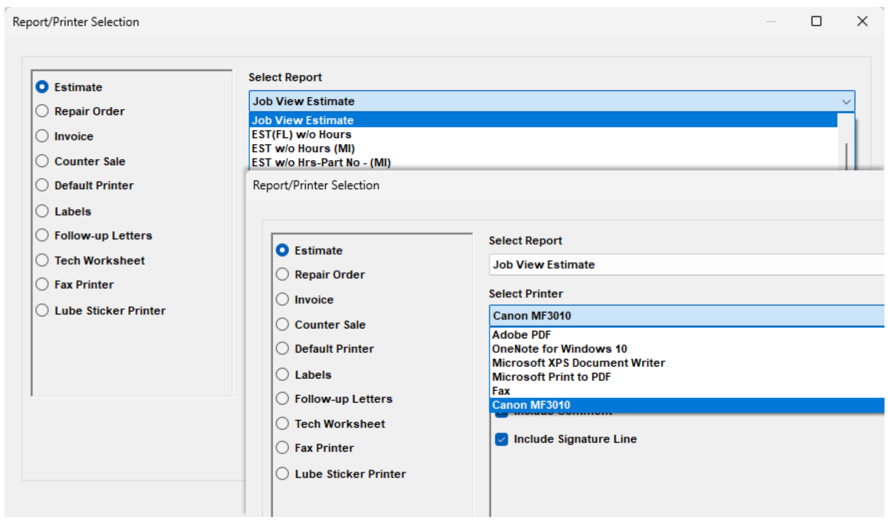
Reports/Printers

Reports/Printers allow users to decide what style of printout is generated, which printer(s) are used, how many copies are printed. Microsoft® Windows™ selects default printer automatically; different printers (or printer trays) may be selected for the various types of documents. **Reports/Printers/Lube Sticker** is a selection from the **Configurations** menu.

NOTE: When users click on the **Print** button, the program immediately prints the number of copies specified for the selected document (2 copies for Invoice, etc.) If you wish to preview the document before actual printing, you should select **File** > **Preview**.

Estimates, Repair Order, Invoice, Counter Sales

Select the **Report** template and **Printer** device to complete each of your selections. Default Report templates are provided for each order status, pick a different Report type if desired.



Repeat for Repair Orders, Invoices, Counter Sales, Technician Worksheet, Labels. The process is essentially the same with the following exceptions/considerations.

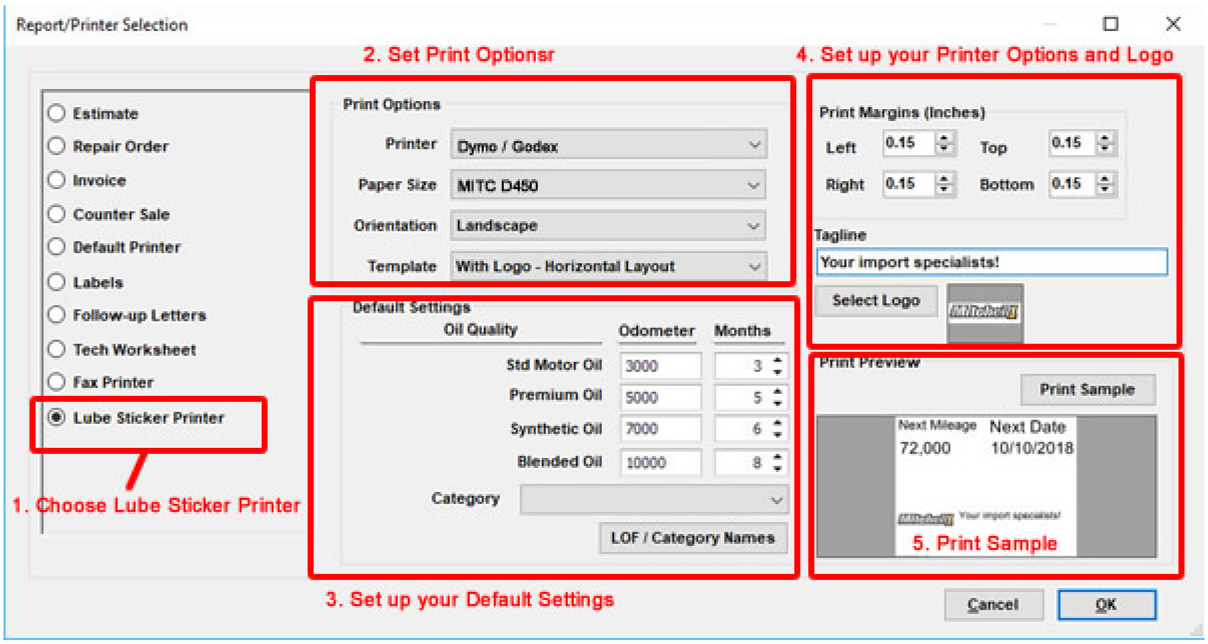
- **Estimates** - Typically two Estimate copies are printed; one for customer and one for shop to file. **Choose Email Template Editor** if you desire to modify the standard email template for Estimates.
- **Repair Orders** - It is possible to 'Mark all ROs as Approved/Printed' under Screen View tab options, if you don't need to actually print ROs. **Choose Email Template Editor** if you desire to modify the standard email template for repair Orders.
- **Invoices** - It is recommended that two Invoice copies are printed; one copy for the customer, another copy for the shop to keep on file. **Choose Email Template Edito**r if you desire to modify the standard email template for Invoices.
- **Labels** - Make certain you select the 'with' or 'w/o vehicle' option that best fits your label & postcard printing needs.

NOTE 1: Special EST / RO / INV templates are provided to meet specific requirements by certain states. These will include a state abbreviation in the titles in the list. Your SE Setup Information Gathering document also indicates where any state-specific template options available.

NOTE 2: **Group By Job View** - appropriate document templates (by state) are automatically selected.

Lube Sticker Printer

Setup for Lube Sticker printing is more complex than for other reports, essentially a five (5) step process.



1. Click the **Lube Sticker Printer** option.

2. Set your **Print Options** to match the Printer, Paper Size, Orientation, and Template you require.

Note: You must first set up your sticker printer and make it visible on your network for it to appear on the Printer list.

3. Set your **Default Settings.** These are the settings that will display when launching the Print LOF option from the Order tab.

Note: The LOF/Category Names are the same ones used in your LOF packages.

4. Setup your Print Margins, Tagline, and Logo

- **Print Margins -** manually adjust margins. Settings will automatically adjust to fit best based on the selected paper size.
- **Select Logo** - browse and select logo image file. Maximum file size is 98 KB.

5. Print Preview/Print Sample

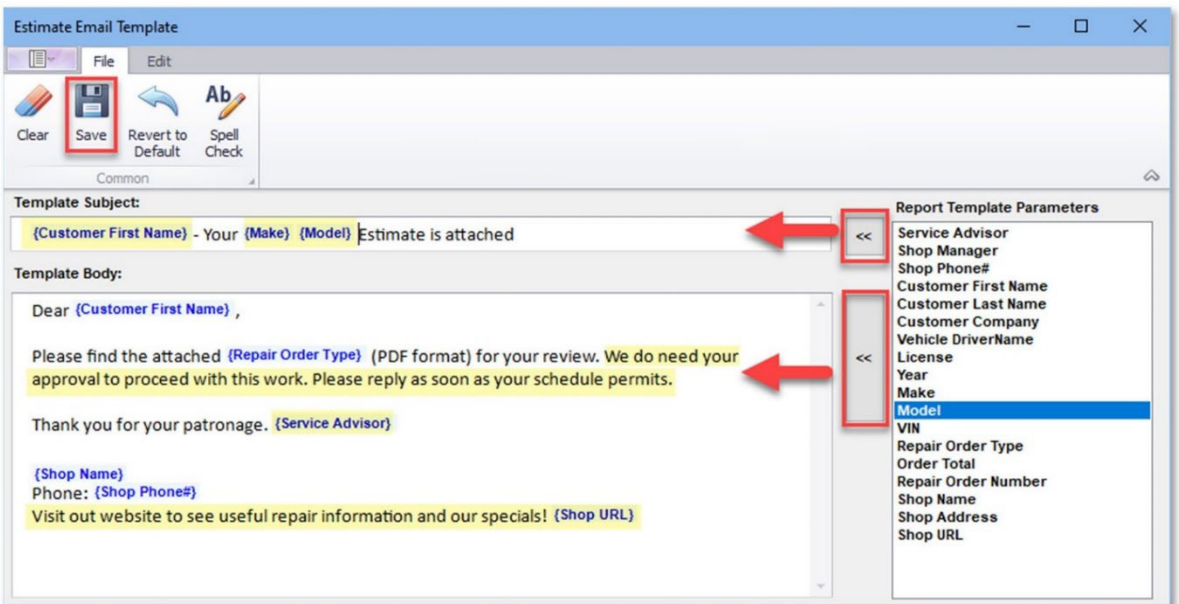
- Changes to the sticker template will display in real-time in the **Print Preview** section.
- Click **Print Sample** to print a sample of how your sticker will look. Adjust your print margins as needed to ensure proper alignment.

Email Template Editor

By default, Manager SE includes generic messages that include basic customer and shop information. This is included in the 'handoff' to your shop PC's email client (Outlook, Thunderbird, etc.) to customer' email Inboxes. Click on the Email Template Editor button to open the editor to change an email template for the selected document type. Make note of your selection before clicking the button so that you can see and edit the appropriate message content. 'Estimate' is selected by default so we'll take a look at that template.

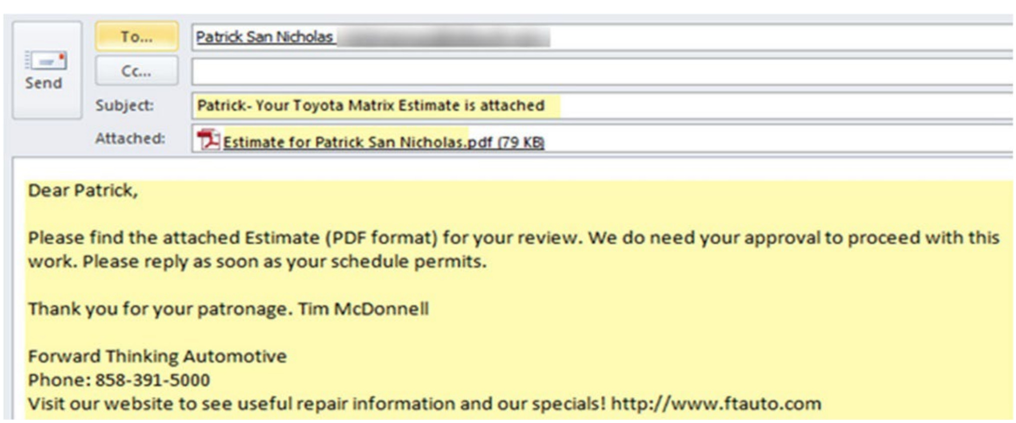
This editor allows you to create their own preferred message to be included when emailing an Estimate, R.O. or Invoice to a customer. You may free-form type anything with basic tools or incorporate actual database fields into the Subject line and the message body itself. You only type what appears in black; any blue text shown in brackets is a database field that has been inserted.

Click inside your template message (or template subject line) where you want to insert a database field, then select that field (listed in Report Template Parameters), then click the double-arrow to insert that spot in either the Template Subject or Template Body you specified.



Click on **Save** in editor to keep template changes; then click **OK** in Report/Printer selection screen to close.

A customized email template can include customer, vehicle, shop and repair specifics. See Report Template Parameters (database fields list) above for additional possibilities to include in your email template(s).

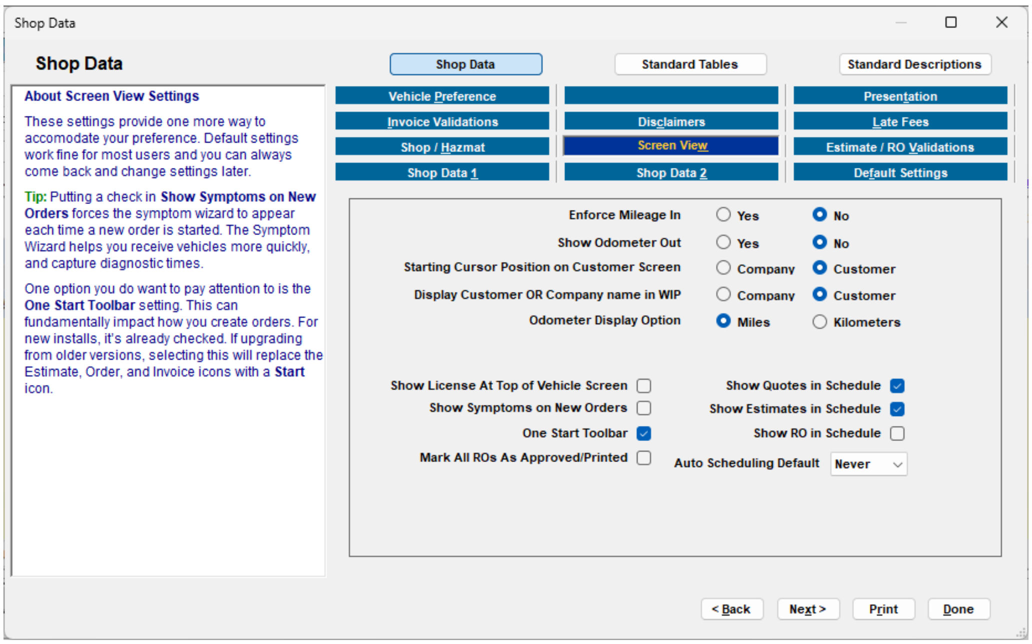


Using the Email Templates Editor to tailor your outgoing email will ensure proper messaging, accuracy and personalization. Manager SE will even insert the amount due on your Invoice template, if you so choose.

Screen View

Screen View allows users to customize program preferences.

Recommendations for various Screen View option settings are shown below, with further background provided for each on the following page.



Screen View options	Recommended
Enforce Mileage In [can be password protected]	**Yes** No
Show Odometer Out [required in some states]	**Yes** No
Starting Cursor Position on Customer Screen	Company **Customer**
Display Customer OR Company Name in WIP	Company **Customer**
Display Margin in WIP [sensitive business data]	Yes **No**
Odometer Display Option	**Miles** Kilometers
Show License at Top of Vehicle Screen (not VIN)	**Yes** No
Show Quotes in Schedule	Yes **No**
Show Estimates in Schedule* *[see next page]*	**Yes** No
Show RO in Schedule* *[see next page]*	**Yes** No
Show Symptoms on New Orders [pops up list]	**Yes** No
One Start Toolbar (default is Yes)	**Yes** No
Mark All ROs As Approved/Printed	**Yes** No
Auto Scheduling Default	Never / Prompt / **Always**

Details for Screen View tab options

- **Enforce Mileage In:** is provided to ensure that service advisors always enter mileage. This is crucial for accuracy with sending shop's service reminders to customers.

- **Starting Cursor Position / Display Customer or Company**: Unless your shop does a lot of commercial fleet business, select Customer instead of Company name as starting point for customer data entry /WIP display.

- **Show License at Top of Screen**: Previously, most users preferred to start vehicle data entry with VIN decode. Since the introduction of **Plate-2-VIN lookup**, users prefer a Vehicle screen leading with license plate field. If you prefer starting from the VIN entry field, leaving this selection UNCHECKED will place the VIN field first, followed by license plate field.

- **Show Quotes in Schedule** would very likely clutter your Schedule with items that have no commitment level or customer contact information.

- Use **Show Estimates in Schedule** if you plan to schedule with them; otherwise uncheck the box to not clutter your Schedule with these items.

- **Show ROs in Schedule** for most shops, this is the setting you will want to use for your Schedule display. If your system is set to launch as RO, skipping Estimate stage, you must select yes for them to become scheduled.

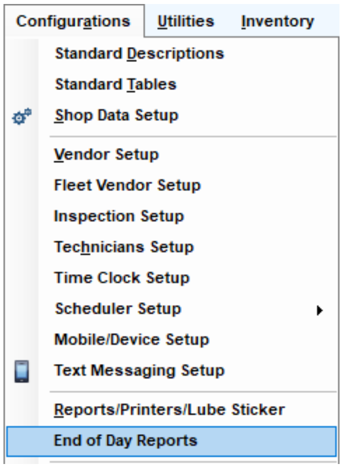
- **Show Symptoms on New Orders:** is very useful because it pops up the Symptoms list so that users are reminded to use them. Press ESC to exit if the Symptoms list is not needed.

- **Mark All ROs as Approved/Printed:** option eliminates the previous steps required to mark an RO as "printed" to put parts into 'Committed' status.

- **Auto Scheduling Default:** When posting an invoice, SE can open the Schedule - Appointment Editor to arrange customer's next appointment. ***Always*** will open the appointment editor with customer and vehicle already selected; ***Prompt*** will ask if you want to do that; ***Never*** setting will not open the editor or ask if you want to do so.

Assisted Setup Complete! This concludes the basic setup task required for invoicing; please continue with self-setup options to complete additional configuration aspects. Remember **F1 Help** and **SE training videos** are available for these additional concepts.

• Setup-Additional by User



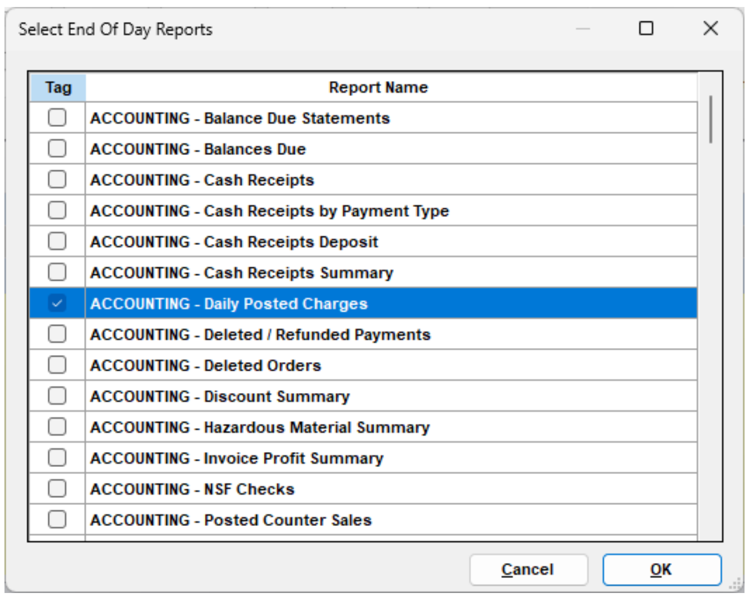
End of Day Reports

End-Of-Day Reports setup is where you select which reports will be run together as a “batch operation” at the close of business. This saves time at the end of every business day.

Consider which reports you want to run on a daily basis and then open Configurations – End of Day Reports and use steps below to tag them.

Select your reports by checking the box (or double-click on highlighted line). You may include any report that doesn’t require a secondary decision such as tech, vendor, etc.

NOTE: Once using the LIVE program, you’ll start End of Day Reports process by clicking on Utilities menu and selecting the End of Day Reports option.



Configuring Shop Reports

Shop Reports provides the ability to view selected Manager SE reports remotely, wherever the internet and a browser are available. Access it by logging into ProDemand and selecting a new Shop Reports module added to the home screen.

NOTE: This Feature is intended for shop owners and managers.

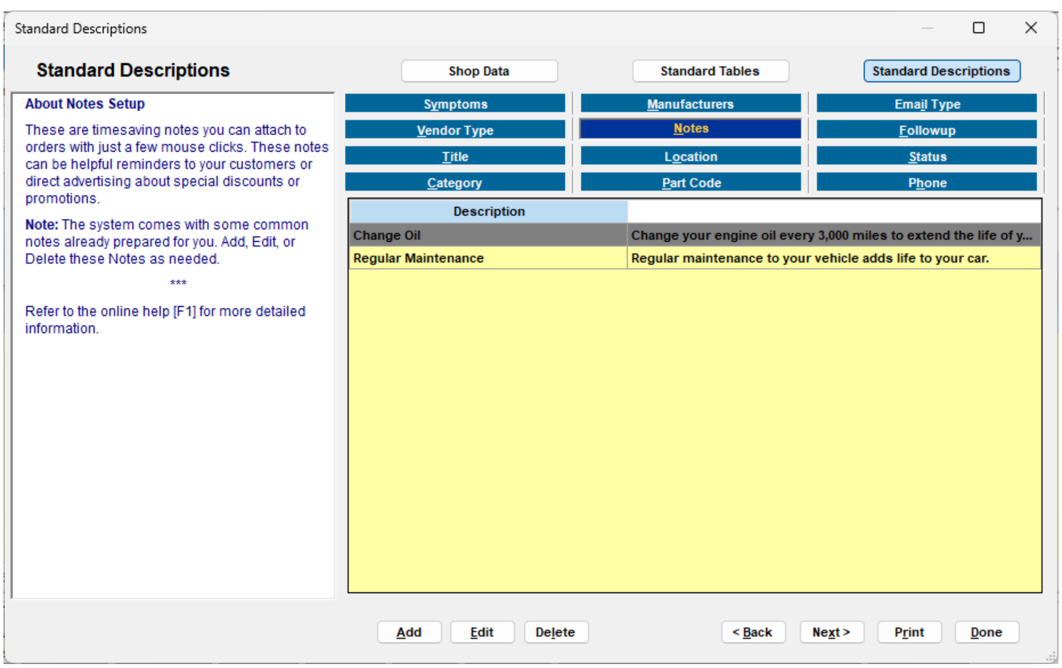
Two videos are available:

Shop Reports Configuration (4 min): https://youtu.be/eChKA0ydVmo
Shop Reports Demo (2 min): https://youtu.be/f-hPPCJhmIM

Notes

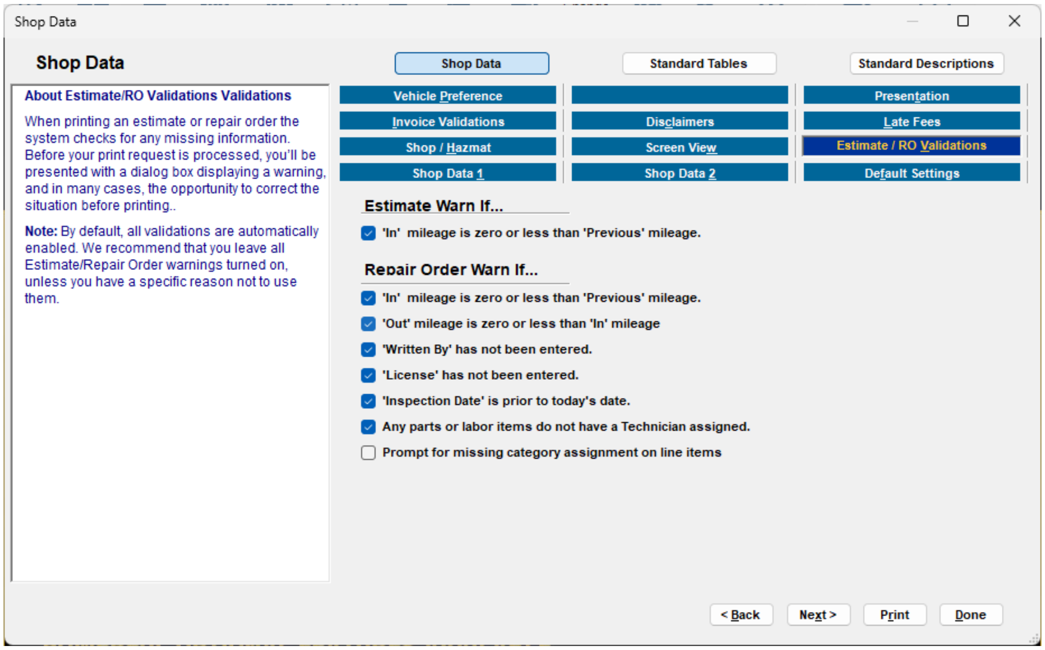
Time-saving **Notes** can be attached to orders with just a click. Notes are used to transmit reminders and service messages to customers. It is also the place to build and store your list of repeated **Recommendations**.

NOTE: Your SE program includes sample Notes to customize now and/or add new Note entries later.

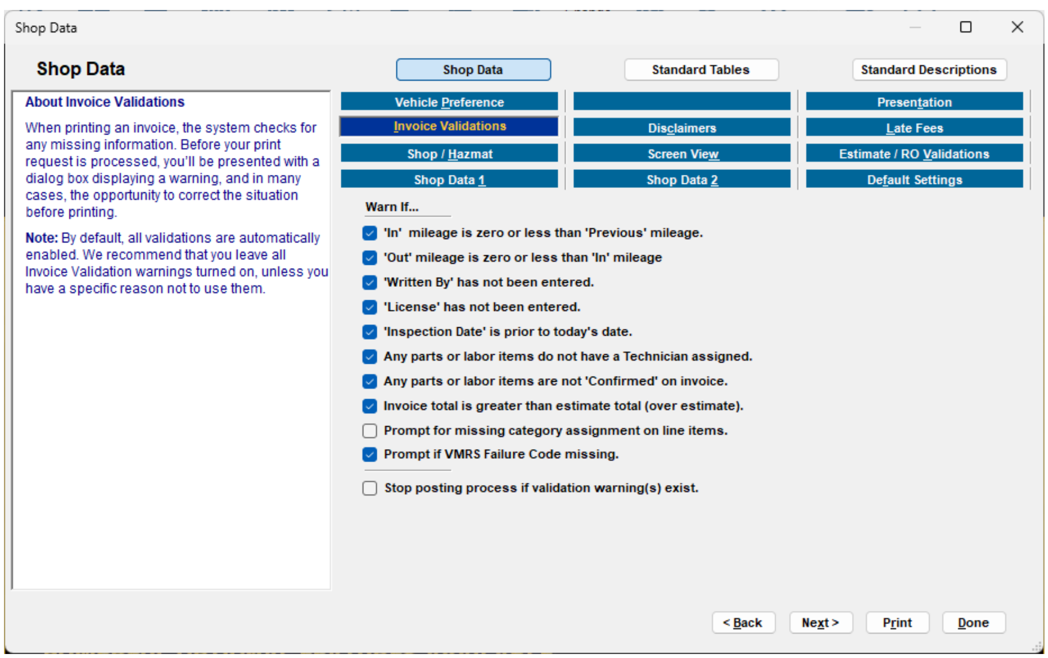


Estimate/RO & Invoice Validations

When you print an estimate, repair order or an invoice, the software uses **Validations** to check for missing or conflicting information. You'll see a warning and dialog box to enter that information and then proceed to printing.



Estimate / RO Validations



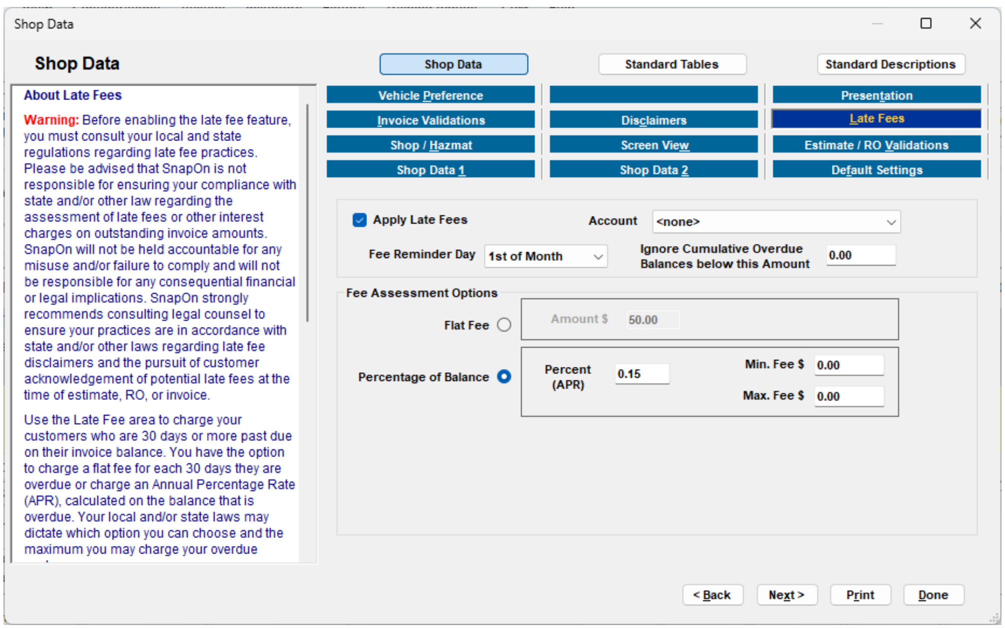
Invoice Validations

NOTE: By default, ALL validations are enabled. We recommend leaving these on, unless you have a specific reason to bypass. If any appear, users are shown fields that require data. Enter it and press Enter key to continue. **Group By Job View**: Items missing techs or Category are highlighted on Order screen.

Late Fees

Late Fees option provides users with a method to automatically calculate late charges for customer accounts that are 30 days overdue. Read the important NOTICE below, place a check in **Apply Late** Fees to activate and begin setup.

Tip: Be sure to watch the Late Fee training video to setup the Account Class Revenue for Late Fees to appear for selection here in the drop-down list.



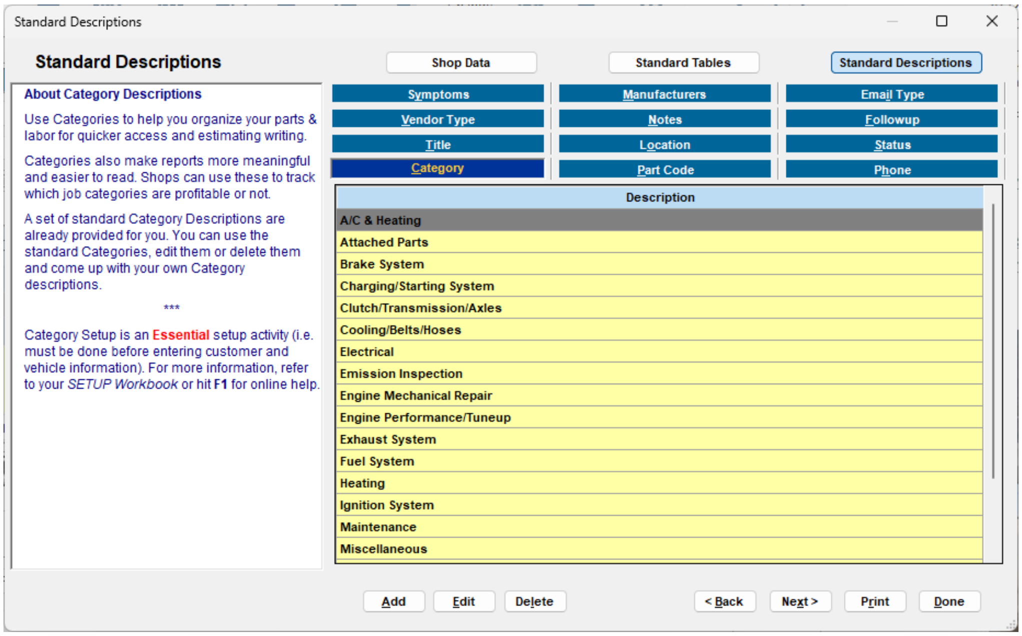
NOTICE: Before enabling, consult local and state regulations regarding late fees. Please be advised we will not responsible for ensuring your compliance with laws regarding the assessment of late fees or other interest charges on outstanding account balances. We will not be held accountable for misuse or failure to comply, nor be responsible for financial or legal implications.

Category

Category descriptions help to organize your parts & labor for faster access.

Categories make reports meaningful and easier to read. Shops can use these to track which business categories are performing well or not.

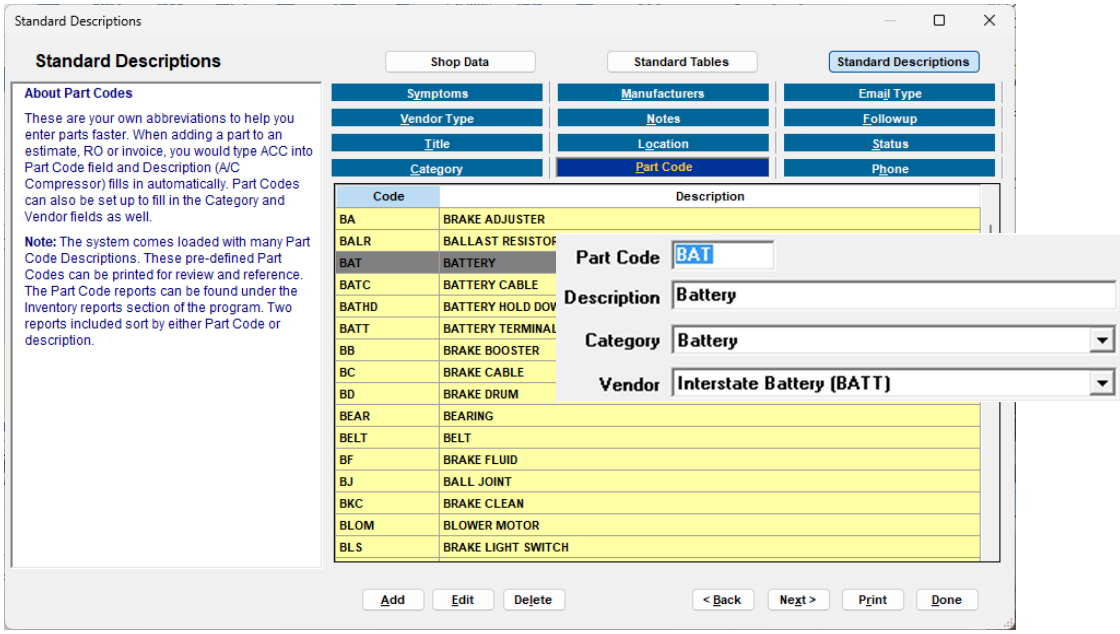
Add your own Category Descriptions (if any) directly into program. SE comes with a stock set of Category Descriptions, add your own as needed.



Part Code

Part Codes are abbreviations to help you enter parts faster.

When adding a new part to an estimate, by typing **BAT** into Part Code, the Description (**Battery**) fills automatically. Part Codes can also be set to fill in the related Category and even the Vendor information.



The program comes pre-loaded with many Part Codes. Two reports are provided to display existing Part Codes with associated descriptions.

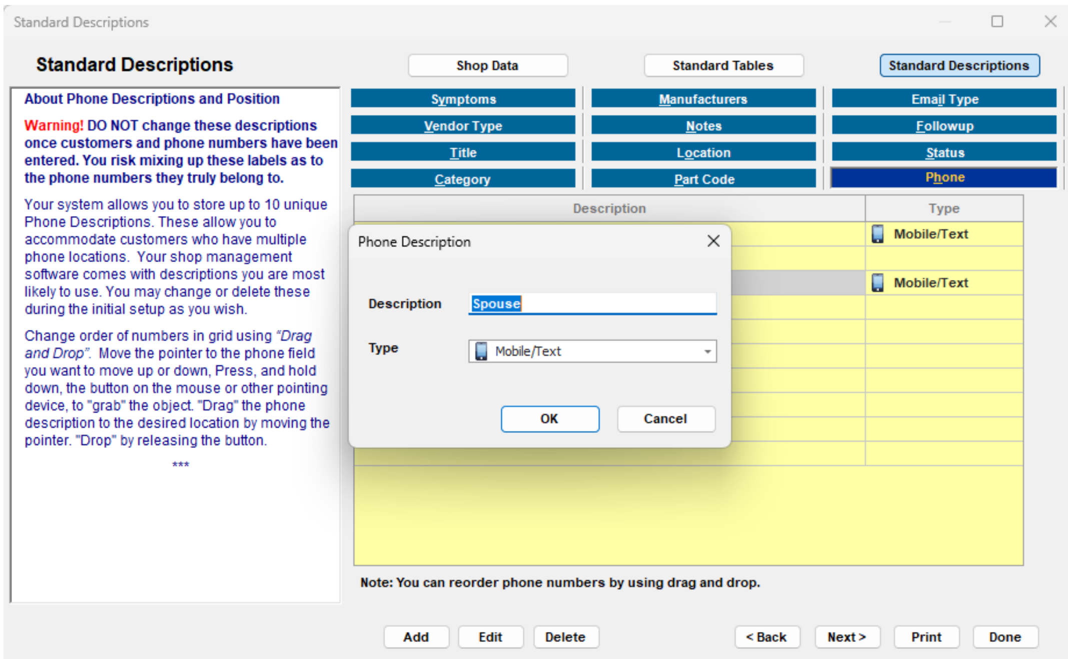
NOTE: If using integrated parts catalogs to order parts, there is far less need to use Part Codes as the Description and Vendor data fields will be filled in automatically.

Phone

Phone setup stores up to 10 different Phone Descriptions labels. These allow you to handle customers who may have multiple phone options.

The program comes loaded with all the descriptions you are most likely to use.

Double-click on any description to edit

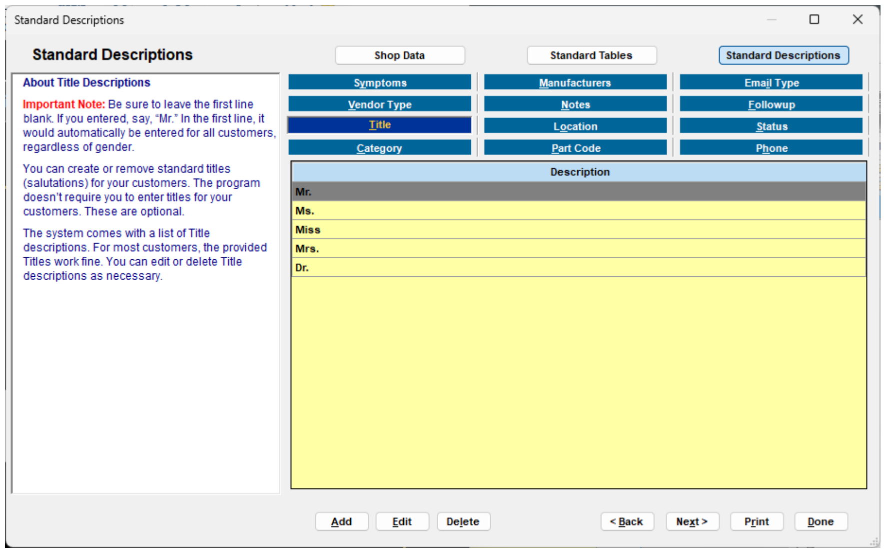


Warning! Do NOT change these entries once customer phone #s have been entered. If you wish to rearrange these entries, to put Cellular in 1st slot, for example, use the new drag and drop option.

NOTE: If using the MessageCenter texting option, use Edit to set an entry for texting by selecting Mobile/Text from the Type menu. For further details refer to MessageCenter help topic: https://buymitchell1.net/managerhelp/TextSetup.htm

Title

Title descriptions allow you to use standard salutations for customers. The program doesn't require you to enter titles for your customers, this is purely optional. The program comes with a list of Title descriptions which work fine for most customers. You may add, edit or delete any of these Title descriptions as needed.

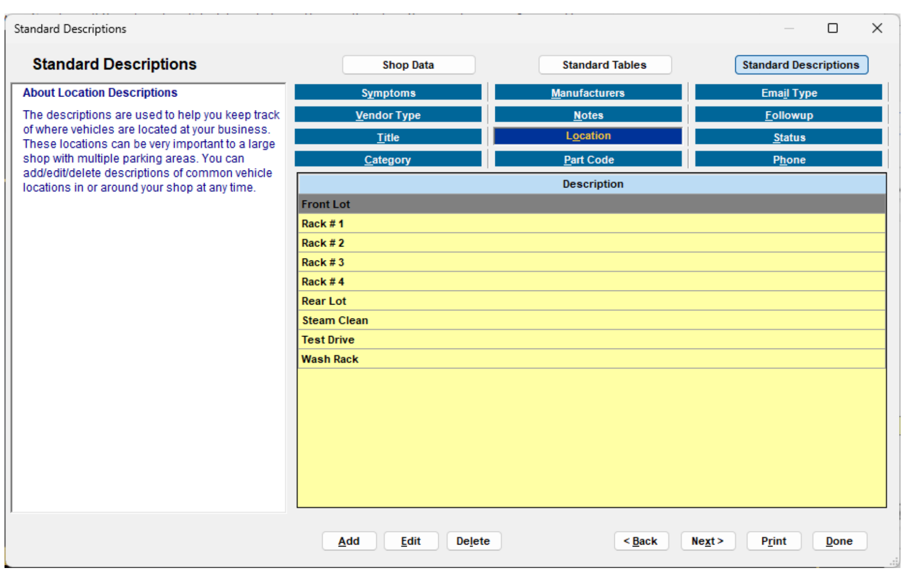


NOTE: Default in customer entry is <none>; apply these as you like.

Location

Location descriptions are used to keep track of where vehicles are located at your business. This can be important to a large shop with multiple parking areas. You may record up to 10 locations to be stored entries. You can still free-form type any additional one-time entries as needed. Use the add/edit/delete options to customize for your shop.

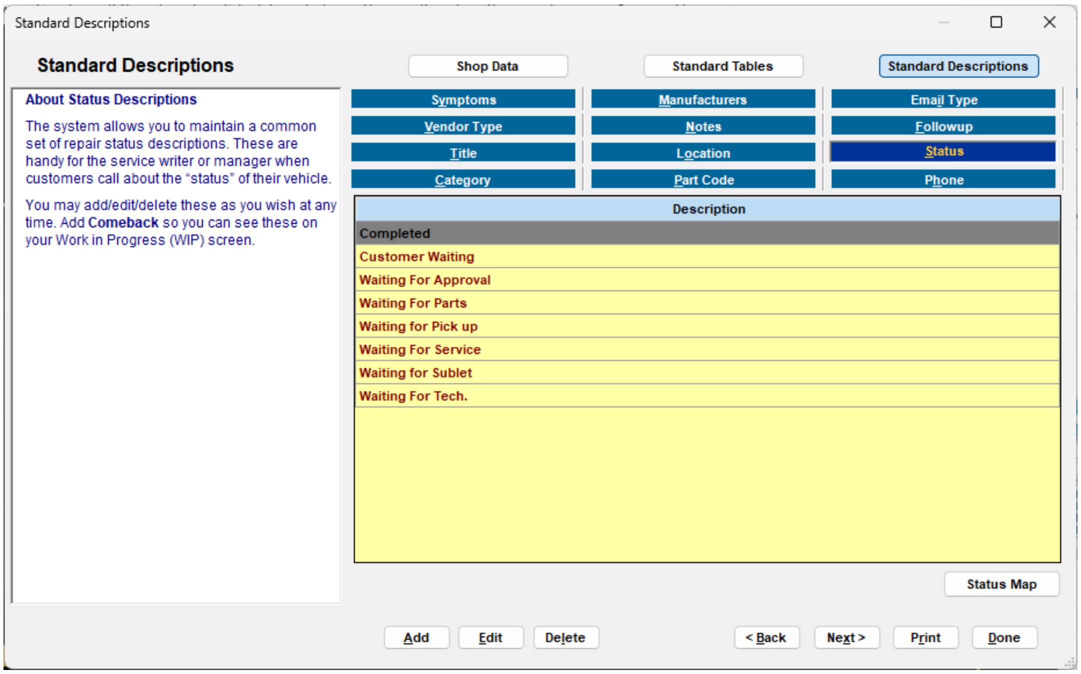
NOTE: Program comes with a list of sample Location descriptions. This will be an item on your ready-to-go-live final checklist.



Status

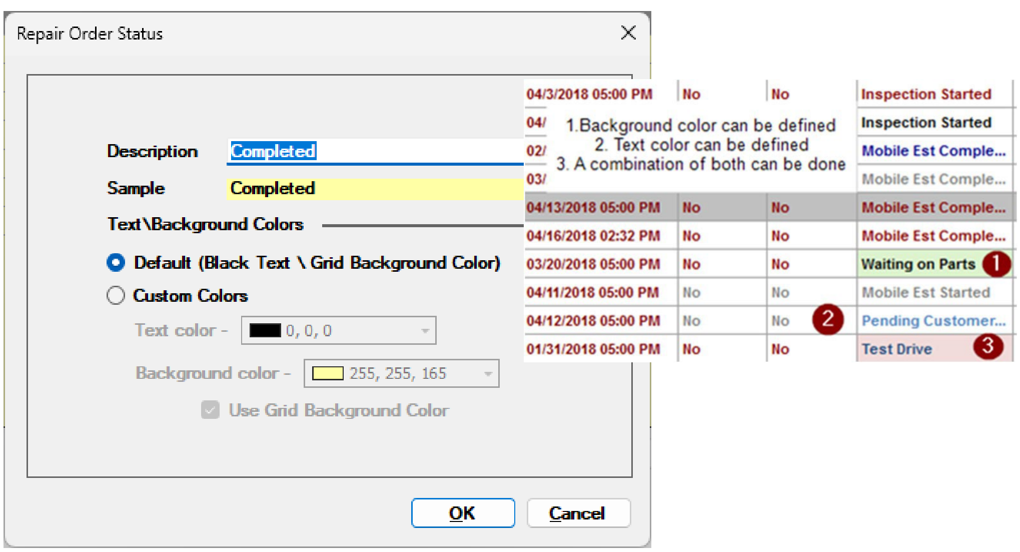
Status allows you to maintain a common set of repair status descriptions. These are handy for the service writer or manager when customers call about their vehicle.

You may record up to 10 locations to be stored entries. You can still free-form type any additional one-time entries as needed. Use the add/edit/delete options to customize for your shop.



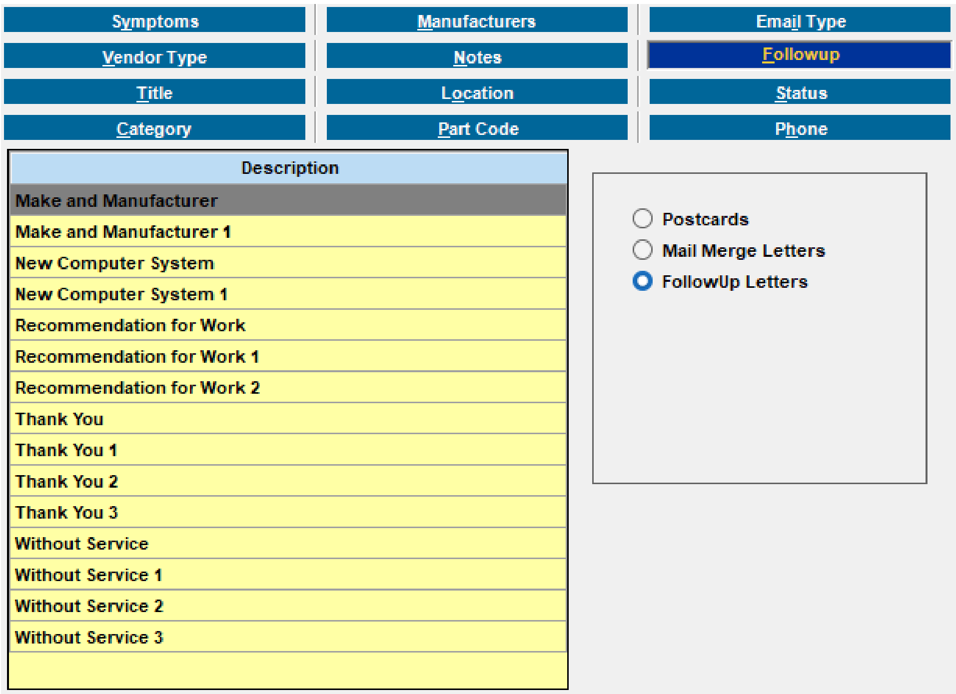
NOTE: The program comes with a list of sample Status descriptions.

Click the **Add/Edit** button to open the Repair Order Status dialog box. You are able to customize the background color and/or text color for each Status entry using this dialog box.



Followup (Postcards, Letters, Mail-Merge)

NOTE: Mail Merge function requires Microsoft Word. Refer to Knowledgebase articles for further details.

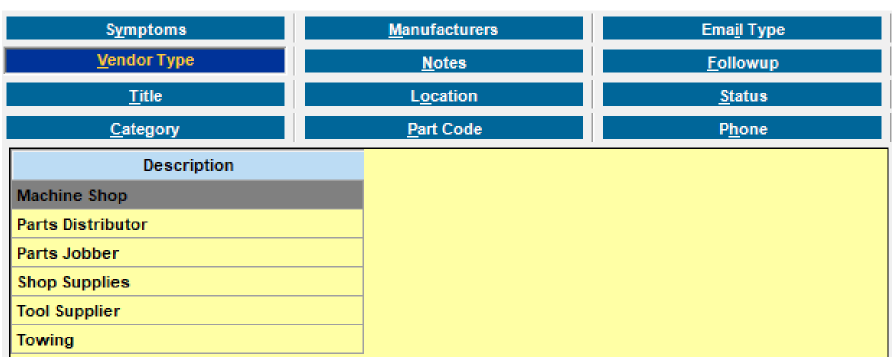


Followup allows generation of Postcards and Letters, even Mail-Merge letters so you can send out reminders, recommendations and announcements to customers.

SE comes with sample Follow-up Postcards and Letters, with add/edit/delete options to tailor these to your business.

NOTE: *MM – Create Data Export File option is provided to export SE data to use in spreadsheet programs such as MS Excel where the data can be sorted and filtered for shop marketing and sales analysis. This system entry is only visible under the actual Followup tab in Reports.

Vendor Type



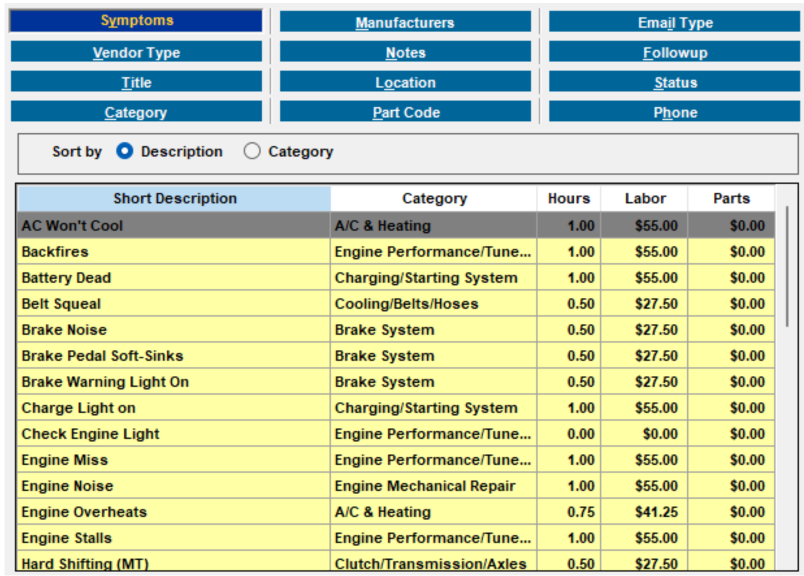
Vendor Type descriptions are used to identify the vendors supplying parts and services to your business. Vendor Types are general headings, not the specific vendors from whom you buy parts.

You may add/edit/delete these as you wish. Please enter examples of your own Vendor Descriptions currently used at your place of business.

Symptoms

Symptoms save shops many keystrokes when estimating a diagnosis.

With Symptoms, you're speaking the customer's language, making it easier to receive a vehicle with standardized labor charges. Symptoms curb giving away of shop diagnostic time.



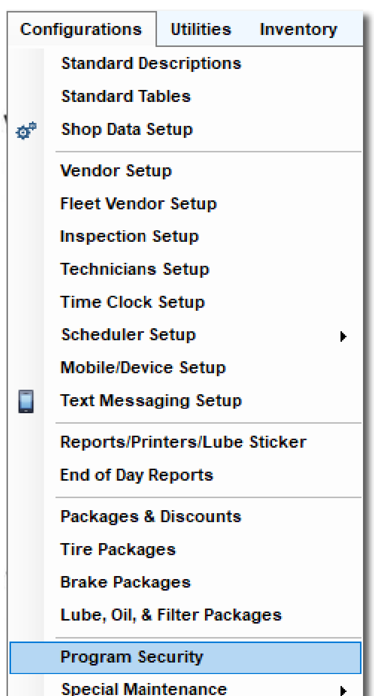
Short Description	Category	Hours	Labor	Parts
AC Won't Cool	A/C & Heating	1.00	$55.00	$0.00
Backfires	Engine Performance/Tune...	1.00	$55.00	$0.00
Battery Dead	Charging/Starting System	1.00	$55.00	$0.00
Belt Squeal	Cooling/Belts/Hoses	0.50	$27.50	$0.00
Brake Noise	Brake System	0.50	$27.50	$0.00
Brake Pedal Soft-Sinks	Brake System	0.50	$27.50	$0.00
Brake Warning Light On	Brake System	0.50	$27.50	$0.00
Charge Light on	Charging/Starting System	1.00	$55.00	$0.00
Check Engine Light	Engine Performance/Tune...	0.00	$0.00	$0.00
Engine Miss	Engine Performance/Tune...	1.00	$55.00	$0.00
Engine Noise	Engine Mechanical Repair	1.00	$55.00	$0.00
Engine Overheats	A/C & Heating	0.75	$41.25	$0.00
Engine Stalls	Engine Performance/Tune...	1.00	$55.00	$0.00
Hard Shifting (MT)	Clutch/Transmission/Axles	0.50	$27.50	$0.00

NOTE: You may also add a new entry on-the-fly using **Save as standard Symptom** checkbox in same window.

☑ **Save as Standard Symptom**

TIP: Symptoms may be set to pop up automatically under **Screen View** tab.

Show Symptoms on New Orders ☑



Program Security

Setup This program area allows the shop owner or manager to password protect sensitive information. For example, shops may not want techs knowing how much other techs are paid.

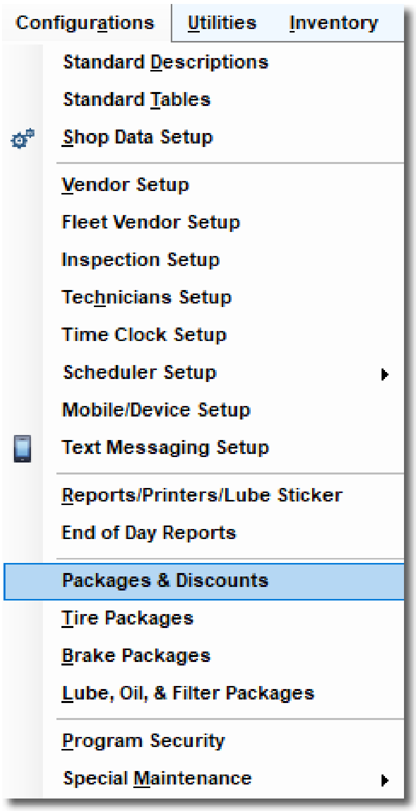
Setup Program Security area allows the shop owner or manager to password protect access to sensitive information. For example, shops typically don't want techs knowing how much other techs are paid or to browse reports.

Program Security supports multiple passwords (rights assigned per user) to control who can delete orders, delete payments, change inventory, etc.

NEW: Change Protected Areas now includes Main / Reports tabs. This allows shops to provide specific report(s) access per specific users.

Demo Watch the SE Program Security Demo video to learn more about how passwords and protected areas define a security strategy for your shop.

NOTE: If you enter or change master password, **be sure to record it** for later reference.



Promotions: Packages & Discounts

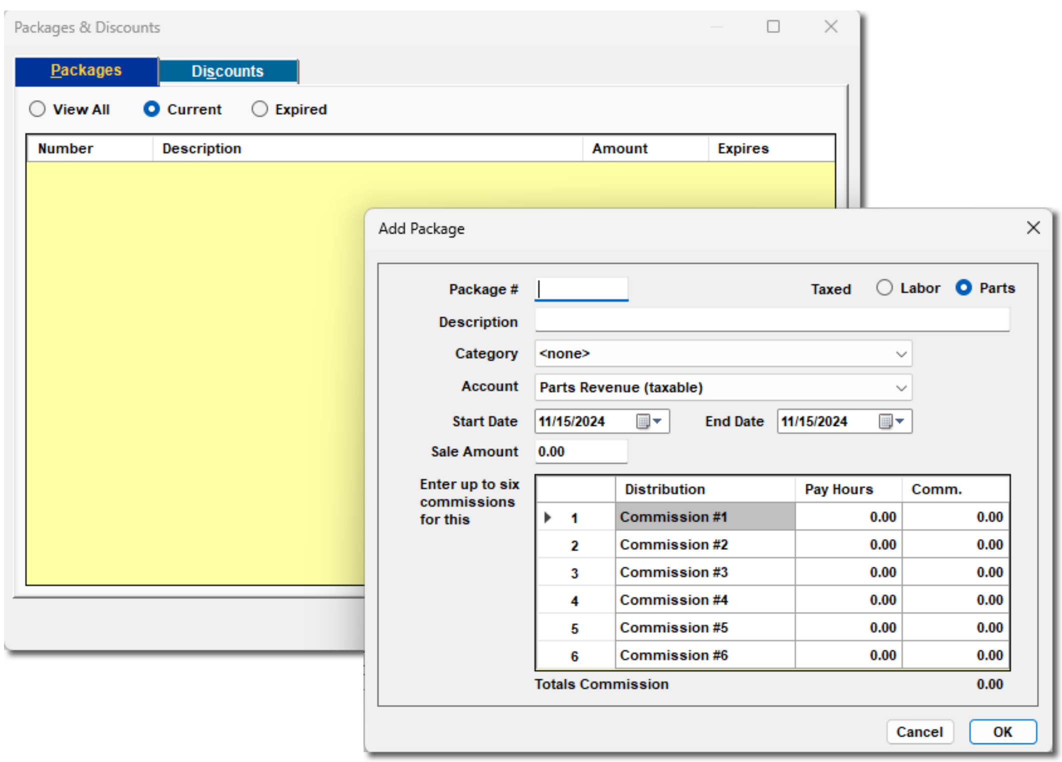
Packages are single line items sold by price. You may optionally add the parts & labor details later, but the <u>customer only sees the single line on invoice that you created in these Packages</u>.

These are good for sales where inventory concern is not as critical. (You can add detail, however it's time-consuming for each sale)

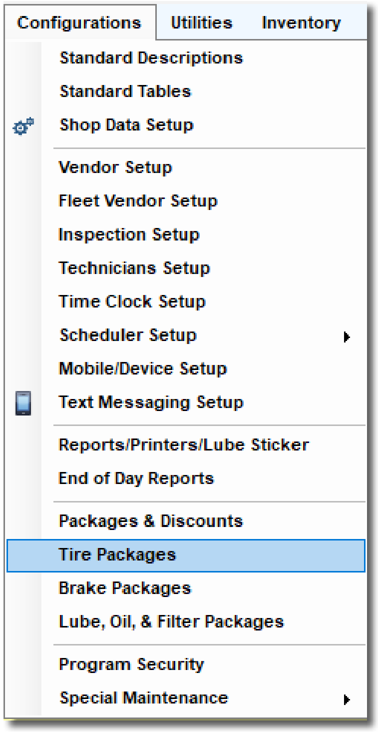
Discounts apply a flat dollar amount **or** percentage discount to total parts and/or labor $ on an order as defined. For example, you might offer a 10% labor discount to all AARP members.

Packages and Discounts are applied via the Promotions button on Order screen.

Go to Configurations -> Packages & Discounts; select Discounts or Packages tab. Then use Add/Edit to customize the entries.



Promotions: Tire Packages



Tire Packages are groupings of tires, related parts and labor operations to create varying service levels.

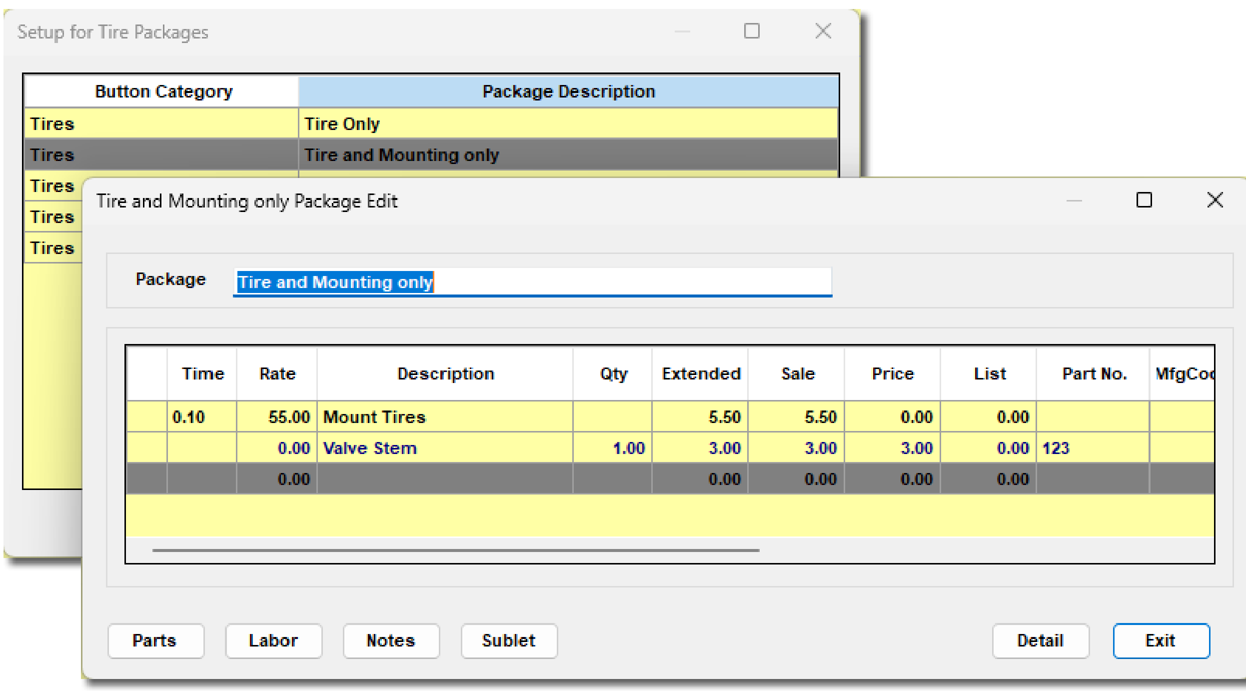
To add or edit a Tire Package, select Tire Packages from Setup menu and then **Add/Edit** in Tire Packages Edit dialog box.

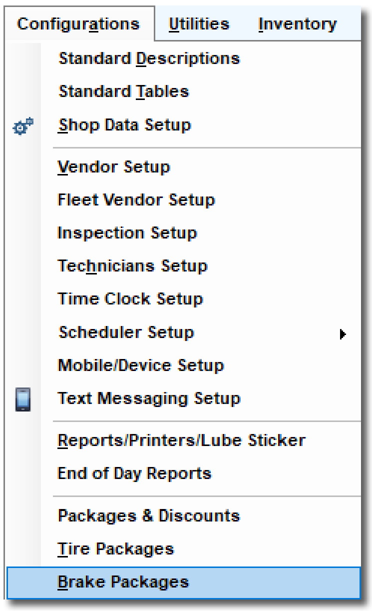
SE comes equipped with sample packages for Tire Only, Tire and Mounting only, Platinum, Ultra Platinum, and Lifetime packages. You can edit these packages levels and add new packages as desired.

NOTE: Tire Packages support the selection of either inventory items or parts catalog items.

Tire Packages are applied to orders via **Promos** icon on Order screen.

For a detailed description of setting up and applying Tire Packages go to **Help** -> **Promotions ->** **Tire Packages** [Shortcut: press F1 key]





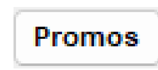
Promotions: Brake Packages

Brake Packages are groupings of brake part and labor operations to create packages of varying levels to offer to your customers.

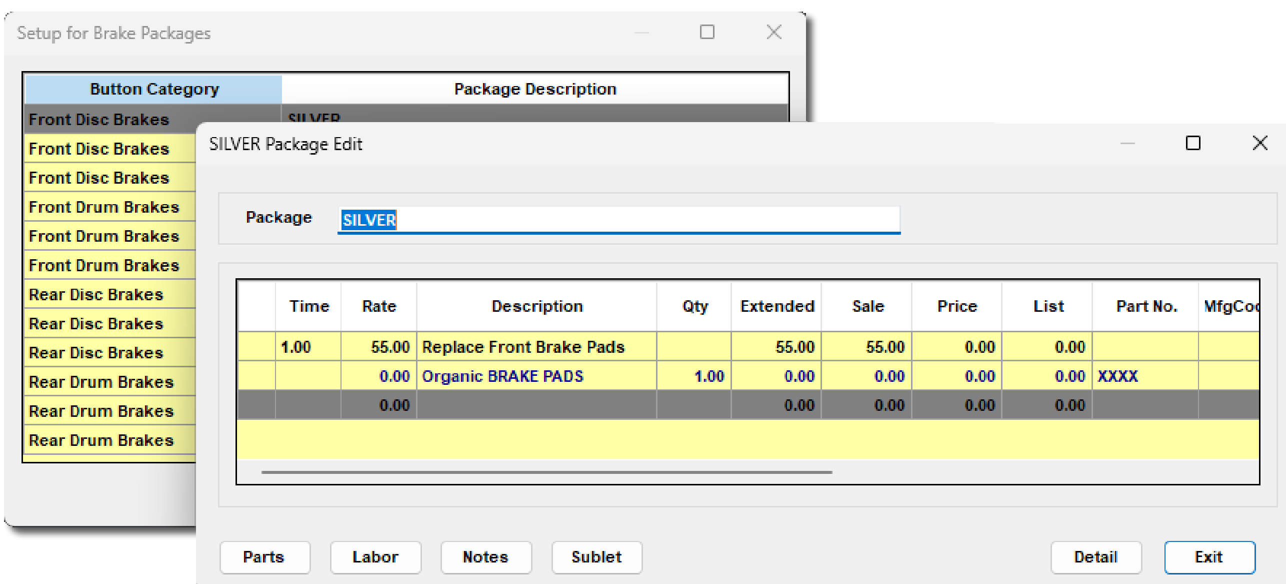
To add or edit a Brake Package, select Brake Packages from Setup and then **Add/Edit** in Packages Setup dialog box.

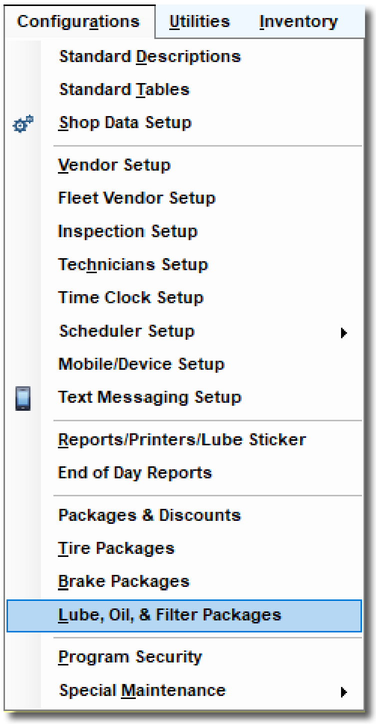
Manager SE comes equipped with sample Silver, Gold, and Platinum labels in combination with Front and Rear brakes. You can edit these packages as desired.

NOTE: Brake Packages interaction with Inventory is limited to only items included in the package itself.



Brake Packages are applied to orders via **Promos** icon on the Order screen. For a detailed description of setting up and applying Brake Packages go to
Help -> **Promotions -> Brake Packages** [Shortcut: press F1 key]





Promotions: Lube, Oil & Filter Packages

Each **LOF Package** is a grouping of fluids, parts, and labor operations to form pre-built

combinations to save input & selection time.

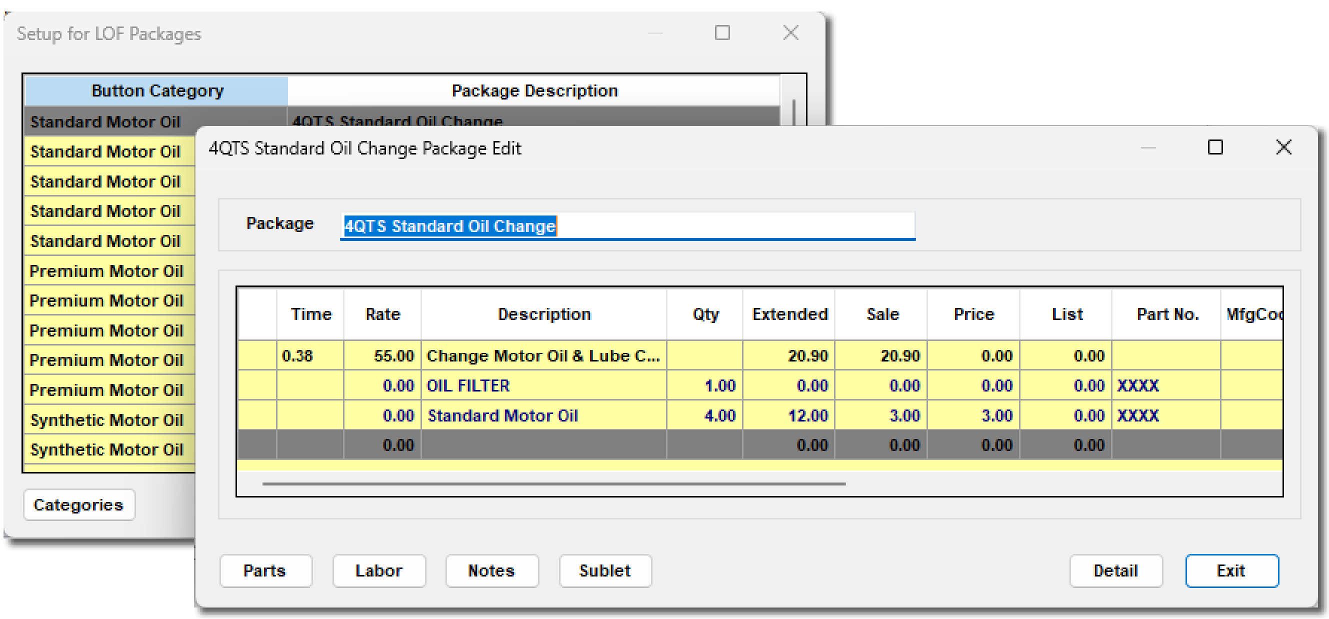
To edit a LOF Package, select Lube, Oil & Filter Packages from Setup, pick a package and then Edit in Packages Setup dialog box.

Program comes equipped with sample packages for various motor oils in combination with 4 & 5 qt. quantities and lube service. Edit these as desired.

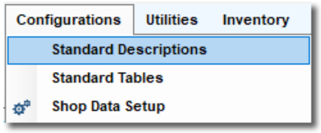
NOTE: LOF Packages interaction with Inventory is limited to only items included in package itself.

LOF Packages are applied to orders via **Promos** icon on Order screen.

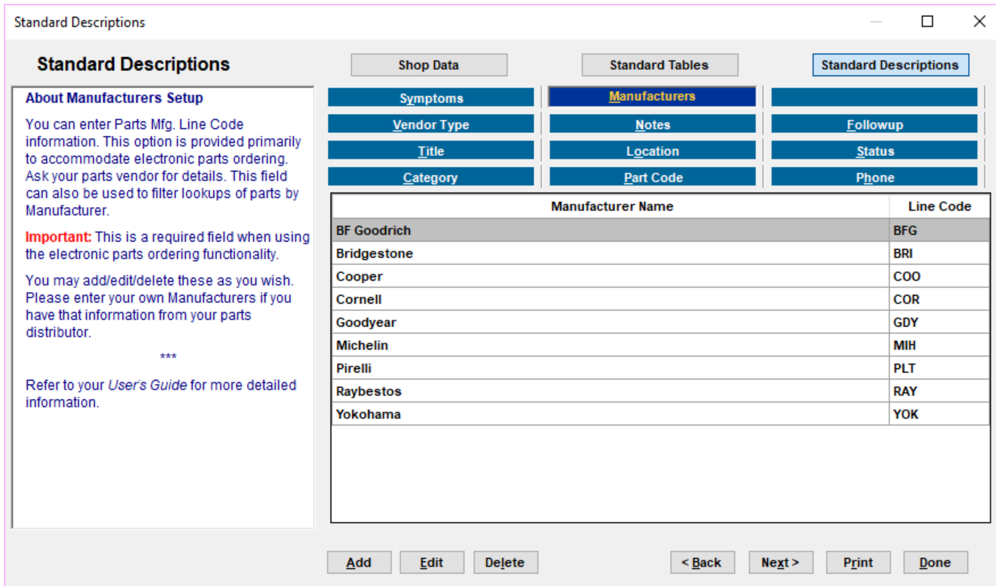
For a detailed description of setting up and applying LOF Packages go to **Help ->Promotions -> LOF Packages** [Shortcut: press F1 key]



Manufacturers (Line Codes)

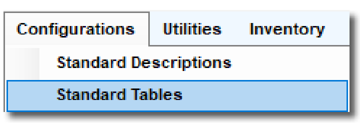


The **Manufacturers** tab (Configurations > Standard Descriptions) displays Line Code data used with on-line parts ordering. Can also be used to filter part lookups on Inventory List.

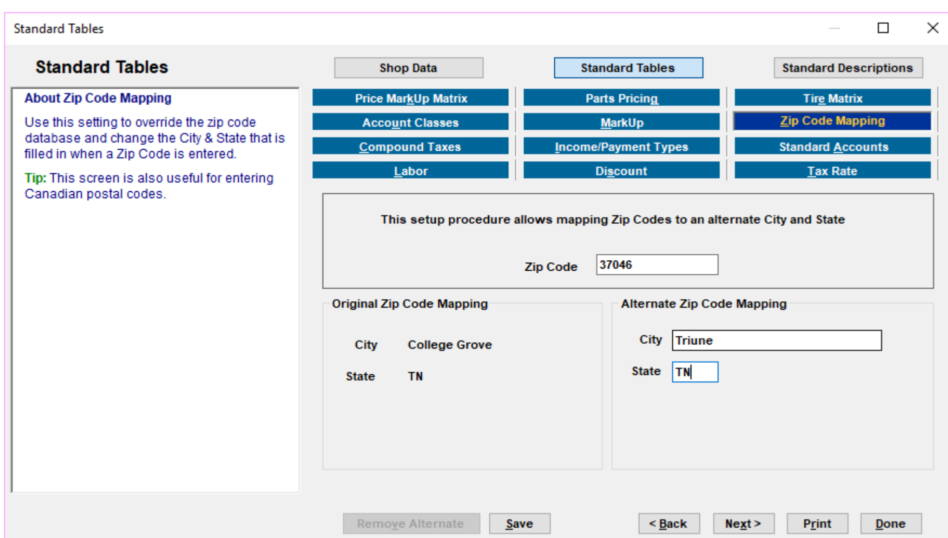


NOTE: The **Manufacturers** list is typically populated by electronic parts catalogs. Codes can be entered if your shop needs to order non-connected catalog items.

Zip Code Mapping



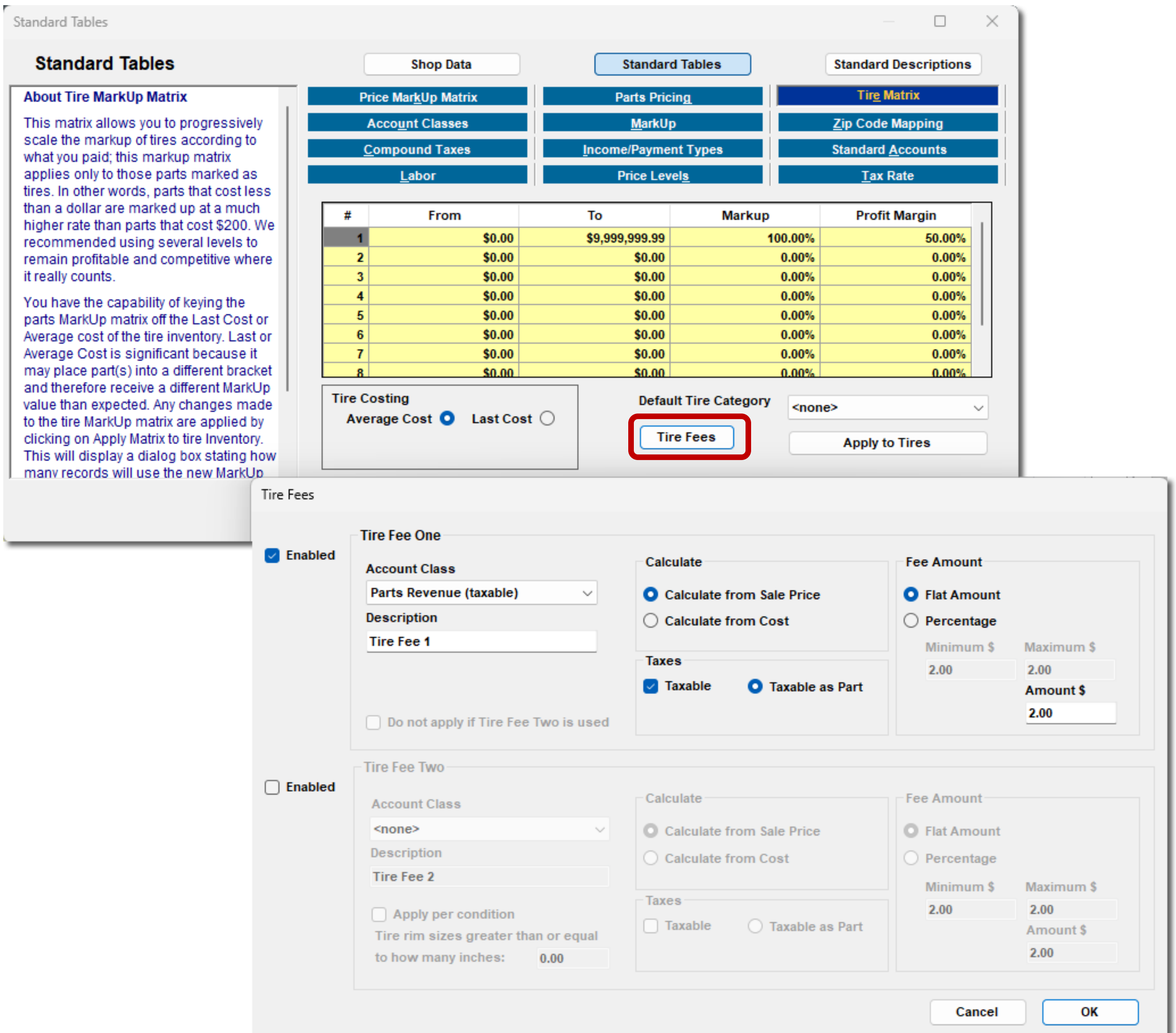
Zip Code Mapping allows shops to override existing zip code database results to change City & State filled in when the Zip Code is entered. Click Done and the new results will be used instead, wherever that zip code is entered.

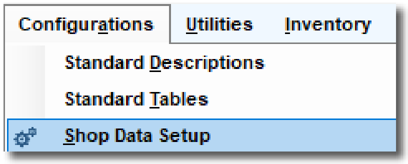


Tire Matrix

Tire Matrix shares most features of the Price Markup Matrix; it's dedicated to a tires category that a user creates. It also provides a method to configure one or two tire fees with a number of options to address all state regulations.

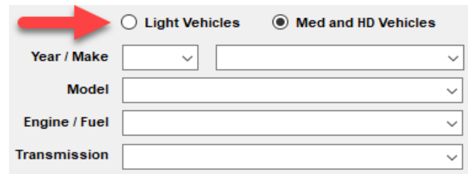
Click the **Tire Fees** button to open the Tire Fees dialog box. This screen allows you to add up to two additional fees to the order. Once you have set up your matrix, click the Apply to Tires button to apply the matrix Price amount to all inventory and canned job tire records.





Vehicle Preference

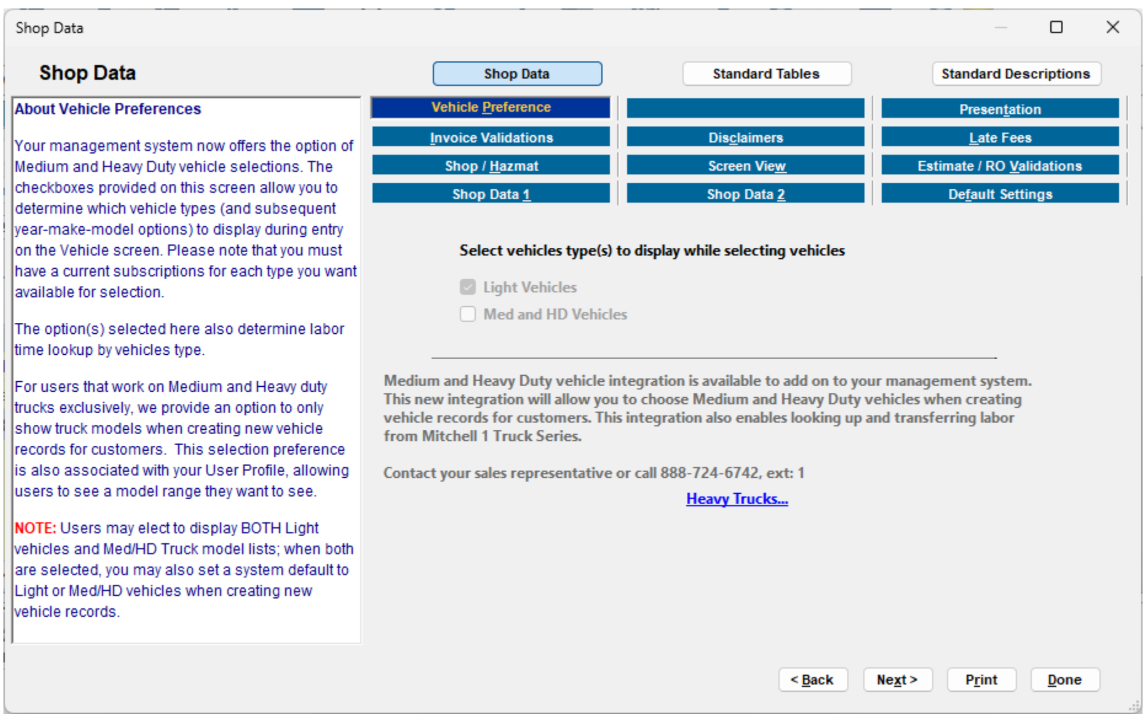
The Vehicle Preference dialog box allows truck information (CVG) subscribers to select which vehicle model list to display when selecting a vehicle.



Note: This section is only applicable to Medium and Heavy Duty Truck users with a Manager SE CVG subscription.

For users who work on Medium and HD Vehicles exclusively, checking the appropriate box ensures that your users are presented with Class 4-8 vehicles model list.

If your shop works on "everything" (light duty vehicles thru 1 ton + class 4-8 vehicles), you'd check both boxes. This will open a secondary decision; 'Start new orders by default using:' This allows you to default to the models list you work on most. You can always toggle access to the other list during vehicle entry by changing this selector.



User Setup Completed - Please continue to Final Steps for Launch.

• Final Steps: Better Prepared SE Launch

Think You're Ready Now? Consider This:

The more you can enter in setup + real data, the better your LIVE startup experience will be. Entering this now will save time & effort down the road!

❑ Best Customers with Vehicles	❑ Your Technicians
❑ Popular Parts into Inventory List	❑ Your Vendors
❑ Create Part Kits & Canned Jobs	❑ Most Popular Notes

By completing these tasks, your software will perform work faster, operate with minimal typing, provide expected results, and reflect your business.

Note: Be sure you've been working in the LIVE program for all this input work. If it says **Demo** at the bottom of your screen, go to **Home** screen to access **Configurations** -> **Special Maintenance**, select **Toggle Demo Mode**. Answer **Yes** to return to 'Live mode' and restart as requested, the shop management program will reopen in the SE **Live** mode for your setup input.

Anything you have input in Demo mode will need to be re-entered in the Live program mode.

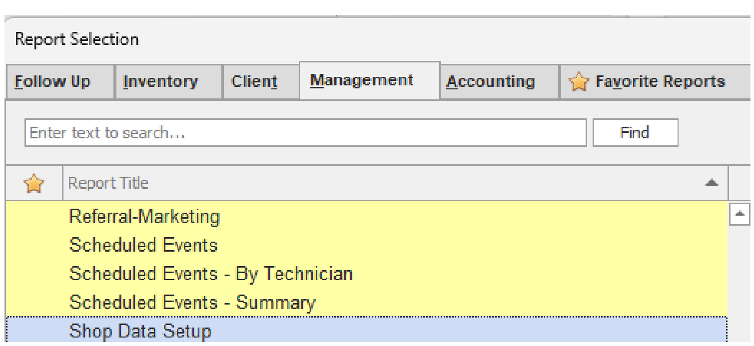
Double Check Your Settings

For the same reason you wouldn't let a customer take a vehicle without first taking it for a test drive, you need to be sure all of *your* settings are correct right BEFORE you start. A fast way to check many settings and defaults is to print a report. This helps you be certain program defaults work as expected.

Printing the 'Shop Data Setup' Report

1. Click Reports

2. Double-click on Shop Data Setup to start report building process (5 seconds).



3. If default Print to Screen is on, it will appear as screen preview. Report may be printed or also exported in various file formats. Click the **Print** Icon to print out a hard copy.

Reviewing the Shop Data Report

Since this report reflects your current settings, look it over very carefully. This data will appear on ALL paperwork, so it's crucial this be correct before you begin. Below are some excerpts of the important information seen within this report. Please print and review to ensure your data and text appears as you expect

Shop Data Report

Report Date: 06/06/2014

Shop Information

Address:	1115 Main St
City:	Poway
Comment:	Ask About Our Free Pickup & Delivery Service
Fax:	858-555-1312
License1:	EPA 12348-IP
License2:	BAR 1234567
Phone:	858-391-5000
ShopName:	Forward Thinking Automotive
Slogan:	You Work Hard For Your Money, So Do We!
State:	CA
Zip:	90210

Overhead

Miscellaneous	5.00%
Shop	5.00%

Shop Supplies Costs

	10.00%
Account Class:	Shop Supplies Revenue
Maximum:	$500.00
Report Desc.:	Shop Supplies
Shop Supplies are	not Taxable

Hazardous Material Costs

% of Parts Sales:	99.99%
Account Class:	HazMat Revenue
Maximum:	$3.97
Report Desc.:	Hazardous Materials
Hazardous Materials are	Taxable

Standard Defaults

	True
	F:\
	False
AreaCode:	858
Income Account:	Visa
Labor Tech:	Please , Select
Parts Tech:	Please , Select

Account Classes

Discount, Labor:	Labor - Discounted
Discount, Parts:	Parts - Discounted
Labor (Non-Tax):	Labor Revenue Non-Taxable
Labor (Taxable):	Labor Revenue
Parts (Taxable):	Parts Revenue
Parts (Non-Tax):	Parts Revenue Non-Taxable
Sublet:	Sublet Revenue

Confirm your settings with Shop Data Report!

MarkUp Add On Costs

Labor Guide	10.00
Parts Guide	10.00
Display information as	MarkUp
Sublet Markup	25%

Parts Markup ID	Parts Max Amount	Parts Percentage
1	0.99	300.00
2	4.99	250.00
3	9.99	200.00
4	19.99	100.00
5	29.99	90.00
6	49.99	75.00
7	99.99	66.00
8	299.99	60.00

Labor Rate

Computer Diagnostics	$114.50
Customer Bought Parts	$120.00
Electrical Work	$100.00
European	$110.00
Labor Rate	$90.00
Maintenance	$80.00
Motorhome/RV	$85.00
Other Shop Wholesale	$75.00
Priority Rush	$125.00
Tractor	$65.00

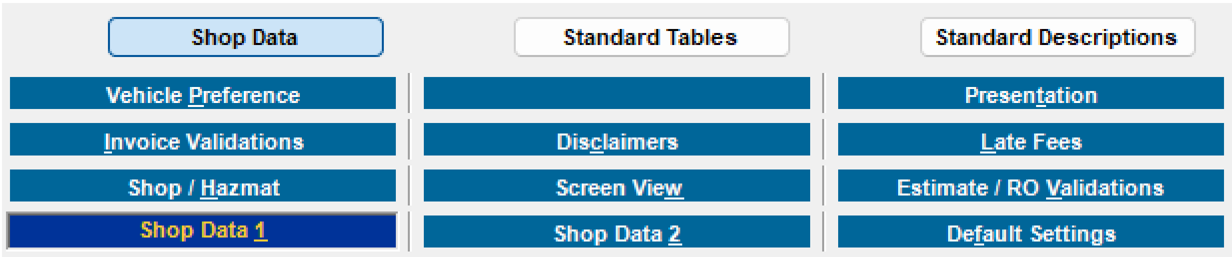
Part Discount

AAA	5.00%
AARP Discount	5.00%
Buyout	15.00%
Family Discount	10.00%
Fleet Discount Rate	10.00%
Give Me a Discount	-20.00%
Government Discount	8.00%
In-Laws	-10.00%
Normal	0.00%
Wholesale	10.00%

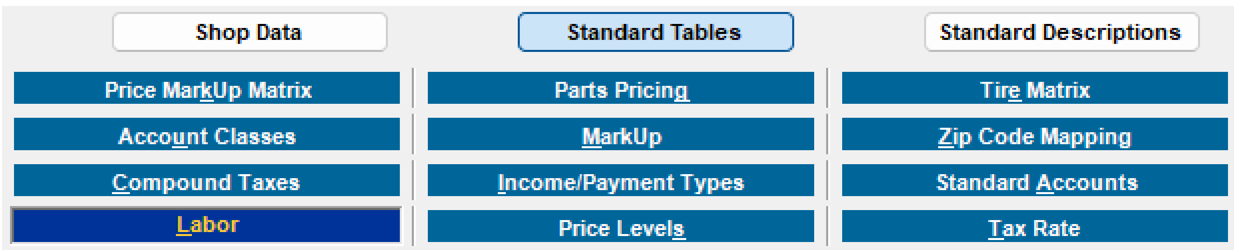
NOTE: If you identify any changes are needed, go to **Shop Data Setup** / **Standard Tables** to check settings and adjust them as needed. Then run report again.

Final Countdown LIVE Checklist

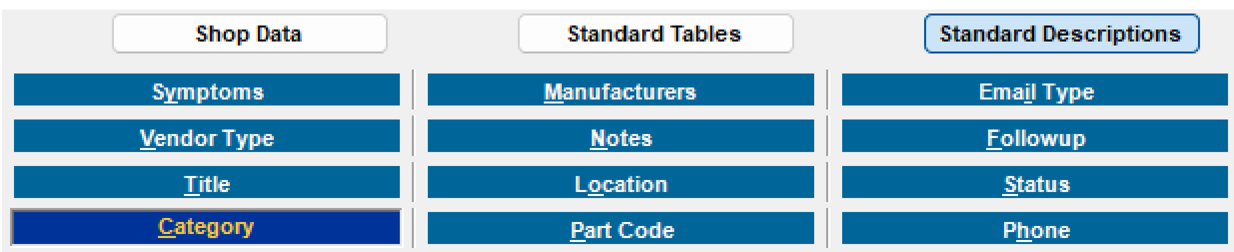
1. Shop Data Setup Complete



2. Standard Tables Setup Complete



3. Standard Descriptions Complete



4. **Catalog Configurations** – You'll want to make sure any parts catalogs are set up and integrated with the Management System before going LIVE. Visit [How to Enable a Catalog and Link a Vendor in Manager (https://kb.mitchell1.com/articles/id-791/)](https://kb.mitchell1.com/articles/id-791/)

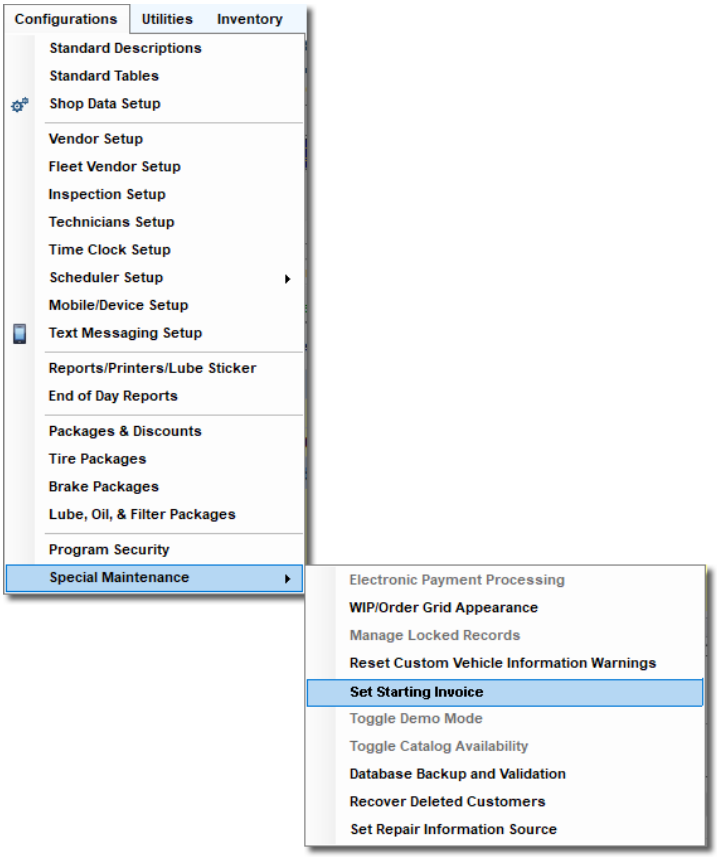
Note: it is beyond the scope of this document to provide instruction on every supported parts catalog. Please read the setup procedure referenced above as well as the instructions that came with the catalog.

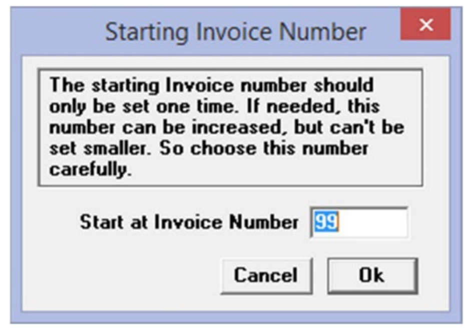
5. **Set Starting Invoice** – see following page.

Set Starting Invoice

This FINAL STEP is performed just before going live with SE. Enter#; future Invoice numbers advance sequentially from that number upward. For example, if you want to begin with Invoice #100, you'd enter starting invoice # 99 here.

Important Note: Once you set the starting invoice #, you can't go back and enter a lower number.





Congratulations, you are ready to begin taking live orders and running your shop with your Mitchell 1/ShopKey Shop Management Program!