

[What's new in this release?](#)[Oil Change Printers/Stickers](#)

MANAGER SE

NEWLY EXPANDED FEATURES AVAILABLE

- Integrated LOF Sticker Printing
- Auto-Scheduling of Quick Service Items
- Expanded Reports - New First-Time Options
- Favorite Reports Selector with Email Button
- Option: 2-Way Text Messaging Inside SE



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SHOP MANAGEMENT

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Mitchell 1 / ShopKey Management Solutions

SETUP: Configuring Your LIVE SE Software

Guide to system settings for the LIVE version of SE 8.x program

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Preparing Your SE Program to Write Actual Orders

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.

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.

Review Program Setup Options

Have Setup screens open to enter your selections into SE LIVE program.

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

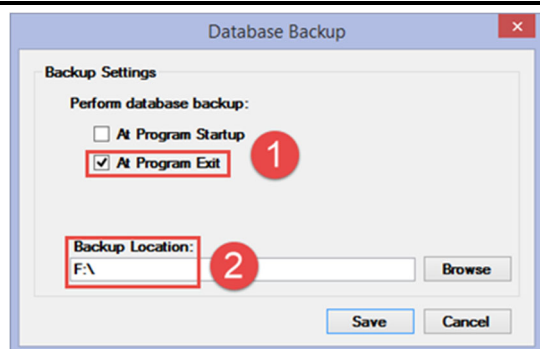
Backup: It is CRUCIAL to keep up-to-date copies of your SE database just in case something goes wrong and it becomes necessary to restore it. There is an internal backup function (to USB flash drives) in the management program and we have also added a MSEC remote backup service as explained below.

Your Database Backup Strategy

Go To: [Configurations](#) [Special Maintenance](#) [Database Backup and Validation](#)

Database Validations are a quick check against the physical consistency of the database and ensures the ability to stay synchronized with SE Connect (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.



Select either **At Program Startup** or **At Program Exit** as the trigger time for daily and weekly validations.

Daily Validations run for a moment prior to writing a copy of the SE database to backup media as usual.

Weekly Validation requires a Day of Week to perform selection and then you're all set.

MSEC (SE Connection): Our newest data backup services platform is installed for you automatically and provides a transactional backup. As you type, your data is being backed up. This means that if a data restore becomes necessary, everything entered is recorded.

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

Shop Data

Standard Tables

Standard Descriptions

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. 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!

Training Videos

How do I...

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.

YouTube

Shop Management
SE Video Training



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.

Alphabetical List of Video Training Assets

- Account Classes <http://youtu.be/vZEH8kp2Mw8>
- Add Part to Inventory <http://youtu.be/HrjHEqXLz34>
- Appointment, Creating <https://youtu.be/erkDajnCoWk>
- Auto Updater <https://youtu.be/KiPvfQVLc7Y>
- Batch Payment [F5] <https://youtu.be/WfIX38REJDw>
- Canned Job <https://youtu.be/NhJP-08ffpU>
- Category <http://youtu.be/QQWe6sqym0A>
- Change Ownership <http://youtu.be/M-jgc2jCtZI>
- Comebacks <https://youtu.be/RnniA7J4hZs>
- Counter Sale <https://youtu.be/j9tGXuLef90>
- Customer Entry <https://youtu.be/JeVi1RVyfpA>
- Customer Screen https://youtu.be/W_Ok_sci-38
- Data Protection & Recovery (DPR) <https://youtu.be/udQjyv4rLJw>
- Database Backup <https://youtu.be/1-kxcy-hhNc>
- Default Settings <http://youtu.be/fgj5StbSzFE>
- Demo - Flow Review 1 of 3 <http://youtu.be/Q7Tpjl1nAxY>
- Demo - Flow Review 2 of 3 <http://youtu.be/xVMxjnPmtXw>
- Demo - Flow Review 3 of 3 <http://youtu.be/Aba167KLZEA>
- Demo - Program Flow <http://youtu.be/i2nkjaogMgk>
- Disclaimers <http://youtu.be/BCG0InQlaoQ>
- Discount (Price Levels by Type) <http://youtu.be/Hi-sI8jOhB8>
- Electronic Payment Processing <https://youtu.be/sfrvKFL4hwY>
- End-Of-Day Reports http://youtu.be/me_k7b5mQKs
- Find Customer [F3] <https://youtu.be/1aws-jXdWhs>
- Find History [F4] <https://youtu.be/fvkl8GhYwWg>
- Fiscal Year End Close <https://youtu.be/TIMCxo9irQc>
- Follow-up <http://youtu.be/hOhOFazdXin>

• Setup--Assisted Basic

Create a User (Profile)

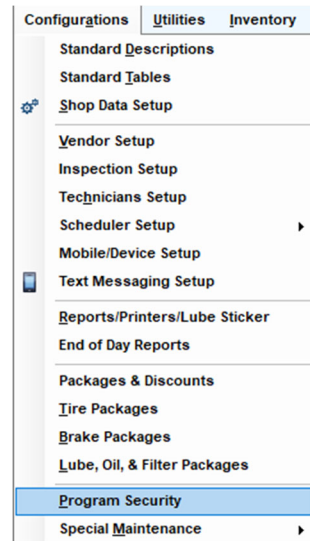


To store and recall your WIP and Order

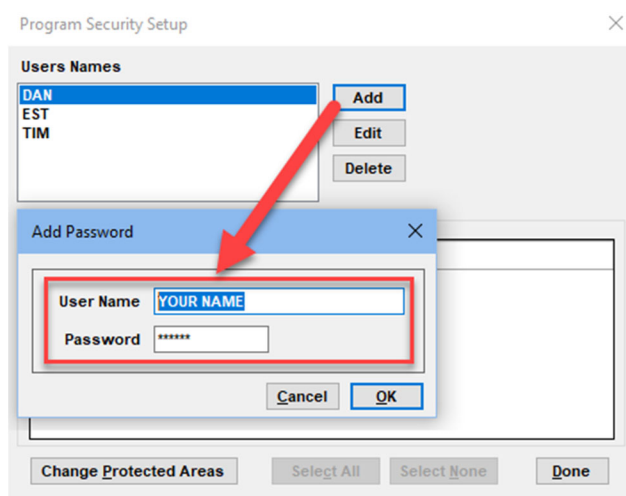
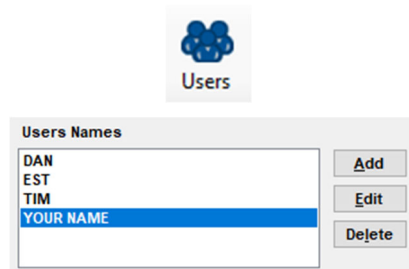
screen layout preferences, create at least one User profile. This is done through the Configurations - Program Security menu option.

Enter user names, job functions or filtered (ROs only, etc.) screen views to create User profiles.

NOTE: Program Security is discussed in the Additional Self-Setup section.



In Program Security Setup, click on **Add** to enter a name & password to create a profile. Do this for each user as required. The entries will appear in a list box when users click on **Users** icon:



User selection is confirmed in the lower right hand corner of the program screen.

8.2.1.81 YOUR NAME

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.*



Shop Data

Shop Data

About Shop Data Setup 1

This is where you enter specific details about your shop. This shop information is automatically entered into all of your printed output, such as estimates, repair orders, invoices, technician worksheets and all your management reports. This will greatly reduce typing and increase the accuracy and consistency of your orders.

Please enter your own Shop data descriptions currently used at your place of business. Remember: **type carefully** as this Shop Data appears on every estimate, repair order, invoice and counter sale printed. Also, remember to complete all fields in the Shop Data dialog boxes.

Tip: Shop Number and Shop Name are considered to be required fields. Your Shop Number is your Mitchell 1 account number. Shop Name appears at the top of all printouts.

Shop Data Setup is an **Essential** setup

Shop Data	Standard Tables	Standard Descriptions
Vehicle Preference		
Invoice Validations	Disclaimers	Late Fees
Shop / Hazmat	Screen View	Estimate/RO Validations
Shop Data 1	Shop Data 2	Default Settings

Account Number

Shop Name

Street Address

Zip City, State

Phone 000-____-____ Fax 000-____-____

Email

Website

< Back Next > Print Done

Shop Data

Shop Data

About Shop Data Setup 2

This is where you enter more details about your shop. This information is automatically printed on estimates, repair orders, invoices, technician worksheets and other management reports. This will greatly reduce typing and increase the accuracy and consistency of your orders.

Enter your own Shop data descriptions currently used at your place of business. Remember: **type carefully** as this Shop Data appears on every estimate, repair order, invoice and counter sale printed. Also, remember to complete all fields in the Shop Data 1..

Note: Shop Data Setup is an **Essential** setup activity (i.e. must be done before entering customer and vehicle information.). For more information, refer to your Workbook number three or hit F1

Shop Data	Standard Tables	Standard Descriptions
Vehicle Preference		
Invoice Validations	Disclaimers	Late Fees
Shop / Hazmat	Screen View	Estimate / RO Validations
Shop Data 1	Shop Data 2	Default Settings

Manager Name

Manager Title

License 1

License 2

Slogan

Comment

< Back Next > Print Done

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.

Shop Data

Shop Data

About Default Settings

Note: If you are upgrading from Ver. 5.X and had a setting of 'After End of Day is Run' this will be changed to 'At Program Exit'.

Your shop uses these automatic program selections most often in creating orders. When you build an order, the default information is automatically entered, unless you specify otherwise.

Tip: Be sure to fill in Labor Technician so that Pay & Actual hours fill in and a true labor cost will be included in the Profit Wizard. We recommend using 'Please Select' which will also function as a handy real-time reminder.

Note: If you select 'Include Tax in Estimates', Shop Supplies and Hazardous Materials charges are also added into Estimates (if their default settings are turned ON).

Shop Data

Vehicle Preference

Invoice Validations

Shop / Hazmat

Shop Data 1

Standard Tables

Disclaimers

Screen View

Shop Data 2

Standard Descriptions

Late Fees

Estimate / RO Validations

Default Settings

Area: 000

Promised: 5:00 PM

Labor Technician: <none>

Parts Technician: Charbonneau, Wayne

Service Writer: <none>

Default Pay Type: <none>

Use Phone # Mask: ☒

Phone # Mask: ###-###-#### * = Any # = Number

☒ On opening a new Order, display a warning if customer has a balance past 30 days

☒ Update Labor on Revisions

☒ Convert Invoice to RO on Change

☐ Include Spouse on Invoice

☒ Include Tax/Fees in Estimates

☒ Include Recommendations on RO

☐ Update Labor Time from Total

☐ Don't Prompt for Tech Worksheet

☐ Don't show existing when starting new order

☐ Check for Substitute part(s) when transferring from catalogs

Local Backup function on Host under Configuration/Special Maintenance

< Back Next > Print Done

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.

Shop Data

About Shop Supplies and Hazardous Materials Setup

Your system can be set to automatically add **Shop Supplies** and **Hazardous Material** charges to any estimate, R.O. or invoice. With Defaults set to "ON," the program will calculate shop supplies and/or hazmat charges and add them to orders based on parts and/or labor totals as defined in this dialog box.

Shop Supplies and HazMat charges can always be turned off at the Order screen as needed (for that specific order only), using the Options Button. Report Description refers to the text that will be displayed in on-screen previews and printouts of estimates, repair orders & invoices. For example, 'Hazardous Materials' could be changed to read 'Environmental Charge' instead.

Tip: Some states require shops to itemize shop supplies. In these instances, we recommend turning Shop Supplies Default setting to Off, then create shop supply line

Shop Data

Shop Supplies

0.00 Percent of ... ☐ Labor Sales ☒ Part Sales Minimum \$ 0.00

Default ☒ On ☐ Off Account Class <none> Maximum \$ 0.00

Report Description Shop Supplies ☒ Taxable

Hazardous Material

0.00 Percent of ... ☒ Labor Sales ☐ Part Sales Minimum \$ 0.00

Default ☒ On ☐ Off Account Class <none> Maximum \$ 0.00

Report Description Hazardous Materials ☒ Taxable

Behavior Show & Tax as Labor ☒ Include Sublet

< Back Next > Print Done

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.

Order Options

Default Technicians:

Labor PLEASE, SELECT

Parts <none>

Include:

☒ Shop Supplies

☒ Hazard Materials

NOTICE: States may require itemized shop supplies; if so, set Shop Supplies 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:



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 to testing and/or inspection. An express mechanic's lien is hereby acknowledged on above car or truck to secure the amount of repairs thereto. Warranty on parts and labor is one years or 12,000 miles whichever comes first. Warranty work has to be performed in our shop & cannot exceed the original cost of repair.

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.

Shop Data

About Disclaimers

Use this area to enter your legal disclaimer information for estimates, repair orders, invoices and counter sales. These appear at the bottom of your printouts.

Your management software comes with "generic" standard disclaimers. You can customize these disclaimers or rewrite them entirely.

Ensure that all your disclaimers are written in accordance with your local, state and federal laws.

Tip: If you need to Spell Check your disclaimer text, put your cursor in the text area and press the [F2] function key.

Shop Data

Standard Tables

Standard Descriptions

Vehicle Preference

Invoice Validations

Shop / Hazmat

Shop Data 1

Disclaimers

Screen View

Shop Data 2

Late Fees

Estimate / RO Validations

Default Settings

Disclaimers

☒ Estimate

☐ Repair

☐ Invoice

☐ Counter Sale

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 vehicle described for testing and/or inspection. Express mechanic's lien is hereby acknowledged on above vehicle to secure the amount of repairs thereto. SMOG: I understand that I can have emission service and/or adjustments done elsewhere. I hereby waive this right.
TEARDOWN ESTIMATE: I understand that my vehicle will be reassembled within ____ days of the date shown above if I choose not to authorize the service recommended. All Parts removed will be discarded unless instructed otherwise: Save all Parts ____, NOT RESPONSIBLE FOR LOSS OR DAMAGE TO CARS OR ARTICLES LEFT IN CARS IN CASE OF FIRE, THEFT OR ANY OTHER CAUSE.

F2 for spell check

418 characters remaining out of 1200.

< Back

Next >

Print

Done

Shop Data

About Disclaimers

Use this area to enter your legal disclaimer information for estimates, repair orders, invoices and counter sales. These appear at the bottom of your printouts.

Your management software comes with "generic" standard disclaimers. You can customize these disclaimers or rewrite them entirely.

Ensure that all your disclaimers are written in accordance with your local, state and federal laws.

Tip: If you need to Spell Check your disclaimer text, put your cursor in the text area and press the [F2] function key.

Shop Data

Standard Tables

Standard Descriptions

Vehicle Preference

Invoice Validations

Shop / Hazmat

Shop Data 1

Disclaimers

Screen View

Shop Data 2

Late Fees

Estimate / RO Validations

Default Settings

Disclaimers

☐ Estimate

☒ Repair

☐ Invoice

☐ Counter Sale

TEARDOWN ESTIMATE: I understand that my vehicle will be reassembled within ____ days of the date shown above if I choose not to authorize the service recommended. All Parts removed will be discarded unless instructed otherwise: Save all Parts ____, NOT RESPONSIBLE FOR LOSS OR DAMAGE TO CARS OR ARTICLES LEFT IN CARS IN CASE OF FIRE, THEFT OR ANY OTHER CAUSE.

F2 for spell check

843 characters remaining out of 1200.

< Back

Next >

Print

Done

Shop Data

Shop Data

Standard Tables

Standard Descriptions

Vehicle Preference

Invoice Validations

Shop / Hazmat

Shop Data 1

Disclaimers

Screen View

Shop Data 2

Late Fees

Estimate / RO Validations

Default Settings

Disclaimers

☐ Estimate
☐ Repair
☒ Invoice
☐ Counter Sale

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 to testing and/or inspection. An express mechanic's lien is hereby acknowledged on above car or truck to secure the amount of repairs thereto. Warranty on parts and labor is one years or 12,000 miles whichever comes first. Warranty work has to be performed in our shop & cannot exceed the original cost of repair.

F2 for spell check

651 characters remaining out of 1200.

Back

Next >

Print

Done

Shop Data

Shop Data

Standard Tables

Standard Descriptions

Vehicle Preference

Invoice Validations

Shop / Hazmat

Shop Data 1

Disclaimers

Screen View

Shop Data 2

Late Fees

Estimate / RO Validations

Default Settings

Disclaimers

☐ Estimate
☐ Repair
☐ Invoice
☒ Counter Sale

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.

F2 for spell check

651 characters remaining out of 1200.

Back

Next >

Print

Done

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 be assigned per vehicle too.

Standard Tables

Standard Tables

About the Labor Table

Tip: Many shops have multiple labor rates and don't realize it. For example, a shop may give a lower labor rate to a fleet account or special customers, while charging a special, higher labor rate for electrical work, computer diagnostics or certain vehicles.

This table allows you to set up to 10 different shop labor rates.

Note: Line 1 is always the default Labor Rate and is added automatically unless you choose otherwise. Your customers can be defined with any of these labor rates as default for their estimates, orders & invoices.

Labor Rate Setup is an **Essential** setup activity (i.e. must be done before entering customer and vehicle information). For more information, refer to your *Workbook number three* or hit **F1** for online help.

Shop Data

Standard Tables

Standard Descriptions

Description	Rate
Labor Rate	\$60.00
Fleet Rate	\$55.00
Electrical Work	\$70.00
Computer Diagnostics	\$75.00
If You Bought Parts	\$80.00
If U Worked on It 1st	\$100.00
European	\$75.00
Motorhome/RV	\$85.00
Tractor	\$65.00
Heavy Truck	\$95.00

Top entry will be used as default Labor rate.

< Back Next > Print Done

NOTE: Line 1 is DEFAULT LABOR RATE (automatic) unless another is selected.

Price Levels

Discount table allows storage of up to 10 part price levels. Parts entered on an estimate or RO reflect any 'discount' defined (using Customer Type). Prices for one or all parts can also be changed (exceptions) at the order item level.



Standard Tables

Standard Tables

About Price Levels

Warning: Keep the value on Line #1 at 0%, or you could end up automatically discounting every part you sell. Please note that negative values (ex. -10%) will instead **add** that percentage to the normal parts charge.

This table allows you to maintain up to 10 pricing levels, including the retail (0% discount) value on line #1 to automatically be applied to customers and vehicles once assigned.

Parts entered on an estimate, R.O. or invoice, automatically reflect the price level assigned to that customer.

Prices for one or all parts can also be changed at the order item level if you need to make an exception. To apply a different price level, click the Type button provided in the Order Item Entry window.

Tip: In addition to defining Price Levels for each customer, these values come into play with the Alternate Price feature, found

Shop Data

Standard Tables

Standard Descriptions

Description	Discount
Normal	0%
Fleet Discount Rate	10%
AARP Discount	5%
Government Discount	8%
Family Discount	10%
In-Laws	-10%
Give Me a Discount	-20%
AAA	5%
Wholesale	10%
Buyout	15%

Top entry will be used as default Parts discount.

< Back Next > Print Done

Notes: Keep Line #1 at 0% or automatically discount every part sold! Negative values (ex. -10%) will instead add 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.

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

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

Description	Material Rate	Labor Rate	Default	GL Code
1 Sales Tax	7.7500%	0.0000%	<input checked="" type="checkbox"/>	20030
2 Alternate Tax	6.0000%	0.0000%	<input type="checkbox"/>	
3	0.0000%	0.0000%	<input type="checkbox"/>	
4	0.0000%	0.0000%	<input type="checkbox"/>	
5	0.0000%	0.0000%	<input type="checkbox"/>	
6	0.0000%	0.0000%	<input type="checkbox"/>	
7	0.0000%	0.0000%	<input type="checkbox"/>	

Note 3: The NEW Tax Calculation Method selector should be set to **Standard** unless your business is located in Florida.

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 occur.

Description	Rate %	GL
Tax #1 Excise Tax	2.0000	18999
Tax #2	0.0000	

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, any new payment type for drop-down list.

You may add/edit/delete these codes and descriptions in the table below.

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

Note 2: Once a payment type has been used, it CANNOT be deleted.

Note 3: This will add Electronic Payment-Debit Card & -Credit Card as default to your Payment Types list.

Class Description	GL Code
Core Revenue	40750
HazMat Revenue	40900
Labor	40110
Labor - Discounted	40100
Labor Revenue	40100
Labor Revenue Non-Taxable	40110
Late Fee Revenue	41000
Parts - Discounted	40515
Parts Revenue	40500
Parts Revenue Non-Taxable	40510
Shop Supplies Revenue	40800

Class Description	GL Code
American Express	10100
Cash	10100
Check	10100
Debit Card (ATM)	10100
Discover	10100
Elec - Credit Card	10100
Elec - Debit Card	10100
MasterCard	10100
Novus	10100
Oil Company Card	10100

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 BEFORE you begin your live invoicing.

GL Code	Description
11100	Accounts Receivable
20026	Customer Deposits
39005	Retained Earnings
64040	Applied Credit

Account Classes

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 assignments BEFORE going live. Changes made later will affect your reporting accuracy.

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.



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 orders. These are used internally to give the Profit Wizard realistic numbers to reflect true cost of doing business.

Display Information As . . .

☒ Mark Up ☐ Profit

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

Scene I: 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

Scene II: 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%.

Question: Is this perhaps why Joe has such a hard time making ends meet?

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

Scene III: 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 Cost	Retail Price	Gross Profit
\$100	66%	\$166	40%

Scene IV: 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% (-\$49.80)	\$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.

Display Information As . . .

☒ Mark Up  ☐ Profit

% Added to Cost of Part	Gross Profit Part Sale	% Added to Cost of Part	Gross Profit Part Sale	% Added to Cost of Part	Gross Profit Part Sale
30%	23.1%	50%	33.3%	70%	41.2%
31%	23.7%	51%	33.8%	75%	42.9%
32%	24.2%	52%	34.2%	80%	44.4%
33%	24.8%	53%	34.6%	85%	45.9%
34%	25.4%	54%	35.1%	90%	47.4%
35%	25.9%	55%	35.5%	95%	48.7%
36%	26.5%	56%	35.9%	100%	50%
37%	27.1%	57%	36.3%	125%	55.6%
38%	27.5%	58%	36.7%	150%	60%
39%	28.1%	59%	37.1%	175%	63.6%
40%	28.6%	60%	37.5%	200%	66.6%
41%	29.1%	61%	37.9%	225%	69.2%
42%	29.6%	62%	38.2%	250%	71.4%
43%	30.1%	63%	38.6%	275%	73.3%
44%	30.6%	64%	39%	300%	75%
45%	31.0%	65%	39.4%	325%	76.5%
46%	31.5%	66%	39.8%	350%	77.8%
47%	32.0%	67%	40.1%	375%	78.9%
48%	32.4%	68%	40.5%	400%	80%
49%	32.9%	69%	40.8%	500%	83.3%

Price Markup Matrix



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

Standard Tables

Standard Tables

About Price Markup Matrix

This matrix allows you to progressively scale your parts markup according to what you paid for each part. In other words, parts that cost less than a dollar are marked up at a much higher rate than parts that cost \$200. We recommend using several levels to remain profitable and competitive where it really counts.

Tip: (Systems with Inventory): You have the added capability of keying the parts Markup matrix off the Last Cost or Average cost of the part. Last or Average Cost is significant because it may place part(s) into a different bracket and therefore receive a different Markup value than expected. Any changes made to the parts Markup matrix can be applied by clicking on Apply Matrix to Parts List or Apply Matrix to Inventory. This will display a dialog box stating how many part records will be updated to use the new Markup percentages.

Shop Data | **Standard Tables** | Standard Descriptions

Price Markup Matrix | Parts Pricing | Tire Matrix

Account Classes | Markup

Compound Taxes | Income/Payment Types

Labor | Discount

#	From	To	Markup	Profit Margin
1	\$0.00	\$10.00	300.00%	75.00%
2	\$10.01	\$100.00	150.00%	60.00%
3	\$100.01	\$9,999,999.99	110.00%	52.38%
4	\$0.00	\$0.00	0.00%	0.00%
5	\$0.00	\$0.00	0.00%	0.00%
6	\$0.00	\$0.00	0.00%	0.00%
7	\$0.00	\$0.00	0.00%	0.00%
8	\$0.00	\$0.00	0.00%	0.00%
9	\$0.00	\$0.00	0.00%	0.00%
10	\$0.00	\$0.00	0.00%	0.00%

Inventory Costing | Average Cost ☒ | Last Cost ☐ | Apply Matrix to Inventory

< Back | Next > | Print | Done

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

Parts Pricing



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

Standard Tables

Standard Tables

Parts Pricing

Use this screen to set up the basis from which a part's Sale amount is calculated.

Price = calculated as Cost times the Markup Matrix. (To set or change the Markup Matrix, go to the Price Markup Matrix tab in the Standard Tables under Setup.)

List = the Manufacturer's Suggested Retail Price (MSRP).

A complete definition of terms is provided at the end.

Sale amount will be calculated as either List minus Discounts or as Price minus Discounts. Use the radio buttons to select whether Price or List shall be the basis for calculating Sale.

When the radio button selection is changed, the rules for the new selection will go into effect. The new rules will apply to newly created Estimates and Repair Orders. The new rules will not effect Estimates, Repair Orders, or Invoices.

Shop Data | **Standard Tables** | Standard Descriptions

Price Markup Matrix | **Parts Pricing** | Tire Matrix

Account Classes | Markup

Compound Taxes | Income/Payment Types

Labor | Discount

Calculate the part's Sale amount based on:

☒ Price

☐ List

< Back | Next > | Print | Done

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.



Scheduler Options [\(Online Help\)](#)

Regular Business Hours

	Start	End
Sunday	CLOSED	CLOSED
Monday	8:00 AM	5:00 PM
Tuesday	8:00 AM	5:00 PM
Wednesday	8:00 AM	5:00 PM
Thursday	8:00 AM	5:00 PM
Friday	8:00 AM	5:00 PM
Saturday	CLOSED	CLOSED

Hours Visible on Schedule

Visible Hours: 7:00 AM - 6:00 PM

Show last 30 days

☒ Auto Adjust Appointment time

Automatically adjusts appointment time span based on Order hours

Drop Off time: 7:00 AM

☐ Match Drop-Off to Start Time

Holidays...

Scheduler Refresh Interval: 30 Seconds

30 Seconds
1 minute
2 minutes
3 minutes
4 minutes
5 minutes

Opening Schedule starts in:

Scheduling Tab

Browser Map Provider

Google

Save Changes

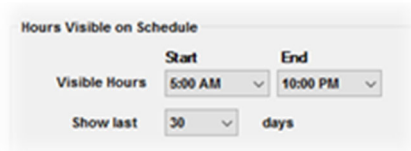
Undo Changes

Opening Schedule starts in – Select the default starting page that opens when the scheduler button is clicked on.

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 - Set the system to display the period of the day you want displayed in the calendar view. Typically this would be set to an hour before and after regular business hours.

Show Last (number of days) - This is the number of days to display in the calendar previous to the current date. You may experiment with this setting to meet your specific needs. A

typical setting would be 15 or 30 days. If your shop has a large number of appointments per day, you may want to use a lower setting.

Auto Adjust Appointment Time - This default setting is provided to save user time and effort when actual Order Hours increase, due to additional work being sold. The appointment time will automatically be extended in the Schedule to reflect this change. While this could 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 some time as you create a new appointment in the Schedule. Select the most popular drop off time and enter it here. It can always be changed at the individual appointment level.

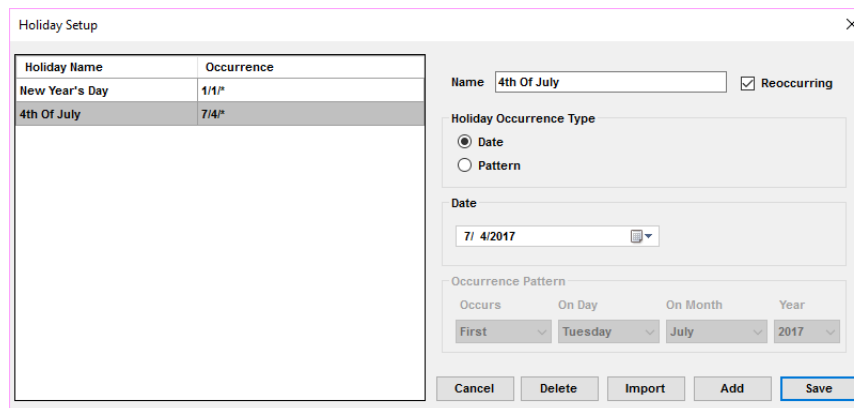
Opening Schedule Starts in: Select the default starting page that opens when Scheduler button is clicked on.

Browser Map Provider: TBD

Scheduler Refresh Interval - The update frequency of Scheduler related columns can be changed from the default 30 seconds to as much as five minutes, if the WIP screen refresh is distracting. The trade-off is that changes to Scheduler items will not be reflected in the WIP screen columns data as soon as the default 30 seconds setting provides.

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 listing.

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.

Scheduler States [\(Online Help\)](#)

Appointment State

State Color

132, 255, 175

☒ Active In Schedule

Code

ARRIVED

Name

Arrived

Status Map

Select a State to Edit

Arrived (ARRIVED)

Add

Save Changes

Undo Changes

Status Map – Provides the option to map Appointment States to Order Statuses. When relationships are created, changes to Appointments on the Scheduler screen will automatically change the Order Status on the WIP screen or vice-versa if updating an Order Status. This saves time and prevents errors.

Status Mapping

Automatically set RO Status based on Appointment State Change

Appointment State	RO Status
Awaiting Parts	Waiting For Parts
Finished	Completed
Waiting	Customer Waiting

Add

Edit

Delete

Automatically set Appointment State based on RO Status Change

RO Status	Appointment State
Completed	Finished
Customer Waiting	Waiting
Waiting For Parts	Awaiting Parts

Add

Edit

Delete

Cancel

Save

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 event.

The screenshot shows a web application window titled "Scheduler Resources" with a close button (X) in the top right corner. Below the title is a link for "(Online Help)". The form is divided into two main sections: "Required Information" and "Optional Information".

Required Information:

- Name:** A text input field containing "Bay 1".
- Schedule Color:** A button labeled "Click to change Color".
- Active in Scheduler:** A checked checkbox.

Optional Information:

- Brand Name:** An empty text input field.
- Nickname:** A text input field containing "Bay 1".
- Size:** A text input field containing "Single".
- Serial Number:** An empty text input field.
- Location:** A text input field containing "1".
- Description:** A text input field containing "Lift and Verus".
- Warranty Information:** An empty text input field.
- Notes:** A large text area with a vertical scrollbar.

At the bottom of the form, there is a section titled "Select a Resource to Edit" with a dropdown menu showing "Bay 1 (Single, 1)". To the right of the dropdown are three buttons: "Add" (with a plus icon), "Save Changes" (with a checkmark icon), and "Undo Changes" (with an X icon).

Technicians Setup



Provides entry of employee wages, availability and personal information; used to create data for Tech Commissions Report, figuring shop's profit margin on work using F12 Check Profit.

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.



Technicians Setup

Name	Technician Type
Charbonneau, Wayne	Technician
Dwulet, John	Service Writer
Johnson, Tina	Technician
McDonnell, Tim	Service Writer
Please , Select	Technician
Warfield, Brian	Manager

Add Edit Delete OK

Wages & Commissions

Wages & Commission Hours Address

Wage Information

☐ Hourly ☒ Salary Last Pay Raise 4/25/2016 x

Wage \$20.00 Hours Per Week 40 Employee Type Technician

Parts Commission Labor Commission Sublet Commission

Type None Type Profit Type None

Rate % 0.000% Rate % 5.000% Rate % 0.000%

Hours of Availability

Wages & Commission Hours Address

Hours

Hourly Cost 0.50 Hours Scheduled Per Week 40.00

	Sun	Mon	Tues	Wed	Thur	Fri	Sat
Start		08:00 AM	08:00 AM	08:00 AM	08:00 AM	08:00 AM	
End		04:00 PM	04:00 PM	04:00 PM	04:00 PM	04:00 PM	

* To remove the start and end times for a day use the keyboard "Delete" key

Employee Background

Wages & Commission Hours Address

Address 1313 Mockingbird Lane

Zip Code 92064 City Poway State CA

Phone 1 858-555-1234 Ext

Phone 2 858- - - Ext

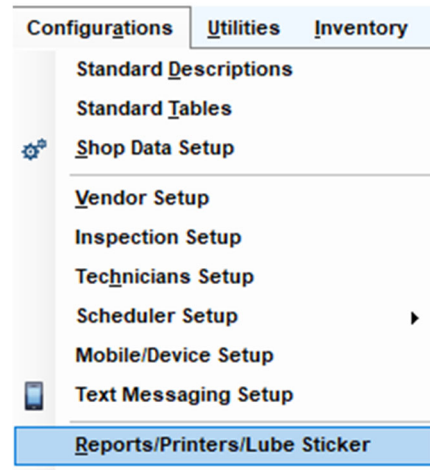
E-Mail wc1958@gmail.com Birthday 10/11 MM/DD

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

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.

TIP: Consider a remote printer dedicated to printing out your Technician Worksheets.

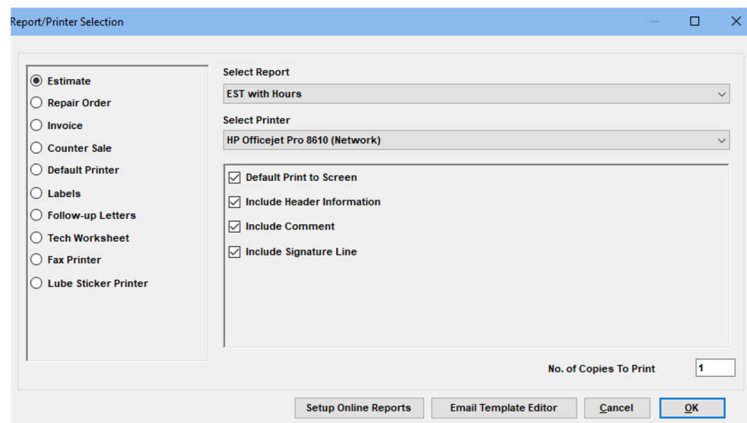


NOTE: When users click on the **Print** button, the program bypasses the Preview setting and immediately prints the number of copies specified for the selected document (2 copies for Invoice, etc.) If you wish to preview the document before actual printing, you should select **File, Preview**.

Estimates

Select the report type and printer to complete your selections.

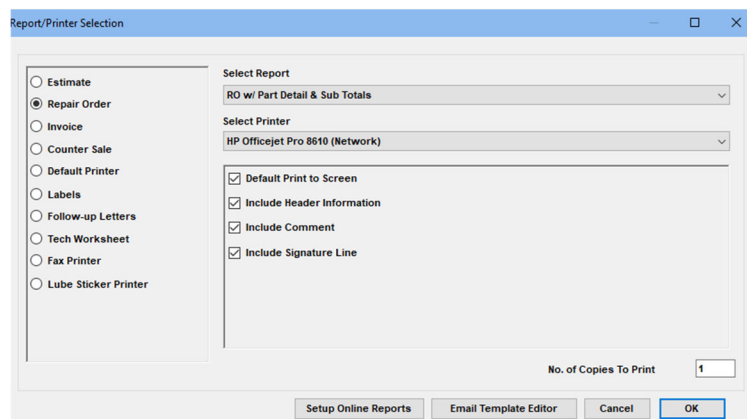
Typically two Estimate copies are printed; one for customer and one for shop to file. Choose Email Template Editor if you desire to modify the standard email template



Repair Orders

Select the report type and printer to complete your selections.

It is possible to 'Mark all ROs as Approved/Printed' under Screen View tab options, if you don't need to actually print ROs. See page 20 for details. Choose Email Template Editor if you desire to modify the standard email template



Invoice

Select the report type and printer to complete your selections.

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 Editor if you desire to modify the standard email template

The 'Report/Printer Selection' dialog for the 'Invoice' report type. On the left, 'Invoice' is selected under the 'Select Report' section. On the right, 'Select Report' is set to 'INV No Hrs/Parts/Rev Data' and 'Select Printer' is 'HP Officejet Pro 8610 (Network)'. Checkboxes for 'Default Print to Screen', 'Include Header Information', 'Include Comment', and 'Include Signature Line' are all checked. The 'No. of Copies To Print' is set to 2. At the bottom are buttons for 'Setup Online Reports', 'Email Template Editor', 'Cancel', and 'OK'.

Labels

Select the report type and printer to complete your selections.

NOTE: Make certain you select the 'with' or 'w/o vehicle' option that best fits your label & postcard printing needs.

The 'Report/Printer Selection' dialog for the 'Labels' report type. On the left, 'Labels' is selected under the 'Select Report' section. On the right, 'Select Report' is set to 'Avery 5161 2-col laser w/o vehicle' and 'Select Printer' is 'HP OfficeJet Pro 6960 [107851]'. Checkboxes for 'Default Print to Screen', 'Include Header Information', 'Include Comment', and 'Include Signature Line' are all checked. The 'No. of Copies To Print' is set to 1. At the bottom are buttons for 'Cancel' and 'OK'.

Technician Worksheet

Select the report type and printer to complete your selections.

Repeat this process for **Counter Sale**, **Default Printer**, **Labels** and **Fax Printer** as needed.

The 'Report/Printer Selection' dialog for the 'Technician Worksheet' report type. On the left, 'Technician Worksheet' is selected under the 'Select Report' section. On the right, 'Select Report' is set to 'Expanded Worksheet w.Charged Hours' and 'Select Printer' is 'HP Officejet Pro 8610 (Network)'. Checkboxes for 'Default Print to Screen', 'Include Header Information', 'Include Comment', and 'Include Signature Line' are all checked. The 'No. of Copies To Print' is set to 1. At the bottom are buttons for 'Setup Online Reports', 'Cancel', and 'OK'.

Lube Sticker Printer

Select the report type and printer to complete your selections.

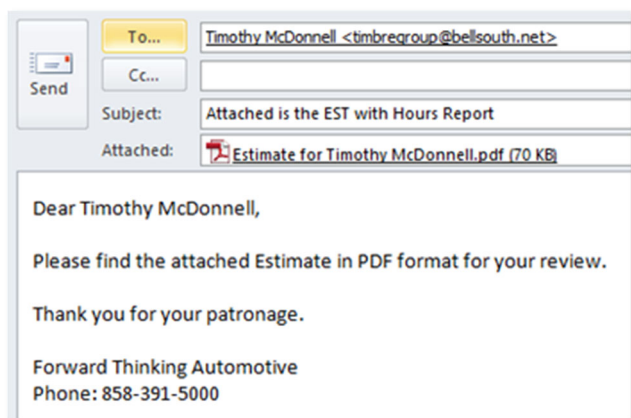
The graphic to the right provides an overview of the options available for printing Lube Stickers. Refer to the Online Help [F1] or (<https://buymitchell1.net/managerhelp/LubeStickerPrinter.html>) for detailed instructions.

The 'Lube Sticker Printer' dialog with numbered steps: 1. 'Choose Lube Sticker Printer' points to the 'Lube Sticker Printer' radio button on the left. 2. 'Set Print Options' points to the 'Print Options' section, which includes 'Printer' (Dymo / Godex), 'Paper Size' (MITC D450), 'Orientation' (Landscape), and 'Template' (With Logo - Horizontal Layout). 3. 'Set up your Default Settings' points to the 'Default Settings' section, which includes a table for 'Oil Quality', 'Odometer', and 'Months'. 4. 'Set up your Printer Options and Logo' points to the 'Print Margins (Inches)' section, which includes 'Left', 'Top', 'Right', and 'Bottom' settings, and a 'Select Logo' button. 5. 'Print Sample' points to the 'Print Preview' section, which shows a sample of the lube sticker and a 'Print Sample' button. The 'No. of Copies To Print' is set to 1. At the bottom are buttons for 'Cancel' and 'OK'.

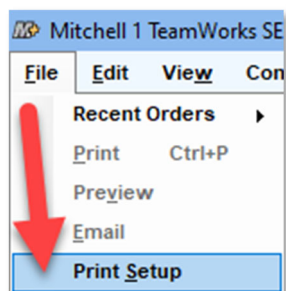
NOTE: Special EST / RO / INV templates are provided to meet specific requirements by certain states. These will include a state abbreviation in the titles. Your SE Setup Information Gathering document also indicates any state-specific template options available.

Email Template Editor

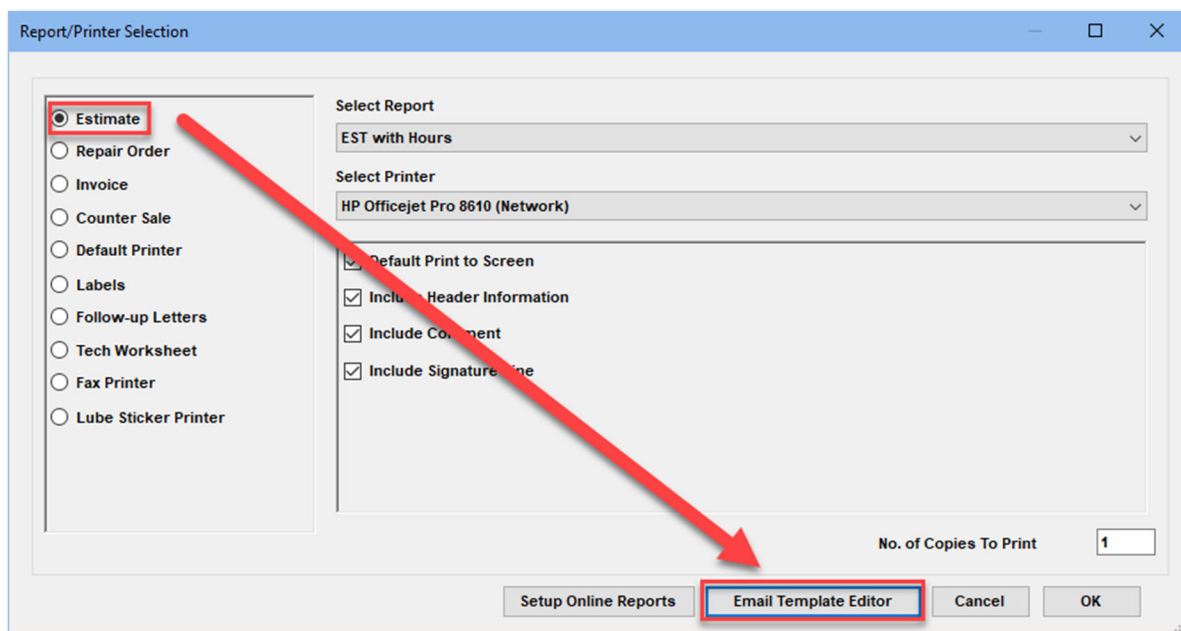
By default, Manager SE includes generic messages that include basic customer and shop information. This is included in the 'handoff' to your shop PC's email client (Outlook, Thunderbird, etc.) to customer's email Inboxes.



It is now possible to edit this wording included in the email document. Go to **File** menu, select **Print Setup** to access the Reports & Printers selection screen.



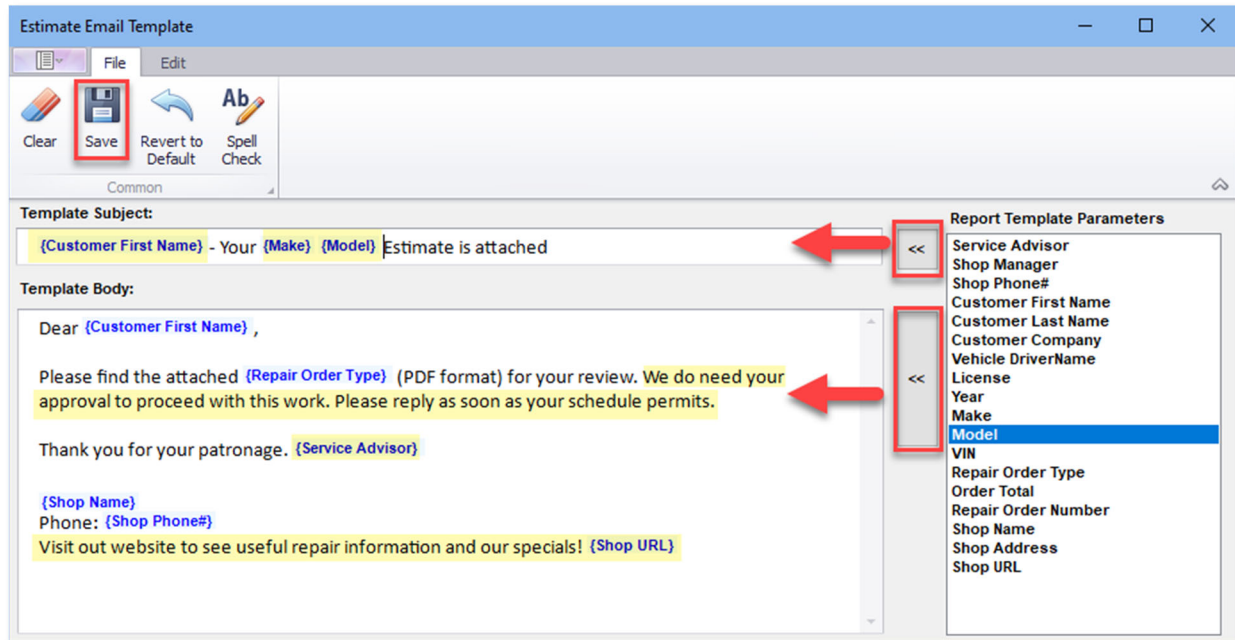
Click on the '**Email Template Editor**' button to open the editor to change an email template for the currently selected document type. Make note of your selection before clicking the button so that you can see and edit the appropriate message content. 'Estimate' is selected by default so we'll take 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

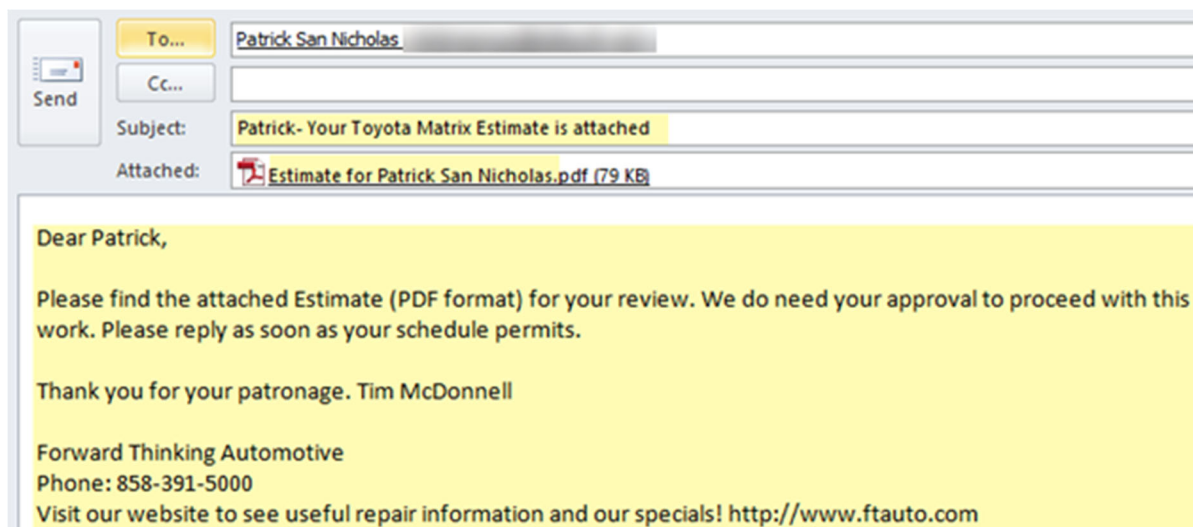
incorporate actual database fields into the Subject line and the message body itself. You only type what appears in black; any blue text shown in brackets is a database field that has been inserted.

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

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.
- **Display Margin:** If this information is deemed sensitive, this selection can remove it from the WIP screen view.
- **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

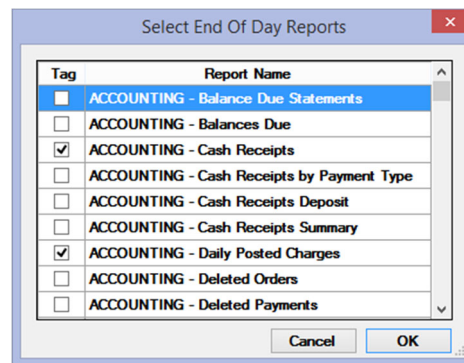
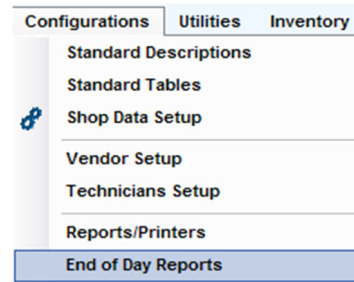


End-Of-Day Reports setup is where you select which reports will be run together as a "batch operation" at the close of business. This saves time at the end of every business day.

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

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 SE LIVE program, you'll start the End of Day Reports process by clicking on Utilities and then 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: 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.

Standard Descriptions

Standard Descriptions

About Notes Setup

These are timesaving notes you can attach to orders with just a few mouse clicks. These notes can be helpful reminders to your customers or direct advertising about special discounts or promotions.

Note: The system comes with some common notes already prepared for you. Add, Edit, or Delete these Notes as needed.

Refer to your *User's Guide* for more detailed information.

Shop Data

Symptoms

Vendor Type

Title

Category

Standard Tables

Manufacturers

Notes

Location

Part Code

Standard Descriptions

Email Type

Followup

Status

Phone

Description	
A/C Recharge - Recommendation	It is our considered opinion that your vehicle requires an ...
Battery - Recommendation	It is our considered opinion that your vehicle requires a n...
Billing Transfer	Vehicle is owned by:The ownership has been changed te...
Brakes - Recommendation	It is our considered opinion that your vehicle requires ne...
Change Oil	Change your engine oil every 3,000 miles to extend the lif...
Clutch Adjustment	When your vehicle has a clutch replacement performed, ...
Regular Maintenance	Regular maintenance to your vehicle adds life to your car.
Senior	SENIOR Discount Applied
Test Drive	Our test drive of your vehicle revealed the following cond...
Tires - Recommendation	It is our considered opinion that your vehicle will require ...

AddEditDelete

< Back

Next >

Print

Done

Estimate/RO & Invoice Validations

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



Shop Data

Shop Data

About Estimate/RO Validations

When printing an estimate or repair order the system checks for any missing information. Before your print request is processed, you'll be presented with a dialog box displaying a warning, and in many cases, the opportunity to correct the situation before printing.

Note: By default, all validations are automatically enabled. We recommend that you leave all Estimate/Repair Order warnings turned on, unless you have a specific reason not to use them.

Shop Data	Standard Tables	Standard Descriptions
Vehicle Preference		
Invoice Validations	Disclaimers	Late Fees
Shop / Hazmat	Screen View	Estimate/RO Validations
Shop Data 1	Shop Data 2	Default Settings

Estimate Warn If...

- ☒ 'In' mileage is zero or less than 'Previous' mileage.

Repair Order Warn If...

- ☒ 'In' mileage is zero or less than 'Previous' mileage.
- ☒ 'Out' mileage is zero or less than 'In' mileage
- ☒ 'Written By' has not been entered.
- ☒ 'License' has not been entered.
- ☒ 'Inspection Date' is prior to today's date.
- ☒ Any parts or labor items do not have a Technician assigned.

< Back Next > Print Done

Estimate / RO Validations

Shop Data

Shop Data

About Invoice Validations

When printing an invoice, the system checks for any missing information. Before your print request is processed, you'll be presented with a dialog box displaying a warning, and in many cases, the opportunity to correct the situation before printing.

Note: By default, all validations are automatically enabled. We recommend that you leave all Invoice Validation warnings turned on, unless you have a specific reason not to use them.

Shop Data	Standard Tables	Standard Descriptions
Vehicle Preference		
Invoice Validations	Disclaimers	Late Fees
Shop / Hazmat	Screen View	Estimate/RO Validations
Shop Data 1	Shop Data 2	Default Settings

Warn If...

- ☒ 'In' mileage is zero or less than 'Previous' mileage.
- ☒ 'Out' mileage is zero or less than 'In' mileage
- ☒ 'Written By' has not been entered.
- ☒ 'License' has not been entered.
- ☒ 'Inspection Date' is prior to today's date.
- ☒ Any parts or labor items do not have a Technician assigned.
- ☒ Any parts or labor items are not 'Confirmed' on invoice.
- ☒ Invoice total is greater than estimate total (over estimate).
- ☒ Required 'Marketing Information' has not been entered.

< Back Next > Print Done

Invoice Validations

NOTE: By default, ALL validations are enabled. We recommend that users leave warnings turned on, unless you have a specific reason not to use any specific validation(s). If any pop-up, users are shown the specific fields to directly enter any required data. Enter it and press Enter key to continue.

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.

The screenshot shows the 'Shop Data' window with the 'Late Fees' section active. It includes a warning about consulting local regulations, a checkbox for 'Apply Late Fees', and fields for 'Fee Assessment Options' such as 'Flat Fee' (Amount \$ 1.00) and 'Percentage of Balance' (Percent (APR) 0.00).

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.

Use provided Categories, edit or delete them, or add your own.

The screenshot shows the 'Standard Descriptions' window with a list of categories including AC/Heating/Cooling, Accessories, Automatic Trans/Transaxle, Axles & Driveshafts, Battery, Belts & Hoses, Brakes, Charging & Starting System, Clutch, Electrical, Emissions Testing, Engine Mechanical, and Engine Performance/Fuel.

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.

NOTE: If using integrated parts catalogs, there is far less need to use Part Codes as the data fields are filled in already.

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

The screenshot shows the 'Standard Descriptions' window. On the left, there is a text box titled 'About Part Codes' explaining that these are abbreviations to help enter parts faster. It mentions that typing 'BAT' into the Part Code field will automatically fill the Description with 'Battery'. Below this, a note states that the system comes loaded with many Part Code Descriptions and that these can be printed for review and reference. The main part of the window is a table with two columns: 'Code' and 'Description'. The table lists various part codes and their corresponding descriptions, such as 'ACA' for 'A/C Accumulator', 'ACC' for 'A/C Compressor', 'ACCL' for 'A/C Compressor Clutch', 'ACF' for 'A/C Fitting', 'ACH' for 'A/C Hose', 'ACD' for 'A/C Oil', 'ACR' for 'A/C Relay', 'ACS' for 'A/C Seal', 'AF' for 'Air Filter', 'AFS' for 'Air Flow Sensor', 'ALT' for 'Alternator', 'ALTR' for 'Rebuilt Alternator', and 'ANT' for 'Antenna'. At the bottom of the window, there are buttons for 'Add', 'Edit', 'Delete', '< Back', 'Next >', 'Print', and 'Done'.

The screenshot shows a form for entering a part code. The 'Part Code' field contains 'BAT'. The 'Description' field contains 'Battery'. The 'Category' dropdown menu is set to 'Battery'. The 'Vendor' dropdown menu is set to 'Interstate Battery (BATT)'. At the bottom, there are buttons for 'Add', 'Edit', 'Delete', '< Back', 'Next >', 'Print', and 'Done'.

Phone



Phone stores 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

The screenshot shows the 'Standard Descriptions' window. On the left, there is a text box titled 'About Phone Descriptions and Position'. It contains a warning: 'Warning! DO NOT change these descriptions once customers and phone numbers have been entered. You risk mixing up these labels as to the phone numbers they truly belong to.' Below the warning, it explains that the system allows you to store up to 10 unique Phone Descriptions and that these allow you to accommodate customers who have multiple phone locations. It also mentions that the shop management software comes with descriptions you are most likely to use and that you may change or delete these during the initial setup as you wish. The main part of the window is a table with two columns: 'Description' and 'Type'. The table lists various phone descriptions and their corresponding types, such as 'Home', 'Office', 'Spouse', 'Cellular', 'Fax', and 'UNKNOWN'. A dialog box titled 'Phone Description' is open over the table, showing the 'Description' field with 'Spouse' and the 'Type' dropdown menu set to 'Mobile/Text'. At the bottom of the dialog box, there are buttons for 'OK' and 'Cancel'. At the bottom of the main window, there are buttons for 'Add', 'Edit', 'Delete', '< Back', 'Next >', 'Print', and 'Done'.

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

NOTE: If using 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.

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 necessary.

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

Standard Descriptions

Standard Descriptions

About Title Descriptions

Important Note: Be sure to leave the first line blank. If you entered, say, "Mr." in the first line, it would automatically be entered for all customers, regardless of gender.

You can create or remove standard titles (salutations) for your customers. The program doesn't require you to enter titles for your customers. These are optional.

The system comes with a list of Title descriptions. For most customers, the provided Titles work fine. You can edit or delete Title descriptions as necessary.

Symptoms	Manufacturers	Standard Descriptions
Vendor Type	Notes	Followup
Title	Location	Status
Category	Part Code	Phone

Description

Mr.
Ms.
Miss
Mrs.
Dr.
Rev.
Pvt.
Sgt.
Maj.

Add Edit Delete < Back Next > Print Done

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 can add/edit/delete descriptions of common vehicle locations in or around your shop at any time.

NOTE: Program comes with a list of sample Location descriptions. This will be an item on your Get Set checklist.

Standard Descriptions

Standard Descriptions

About Location Descriptions

The descriptions are used to help you keep track of where vehicles are located at your business. These locations can be very important to a large shop with multiple parking areas. You can add/edit/delete descriptions of common vehicle locations in or around your shop at any time.

Symptoms	Manufacturers	Standard Descriptions
Vendor Type	Notes	Followup
Title	Location	Status
Category	Part Code	Phone

Description

Body Shop
Front Lot
Rack # 1
Rack # 2
Rear Lot
Steam Clean
Storage Bldg #2
Test Drive
Towing Yard
Wash Rack

Add Edit Delete < Back Next > Print Done

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 add/edit/delete these as you wish at any time. Add **Comeback** so you can see these on your Work-In-Progress screen.

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 define the background color and/or text color in this dialog box.

04/3/2018 05:00 PM	No	No	Inspection Started
04/02/2018 05:00 PM	No	No	Inspection Started
02/02/2018 05:00 PM	No	No	Mobile Est Comple...
03/03/2018 05:00 PM	No	No	Mobile Est Comple...
04/13/2018 05:00 PM	No	No	Mobile Est Comple...
04/16/2018 02:32 PM	No	No	Mobile Est Comple...
03/20/2018 05:00 PM	No	No	Waiting on Parts 1
04/11/2018 05:00 PM	No	No	Mobile Est Started
04/12/2018 05:00 PM	No	No	Pending Customer... 2
01/31/2018 05:00 PM	No	No	Test Drive 3

Standard Descriptions

Standard Descriptions

About Status Descriptions

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

You may add/edit/delete these as you wish at any time. Add Comeback so you can see these on your Work in Progress (WIP) screen.

Symptoms

Vendor Type

Title

Category

Manufacturers

Notes

Location

Part Code

Followup

Status

Phone

Description

Appointment Only

Comeback

Completed

Customer Waiting

In Progress

Storage Due

Waiting For Approval

Waiting For Parts

Waiting for Pick up

Waiting for Sublet

Waiting For Tech.

Add

Edit

Delete

< Back

Next >

Print

Done

Repair Order Status

Description

Pending Customer App.

Sample

Pending Customer App.

Text\Background Colors

☐ Default (Black Text \ Grid Background Color)

☒ Custom Colors

Text color -

79, 129, 189

Background color -

255, 255, 255

☒ Use Grid Background Color

OK

Cancel

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.



The screenshot shows a software window titled 'Followup'. It has a tabbed interface with tabs for 'Symptoms', 'Manufacturers', 'Notes', 'Followup', 'Vendor Type', 'Location', 'Status', 'Title', 'Part Code', and 'Phone'. The 'Followup' tab is active. On the left, there is a list of descriptions: 'How Did We Do?', 'Make and Manufacturer 1', 'Make and Manufacturer 2', 'New Computer System 1', 'New Computer System 2', 'Recommendation Data', 'Recommendation for Work 1', 'Recommendation for Work 2', 'Recommendation for Work 3', 'Thank You 1', 'Thank You 2', 'Thank You 3', 'Thank You 4', 'Without Service 1', and 'Without Service 2'. On the right, there are three radio buttons: 'Postcards', 'Mail Merge Letters', and 'FollowUp Letters'. The 'FollowUp Letters' option is selected.

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.



The screenshot shows a software window titled 'Standard Descriptions'. It has a tabbed interface with tabs for 'Shop Data', 'Standard Tables', and 'Standard Descriptions'. The 'Standard Descriptions' tab is active. On the left, there is a text area with the following text: 'About Vendor Type Descriptions', 'These descriptions are used to identify the various 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 Vendor Descriptions currently used at your place of business.', '***', 'Refer to your Workbook number three or hit F1 for more detailed information.' On the right, there is a list of vendor types: 'Auto Dealer', 'Auto Recycler', 'Machine Shop', 'Muffler Shop', 'Parts Distributor', 'Parts Jobber', 'Shop Supplies', 'State Agency', 'Tool Supplier', 'Towing', and 'Transmission Shop'. At the bottom, there are buttons for 'Add', 'Edit', 'Delete', '< Back', 'Next >', 'Print', and 'Done'.

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.



Standard Descriptions

Standard Descriptions

About Symptoms
Recommended: Review the existing Symptoms and enter any additional symptoms you think you may want to use.
Using symptoms can save many keystrokes when writing estimates, repair orders and invoices. By using Symptoms, you're speaking the customer's language right away. This makes it easier to receive the vehicle and standardize your diagnostic labor charges. You can always delete the diagnostic charge from the order, if the customer elects to have you do the work. Using diagnostic charges make the customer aware of this valuable and necessary service.
Note: You may also add these on the fly with the Order Screen Symptoms button.

Refer to your Users Guide for more detailed information.

Shop Data

Standard Tables

Standard Descriptions

Symptoms

Manufacturers

Vendor Type

Notes

Followup

Title

Location

Status

Category

Part Code

Phone

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

Add

Edit

Delete

< Back

Next >

Print

Done

☒ Save as Standard Symptom

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

Show Symptoms on New Orders ☒

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

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 employee) to control who can delete orders, delete payments, make changes to inventory, etc.



Demo Watch the SE Program Security Demo video to learn more about its configuration

and usage.

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

Configurations Utilities Inventory

Standard Descriptions

Standard Tables

Shop Data Setup

Vendor Setup

Inspection Setup

Technicians Setup

Scheduler Setup

Mobile/Device Setup

Text Messaging Setup

Reports/Printers/Lube Sticker

End of Day Reports

Packages & Discounts

Tire Packages

Brake Packages

Lube, Oil, & Filter Packages

Program Security

Special Maintenance

Promotions: Packages & Discounts

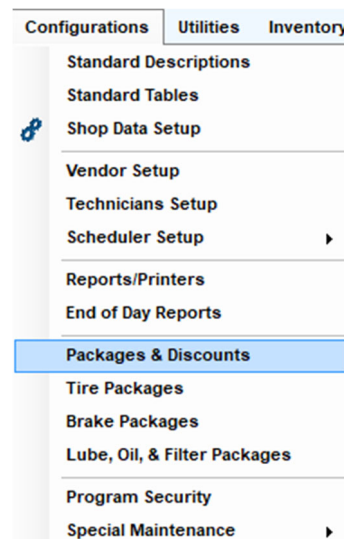


Packages are single line items sold by price. You may optionally add the parts & labor details later, but the customer only sees the single line on invoice that you created in these Packages.

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.

Packages & Discounts

Packages | **Discounts**

☒ View All ☐ Current ☐ Expired

Number	Description	Amount	Expires
FIS	Fuel Injection Service	49.95	01/01/2023
Used	Used Car Pre-Purchase Inspection	45.00	01/01/2023
Oil	Oil & Filter Change Special	19.95	01/01/2023
Smog	Smog Check Special - \$8 certificate additional	24.95	01/01/2023
Align_A	Computerized Alignment - Auto	24.95	01/01/2023
Align_T	Computerized Alignment - Light Truck	39.95	01/01/2023
AC1	Air Conditioning Diagnostic Special	24.98	01/01/2022
TS1	Transmission Filter Service Special	49.95	12/31/2021

Add Edit Delete **Done**

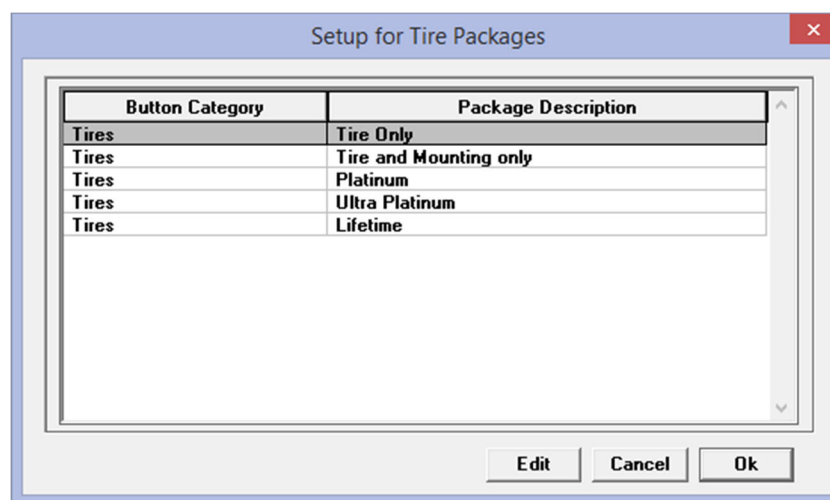
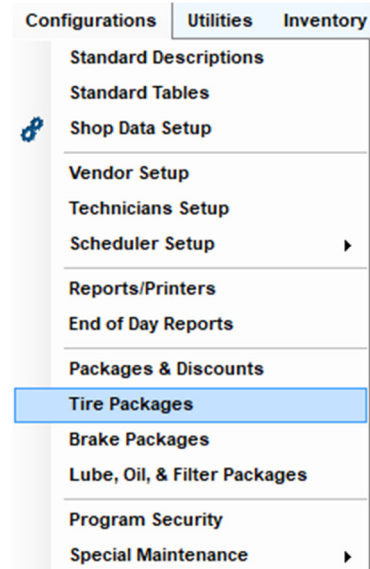
Promotions: Tire Packages

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.

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

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]

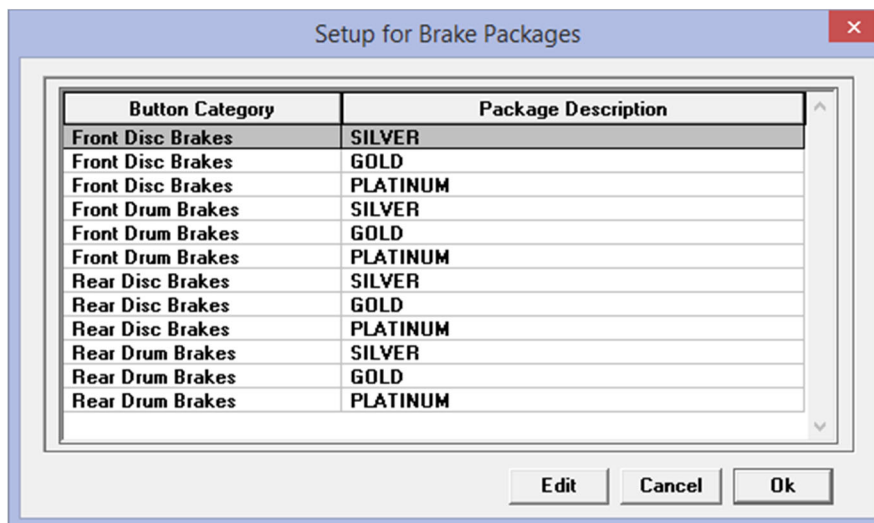
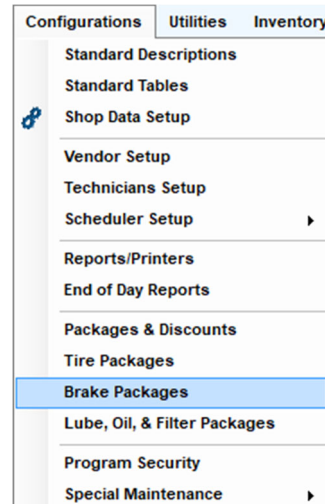
Promotions: Brake Packages

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.

Program 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 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



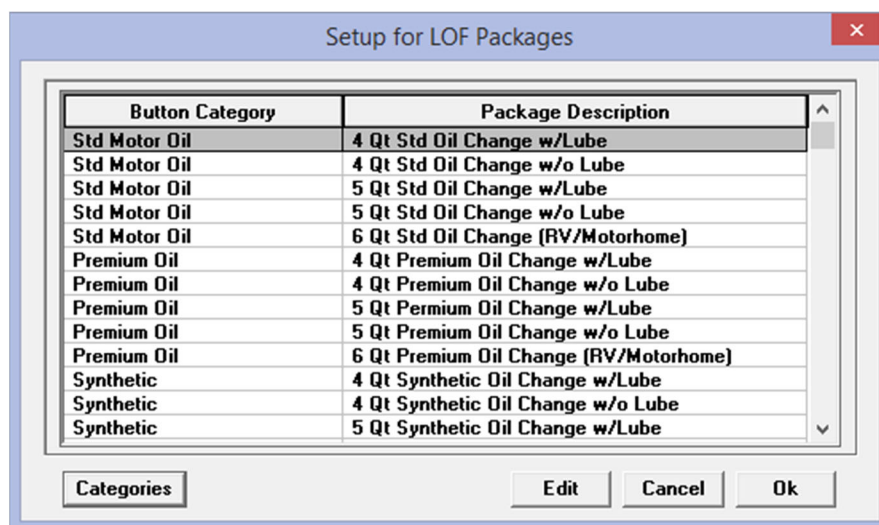
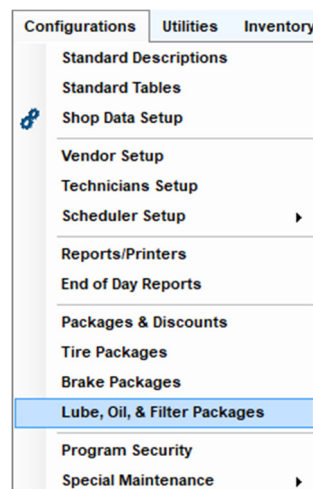
Each **LOF Package** is a grouping of fluids, parts, and labor operations to form pre-built

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)

Manufacturers tab displays Line Code data used with electronic on-line parts ordering. Can also be useful to filter part lookups by Mfg. on Inventory List.



Standard Descriptions

Standard Descriptions

About Manufacturers Setup

You can enter Parts Mfg. Line Code information. This option is provided primarily to accommodate electronic parts ordering. Ask your parts vendor for details. This field can also be used to filter lookups of parts by Manufacturer.

Important: This is a required field when using the electronic parts ordering functionality.

You may add/edit/delete these as you wish. Please enter your own Manufacturers if you have that information from your parts distributor.

Refer to your *Users Guide* for more detailed information.

Shop Data **Standard Tables** **Standard Descriptions**

Symptoms	Manufacturers	
Vendor Type	Notes	Followup
Title	Location	Status
Category	Part Code	Phone

Manufacturer Name	Line Code
BF Goodrich	BFG
Bridgestone	BRI
Cooper	COO
Cornell	COR
Goodyear	GDY
Michelin	MIH
Pirelli	PLT
Raybestos	RAY
Yokohama	YOK

Add **Edit** **Delete** **< Back** **Next >** **Print** **Done**

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

Zip Code Mapping

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



is

Standard Tables

Standard Tables

About Zip Code Mapping

Use this setting to override the zip code database and change the City & State that is filled in when a Zip Code is entered.

Tip: This screen is also useful for entering Canadian postal codes.

Shop Data **Standard Tables** **Standard Descriptions**

Price Markup Matrix	Parts Pricing	Tire Matrix
Account Classes	Markup	Zip Code Mapping
Compound Taxes	Income/Payment Types	Standard Accounts
Labor	Discount	Tax Rate

This setup procedure allows mapping Zip Codes to an alternate City and State

Zip Code 37046

Original Zip Code Mapping

City College Grove

State TN

Alternate Zip Code Mapping

City Triune

State TN

Remove Alternate **Save** **< Back** **Next >** **Print** **Done**

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.

Standard Tables

Standard Tables

About Tire Markup Matrix

This matrix allows you to progressively scale the markup of tires according to what you paid; this markup matrix applies only to those parts marked as tires. In other words, parts that cost less than a dollar are marked up at a much higher rate than parts that cost \$200. We recommended using several levels to remain profitable and competitive where it really counts.

You have the capability of keying the parts Markup matrix off the Last Cost or Average cost of the tire inventory. Last or Average Cost is significant because it may place part(s) into a different bracket and therefore receive a different Markup value than expected. Any changes made to the tire Markup matrix are applied by clicking on Apply Matrix to tire Inventory. This will display a dialog box stating how many records will use the new Markup percentages. This dialog also allows you to set the default category assigned to tires for accurate reporting.

Shop Data

Standard Tables

Standard Descriptions

Price Markup Matrix

Account Classes

Compound Taxes

Labor

Parts Pricing

Markup

Income/Payment Types

Discount

Tire Matrix

Zip Code Mapping

Standard Accounts

Tax Rate

#	From	To	Markup	Profit Margin
1	\$0.00	\$9,999,999.99	100.00%	50.00%
2	\$0.00	\$0.00	0.00%	0.00%
3	\$0.00	\$0.00	0.00%	0.00%
4	\$0.00	\$0.00	0.00%	0.00%
5	\$0.00	\$0.00	0.00%	0.00%
6	\$0.00	\$0.00	0.00%	0.00%
7	\$0.00	\$0.00	0.00%	0.00%
8	\$0.00	\$0.00	0.00%	0.00%
9	\$0.00	\$0.00	0.00%	0.00%
10	\$0.00	\$0.00	0.00%	0.00%

Tire Costing

Average Cost ☒ Last Cost ☐

Default Tire Category

<none>

Tire Fees

Apply to Tires

< Back Next > Print Done

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.

Tire Fees

☒ Enabled

Tire Fee One

Account Class

Tire Disposal Fee

Description

Tire Fee 1

☒ Do not apply if Tire Fee Two is used

Calculate

☒ Calculate from Sale Price

☐ Calculate from Cost

Taxes

☐ Taxable ☐ Taxable as Part

Fee Amount

☒ Flat Amount

☐ Percentage

Minimum \$ 0.00 Maximum \$ 0.00

Amount \$ 2.00

☒ Enabled

Tire Fee Two

Account Class

Tire Disposal Fee

Description

Tire Fee 2

☒ Apply per condition

Tire rim sizes greater than or equal to how many inches: 18.00

Calculate

☒ Calculate from Sale Price

☐ Calculate from Cost

Taxes

☐ Taxable ☐ Taxable as Part

Fee Amount

☒ Flat Amount

☐ Percentage

Minimum \$ 0.00 Maximum \$ 0.00

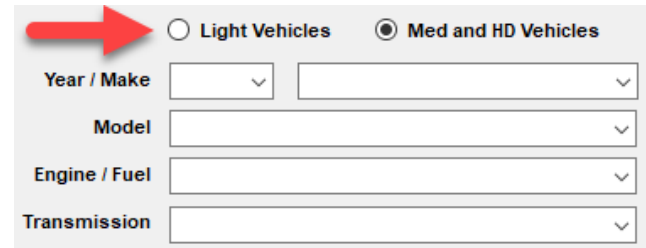
Amount \$ 3.00

Cancel OK

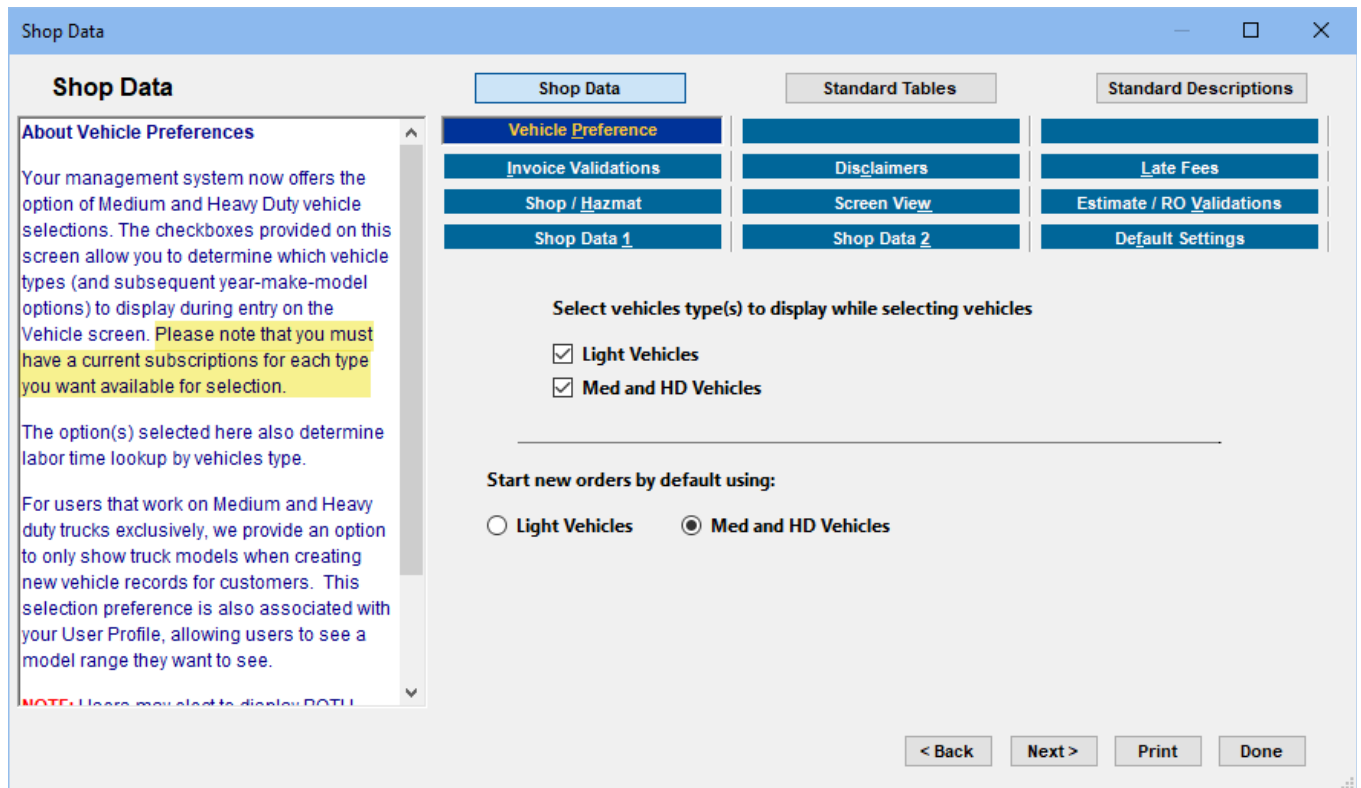
Vehicle Preference

The Vehicle Preference dialog box allows truck information (CVG) subscribers to select which vehicle model list to display when selecting a vehicle. For users who work on Medium and HD Vehicles exclusively, checking the appropriate box insures 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.



The image shows a close-up of the Vehicle Preference dialog box. A red arrow points to the radio button for 'Med and HD Vehicles', which is selected. Below the radio buttons are four dropdown menus labeled 'Year / Make', 'Model', 'Engine / Fuel', and 'Transmission'.



The image shows the 'Shop Data' dialog box. On the left is a sidebar with 'About Vehicle Preferences' and a list of settings. The main area has tabs for 'Shop Data', 'Standard Tables', and 'Standard Descriptions'. Under 'Shop Data', there are buttons for 'Vehicle Preference', 'Invoice Validations', 'Shop / Hazmat', and 'Shop Data 1'. Below these buttons, there are checkboxes for 'Light Vehicles' and 'Med and HD Vehicles', both of which are checked. At the bottom, there are radio buttons for 'Start new orders by default using:', with 'Med and HD Vehicles' selected. At the very bottom are buttons for '< Back', 'Next >', 'Print', and 'Done'.

User Setup Completed! Please continue on 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!

<input type="checkbox"/> Best Customers with Vehicles	<input type="checkbox"/> Your Technicians
<input type="checkbox"/> Popular Parts into Inventory List	<input type="checkbox"/> Your Vendors
<input type="checkbox"/> Create Part Kits & Canned Jobs	<input type="checkbox"/> 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're working in the **LIVE** program for all of 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.

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. Go to Reports-> Management	2. Double-click on Shop Data Setup to start report building process (5 seconds).
If default Print to Screen is on, it will appear as screen preview. Report may be printed or also exported in various file formats.	 3. Click Printer to create a hard copy.

Reviewing the Shop Data Report

Since this 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

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

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

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
 1 0.99
 2 4.99
 3 9.99
 4 19.99
 5 29.99
 6 49.99
 7 99.99
 8 299.99

**Confirm your settings
with Shop Data Report!**

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%

Parts Percentage
 300.00
 250.00
 200.00
 100.00
 90.00
 75.00
 66.00
 60.00

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

Shop Data

Shop Data	Standard Tables	Standard Descriptions
Vehicle Preference		
Invoice Validations	Disclaimers	Late Fees
Shop / Hazmat	Screen View	Estimate/RO Validations
Shop Data 1	Shop Data 2	Default Settings

Standard Tables

Shop Data	Standard Tables	Standard Descriptions
Price MarkUp Matrix	Parts Pricing	Tire Matrix
Account Classes	MarkUp	Zip Code Mapping
Compound Taxes	Income/Payment Types	Standard Accounts
Labor	Discount	Tax Rate

Standard Descriptions

Shop Data	Standard Tables	Standard Descriptions
Symptoms	Manufacturers	
Vendor Type	Notes	Followup
Title	Location	Status
Category	Part Code	Phone

Configurations Options →→→

Configurations

Special Maintenance ▶

- Set Starting Invoice
- Toggle Demo Mode
- Toggle Catalog Availability
- Database Backup

Catalog Configurations Documents: m1faqs.com – type 'catalog' in Search.

Set Starting Invoice

This step is performed just before going live with SE. Enter#; future Invoice #s advance sequentially from that # upward. If you want to begin with Invoice #100, you'd enter starting invoice # 99 here. **Once you set the starting invoice #, you can't go back and enter a lower number.**

Starting Invoice Number

The starting Invoice number should only be set one time. If needed, this number can be increased, but can't be set smaller. So choose this number carefully.

Start at Invoice Number 99

Cancel Ok