

MANAGER SE

POWERFUL NEW ENHANCEMENTS AVAILABLE INTRODUCING JOB VIEW

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

Mitchell1
In your shop, at your side

SHOP MANAGEMENT

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 **SHOPKEY**

Mitchell 1 / ShopKey Management Solutions

SETUP: Configuring Your LIVE SE Software

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

Published by Mitchell 1 • San Diego, CA
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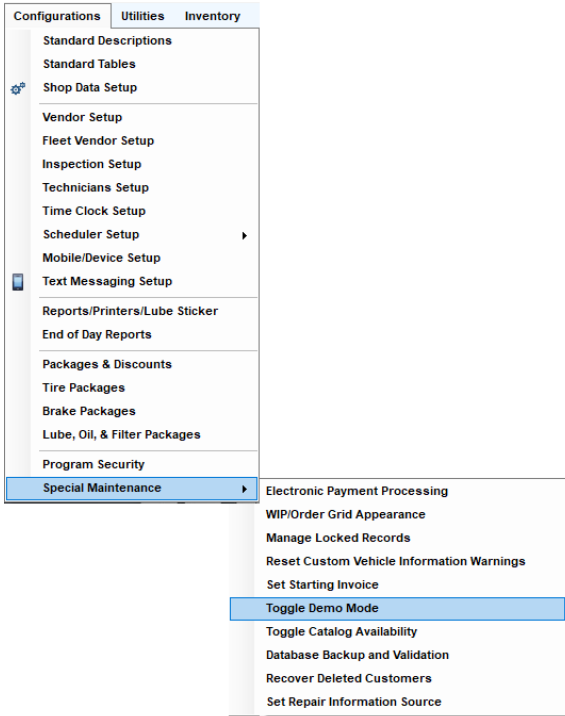
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Preparing Your SE Program to Write Actual Orders

Switching from Demo Mode to LIVE

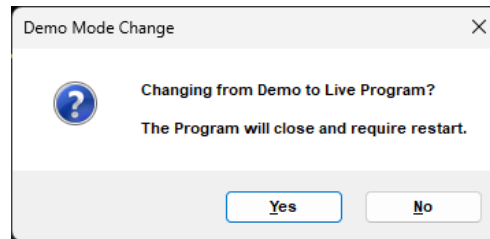
Before doing any setup and configuration work it is absolutely essential to switch from the DEMO to the LIVE Program if you haven't already done so.



To Switch from Demo to LIVE view:

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

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



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

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

Configuring the LIVE SE Program for Your Shop

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

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

Review Program Setup Options

Basics (Assisted):

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

Additional (User Self-Instruction):

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

BONUS: SE LIVE Checklist

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

Tips for a Better Startup Experience

- Consider ALL Program Settings Very Carefully Now.

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

- Don't Rush Yourself!

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

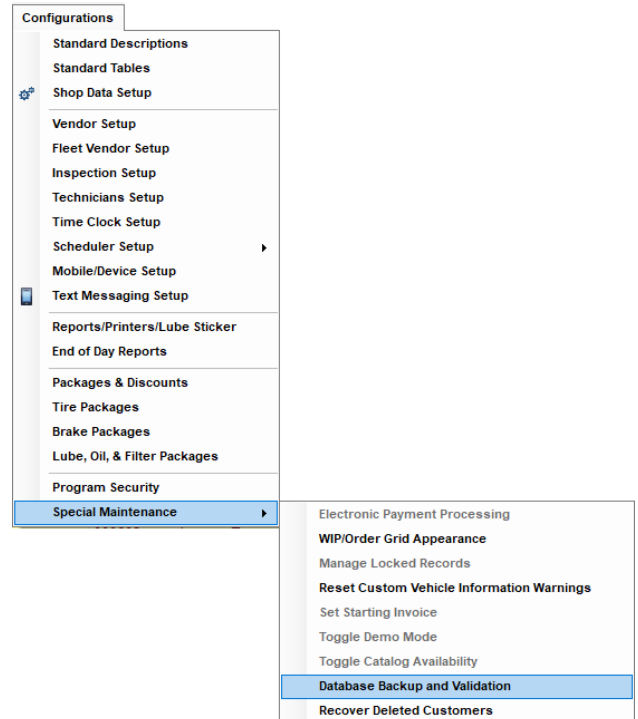
Backup: It is CRUCIAL to keep up-to-date copies of your SE database just in case something goes wrong and it becomes necessary to restore it. There is an internal backup function (to USB flash drives) in the management program and we have also added a MSEC remote backup service as explained below.

Your Database Backup Strategy

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

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

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



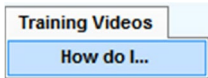
NOTE: We still recommend shops continue using local backups to external flash drives to provide your shop with an extra measure of protection.

SE Setup Information Gathering Checklist

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

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

Learn more with 100+ SE Training Videos!

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

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

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



Mitchell 1 Shop Management Video Training Assets



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

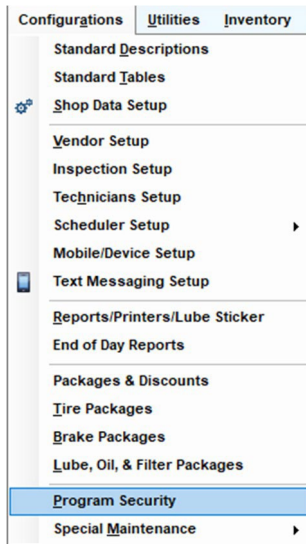
Your shop management software comes with a comprehensive set of multimedia (audio + video) demonstrations on how to use program basics. Simply click on any title below to start the brief training video demonstration. Click on the YouTube Video link in any help topic to access a video specific to the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

Alphabetical List of Video Training Assets

- Add Part to Inventory <http://youtu.be/HrjHEqXLz34>
- Appointment, Creating <https://youtu.be/erkDajnCoWk>
- Auto Updater <https://youtu.be/TvadPxxUVKg>
- Batch Payment [F5] <https://youtu.be/WfIX38REJDw>
- Canned Job <https://youtu.be/NhJP-08ffpU>
- Catalog Part Pricing Options https://youtu.be/Ifx_r38bxZY
- Category <http://youtu.be/QOWe6sqym0A>
- Change Ownership <http://youtu.be/M-jgc2jCtZI>
- Comebacks <https://youtu.be/RnniA7J4hZs>
- Counter Sale <https://youtu.be/j9tGXuLef90>
- Creating a User Profile <https://youtu.be/vaV25FIDj2M>
- Customer Entry <https://youtu.be/JeVi1RVvfpA>
- Customer Screen https://youtu.be/W_Ok_sci-38

• Setup-Assisted Basics

Create a User (Profile)

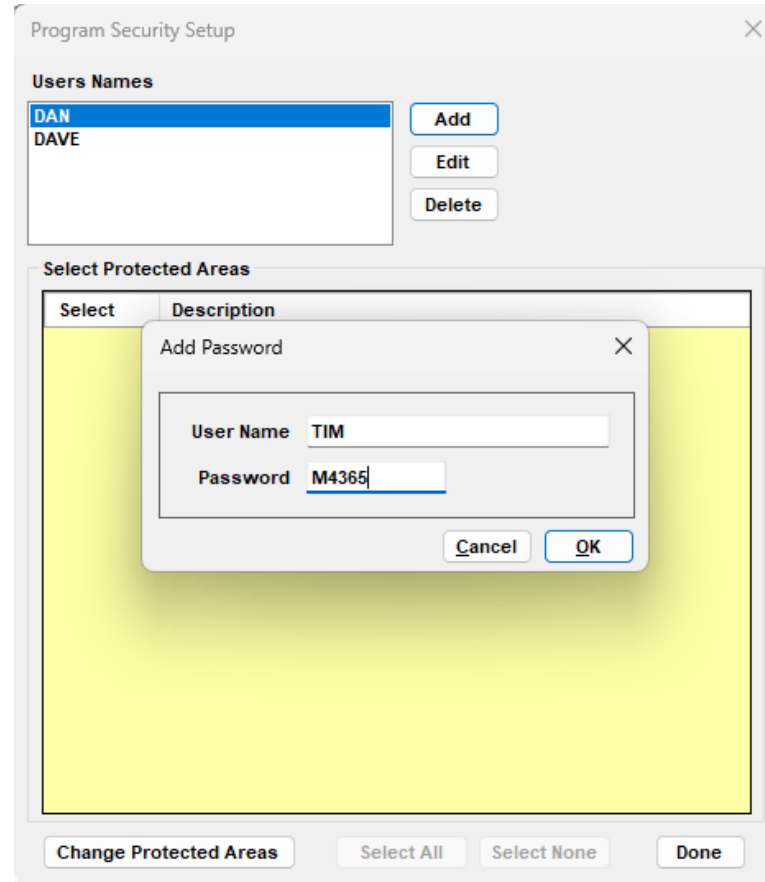


To store and recall your WIP and Order screen layout preferences, create at least one User profile. This is accomplished through the **Configurations > Program Security** menu option.


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

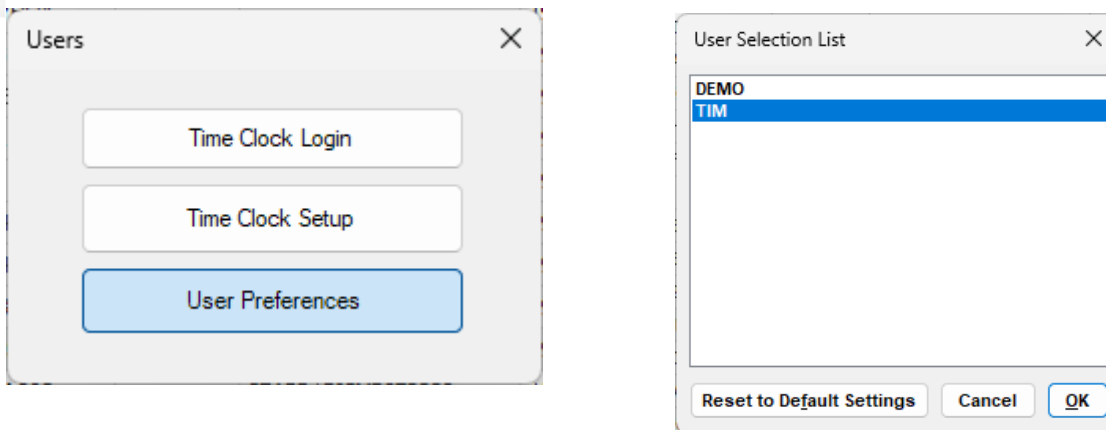
NOTE: Program Security is discussed at greater length in the Additional Self-Setup section. Visit <https://managerhelp.buymitchell1.net/Programsecurity.htm> for a detailed description of Program Security and video links to Program Security setup and a Demo of how program security works.

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




Choose the User

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



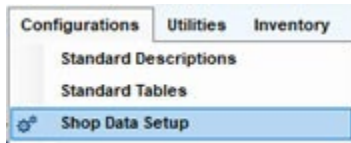
The WIP Grid and Order Screen Preferences of the selected user will be reflected in your screen display.

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

Manager SE Demo 9.1.0.3253 TIM 

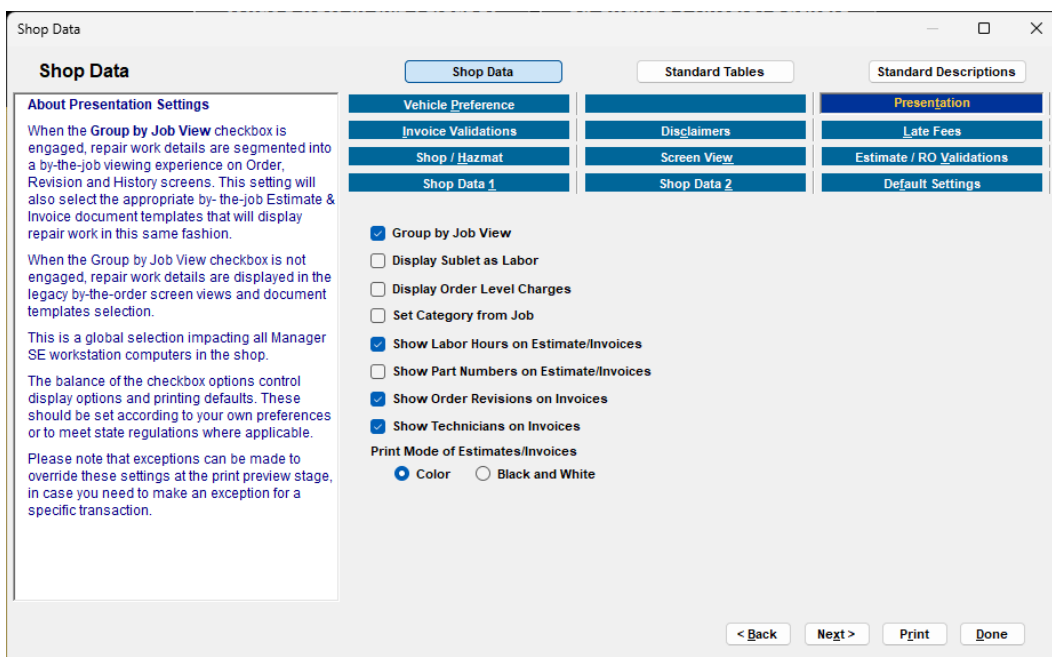
See <https://managerhelp.buymitchell1.net/wipgridsettings.htm> for details about WIP and Order Screen layout preferences.

Presentation Settings



on the **Presentation** tab.

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



Group by Job View:

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



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

Additional Print and Display options:

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

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

A screenshot of a settings menu with a light gray background. It contains several checkboxes and a section for print mode. The checkboxes are: 'Display Sublet as Labor' (unchecked), 'Display Order Level Charges' (unchecked), 'Set Category from Job' (unchecked), 'Show Labor Hours on Estimate/Invoices' (checked with a blue checkmark), 'Show Part Numbers on Estimate/Invoices' (unchecked), 'Show Order Revisions on Invoices' (checked with a blue checkmark), and 'Show Technicians on Invoices' (checked with a blue checkmark). Below these is the section 'Print Mode of Estimates/Invoices' with two radio buttons: 'Color' (selected with a blue dot) and 'Black and White' (unselected).

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

Standard Tables

Standard Descriptions

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 activity (i.e. must be done before entering customer and vehicle information.). For more information, refer to your *SETUP Workbook* or hit **F1** for online help.

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

Account Number

989800777

Shop Name

Forward Thinking Automotive

Street Address

16067 Templeton St

Zip City, State

92065

RAMONA

CA

Phone

858-391-5000

Fax

760-788-8327

Email

Mgr@Mitchell1.com

Website

www.mitchell1.com

< Back

Next >

Print

Done

Shop Data

Shop Data

Standard Tables

Standard Descriptions

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 *SETUP Workbook* or hit **F1** for online help.

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

Manager Name

Les Johnson

Manager Title

Owner

License 1

EPA 12345-IP

License 2

BAR 1234567

Slogan

You Work Hard For your Money, So Do We!

Comment

Ask About Our Free Pickup & Delivery Service

< 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

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).

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

Shop Data

Vehicle Preference

Invoice Validations

Shop / Hazmat

Shop Data 1

Standard Tables

Disclaimers

Screen View

Shop Data 2

Standard Descriptions

Presentation

Late Fees

Estimate / RO Validations

Default Settings

Area: 760

Promised: 5:00 PM

Labor Technician: <none>

Parts Technician: <none>

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

☐ Always prompt when emailing

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



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.

Shop Data

Shop Data | Standard Tables | Standard Descriptions

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 items as parts or a part kit to recover your legitimate shop costs and still satisfy this legal requirement.

Note: If you want to add Shop Supplies and Hazardous Materials to your orders, you must first set the defaults in this dialog box.

Shop Supplies

Vehicle Preference: 2.30 | Percent of ... ☒ Labor Sales ☒ Part Sales | Minimum \$ 5.00

Default: ☒ On ☐ Off | Account Class: Parts Revenue (taxable) | Maximum \$ 100.00

Report Description: Shop Supplies | ☒ Taxable

Hazardous Material

Vehicle Preference: 3.50 | Percent of ... ☐ Labor Sales ☒ Part Sales | Minimum \$ 5.00

Default: ☒ On ☐ Off | Account Class: Parts Revenue (non-tax) | Maximum \$ 100.00

Report Description: Hazardous Materials | ☒ Taxable

Behavior: Show & Tax as Labor | ☒ Include Sublet

< Back | Next > | Print | Done

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

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

Order Options

Default Technicians:

Labor: PLEASE, SELECT | Include: ☒ Shop Supplies ☒ Hazard Materials

Parts: <none>

Shop Supplies

0.00

Default

☐ On ☒ Off

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

Disclaimers

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



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

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

Labor Rates

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

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

The screenshot shows the 'Standard Tables' window with the 'Labor' tab selected. The left pane contains information about the Labor Table, including a tip and a note. The main table lists labor rates with a description and a rate. The first row is 'Your Shop Rate' at \$55.00, and the second row is 'Diagnostics' at \$65.00. The bottom of the table is highlighted in yellow.

Description	Rate
Your Shop Rate	\$55.00
Diagnostics	\$65.00
	\$0.00
	\$0.00
	\$0.00
	\$0.00
	\$0.00
	\$0.00
	\$0.00
	\$0.00
	\$0.00

Top entry will be used as default Labor rate.

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

Price Levels

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



The screenshot shows the 'Standard Tables' window with the 'Price Levels' tab selected. The left pane contains information about the Price Levels table, including a warning and a tip. The main table lists price levels with a description and a discount. The first row is 'Your Discount Rate' at 0%, and the second row is 'Fleet' at 10%. The bottom of the table is highlighted in yellow.

Description	Discount
Your Discount Rate	0%
Fleet	10%
AARP Discount	5%
Wholesale	10%
	0%
	0%
	0%
	0%
	0%
	0%

Top entry will be used as default Parts discount.

Important! Keep Line #1 at 0% or you'd automatically discount every part sold! Negatives 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. (Most shops can enter a single tax rate)



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

Standard Tables

Standard Tables

About the Tax Rate Table

Important Note: The system is shipped with the sales tax setting turn on. All new customers entered into the system will be marked as taxable at 0% until you enter your current tax rate. You can change any customer to a non-tax status as needed by clicking on the Tax button while in the customer screen. If you change a customer record to non-taxable, remember to also change their vehicles to non-taxable as applicable.

You can maintain up to seven different tax rates. Most shops have only one. Line 1 should have Default checked.

Note: Line 1 is the default tax value. This is the global tax setting the software will apply.

Users can always make tax exceptions at the Customer, Vehicle, and/or Order Item levels.

Tax lines #6 and #7 will be applied as Compound Taxes.

Typically, shops rely on accountants to break out any city, county, etc. taxes at the accounting stage, instead of re-creating those separate rates here. The choice is yours.

Tax Calculation Method: As Florida has now discontinued tiered rate taxes and returned to

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	Price Levels	Tax Rate

	Description	Material Rate	Labor Rate	Default	GL Code
1	Sales Tax	8.2500%	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"/>	

Tax #6 and #7 are Compound Taxes

Tax Calculation Method: Standard

< Back Next > Print Done

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

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

Compound Taxes

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

Standard Tables

Standard Tables

About Compound Taxes

Your system allows you to set up compound taxes. In instances where there are two excise taxes, the tax you list first is applied first and the tax you list second is applied second.

Note: In most shops, only the standard Tax Rate Table will be used and no setup is required in this dialog box.

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

Shop Data

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Compound Taxes

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Parts Pricing

Markup

Income/Payment Types

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Tire Matrix

Zip Code Mapping

Standard Accounts

Tax Rate

Notice....

These compound taxes are applied to parts only.
Tax #1 is applied to the order first.
Tax #2 is then applied to the order

	Description	Rate %	GL
Tax #1		0.0000	
Tax #2		0.0000	

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Print

Done

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

The logo for Mitchell1 SE Video Training, featuring the YouTube logo, the text "Mitchell1", and "SE Video Training" next to a play button icon.

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Income / Payment Types

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



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

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

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

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

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

Standard Tables

Standard Tables

About Income/Payment Types Setup

Day 1 Caution: It is **highly recommended** that any changes to this area be made BEFORE starting regular use of the live program. Changes made later will likely affect the accuracy of your reports.

Version 5.7 Users: The Workbook indicates this field as **Income/Cash Accounts** it has been re-labeled to **Income / Payment Types**.

Income Accounts are the General Ledger (GL) account numbers where revenues are grouped for accounting purposes.

Payment Types are the various forms of payment from a customer. This is where you would add a credit card, debit card, or other new payment type. You may add/edit/delete these codes and descriptions.

Note: Cash refers to any payment by cash, credit card, check, etc. In other words, this is any payment to an order balance other than a charge to a customer's in-house credit account. This area can be used with numerous Accounting Reports built into the program.

Income/Payment Types is an **Essential** setup activity (i.e. must be done before entering

Shop Data Standard Tables Standard Descriptions

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

☒ Income Accounts ☐ Payment Types

Class Description	G L Code
Core Revenue	40710
Discount - Labor	57020
Discount - Parts	57010
HazMat Revenue	40900
Labor Revenue (non_tax)	40200
Labor Revenue (taxable)	40100
Late Fee Revenue	41000
Parts Revenue (non-tax)	40600
Parts Revenue (taxable)	40500
Shop Supplies Revenue	40800
Sublet Revenue	40300

Add Edit Delete < Back Next > Print Done

Standard Tables

Standard Tables

About Income/Payment Types Setup

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Shop Data Standard Tables Standard Descriptions

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

☐ Income Accounts ☒ Payment Types

Class Description	G L Code
American Express	10100
Cash	10100
Check	10100
Discover	10100
MasterCard	10100
Visa	10100

Add Edit Delete < Back Next > Print Done

Standard Accounts

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



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

Standard Tables

Standard Tables

About Standard Accounts

Caution: It is recommended that any changes to this area be made BEFORE starting regular use of the live program. Changes made later will likely affect the accuracy of your reports.

This is where you enter general ledger codes for Accounts Receivable, Customer Deposits, and Retained Earnings. Please consult your tax advisor if you have any questions about these values.

Standard Accounts Setup is considered 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

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

GL Code

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

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Print

Done

Account Classes

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



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

Standard Tables

Standard Tables

About Account Classes

This screen allows the selection of which accounts the shop invoice revenues will flow into.
Note: In most shops, these account class assignments typically match the descriptions in the default list created in the Income/Cash Accounts section.

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

Shop Data

Standard Tables

Standard Descriptions

Price MarkUp Matrix

Account Classes

Compound Taxes

Labor

Parts Pricing

MarkUp

Income/Payment Types

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Zip Code Mapping

Standard Accounts

Tax Rate

Labor (Taxable)

Labor (Non-Tax)

Parts (Taxable)

Parts (Non-Tax)

Sublet

Discount (Parts)

Discount (Labor)

Labor Revenue (taxable)

Labor Revenue (non_tax)

Parts Revenue (taxable)

Parts Revenue (taxable)

Sublet Revenue

Discount - Parts

Discount - Labor

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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.



Standard Tables

Standard Tables

About Markup

You can mark up* Parts and Labor information taken from Parts & Labor Estimating Module (if installed). You can also apply a markup percentage for any sublet work.

For example, an OEM part with a \$100 list price and a 10% markup would transfer into an estimate or order as \$110. A Sublet item of \$50 cost and a 25% markup would sell for \$62.50.

Tip: Check out the *SETUP Workbook* or hit **F1** for some additional example markups and a discussion of Markup vs. Gross Profit.

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

Shop Data

Standard Tables

Standard Descriptions

Price Markup Matrix

Parts Pricing

Tire Matrix

Account Classes

Markup

Zip Code Mapping

Compound Taxes

Income/Payment Types

Labor

Price Levels

Display Information As . . .

Mark Up ←→ Profit

Display Information As . . .

Mark Up Profit

Sublet % 25.00 Shop Overhead % 0.00

Parts Guide % 0.00 Miscellaneous Overhead % 0.00

Labor Guide % 0.00

Sale Only

Sale & Tech Pay

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

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

Markup Percentage vs. Gross Profit Examples

Example 1: Markup Part by Percentage

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

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

Example 2: Discounting "Marked Up" Parts

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

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

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

Example 3: Using Gross Profit to Determine Retail Selling Price

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

Part Cost	% Added to Cost	Retail Price	Gross Profit
\$100	66%	\$166	40%

Example 4: Discounting After Using Proper Gross Profit

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

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

Parts Markup & Gross Profit Projections Table

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

Display Information As . . .

☒ Mark Up  ☐ Profit

% Added to Cost	Gross Profit Part Sale	% Added to Cost	Gross Profit Part Sale	% Added to Cost	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

Shop Data Standard Tables Standard Descriptions

Price Markup Matrix

Account Classes

Compound Taxes

Labor

Parts Pricing

MarkUp

Income/Payment Types

Price Levels

Tire Matrix

Zip Code Mapping

Standard Accounts

Tax Rate

#	From	To	Markup	Profit Margin
1	\$0.00	\$10.00	300.00%	75.00%
2	\$10.01	\$100.00	200.00%	66.67%
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

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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 recommended 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.

Price MarkUp Matrix is an **Essential** setup activity (i.e. must be done before entering customer and vehicle information). For more information, refer to your **SETUP Workbook** or hit F1 for online help.

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

Parts Pricing

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



Standard Tables

Shop Data Standard Tables Standard Descriptions

Parts Pricing

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

Use the radio buttons to select whether **Cost** or **List** shall be the basis for calculating the sale price to your customer.

When the 'Cost' or 'List' radio button is changed, the rule will apply to newly created Estimates and Repair Orders. The new rule will not affect Estimates, Repair Orders, or Invoice created before the change. If a prior Estimate, Repair Order, or Invoice is opened and a part line item is edited or added, the new rule will apply only to that part's line item. When a part from a canned job, parts kit, or inventory is added to an order, the part's Sale amount will reflect the current rules.

The program will attempt to ensure you don't end up with a Sale amount of zero. If you chose to calculate Sale based on List and no List amount has been entered for the part, the program will use the Cost to calculate the Sale amount (see "Cost" definition below).

If you chose to calculate the sale price of a part to your customer based on Cost, and no Price amount has been entered, the

Calculate the part's Sale amount based on:

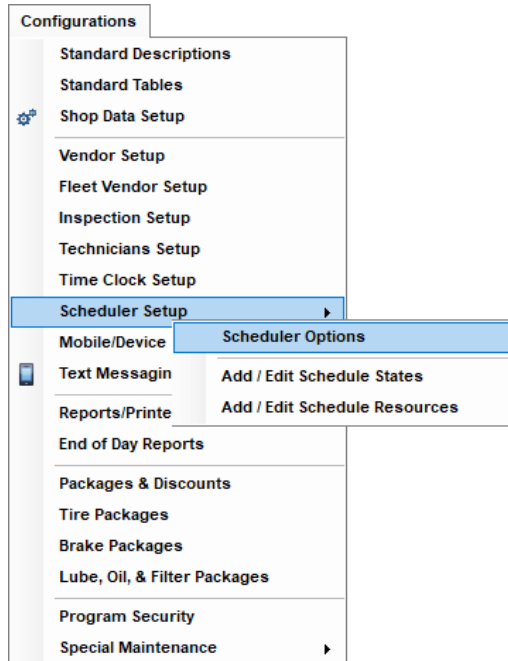
☒ Cost

☐ List

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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	8:00 AM	12:00 PM

Opening Schedule starts in:

Scheduling Tab
Appointment Tab
Shop Event Tab
Schedule Request Tab
Vehicle Alert Tab
Fleet Tab

Hours Visible on Schedule

	Start	End
Visible Hours	7:00 AM	6:00 PM
Show last	2	days

☒ Auto Adjust Appointment time

Automatically adjusts appointment time span based on Order hours

Drop Off time: 7:30 AM

☒ Match Drop-Off to Start Time

Holidays...

Scheduler Refresh Interval: 30 Seconds

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

Regular Business Hours

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

Regular Business Hours

	Start	End
Sunday	CLOSED	CLOSED
Monday	8:00 AM	5:00 PM

Hours Visible on Schedule

Hours Visible on Schedule

	Start	End
Visible Hours	7:00 AM	10:00 PM
Show last	30	days

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

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

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

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

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

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

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

Holiday Setup

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

Holiday Name	Occurrence
Christmas	12/25*
New Year's Day	1/1*
Third Friday	Third Friday of August

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

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

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

Scheduler States

Configurations > Scheduler Setup > Add/Edit Schedule States



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



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

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

Schedule Resources



Configurations > Scheduler Setup > Add/Edit Schedule Resources

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

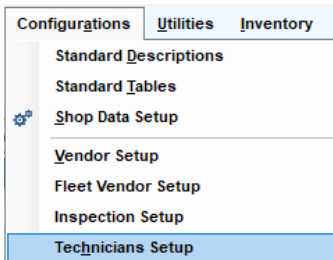
Add/Edit Schedule Resources

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

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

The screenshot shows a web application window titled 'Scheduler - 10/24/2024'. On the left is a blue sidebar with navigation links: 'View', 'Filtering', 'Online Help', 'Login', 'Scheduler Options', 'Scheduler Resources' (highlighted), 'Scheduler States', 'Online Appointments Setup', 'Online Appointments Options', 'Availability Options', 'Web Submission Acknowledgement', 'Declined Email', 'Declined Text', 'Confirmation Email', and 'Confirmation Text'. The main content area is titled 'Scheduler Resources (Online Help)'. It contains two sections: 'Required Information' with a 'Name' text field, a 'Schedule Color' button labeled 'Click to change Color', and a checked 'Active in Scheduler' checkbox; and 'Optional Information' with fields for 'Brand Name', 'Nickname', 'Size', 'Serial Number', 'Location', 'Description', 'Warranty Information', and a 'Notes' text area. At the bottom, there is a 'Select a Resource to Edit' dropdown menu and three buttons: 'Add' (blue plus icon), 'Save Changes' (green checkmark icon), and 'Undo Changes' (red X icon).

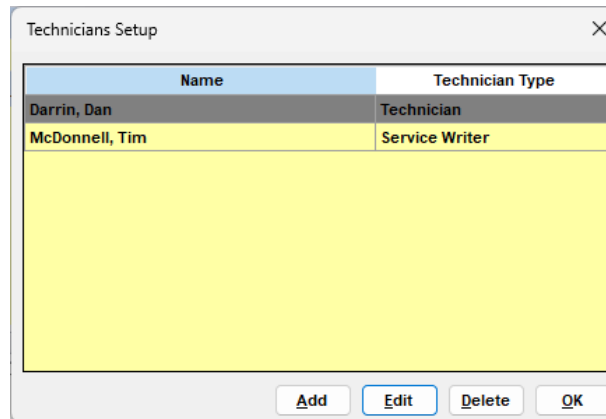
Technicians Setup



Technicians Setup is selected from the Configurations menu.

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

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

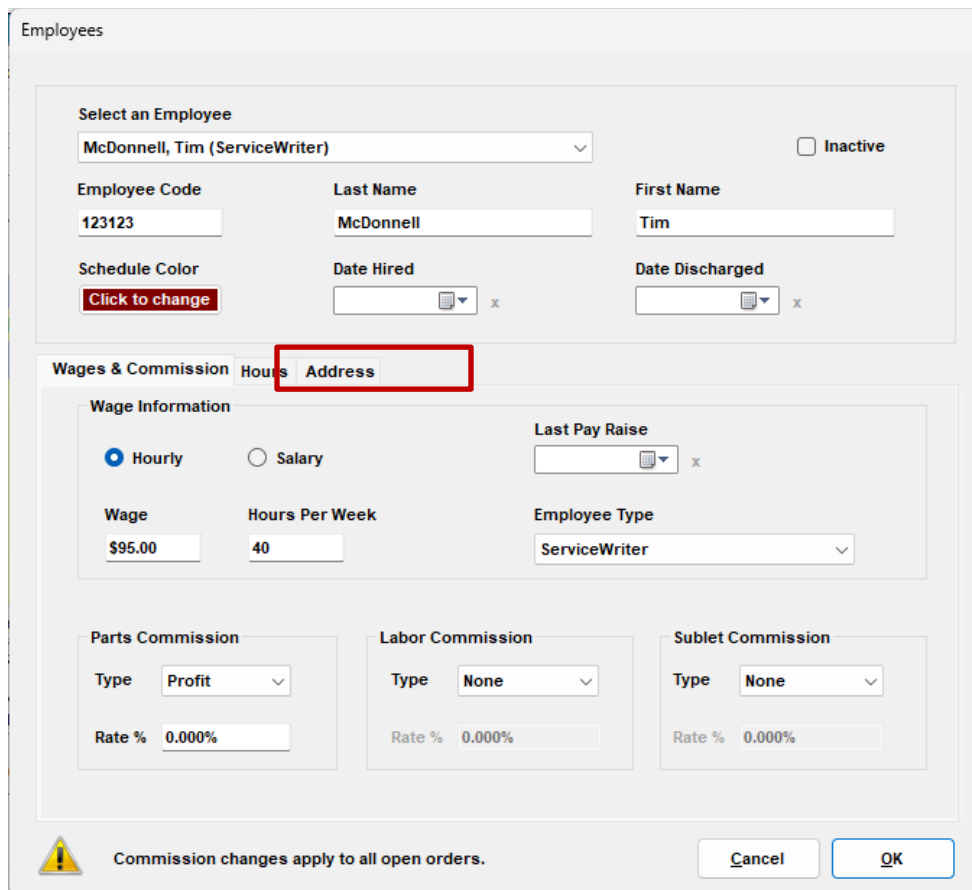


Name	Technician Type
Darrin, Dan	Technician
McDonnell, Tim	Service Writer

Buttons: Add, Edit, Delete, OK

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

Wages & Commissions



Employees

Select an Employee: McDonnell, Tim (ServiceWriter) ☐ Inactive

Employee Code: 123123 Last Name: McDonnell First Name: Tim

Schedule Color: Click to change Date Hired: Date Discharged:

Wages & Commission **Hours** **Address**

Wage Information

☒ Hourly ☐ Salary Last Pay Raise:

Wage: \$95.00 Hours Per Week: 40 Employee Type: ServiceWriter

Parts Commission Labor Commission Sublet Commission

Type: Profit Type: None Type: None

Rate %: 0.000% Rate %: 0.000% Rate %: 0.000%

Commission changes apply to all open orders. Cancel OK

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

Hours of Availability

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

Wages & Commission **Hours** Address

Hours

Hourly Cost Hours Scheduled Per Week

	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 Address

Enter any appropriate details in the fields provided.

Wages & Commission Hours **Address**

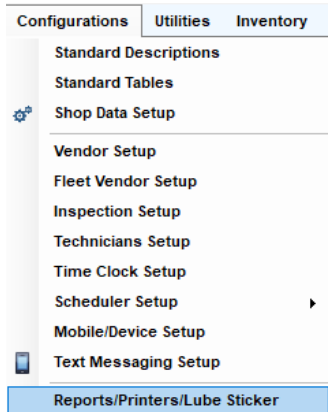
Address

Zip Code City State

Phone 1 Ext

Phone 2 Ext

E-Mail Birthday MM/DD



Reports/Printers

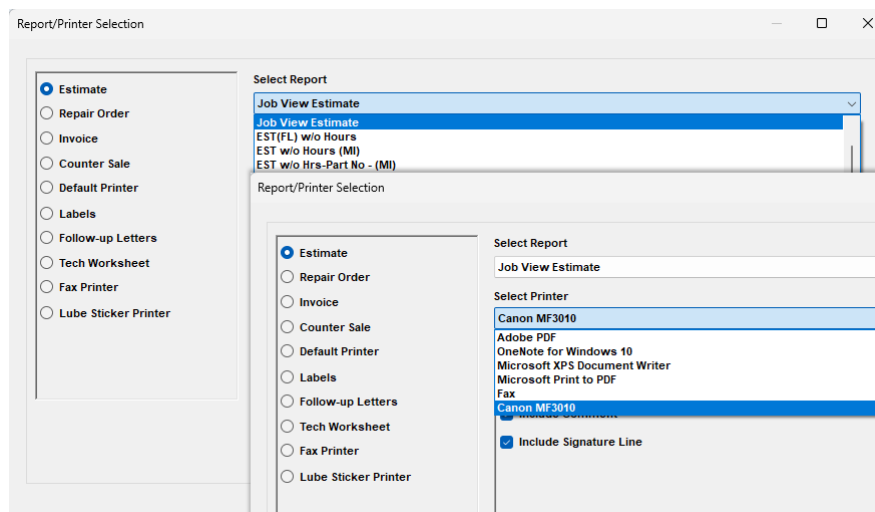


Reports/Printers allow users to decide what style of printout is generated, which printer(s) are used, how many copies are printed. Microsoft® Windows™ selects default printer automatically; different printers (or printer trays) may be selected for the various types of documents. **Reports/Printers/Lube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

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

Estimates, Repair Order, Invoice, Counter Sales

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



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

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

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

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

Lube Sticker Printer

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

The screenshot shows the 'Report/Printer Selection' dialog box with the following sections and steps highlighted:

- 1. Choose Lube Sticker Printer:** The 'Lube Sticker Printer' option is selected in the left-hand list.
- 2. Set Print Options:** The 'Print Options' section includes:
 - Printer: Dymo / Godex
 - Paper Size: MITC D450
 - Orientation: Landscape
 - Template: With Logo - Horizontal Layout
- 3. Set up your Default Settings:** The 'Default Settings' section includes a table for oil quality and mileage, and a 'Category' dropdown.

Oil Quality	Odometer	Months
Std Motor Oil	3000	3
Premium Oil	5000	5
Synthetic Oil	7000	6
Blended Oil	10000	8

Category: [Dropdown]
LOF / Category Names
- 4. Set up your Printer Options and Logo:** The 'Print Margins (Inches)' section includes:
 - Left: 0.15, Top: 0.15, Right: 0.15, Bottom: 0.15
 - Tagline: Your import specialists!
 - Select Logo: [Image]
- 5. Print Sample:** The 'Print Preview' section shows a sample of the sticker with the text: 'Next Mileage: 72,000, Next Date: 10/10/2018, Your import specialists!'. A 'Print Sample' button is visible.

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

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

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

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

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

4. Setup your Print Margins, Tagline, and Logo

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

5. Print Preview/Print Sample

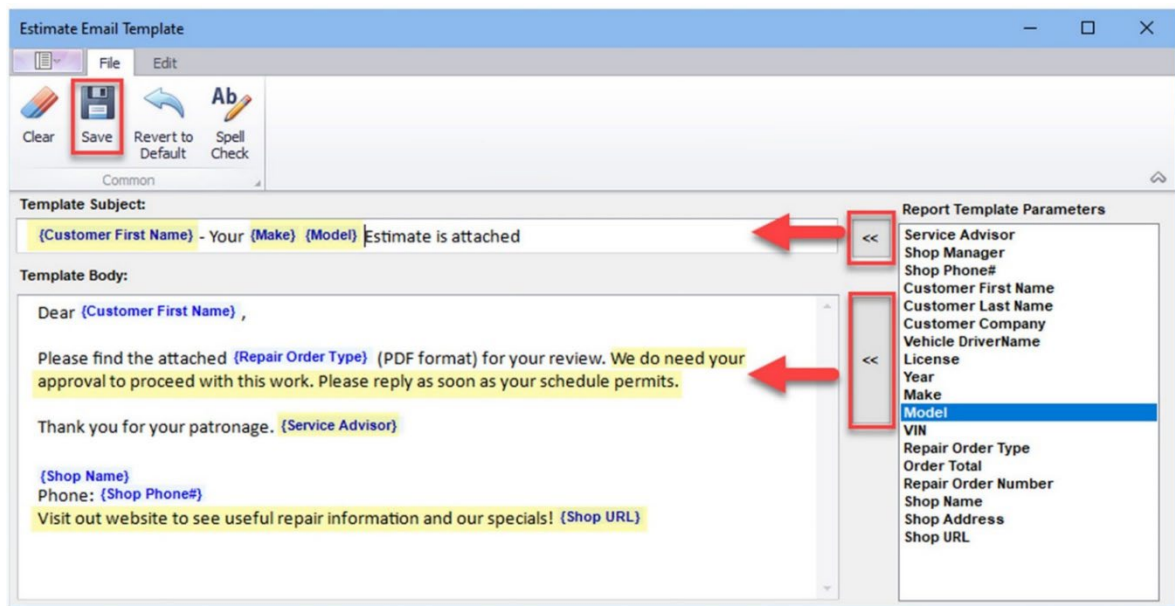
- Changes to the sticker template will display in real-time in the **Print Preview** section.
- Click **Print Sample** to print a sample of how your sticker will look. Adjust your print margins as needed to ensure proper alignment.

Email Template Editor

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

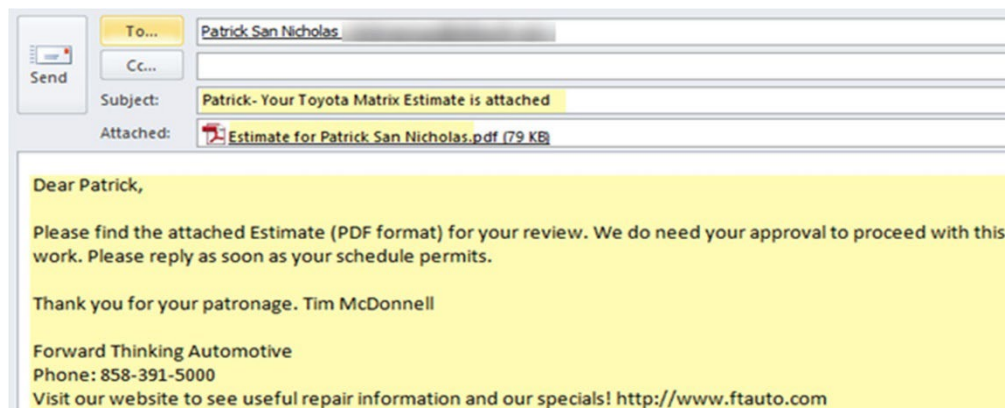
This editor allows you to create their own preferred message to be included when emailing an Estimate, R.O. or Invoice to a customer. You may free-form type anything with basic tools or incorporate actual database fields into the Subject line and the message body itself. You only type what appears in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

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



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

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



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

Screen View

Screen View allows users to customize program preferences.

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



Shop Data

Shop Data | Standard Tables | Standard Descriptions

About Screen View Settings

These settings provide one more way to accommodate your preference. Default settings work fine for most users and you can always come back and change settings later.

Tip: Putting a check in **Show Symptoms on New Orders** forces the symptom wizard to appear each time a new order is started. The Symptom Wizard helps you receive vehicles more quickly, and capture diagnostic times.

One option you do want to pay attention to is the **One Start Toolbar** setting. This can fundamentally impact how you create orders. For new installs, it's already checked. If upgrading from older versions, selecting this will replace the Estimate, Order, and Invoice icons with a **Start** icon.

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

Enforce Mileage In ☐ Yes ☒ No

Show Odometer Out ☐ Yes ☒ No

Starting Cursor Position on Customer Screen ☐ Company ☒ Customer

Display Customer OR Company name in WIP ☐ Company ☒ Customer

Odometer Display Option ☒ Miles ☐ Kilometers

Show License At Top of Vehicle Screen ☐

Show Quotes in Schedule ☒

Show Symptoms on New Orders ☐

Show Estimates in Schedule ☒

One Start Toolbar ☒

Show RO in Schedule ☐

Mark All ROs As Approved/Printed ☐

Auto Scheduling Default

< Back Next > Print Done

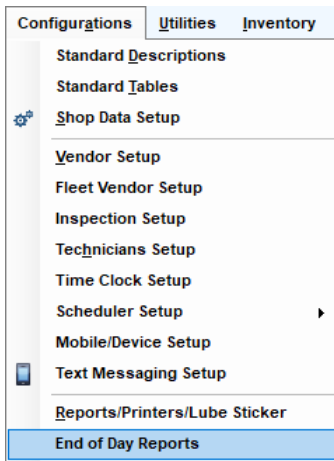
Screen View options	Recommended
Enforce Mileage In [can be password protected]	<u>Yes</u> No
Show Odometer Out [required in some states]	<u>Yes</u> No
Starting Cursor Position on Customer Screen	Company <u>Customer</u>
Display Customer OR Company Name in WIP	Company <u>Customer</u>
Display Margin in 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.
- **Show License at Top of Screen:** Previously, most users preferred to start vehicle data entry with VIN decode. Since the introduction of **Plate-2-VIN lookup**, users prefer a Vehicle screen leading with license plate field. If you prefer starting from the VIN entry field, leaving this selection UNCHECKED will place the VIN field first, followed by license plate field.
- **Show Quotes in Schedule** would very likely clutter your Schedule with items that have no commitment level or customer contact information.
- Use **Show Estimates in Schedule** if you plan to schedule with them; otherwise uncheck the box to not clutter your Schedule with these items.
- **Show ROs in Schedule** for most shops, this is the setting you will want to use for your Schedule display. If your system is set to launch as RO, skipping Estimate stage, you must select yes for them to become scheduled.
- **Show Symptoms on New Orders:** is very useful because it pops up the Symptoms list so that users are reminded to use them. Press ESC to exit if the Symptoms list is not needed.
- **Mark All ROs as Approved/Printed:** option eliminates the previous steps required to mark an RO as "printed" to put parts into 'Committed' status.
- **Auto Scheduling Default:** When posting an invoice, SE can open the Schedule - Appointment Editor to arrange customer's next appointment. **Always** will open the appointment editor with customer and vehicle already selected; **Prompt** will ask if you want to do that; **Never** setting will not open the editor or ask if you want to do so.

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

• Setup-Additional by User



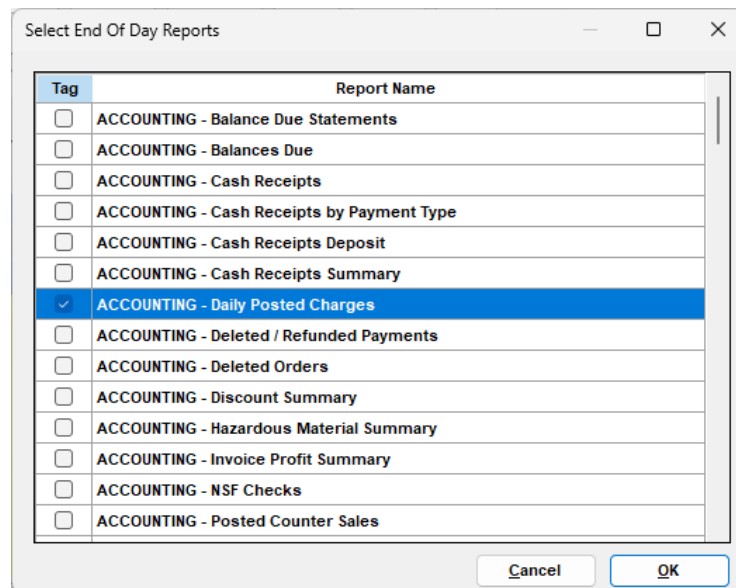
End of Day Reports

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

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

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

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



Configuring Shop Reports

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

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

YouTube

Mitchell1
SE Video Training



Two videos are available:

Shop Reports Configuration (4 min): <https://youtu.be/eChKA0ydVmo>

Shop Reports Demo (2 min): <https://youtu.be/f-hPPCJhmIM>



Notes

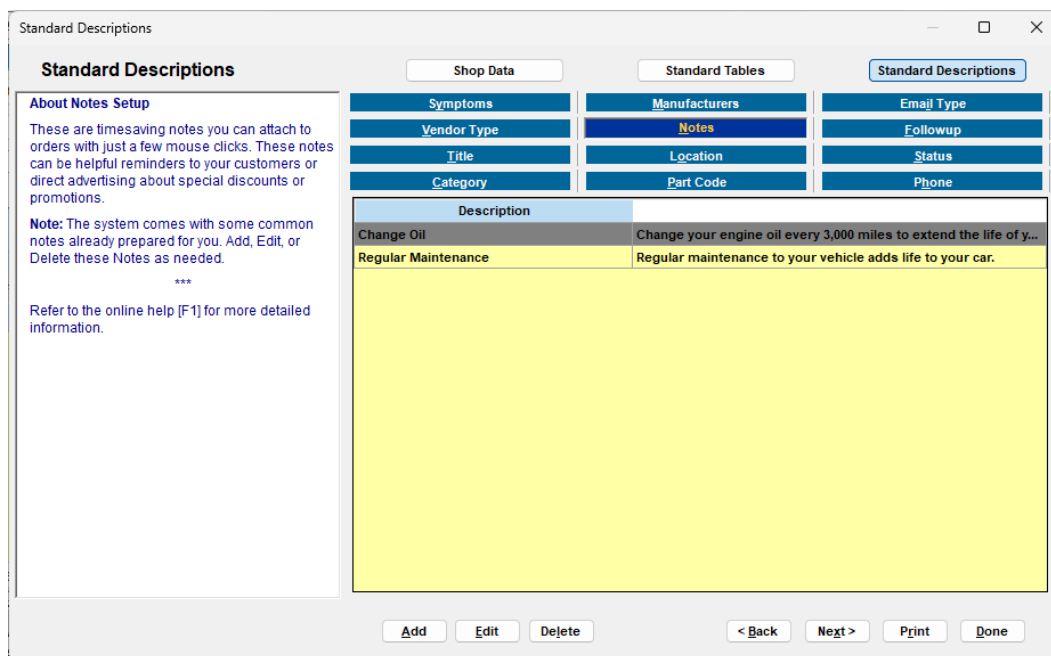
Time-saving **Notes** can be attached to orders with just a click. Notes are used to transmit reminders and service messages to customers. It is also the place to build and store your list of repeated **Recommendations**.

YouTube

Mitchell1
SE Video Training



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



Estimate/RO & Invoice Validations

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



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		Presentation
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.
- ☐ Prompt for missing category assignment on line items

< 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		Presentation
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).
- ☐ Prompt for missing category assignment on line items.
- ☒ Prompt if VMRS Failure Code missing.
- ☐ Stop posting process if validation warning(s) exist.

< Back Next > Print Done

Invoice Validations

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

Late Fees

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



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

Shop Data

Shop Data

About Late Fees

Warning: Before enabling the late fee feature, you must consult your local and state regulations regarding late fee practices. Please be advised that SnapOn is not responsible for ensuring your compliance with state and/or other law regarding the assessment of late fees or other interest charges on outstanding invoice amounts. SnapOn will not be held accountable for any misuse and/or failure to comply and will not be responsible for any consequential financial or legal implications. SnapOn strongly recommends consulting legal counsel to ensure your practices are in accordance with state and/or other laws regarding late fee disclaimers and the pursuit of customer acknowledgement of potential late fees at the time of estimate, RO, or invoice.

Use the Late Fee area to charge your customers who are 30 days or more past due on their invoice balance. You have the option to charge a flat fee for each 30 days they are overdue or charge an Annual Percentage Rate (APR), calculated on the balance that is overdue. Your local and/or state laws may dictate which option you can choose and the maximum you may charge your overdue

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

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

☒ **Apply Late Fees** | Account: <none>

Fee Reminder Day: 1st of Month | Ignore Cumulative Overdue Balances below this Amount: 0.00

Fee Assessment Options

Flat Fee ☐ Amount \$ 50.00

Percentage of Balance ☒ Percent (APR) 0.15 | Min. Fee \$ 0.00 | Max. Fee \$ 0.00

< Back | Next > | Print | Done

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

Category

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

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

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



Standard Descriptions

Standard Descriptions

About Category Descriptions

Use Categories to help you organize your parts & labor for quicker access and estimating writing.

Categories also make reports more meaningful and easier to read. Shops can use these to track which job categories are profitable or not.

A set of standard Category Descriptions are already provided for you. You can use the standard Categories, edit them or delete them and come up with your own Category descriptions.

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

Shop Data

Symptoms
Vendor Type
Title
Category

Standard Tables

Manufacturers
Notes
Location
Part Code

Standard Descriptions

Email Type
Followup
Status
Phone

Description

A/C & Heating
Attached Parts
Brake System
Charging/Starting System
Clutch/Transmission/Axles
Cooling/Belts/Hoses
Electrical
Emission Inspection
Engine Mechanical Repair
Engine Performance/Tuneup
Exhaust System
Fuel System
Heating
Ignition System
Maintenance
Miscellaneous

Add Edit Delete

< Back Next > Print Done

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.

Standard Descriptions

Standard Descriptions

These are your own abbreviations to help you enter parts faster. When adding a part to an estimate, RO or invoice, you would type ACC into Part Code field and Description (A/C Compressor) fills in automatically. Part Codes can also be set up to fill in the Category and Vendor fields as well.

Note: The system comes loaded with many Part Code Descriptions. These pre-defined Part Codes can be printed for review and reference. The Part Code reports can be found under the Inventory reports section of the program. Two reports included sort by either Part Code or description.

Code	Description
BA	BRAKE ADJUSTER
BALR	BALLAST RESISTOR
BAT	BATTERY
BATC	BATTERY CABLE
BATHD	BATTERY HOLD DOWN
BATT	BATTERY TERMINAL
BB	BRAKE BOOSTER
BC	BRAKE CABLE
BD	BRAKE DRUM
BEAR	BEARING
BELT	BELT
BF	BRAKE FLUID
BJ	BALL JOINT
BKC	BRAKE CLEAN
BLOM	BLOWER MOTOR
BLS	BRAKE LIGHT SWITCH

Part Code: **BAT**

Description: **Battery**

Category: **Battery**

Vendor: **Interstate Battery (BATT)**

Buttons: Add, Edit, Delete, < Back, Next >, Print, Done

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

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

Phone

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

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

Double-click on any description to edit

The screenshot shows the 'Standard Descriptions' window. On the left, there is a text area titled 'About Phone Descriptions and Position' containing a warning and instructions. The main area displays a table of phone descriptions. A modal window titled 'Phone Description' is open, allowing editing of the description and type.

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

Description	Type
Spouse	Mobile/Text
	Mobile/Text

Note: You can reorder phone numbers by using drag and drop.

Buttons: Add, Edit, Delete, < Back, Next >, Print, Done

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

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

Title

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



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.

Shop Data			Standard Tables			Standard Descriptions					
Symptoms	Vendor Type	Title	Category	Manufacturers	Notes	Location	Part Code	Email Type	Followup	Status	Phone
Description											
Mr.											
Ms.											
Miss											
Mrs.											
Dr.											

Add Edit Delete < Back Next > Print Done

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

Location

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



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

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.

Shop Data			Standard Tables			Standard Descriptions					
Symptoms	Vendor Type	Title	Category	Manufacturers	Notes	Location	Part Code	Email Type	Followup	Status	Phone
Description											
Front Lot											
Rack # 1											
Rack # 2											
Rack # 3											
Rack # 4											
Rear Lot											
Steam Clean											
Test Drive											
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 record up to 10 locations to be stored entries. You can still free-form type any additional one-time entries as needed. Use the add/edit/delete options to customize for your shop.

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.

Shop Data

Standard Tables

Standard Descriptions

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

Description

Completed

Customer Waiting

Waiting For Approval

Waiting For Parts

Waiting for Pick up

Waiting For Service

Waiting for Sublet

Waiting For Tech.

Status Map

AddEditDelete

<BackNext>PrintDone

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

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

Repair Order Status

DescriptionCompleted

SampleCompleted

Text\Background Colors

Default (Black Text \ Grid Background Color)

Custom Colors

Text color - 0, 0, 0

Background color - 255, 255, 165

Use Grid Background Color

OK

Cancel

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

Followup (Postcards, Letters, Mail-Merge)

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



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

Description
Make and Manufacturer
Make and Manufacturer 1
New Computer System
New Computer System 1
Recommendation for Work
Recommendation for Work 1
Recommendation for Work 2
Thank You
Thank You 1
Thank You 2
Thank You 3
Without Service
Without Service 1
Without Service 2
Without Service 3

☐ Postcards
☐ Mail Merge Letters
☒ FollowUp Letters

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

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

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

Vendor Type

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

Description
Machine Shop
Parts Distributor
Parts Jobber
Shop Supplies
Tool Supplier
Towing

Vendor Type

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

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

at your place of business.



Symptoms

Symptoms save shops many keystrokes when estimating a diagnosis.

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

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

☒ **Save as Standard Symptom**

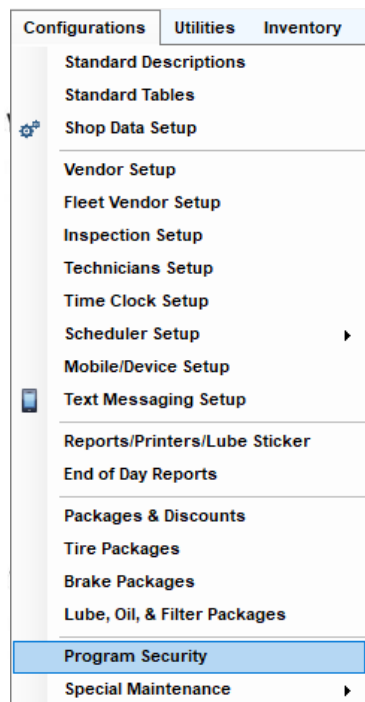
TIP: Symptoms may be set to pop up automatically under **Screen View** tab.

Show Symptoms on New Orders ☒



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

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



Program Security

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

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

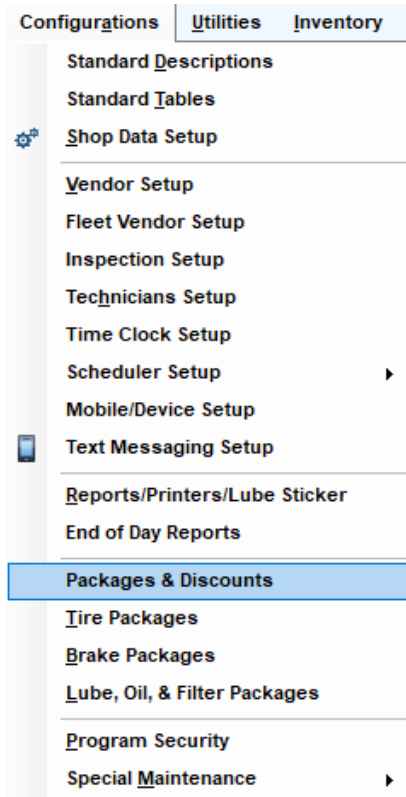
Program Security supports multiple passwords (rights assigned per user) to control who can delete orders, delete payments, change inventory, etc.

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



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

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



Promotions: Packages & Discounts

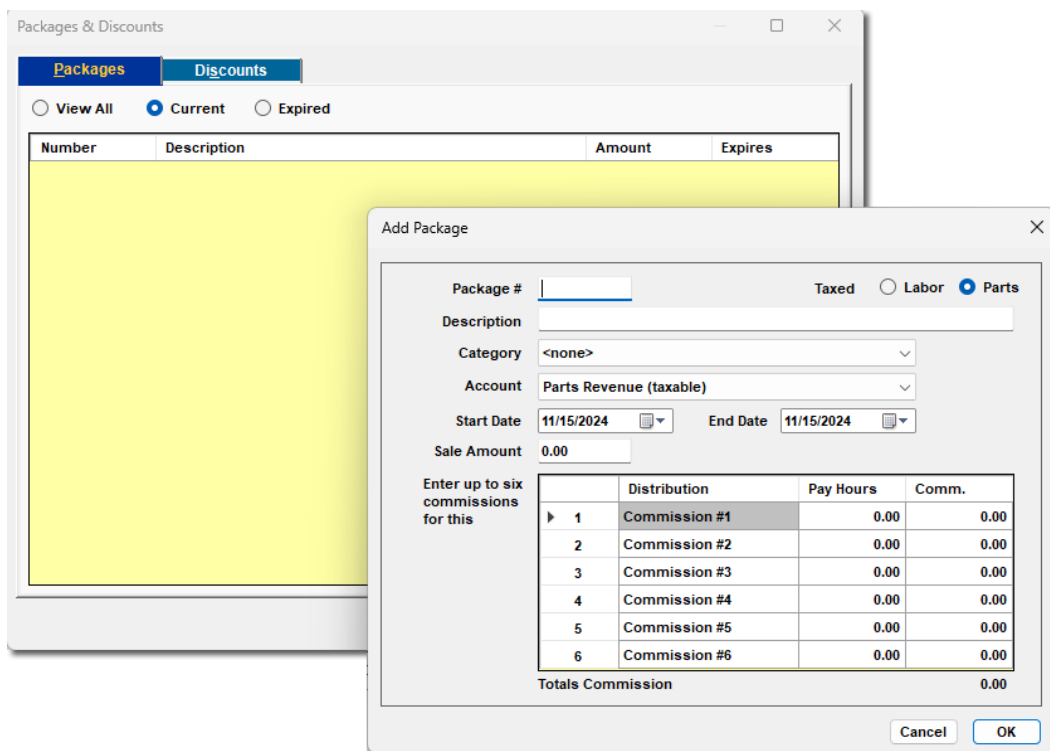
Packages are single line items sold by price. You may optionally add the parts & labor details later, but the customer only sees the single line on invoice that you created in these Packages.

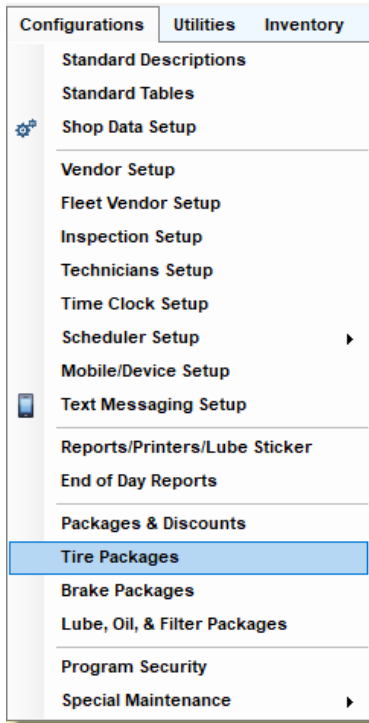
These are good for sales where inventory concern is not as critical. (You can add detail, however it's time-consuming for each sale)

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.





Promotions: Tire Packages

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

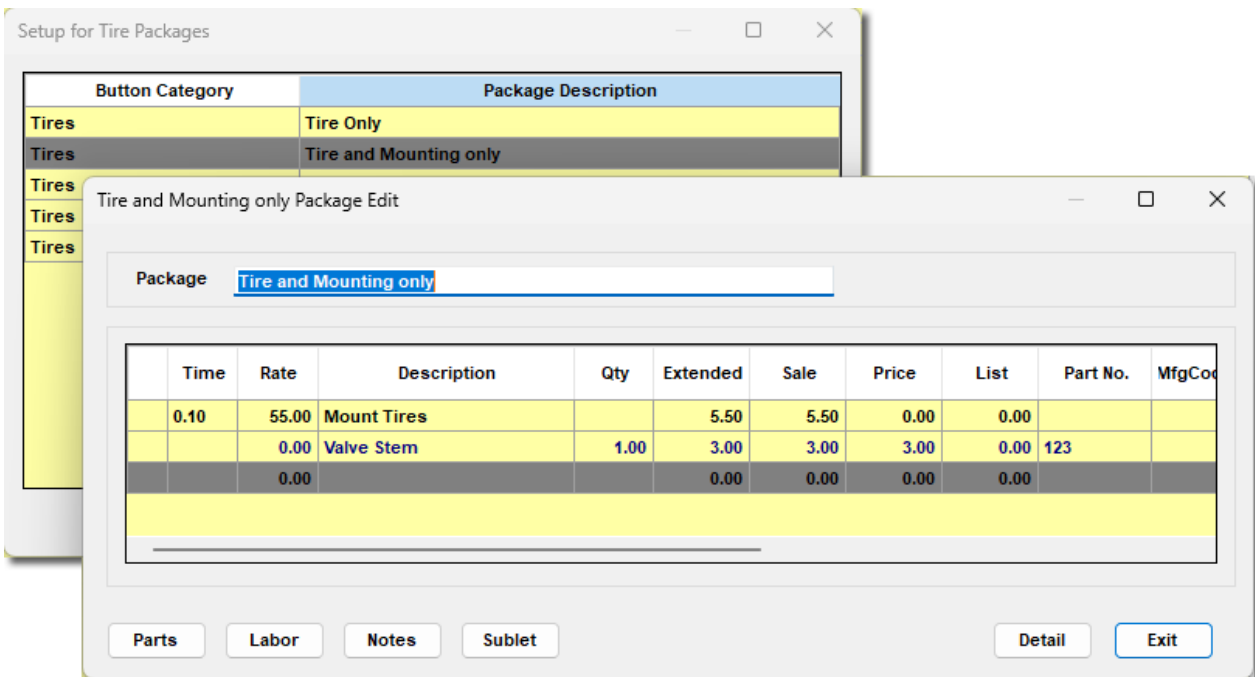
To add or edit a Tire Package, select Tire Packages from Setup menu and then **Add/Edit** in Tire Packages Edit dialog box.

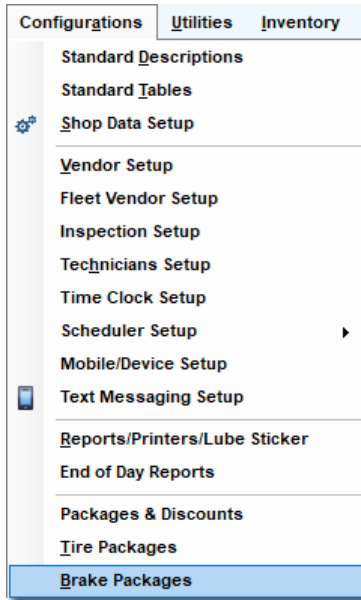
SE comes equipped with sample packages for Tire Only, Tire and Mounting only, Platinum, Ultra Platinum, and Lifetime packages. You can edit these packages levels and add new packages as desired.

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

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

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





Promotions: Brake Packages

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

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

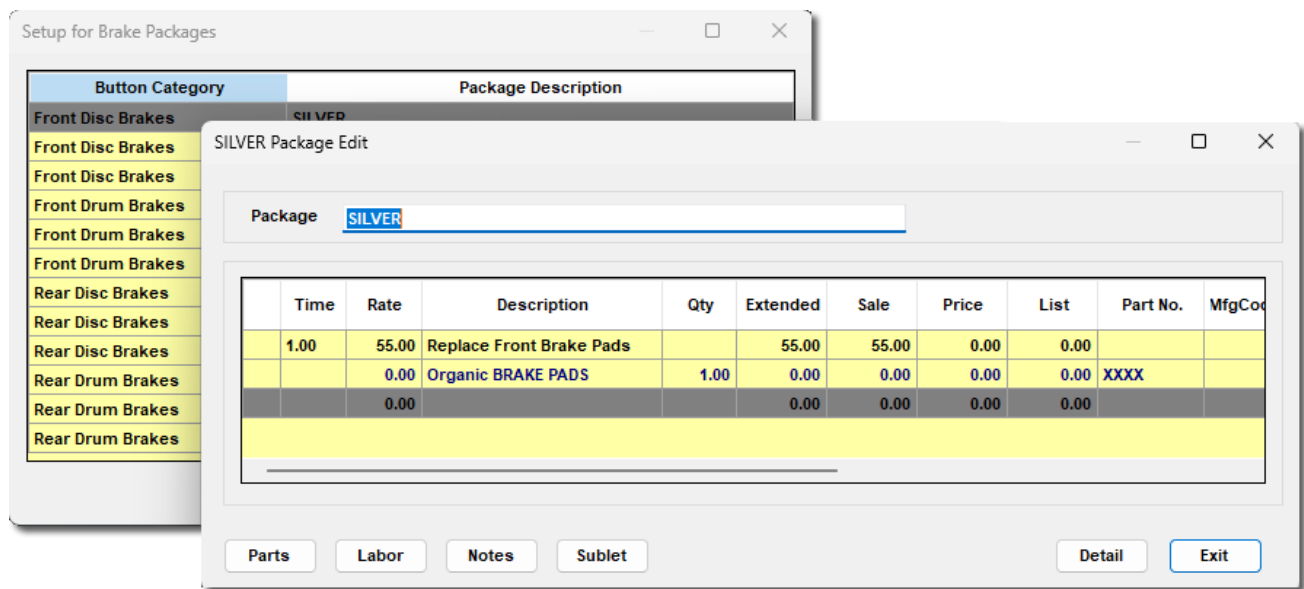
Manager SE comes equipped with sample Silver, Gold, and Platinum labels in combination with Front and Rear brakes. You can edit these packages as desired.

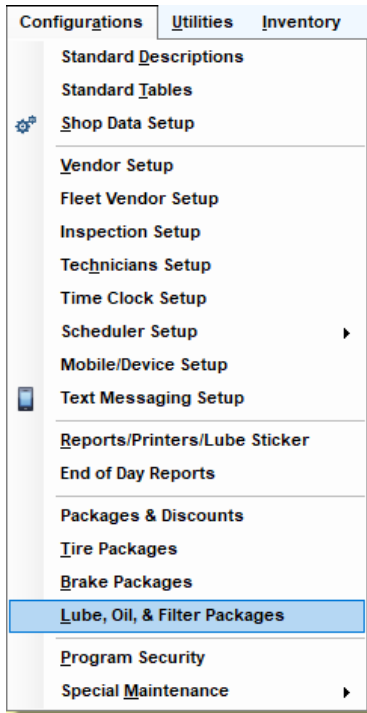
NOTE: Brake Packages interaction with Inventory is limited to only items included in the package itself.

Brake Packages are applied to orders via **Promos** icon on the Order screen. For a detailed description of setting up and applying Brake Packages go to

Promos

Help -> Promotions -> Brake Packages [Shortcut: press F1 key]





Promotions: Lube, Oil & Filter Packages

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

combinations to save input & selection time.

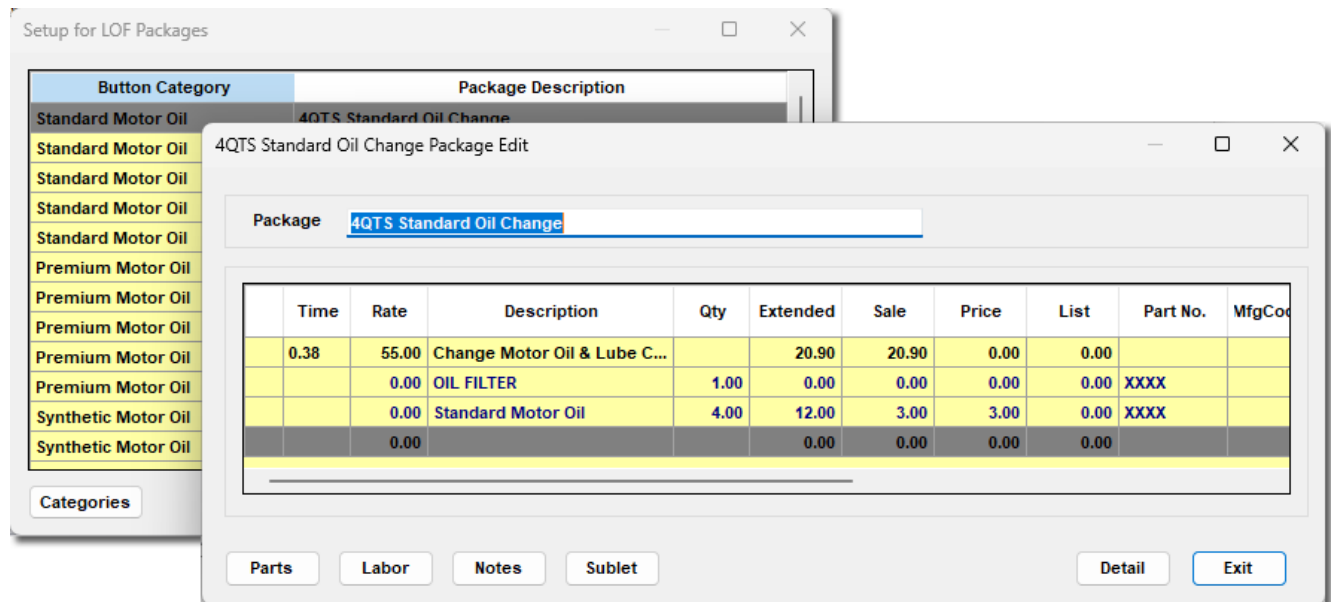
To edit a LOF Package, select Lube, Oil & Filter Packages from Setup, pick a package and then Edit in Packages Setup dialog box.

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

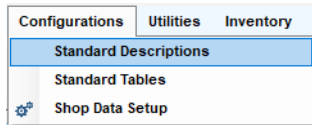
NOTE: LOF Packages interaction with Inventory is limited to only items included in package itself.

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

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



Manufacturers (Line Codes)



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

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 *User's Guide* for more detailed information.

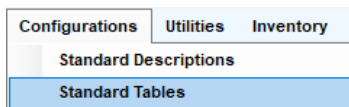
Symptoms	Manufacturers	Followup
Vendor Type	Notes	Status
Title	Location	Phone
Category	Part Code	

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

Zip Code Mapping



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

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.

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

Zip Code: 37046

Original Zip Code Mapping	Alternate Zip Code Mapping
City: College Grove	City: Triune
State: TN	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.



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

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.

Shop Data

Standard Tables

Standard Descriptions

Price Markup Matrix

Account Classes

Compound Taxes

Labor

Parts Pricing

Markup

Income/Payment Types

Price Levels

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%

Tire Costing

Average Cost ☒ Last Cost ☐

Default Tire Category

Tire Fees

Apply to Tires

Tire Fees

☒ Enabled

Tire Fee One

Account Class

Description

☐ 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 \$ Maximum \$

Amount \$

☐ Enabled

Tire Fee Two

Account Class

Description

☐ Apply per condition
Tire rim sizes greater than or equal to how many inches:

Calculate

☒ Calculate from Sale Price
☐ Calculate from Cost

Taxes

☐ Taxable ☐ Taxable as Part

Fee Amount

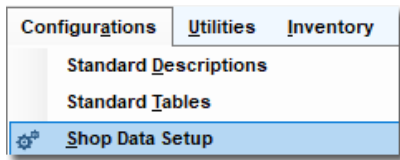
☒ Flat Amount
☐ Percentage

Minimum \$ Maximum \$

Amount \$

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.

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

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

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

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

• Final Steps: Better Prepared SE Launch

Think You're Ready Now? Consider This:

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

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

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

Double Check Your Settings

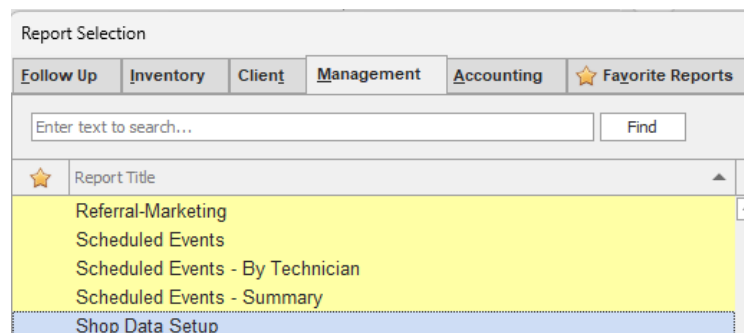
For the same reason you wouldn't let a customer take a vehicle without first taking it for a test drive, you need to be sure all of *your* settings are correct right BEFORE you start. A fast way to check many settings and defaults is to print a report. This helps you be certain program defaults work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

Printing the 'Shop Data Setup' Report

1. Click Reports



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



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



Reviewing the Shop Data Report

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

Shop Data Report

Report Date: 06/06/2014

Shop Information

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

Overhead

Miscellaneous 5.00%
 Shop 5.00%

Shop Supplies Costs

Account Class: 10.00%
 Maximum: Shop Supplies Revenue
 Report Desc.: \$500.00
 Shop Supplies are Shop Supplies
 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: FA
 Labor Tech: False
 Parts Tech: 858
 Please , Select Visa
 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!**

Parts Percentage

300.00
 250.00
 200.00
 100.00
 90.00
 75.00
 66.00
 60.00

Labor Rate

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

Part Discount

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

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

Final Countdown LIVE Checklist

1. Shop Data Setup Complete

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

2. Standard Tables Setup Complete

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	Price Levels	Tax Rate

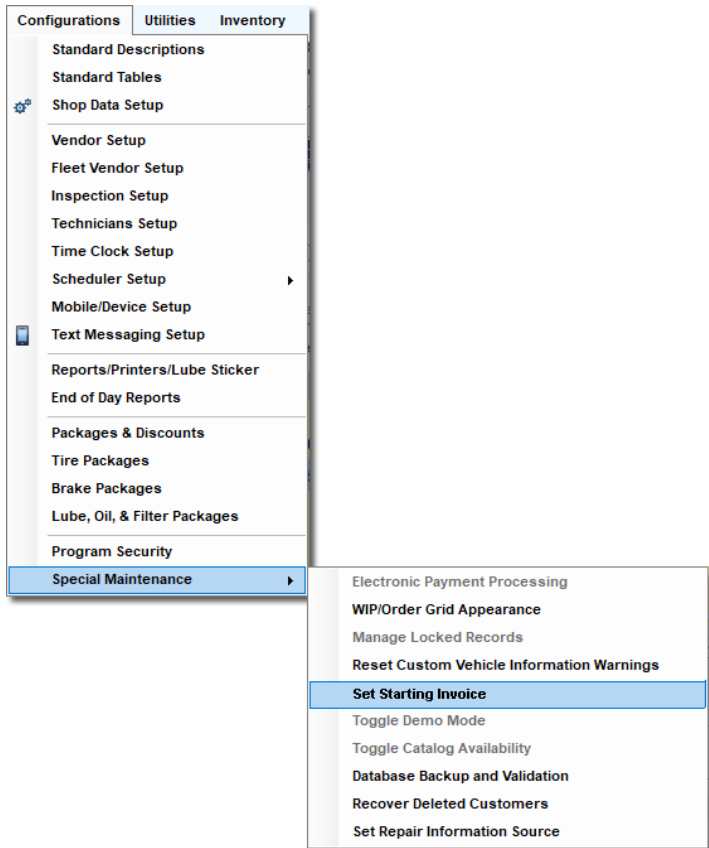
3. Standard Descriptions Complete

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

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

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

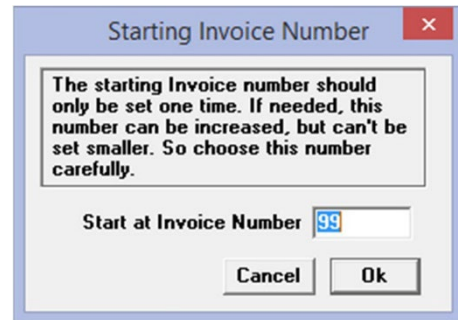
- Set Starting Invoice** – see following page.



Set Starting Invoice

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

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



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