## Contents

### Introduction

- Overview 1
- Manager and Manager Plus 1
  - About this User's Guide 1
- How Manager Works 2
- Before You Begin 3
- Hardware and Software Requirements 3
  - Networking Requirements 4
- Mouse and Keyboard 5
  - Using a Mouse 5
- Protecting Your Data 6
  - Uninterruptible Power Supply (UPS) 7
  - Backing Up Your Data 7
- How to Use this Guide 7
  - User's Guide Contents 7
- Online Help 9
  - Online Assistance 9
  - FAQs 11
  - Tool Tips 11
- Notational Conventions 11
- Summary 12

### Getting Started

- Overview 13
- Setup 13
  - Demo Setup Instructions 14
  - Live Setup Instructions 19
- Starting the Program 25
- Manager Screen 26
  - Screen Layout 26
- Moving Around in Manager 29
Utilities

Overview 117
Before You Begin 117
Utilities 117
  Find Customer 118
  Find History Record 119
  Batch Payments 119
  Spell Check 120
Your Series Database 120
  How Much Setup to Begin With? 121
The Utilities Menu 121
  Parts List 121
Part Kits 121
Canned Jobs 127
Importing and Exporting Promotional Packages 132
Customer Screen 133
Vehicle Screen 139
End Of Day Reports 144
Summary 144

Security

Overview 145
How Manager Security Works 145
Setting Up Protected Functions 145
User Setup 148
  Adding Users 150
  Defining User Access 151
  Editing a User's Name/Password 152
  Deleting a User 152
Accessing Protected Functions 153
Summary 154

Orders

Overview 155
Before You Begin 155
Order Lifecycle 155
  Quick Estimate 156
Estimates, Repair Orders, and Invoices 159
  Order Entry Panels 160
  Customer Panel 162
  Vehicle Panel 165
Order Panel 168
  Building Repair Lines 171
  Special Orders 186
  Changing Order Status/Revision 188
Counter Sales 195
Parts and Labor Interface

Overview 203
Before You Begin 203
Using Parts and Labor 203
Vehicle not Defined 205
Summary 206

Work In Progress

Overview 207
The Work in Progress Screen 207
   Options 208
   Colors 209
      Opening an Order 210
      Removing an Order 210
      Purging Estimates 212
Schedule 212
   Schedule Screen 212
      Schedule Work Dialog Box 216
Payment 218
   Applying Payment in Full 218
   Applying a Partial Payment 221
   Splitting Payment Types 221
   Posting an Unpaid Invoice 223
Work In Progress Detail 224
Customizing your Screen View 225
   Status Display Preferences 225
   Sizing/ Rearranging Columns 228
   User List 229
Summary 231
History
Overview 233
Find History Record 233
History Search (by Invoice number) 233
History Search (by Vehicle) 235
History Screen 237
Batch Payments 242
NSF Funds 245
Deleting a Payment 246
Summary 247

Reporting
Overview 249
Printing Reports 249
Screen Reports 251
Faxing Reports 252
Summary 252

Inventory
Overview 253
Inventory List 253
Adding an Inventory Item 254
Editing an Existing Part 256
Copying a Part 257
Inventory Update 257
Deleting a Part 259
Attached Items 259
Alternate Part Numbers 261
Alternate Price 262
Supersede 264
Inventory Balance 265
Inventory Transactions 265
Month End Close 267
Purchase Orders

Introduction 271
Purchase Orders Dialog Box 271
Restock From Inventory 273
Pick List From Orders 274
Purchase Order Worksheet 276
PO Creation 277
Receiving Parts 279
Comment Lines for Purchase Order 280
Add/Edit Part on Purchase Order 281
Summary 283

Marketing

Introduction 285
Promotions 285
Tires 286
Brakes 287
LOF 288
Packages 290
Discounts 291
Marketing Data 292
Referral Information 292
Customer Work Information 294
Customer Personal Information 294
Followup Letters and Postcards 294
Letters and Postcards Setup 294
Creating a Followup Postcard or Letter 295
Followup Dialog Box 296
Mail Merge Letters 304
Summary 312
Database Structure 331
  Vendors 331
  Inventory 332
  Customer 332
Using the Database Creation Utility 333
Summary 335

Parts Ordering

  Overview 337
  Setup 337
  NAPA Parts Ordering 339
    Ordering NAPA Parts 339
Summary 340
Overview

Welcome to Manager and Manager Plus. These products represent the culmination of decades of experience in the hands-on management of automobile repair facilities. These products are comprehensive shop management systems which use the best database management technology available to provide an automated approach to creating estimates, repair orders, and invoices. Reporting features are available which allow you to track and easily access the information you need to run your shop in an efficient and profitable fashion.

Manager and Manager Plus

Manager is a subset of Manager Plus. The primary difference between the two systems is that Manager Plus includes inventory management and purchasing functions. A corollary result is additional reporting capabilities for Manager Plus users. The relationship is depicted graphically in the figure to the right.

About this User's Guide
This User's Guide is structured to serve users of Manager and Manager Plus. By describing all of the features available in the Manager Plus, all of the features available in both programs are documented. For the sake of simplicity, the title “Manager,” is used generically throughout this User's Guide to refer to both systems.
As such, there are some features described in the book which do not apply to users of Manager I. Description of these features is concentrated, as much as possible, in Chapter 11, “Inventory,” and in Chapter 12, “Purchase Orders.” If you are a Manager user, you can simply ignore these chapters as well as the occasional reference to an inventory or purchasing function in other chapters of the book.

Similarly, if you are not a purchaser of Mitchell Parts and Labor Guide (MPLG) program, you can disregard the information in Chapter 7, “Parts and Labor Interface.”

How Manager Works

Managing your shop with Managers essentially a seven-step process. These steps are explained in detail below.

**Step 1 - Set up Information about your Shop** Before you can begin working with Manager, you must enter certain information about your shop. You must enter rate information (labor, parts mark-up, tax rates, etc.) and administrative information (shop name, technicians).

**Step 2 - Set up a Parts and Labor Database for your Shop** When you go to build an Order (Estimate, Repair Order, or Invoice) you will need to know what parts to use and the amount of labor time that will be required. To accomplish this efficiently, you need to maintain a database of the parts that your shop uses on a daily basis. You will want to have Part Kits set up for parts that are frequently used in combination with one another. You will want to have Canned Jobs set up for parts and labor operations required for frequently performed jobs such as alignment jobs. Finally, you will want to set up the Tire, Lube and Oil Filter, and Brake Packages.

**Step 3 - Create Estimate** Creating estimates quickly and accurately is central to the success of your business.

Manager allows you to tap into your parts and labor database to build estimates without wading through stacks of thick books. The developers of Manager know what it is like to open the doors at 8 am to a line of impatient customers. With this in mind, we have built a product that will allow you to deliver estimates quickly and confidently.

The Quick Estimating feature allows you to build a quick quote requiring a bare minimum of information. This feature is most useful for situations where you may, or may not, get the job, such as in the case of a customer calling around for prices. The quote can then be converted to an estimate, or repair order, once the customer indicates acceptance.

**Step 4 - Convert Estimate to Repair Order** Once the customer has agreed to the necessary work, a single command converts your estimate to a repair order. You can print the order so that the customer can authorize the work to be performed. Then you can schedule the job. Once work has begun, the system allows you to track the location and status of the vehicle in your shop in the Work in Progress screen.
Step 5 - Create an Invoice  Once work has been completed, you will need to create an invoice—a request for payment for services provided. Again, a single command turns your repair order into an invoice.

As with estimates and repair orders, the status of the invoice is tracked in the Work in Progress screen.

Step 6 - Post Invoice  Posting the invoice indicates that the car has been picked up. At this point, the order is closed and removed from Work in Progress to Order History. A complete record of the repair and payment history are maintained where they can be viewed at any time.

Step 7 - Utilize Shop Management Tools  The final step in the process is making use of the management reporting tools that Manager provides. Reports have been structured that pinpoint where your shop is making, and losing, money. All of your inventory and purchasing functions are fully automated within Manager.

Before You Begin

Manager runs under the Microsoft® Windows 95, Windows 98, Windows 2000, and Windows NT operating system. The Windows Graphical User Interface (GUI) helps to make the program easy to learn and use.

This guide assumes a basic familiarity with Windows. If you are not familiar with Windows, you should refer to the Windows online tutorials and documentation, as necessary.

Hardware and Software Requirements

Mitchell recommends using business class Pentium computers. Although custom built clone machines may run well, the majority of problems result from poorly engineered equipment. Mitchell recommends using name brand business computers from Dell, Gateway, Compaq, Digital and HP. 3COM or Intel cards are required for networking. Any system with more than five (5) concurrent users should consider a dedicated Windows server. Most Windows networks should be configured with a DVD drive for ON-DEMAND Repair data and 1 standard CD-ROM for Parts and Labor Estimating data. Although there are various processors available in the market place (e.g., Cyrix and AMD), Mitchell highly recommends the Intel® processor for product reliability.
For applications requiring a modem, 3COM/US Robotics modems are the best choice. Mitchell Repair and Management Systems include training videos so systems should be configured with a 16-bit sound card and speakers.

### Networking Requirements

**Network platforms tested are**
- Windows 95B, Windows 95C, and Windows 98
- Windows 2000, Windows NT 4.0 SP6 (NT Platforms must be on Microsoft’s Hardware Compatibility List and recommend dedicated servers).

**Recommended network cards (NICS) & Hubs**
- 3Com or Intel (100 Mb/sec is preferred for high performance)

**NOTE:** Mitchell highly recommends TCP/IP as network protocol. NetBEUI network protocol is not recommended.

**Networking** Users wishing to integrate a network solution should develop the system around Microsoft Networking. It is easy to implement and support. Windows 98 Peer-to-Peer networking handles 3 to 5 workstations for Manager Management
System. If a user wants to use NT4.0 as a Server, then the server must be configured as a stand-alone server (meaning it must not be configured as server and workstation). For five or more Repair and Management users, NT4.0 as a stand-alone server must be planned as a network solution. Management systems should include an Iomega Zip drive for backing up data on Workstation. Servers require a backup power supply recommended on all workstations. NT 4.0 Server can be used as a workstation but is not recommended. Mitchell does not support NT Terminal Server.

Mouse and Keyboard

The information in Manager can be accessed with a keyboard or mouse. The keyboard is simple, though access is slower. You don't need to know how to type to run the Manager software.

Using a Mouse

To make a selection using a mouse, roll the mouse on a flat surface until the arrow on your screen is in the desired location, and press the left mouse button. This is known as “clicking.” When you release the mouse button, the computer calls your choice onto the screen.

Throughout this manual, whenever you are told to “select” or “click on” a function, menu item, icon, or button, this means to place your mouse cursor (arrow) on the selection, and click the left mouse button.

Right-Clicking

Right-clicking allows you to access some of the functions you use most often without leaving the work area to look for menus or icons. To right-click, simply aim your mouse pointer towards the appropriate area of the screen and click the right mouse button. The appropriate menu displays or dialog box opens.

Some of the right-clicking functions are described below:

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setup Dialog Boxes</td>
<td>Right-click on the gray area at the bottom of any of the three major setup dialog boxes (Standard Descriptions, Standard Tables, Shop Data Setup) to select from a menu of the other setup dialog boxes.</td>
</tr>
<tr>
<td>Quick Canned Jobs List</td>
<td>Right-click on an empty grid line in any order panel to display a listing of Quick Canned Jobs or display the Canned Job List.</td>
</tr>
</tbody>
</table>
Chapter 1

Protecting Your Data

The most important part of your investment in Managers the data that you input. Every effort possible has gone into making the system stable, but there are some things that the end-user can do to extend protection of their data. A database’s biggest enemy is file corruption. This problem is common to ALL databases, not just Manager.

The most common form of corruption is caused when data is incorrectly written to disk. This is typically caused by power fluctuations to the computer. A sudden, short term voltage drop across the computer’s circuitry could result in data being written some place other than where the operating system expects it to be. Manager will no longer be able to access this “lost” data. The result is lost records and incorrect reports.

In automobile repair shops the biggest culprit is the air compressor. However, even connecting the computer to the same circuit as a coffee maker or copier can cause voltage drops at the computer when those devices cycle.

The best solution to this problem is an Uninterruptible Power Supply (UPS) equipped with line conditioning. A UPS provides a back-up power supply which allows the user to save their work and shut down the computer normally in the event of a power outage. More importantly, the line conditioner uses battery power from the UPS to provide a constant 110 volt power supply to the computer as voltage drops occur. Line voltage fluctuation is the #1 cause of premature hardware failure.

In addition to using a UPS, Mitchell recommends the following:

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>WIP Detail</td>
<td>Right-click on any item in the Work-In-Progress screen to display the Work-In-Progress Detail dialog box for that item.</td>
</tr>
<tr>
<td>Toolbar Menu</td>
<td>Right-click on the gray space between icons on the toolbar (usually appears as a thin vertical bar) to open a menu of toolbar selections (as shown below).</td>
</tr>
</tbody>
</table>

*Right-click example*
If at all possible, connect the computer to a dedicated circuit.

DO NOT connect copiers, coffee makers, fax machines, etc. on the computer’s circuit.

Back up your data regularly.

**Uninterruptible Power Supply (UPS)**

In order to be most effective, the UPS should provide 10-15 minutes of back-up power. This will allow for an orderly shut down of the computer. The line conditioning should be constant. Some UPSs have an alarm that sounds when UPS services are being used. This feature is useful for indicating voltage drops and brownout conditions.

For network installations, the file server as well as each of the individual workstations should each be protected by a UPS. The network solution provider should be able to provide recommendations for power protection for the network.

**Backing Up Your Data**

Backups protect against data loss due to a disk crash, fire, theft, software/hardware failure, accidental deletion, and power fluctuations. The Manager automated backup system, used properly, can save you time and money. If a data loss occurs, you simply restore from the backup, eliminating costly reconstruction of your data.

A variety of backup solutions may be used with Manager. However, Mitchell recommends using an Iomega® Zip. Refer to Appendix B, “Backup” for details on backing up your data.

**How to Use this Guide**

The *Manager User's Guide* is designed to help you learn and work with the system. General, as well as detailed, information is provided so that new learners as well as experienced users are provided with the information they need to use Manager effectively.

**User's Guide Contents**

This guide contains all of the information you need to install, start, learn, and work with Manager. The information is divided into the following chapters:

Chapter 1, “Introduction” provides an overview of the Manager product and this User's Guide.

Chapter 2, “Getting Started” details procedures for installing, starting, and exiting the system. Manager’ menu and button bars are also introduced.

Chapter 3, “Shop Setup” describes the steps necessary to set up and maintain, administrative and rate information about your shop.
Chapter 4, “Utilities” describes setup of customer and vehicle information, as well as setup of parts kits and canned jobs. Other selections available from the Utilities menu are described as well.

Chapter 5, “Security” details options for providing password protection for sensitive system functions.

Chapter 6, “Manager Orders” details the procedures to be followed to create quick estimates, regular estimates, repair orders and counter sales.

Chapter 7, “Parts and Labor” describes the interface with Manager’s estimating program interface.

Chapter 8, “Work In Progress” describes the options available in the Work In Progress screen and how its view can be customized for individual users. A detailed description is also provided of the options available for scheduling, and looking at scheduled orders.

Chapter 9, “History Records” details the options available for working with historical Manager records.

Chapter 10, “Reporting” details the reports that Manager provides for managing your shop in an efficient and profitable manner.

Chapter 11, “Inventory” describes the process of setting up inventory items and receiving and issuing parts from inventory.

Chapter 12, “Purchase Orders” explains the tools that Manager offers for generating and working with Manager Purchase Orders.

Chapter 13, “Marketing” details the many ways that Manager provides to help you reach out to your customers. Packages, Discount Coupons, Marketing Data collection, and Mail Merge Postcards and Letters are all described.

Appendix A, “Customer Service” describes common questions and answers and where to call for help.

Appendix B, “Backup” describes backup considerations, and provides recommendations for a suitable backup (hardware and software) system.

Appendix C, “Multi-User” describes the procedure for setting up Manager on a network. The chapter also describes technical considerations for using Manager in a multi-user environment.

Appendix D, “Importing Data Into Manager” describes the Import and Database Creation Utilities, which allows for import of data into the Manager database.

Appendix E, “Parts Ordering” provides information about ordering parts from participating parts distributors.
Online Help

Manager provides extensive context-sensitive online Help. What this means is that no matter where you are working in the system, you can access Help specific to the dialog box you are working in by pressing [F1]. You can also open online help by selecting the Help button on the tool bar.

Select the Help Topics button on the toolbar to open the Help Topics dialog box, or the Search button to utilize the key word search option.

Online Assistance

To facilitate the process of learning to work with the Manager system, a set of online demonstrations has been included on CD. These demos, created and displayed using the Lotus® ScreenCam® program feature voice instruction coupled with actual online demonstration of how to use the program.

NOTE: You need a 16-bit (or better) sound card and speaker(s) if you desire to hear the narration (highly recommended). For best viewing, it is recommended that your computer video resolution be set at 800x600, or higher. For convenience and best performance, Mitchell recommends that you install the videos to your hard drive when prompted during installation.
Online Assistance is optionally installed as part of the Manager setup. Online Assistance is accessed from the Manager CD from within the Help program in either of two ways:

- Click on the camera icon in the title of any Help topic for a related demonstration.
- Select the How To... button on the Help screen button bar to open a menu of all available demonstrations.

The first time you work in Online Assistance, a dialog box asks that you specify the directory where the Training Videos are located.

**To specify a location for the Training Videos:**

1. With the Manager CD inserted in the CD-ROM drive, open the Online Help.
2. Choose How To... to open the list of Training Videos.
3. Click on any Title. The Help Movie Not Found dialog box displays.

4. Click OK.

The Save Help Movie Path dialog box displays. This dialog box allows you to specify the path for the Online Assistance demonstrations.
Select the movie path by choosing the drive letter of your CD-ROM from the Drive List and then the movie path in the Select Path: control group. For example, if your CD-ROM drive was e: your path would be:

```
e:\scrcam\movies\n```

Choose Save Path.

You are now able to run Online Assistance.

**FAQs**

The FAQs button on the Help button bar provides access to Frequently Asked Questions—a listing of some of the questions that are most often asked of our customer service representatives. Click on the desired question and you are taken directly to the Help topic that addresses the question.

Before dialing our Customer Support department, give FAQs a try. It might save you a phone call.

**Tool Tips**

Manager features Bubble Help (also known as “Tool Tips”) for the toolbar icons. To use bubble help, simply position your mouse pointer over a toolbar icon and a help bubble pops up displaying a description of the icon's function.

**Notational Conventions**

In order to make the instructions in this manual easy to understand, this User's Guide makes use of certain standard conventions.

**Keys** When you use the keyboard to work with the Manager system, you will need to “press a key.” In this guide, a key is represented by Helvetica font. For example:

Press Esc to exit the dialog box.

**Commands** Commands have been bolded in the procedures of this user's guide. For example:

- Enter customer information and click OK when finished.

Bolding allows you to scan quickly through a procedure and still pick up on necessary actions.

**Text** When you need to type a command in order to perform a task, this Guide displays the command using the Courier font. For example:

Type:
```
d:\setup
```

and then click OK to install the Manager software.
**Notes**  When information in the text needs to be emphasized, it is shown as a **NOTE:** with a shaded background behind the text. For example:

**NOTE:** Information is displayed in this format for emphasis. As you work with this Guide, you should look for these notes.

**Procedures**  The primary purpose of this User's Guide is to explain the procedures for using Manager. So that you can easily locate these procedures, the introductory phrase is printed in a bold typeface. For example:

**To start Manager:**
- The steps of the procedure are numbered when there is more than one action item, or bulleted if there is only a single action.

**Select**  In a number of places in this manual, you are asked to select or choose a button, menu, or a menu option. To select one of these items, position your mouse pointer on it and press, then release, the mouse button.

**Summary**

Now that you know the requirements for using the system, and are familiar with the structure and conventions of this User's Guide, you are ready to install and use Manager.
Chapter 2
Getting Started

Overview

To prepare your system for processing orders, you must install the software and enter some system settings. This chapter explains these procedures as well as steps for starting and exiting the program. The chapter concludes with an overview of the system's menus and buttons.

Setup

Manager is a 32-bit Windows application. For this reason, you must have Microsoft Windows 95/98, Windows 2000, or Windows NT 4.0 Service Pack 4 installed and running on your system before installing the program.

Mitchell recommends that you perform setup as a two-step process:

- First you should set up the demo database and work through the *Teach Yourself Manager Guide*. You should work with the demo data until you are completely comfortable with the software.

- Once you have mastered the program, you should perform the regular installation. You should then work through the setup activities documented in the *Putting Manager to Work* workbook before going live with the program.

**IMPORTANT UPGRADE NOTE:** Before installing either the demo or the live versions of Manager, ALWAYS BACK UP YOUR DATABASE!
Demo Setup Instructions

The Demo installation program is entirely resident on your CD. Do not insert the Key diskette when performing Demo installation. When you insert your Manager CD, the Manager Install Menu should automatically display (autorun):

Autorun

Choose **Install Manager or Manager Plus Demo** and then skip to Step #5 in the procedure below. If, for some reason, the autorun fails, follow the complete procedure below to install the Manager Demo.

To setup Manager (Demo Version):

1. Insert the Manager CD into your CD-ROM drive.
2. Open the Run dialog box by choosing **Run** from the Start Menu.
The Run dialog box displays.

3 In the Open field, type:
   x:\setup
   Where x\ is your CD-ROM drive letter.

4 Choose OK.
   You are informed that if you have any other Mitchell programs, you should install them first, before installing Manager.

5 If you have other Mitchell Products to install, click No and install them. If you don’t have other products to install, click Yes to continue the installation.
A screen welcomes you to the Manager setup program.

Welcome

6 After reading the information in the Welcome screen, choose Next to continue. The Select Components dialog box displays.
Choose Install Manager I/II Demo and click Next. The Customer Information dialog box displays.

8 Enter your Manager Account Number. This account number is located on the mailing label of the package in which the product was shipped. Ignore the leading number followed by a space. The next set of numbers is your Manager Account Number. It can be four to six digits.

9 Enter the other requested shop information.

NOTE: Setup does not allow the entry of apostrophes in the Company Information dialog box. You will get an error message when you exit the dialog box. Use the back apostrophe symbol (located under the “~” on your keyboard).

10 Click Next to begin the installation. A dialog box provides information about the installation. Click Next to continue.

The program files are loaded to your computer’s hard drive.
After several moments processing, you are asked if you want to load the Screen Cam training files. Loading the Screen Cam files means that you don’t need to insert the installation CD every time you want to look at them. They will also run more quickly. The down side is that the files are big (currently about 450 mb). If space is not an issue, we recommend that you install the files.

**Install Screen Cams**

11 Select **Yes** to install the videos or **No** to not install them.

When all files have finished loading, the Setup Complete dialog box displays.

**Setup Complete**

You are now setup to run the demo program.

12 Click in the **Yes I want to run the Demo Now** box to run the demo now.

**OR**

Leave the box blank if you don’t want to run the demo until later.

13 Click **Finish** to complete the installation.
Live Setup Instructions

**IMPORTANT UPGRADE NOTE:** If you are upgrading from a previous version of Manager, you must run the Import Packages procedure to load the Tire, Brakes and LOF packages that have been added for the current release. Refer to “Importing and Exporting Promotions” on page 132.

The regular (full) installation program features installation by CD and a Key Diskette. It is highly recommended that you have completed the demo installation and have worked through the *Teach Yourself Manager book* until you are comfortable with all program functions *before* attempting to work with Manager in a “live” shop environment.

**NOTE:** Before installing Manager, it is recommended that you close all other Windows applications.

To install/update Manager I/Manager Plus:

1. Insert the Manager I or Manager Plus Key Diskette into your 3.5” floppy drive. Insert the Manager CD into your CD-ROM drive. When you insert your Manager CD, the Manager Install Menu should automatically display (autorun):
Choose **Install Manager I or II Program** and then skip to Step #5 in the procedure below. If, for some reason, the autorun fails, follow the complete procedure below to install the Manager Demo.

2. Open the Run dialog box by choosing **Run** from the Start Menu.
   The Run dialog box displays.

   ![Run dialog box](image)

   **Run**

3. In the Open field, type:
   \[ x:\text{\setup} \]
   Where \( x:\ \) is your CD-ROM drive letter.
   Choose **OK**. You are informed that if you have any other Mitchell programs, you should install them first, before installing Manager.

   ![Installation Info](image)

   **Run**

4. If you have other Mitchell Products to install, click **No** and install them. If you don’t have other products to install, click **Yes** to continue the installation.
A screen welcomes you to the Manager setup program.

Select Next to continue.

**NOTE:** If you didn't insert the Key Diskette before beginning, you will be given the opportunity to insert it now. Insert the diskette into your 3.5" drive and choose Next to continue.
The Customer Information dialog box displays.

Company Information

6 Enter your Manager Account Number.

This account number is located on the mailing label of the package in which the product was shipped. Ignore the leading number followed by a space. The next set of numbers is your account number. It can be four to six digits.

7 Enter/edit the other requested shop information.

NOTE: Setup does not allow the entry of apostrophes in the Company Information dialog box. You will get an error message when you exit the dialog box. Use the back apostrophe symbol (located under the “~” on your keyboard).

8 Click Next.
You are asked to specify your installation options.

![Select Installation Options]

**Select Installation Options**

9 Choose an installation option. Normally, you will want to choose a **TYPICAL** installation. If you are a current customer, the installation will look for an existing copy of the program and upgrade it.

A dialog box indicates where the program files and database will be installed.

![Program and Database Installation Location]

**Program and Database Installation Location**
You are instructed to remove your Key diskette.

![Remove Key Diskette](image)

**Remove Key Diskette**

10 Remove your **Key diskette** and click **OK**.

You are asked if you want to load the Screen Cam training files. Loading the Screen Cam files means that you don’t need to insert the installation CD every time you want to look at them. They will also run more quickly. The down side is that the files are big (currently about 450 mb). If space is not an issue, we recommend that you install the files.

![Install Screen Cams](image)

**Install Screen Cams**

11 Select **Yes** to install the videos or **No** to not install them.
After a moments’ processing, a dialog box informs you that setup is complete.

Setup Complete

12 Click **Finish** to complete the installation and close the dialog box. Manager installation is complete.

**Starting the Program**

Manager is opened by selecting the program icon from within the Mitchell Repair program group or by selecting the appropriate program icon from the Start menu.

**To start Manager:**
- Click on the Manager icon in the Mitchell Repair program group.
OR
• Choose the Manager icon from the Start menu.

OR
• Click the Manager icon on your desktop.
  The Manager Front screen displays.

Manager Screen

The Manager screen consists of the following sections: Title Bar, Menu Bar, Button Bar, Work Area, and Status Bar. When you first open the program, the Manager logo appears in the Work Area.

Manager Front Screen

Screen Layout
The Manager screen layout is consistent with that of other Windows applications. Each area of the screen is described below.
Title and Menu Bar  The Title Bar is the upper strip of the Manager screen. To the left is the application title. To the far left is the control menu box, and to the right are the minimize and maximize buttons.

Manager provides menus that allow you to move freely through the system using whichever method (keyboard or mouse) you prefer. The Menu Bar contains drop-down menus from which you can select a command or an option. These drop-down menus are: File, Edit, View, Setup, Utilities, Inventory, and Help.

Each menu is described in detail later in this guide. For the convenience of keyboard users, the View menu commands correspond to the Button Bar functions.

Toolbar  Manager features a row of icons, or buttons, each representing a different step in the daily shop operations process. When you select a button, the program overlays the work area with a window or dialog box allowing you to perform a system function. Displayed below is the Manager Toolbar in the standard (default) configuration.

The One-Start Toolbar configuration allows you to run your shop in a more systematic fashion, replacing the Estimate, Repair and Invoice icons with a single Start icon. The One Start Toolbar is displayed below.

Refer to “One Start Toolbar” on page 40 for details.
The Manager toolbar is *customizable*. What this means is that you can move it around on your desktop. Simply click and hold down your mouse pointer on the line in the middle or at either end of the toolbar. You can then move the toolbar to a different location on your screen. Displayed below is an example screen with the toolbar moved to the side.

![Toolbar on Side Example](image)

You can restore the toolbar to its original position by choosing Default toolbar from the Toolbars selection from the View menu.

**Work Area** The work area is the portion of the screen that displays the windows and dialog boxes in which you work. This is the largest area of the Manager screen and works in conjunction with icons selected from the Button Bar, Menu commands, and hyperlinked areas of certain dialog boxes. These allow you to jump to a different, related dialog box. Depending on which command you choose, the work area displays the appropriate information or data entry screen.

**Status Bar** The Status Bar is located at the bottom of the screen—displaying information for quick referencing.
Moving Around in Manager

Manager has been designed with flexibility in mind. You can move from one window/function to the next using the mouse or the keyboard.

Using a Mouse
A mouse allows you to move around in Manager a lot quicker than when using the keyboard alone. For instructions on installing, setting up, and using your mouse, refer to your mouse documentation and the Microsoft Windows User's Guide.

Using the Keyboard
Although a mouse is a convenient tool, many Manager operations can be completed by keyboard. The system not only uses all the standard typewriter key functions, but also some PC-specific keys, as described below. As you work with the program, these keyboard commands will become second nature to you.

The View menu on the menu bar provides keyboard access to all system functions represented on the Manager button bar.

<table>
<thead>
<tr>
<th>Key</th>
<th>Screen Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tab</td>
<td>Moves the cursor (data entry point) forward to the next field.</td>
</tr>
<tr>
<td>Shift+Tab</td>
<td>Moves the cursor backward one field at a time.</td>
</tr>
<tr>
<td>Backspace</td>
<td>Removes the character to the left of the cursor.</td>
</tr>
<tr>
<td>Delete</td>
<td>Erases one character or a highlighted group of characters or data field.</td>
</tr>
<tr>
<td>Arrow Keys</td>
<td>Moves the cursor (or highlight bar, as the case may be) one character in the direction of the arrow (Up, Down, Left, or Right).</td>
</tr>
<tr>
<td>Alt</td>
<td>Used in combination with a hot key to select an option. (See the section, Using Hot Keys.)</td>
</tr>
<tr>
<td>Enter</td>
<td>Function varies depending on where you are in the program.</td>
</tr>
</tbody>
</table>
Using Hot Keys  The hot key is any underlined letter or character on the screen. It is used in combination with the Alt key to select a menu or a command option. For example, in Manager, pressing Alt and the letter F accesses the File menu. When the File menu is open, pressing X exits you from the program. Where possible, the hot key for an item is the first letter of the item name (such as N for New).

Menu Bar
Described below are the menu options offered on the Manager menu bar. Each of the menu options can be accessed either by mouse or by keyboard as described in the previous section.

<table>
<thead>
<tr>
<th>Key</th>
<th>Screen Function</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>In dialog boxes with fields that allow for longer text passages (for example, Notes) pressing the Enter key acts like the carriage return on a typewriter, moving you to the first character position on the next line. In other windows, the Enter key has no function.</td>
</tr>
</tbody>
</table>

File  The File menu contains selections which allow you to exit Manager or to pull up any of the last four orders on which you were working. This list is customized to the current user in the user list—if a different user is selected, the list changes. You can also choose to Print or Print Preview the current order or choose Print Setup to open the Reports/Printers Selection dialog box in which you can specify the printer to be used for each type of report.
**Edit** The Edit menu provides options for entering and removing information from your Manager orders.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cut</td>
<td>Removes a highlighted section of repair lines out of the order. The section is copied to your Windows clipboard, from which it can be pasted elsewhere, if desired.</td>
</tr>
<tr>
<td>Copy</td>
<td>Copies a highlighted section of repair lines from within the order. The section is copied to your Windows clipboard, from which it can be pasted elsewhere, if desired.</td>
</tr>
<tr>
<td>Paste</td>
<td>Pasters a section of repair lines from the clipboard into an order.</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes a highlighted section of repair lines from the order.</td>
</tr>
<tr>
<td>Clear Customer</td>
<td>Clears customer and vehicle information from an order.</td>
</tr>
<tr>
<td>Remove Customer</td>
<td>Removes the currently selected customer's record, and all associated vehicles, from the database. This option is only available if the customer has no current orders in Work In Progress.</td>
</tr>
<tr>
<td>Remove Vehicle</td>
<td>Removes a selected vehicle from the Manager database. This option is only available if the vehicle has no current orders in Work In Progress.</td>
</tr>
<tr>
<td>Remove Order</td>
<td>Removes the current order from the database.</td>
</tr>
</tbody>
</table>

**View** The View menu allows you to access, by keyboard or mouse, all of the options available from the button bar. Details of these menu operations are provided in Chapter 8, “Work In Progress.” Additional options allow you to quickly locate a customer, alter certain elements of your display, and show or hide the Toolbar and Status Bar.
Options available from the View menu are described below:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work In Progress</td>
<td>Accesses the Work In Progress display allowing the selection of any open order (Estimate, Repair Order, Invoice).</td>
</tr>
<tr>
<td>Quick Estimate</td>
<td>Opens a new Quick Estimate.</td>
</tr>
<tr>
<td>Estimate</td>
<td>Opens a new Estimate.</td>
</tr>
<tr>
<td>Repair Order</td>
<td>Opens a new Repair Order.</td>
</tr>
<tr>
<td>Invoice</td>
<td>Opens a new Invoice.</td>
</tr>
<tr>
<td>Counter Sale</td>
<td>Opens a new Counter Sale.</td>
</tr>
<tr>
<td>Special Order</td>
<td>Begins a Special Order.</td>
</tr>
<tr>
<td>Applications</td>
<td>Allows you to open, or switch to, other Manager applications you have installed on your system.</td>
</tr>
<tr>
<td>Schedule</td>
<td>Brings up the Schedule window.</td>
</tr>
<tr>
<td>User List</td>
<td>Allows you to select the current user and add or delete users.</td>
</tr>
<tr>
<td>Reports</td>
<td>Brings up the Report Selections dialog box allowing you to select from available Client, Management, Accounting, and Inventory reports for viewing and printing.</td>
</tr>
<tr>
<td>Toolbar</td>
<td>Allows you to display and/or hide the Manager toolbar (program icons) and allows you to restore the toolbar to its default settings. A checkmark next to the Toolbar command signifies that the toolbar is currently displayed. Choose Default Toolbar to restore the toolbar to its default settings.</td>
</tr>
<tr>
<td>Status Bar</td>
<td>Allows you to toggle on or off the Manager status bar.</td>
</tr>
</tbody>
</table>
**Setup Menu**  The Setup menu provides access to options allowing you to set up and maintain your Manager database. These options are described briefly below, and in detail in Chapter 3, “Shop Setup.”

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Descriptions</td>
<td>Opens the Standard Descriptions dialog box. Refer to Chapter 3 for details of the setup activities that are available in this dialog box.</td>
</tr>
<tr>
<td>Standard Tables</td>
<td>Opens the Standard Tables dialog box. Refer to Chapter 3 for details of the setup activities that are available in this dialog box.</td>
</tr>
<tr>
<td>Shop Data Setup</td>
<td>Opens the Shop Data Setup dialog box. Refer to Chapter 3 for details of the setup activities that are available in this dialog box.</td>
</tr>
<tr>
<td>Vendor Setup</td>
<td>Opens the Vendor List dialog, from which you can add, edit, or delete vendor codes and names.</td>
</tr>
<tr>
<td>Technicians Setup</td>
<td>Allows you to add, edit, or delete technician names and types.</td>
</tr>
<tr>
<td>Reports/Printers</td>
<td>Allows you to individually select a unique printer and report type for Estimates, Repair Orders, Invoices, and Counter Sales.</td>
</tr>
<tr>
<td>End of Day Reports</td>
<td>End of day reporting allows you to designate reports to be printed when you exit the program at the end of the day or over any other desired time period.</td>
</tr>
<tr>
<td>Packages &amp; Discounts</td>
<td>Opens Packages and Discounts setup. See page 101 for details on setting up packages and discounts.</td>
</tr>
<tr>
<td>Tire Packages</td>
<td>Opens Tire Packages setup. Refer to page 105 for details on setting up Tire Packages.</td>
</tr>
</tbody>
</table>
Utilities

The Utilities menu contains the following selections.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brake Packages</td>
<td>Opens Brake Packages setup. Refer to page 107 for details on setting up Brake Packages.</td>
</tr>
<tr>
<td>Lube, Oil, and Filter Packages</td>
<td>Opens Lube, Oil, and Filter (LOF) setup. Refer to page 108 for details on setting up LOF Packages.</td>
</tr>
<tr>
<td>Program Security</td>
<td>Allows a System Administrator to enable password protection for designated system functions and define user access to those functions.</td>
</tr>
<tr>
<td>Diagnostic Reports</td>
<td>Pulls up the Error Reporting Preferences dialog box, in which you are able to select error logging options and set a log file name.</td>
</tr>
<tr>
<td>Special Maintenance</td>
<td>Provides access to a submenu allowing you to access some special system maintenance utilities.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find Customer</td>
<td>Allows you to quickly locate a customer record from anywhere in Manager.</td>
</tr>
<tr>
<td>Find History Record</td>
<td>Allows you to quickly locate a history record from anywhere in Manager.</td>
</tr>
<tr>
<td>Batch Payment</td>
<td>Opens the Batch Payments dialog box, allowing you to make payments on a number of invoices without opening them individually.</td>
</tr>
<tr>
<td>Parts List</td>
<td><strong>NOTE:</strong> Available in Manager I only. Manager users refer to Inventory List, (opened from the Inventory menu.) Opens the Parts List dialog box, allowing you to add, edit, and delete parts from the Parts List.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Utilities</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Find Customer</td>
<td>Allows you to quickly locate a customer record from anywhere in Manager.</td>
</tr>
<tr>
<td>Find History Record</td>
<td>Allows you to quickly locate a history record from anywhere in Manager.</td>
</tr>
<tr>
<td>Batch Payment</td>
<td>Opens the Batch Payments dialog box, allowing you to make payments on a number of invoices without opening them individually.</td>
</tr>
<tr>
<td>Parts List</td>
<td><strong>NOTE:</strong> Available in Manager I only. Manager users refer to Inventory List, (opened from the Inventory menu.) Opens the Parts List dialog box, allowing you to add, edit, and delete parts from the Parts List.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Utilities</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Find Customer</td>
<td>Allows you to quickly locate a customer record from anywhere in Manager.</td>
</tr>
<tr>
<td>Find History Record</td>
<td>Allows you to quickly locate a history record from anywhere in Manager.</td>
</tr>
<tr>
<td>Batch Payment</td>
<td>Opens the Batch Payments dialog box, allowing you to make payments on a number of invoices without opening them individually.</td>
</tr>
<tr>
<td>Parts List</td>
<td><strong>NOTE:</strong> Available in Manager I only. Manager users refer to Inventory List, (opened from the Inventory menu.) Opens the Parts List dialog box, allowing you to add, edit, and delete parts from the Parts List.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Utilities</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Find Customer</td>
<td>Allows you to quickly locate a customer record from anywhere in Manager.</td>
</tr>
<tr>
<td>Find History Record</td>
<td>Allows you to quickly locate a history record from anywhere in Manager.</td>
</tr>
<tr>
<td>Batch Payment</td>
<td>Opens the Batch Payments dialog box, allowing you to make payments on a number of invoices without opening them individually.</td>
</tr>
<tr>
<td>Parts List</td>
<td><strong>NOTE:</strong> Available in Manager I only. Manager users refer to Inventory List, (opened from the Inventory menu.) Opens the Parts List dialog box, allowing you to add, edit, and delete parts from the Parts List.</td>
</tr>
</tbody>
</table>
Inventory Menu

The Inventory menu allows access to all inventory and purchasing functions. These options are described briefly below, and in detail in Chapter 11, “Inventory” and Chapter 12, “Purchase Orders.”

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part Kits</td>
<td>Opens the Part Kits dialog box, allowing you to add, edit, and delete Parts Kits.</td>
</tr>
<tr>
<td>Canned Jobs</td>
<td>Opens the Canned Job List, allowing you to copy, add, edit, and delete Canned Jobs.</td>
</tr>
<tr>
<td>Promotions</td>
<td>Opens the Promotions dialog box, from which you can add, edit, and delete Packages and Discount Coupons.</td>
</tr>
<tr>
<td>Customer Screen</td>
<td>Opens the Customer screen, allowing you to enter customer information into the MMS database.</td>
</tr>
<tr>
<td>Vehicle Screen</td>
<td>Opens the Vehicle screen, allowing you to enter vehicle information into the MMS database.</td>
</tr>
<tr>
<td>End of Day</td>
<td>Opens the End of Day procedure dialog box.</td>
</tr>
</tbody>
</table>

**NOTE:** The Inventory menu is available only to Manager Plus users. Manager I users use Parts List (Utilities menu) to enter parts. Manager I users also select Year End Close from the Utilities menu.
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inventory List</td>
<td>Opens the Inventory List dialog box, allowing you to add, edit, and delete Inventory List records.</td>
</tr>
<tr>
<td>Inventory Transactions</td>
<td>Opens the Inventory Transactions submenu. The three available selections, Physical Count, Transfer, and Returns, are described below.</td>
</tr>
<tr>
<td>Physical Count</td>
<td>Opens the Physical Count Update dialog box, allowing you to record an inventory count adjustment.</td>
</tr>
<tr>
<td>Transfer</td>
<td>Unavailable in this software release.</td>
</tr>
<tr>
<td>Returns</td>
<td>Opens the Return Part to Vendor dialog box allowing you to reduce the on-hand quantity of an inventory item to account for parts that are returned to the vendor.</td>
</tr>
<tr>
<td>Purchase Orders</td>
<td>The Purchase Orders dialog box provides options for creating new purchase orders, viewing open purchase orders, and performing operations on open POs (Edit PO, Receive Parts, etc.).</td>
</tr>
<tr>
<td>Month-End Close</td>
<td>Opens the Close Month dialog box, allowing you to close a month for accounting purposes.</td>
</tr>
<tr>
<td>Year-End Close</td>
<td>Initiates a transaction to close a year for accounting purposes. (Manager I users select Year-End Close from Utilities menu.)</td>
</tr>
</tbody>
</table>

**Training Videos** Use this menu selection to access a selection of available Training Videos.
The Help selection provides access to the online help system. When you access Help via the Index selection from the Help menu, you open the Help Topics dialog box.

Help Topics

This dialog box allows you to search help via a structured Contents lookup, an Index search or a word search (Find).
You can also access Help for any program function by pressing [F1] or the Help button on the toolbar.
The Help Menu also provides access to the About dialog box, which provides program version identification.

About

You can also click the **System Info ...** button to pull up the Microsoft System Information dialog box.

**Microsoft System Information**
This dialog box provides information about your operating system, memory, and other aspects of your computer environment that may be of use in troubleshooting performance issues.

**NOTE:** The Microsoft System Information dialog box is only available if you have either Microsoft Office or Windows 98 installed on your system.

**One Start Toolbar**

The Screen View panel in Shop Data Setup now contains a setting that allows you to display the Manager One Start toolbar. (Select **Shop Data Setup** from the **Setup** menu and then the **Screen View** tab to open the Screen View panel.) See “Screen View” on page “Screen View” on page 88, for details.

Selecting the One Start Toolbar option causes the One Start Toolbar to display as your toolbar.

The One Start Toolbar replaces the Estimate, Order, and Invoice icons with the Start icon. Clicking on the Start icon to start the order at the Customer List for Start Order dialog box, which allows you to look up a customer by Name, Phone Number, or License number, or start a new customer.
To begin an order using the Start icon:

1. With the One Start toolbar enabled, select the Start icon from the Toolbar. (See “Screen View” on page 88, for details on enabling the One Start toolbar). The Customer List for Start Order dialog box displays. Manager “remembers” whether you chose to start an estimate or a repair order the last time you created an order.

2. Click the other option button to change your selection, if desired.

3. Input known information. As you start typing, the grid area below displays matches. When you see the name you are looking for, simply click on it and click OK. You are taken to the Customer panel with information about the selected customer entered into the fields of the dialog box.

   If the Customer is not in your database, you need to create a new customer record. Click New Customer to close the dialog box and start at an empty Customer screen.

Printing and Faxing

Many screens and dialog boxes in Manager allow you to print and/or fax.

Printing

For each type of order (Estimate, Repair Order, etc.) you can select a different printer in the Reports/Printer Selection dialog box (refer to Chapter 3, “Shop Setup,” for details).

To print in Manager:

1. Select the Print button.

OR

Select Print from the File menu.

The document is sent to the printer that you specified in the Reports/Printer Selection dialog box.

OR

The Report prints to your screen if you have selected Default Print To Screen in the Reports Printers dialog box.

NOTE: Additional dialog boxes may appear requesting information before you can continue your print job.

2. If you have selected Print To Screen, click on the small print icon at the top of the screen to send the document to the printer.
Faxing

A number of screens in Manager allow you to fax to a customer, vendor, etc. Faxing in Manager is simple—the process is very much like printing to a printer, only that instead of sending to a printer, you send to a fax driver on your computer which sends the job to a fax machine. The only requirement is that you have a working modem and fax software.

Faxing with Third Party Software  
Manager normally works very well with third-party faxing software.

To fax with third-party software, you must first select a fax printer in the Reports/Printers dialog box (refer to Fax Printer Selection in Chapter 3, “Shop Setup,” if necessary).

To Fax with Third-Party Faxing Software:

1. Select the Fax button from within a screen or dialog box that allows faxing. A dialog box displays requiring that you enter fax information (Fax Phone Number, Sender Name, Receiver Name, etc.). This dialog box varies depending on your software vendor.

   OR

   If you have selected Default Print to Screen for the fax printer in the Reports/Printers dialog box, the report prints to screen. You can continue the fax by selecting the Print icon at the bottom of the Screen Print.

2. Enter required information.

3. Select Send (or corresponding command to send the fax).

   The fax is sent.
Maintenance Program Utilities

The Shop Management Database Utilities dialog box includes the Repair, Compact, Update and Verify Data database utilities. These utilities can be used, with the help of Manager's technical support department, to troubleshoot and repair database problems.

Database Utilities

The dialog box is opened by selecting the Database Utility icon in the Mitchell 1 program group.

**NOTE:** It is recommended that you not run these utilities without the assistance of Mitchell’s Technical Support Department. Misuse could result in damage to the database and loss of information.

Exiting the Program

The Manager system is exited by selecting Exit from the File menu. Because all changes are recorded to the database real-time, or as soon as you make them, you do not need to save anything when exiting the program.

To exit Manager:

- Choose Exit from the File menu. Manager closes.

**NOTE:** Do NOT exit program by turning off computer. This may result in lost or corrupted files and data.
Summary

In this chapter you installed and learned to start and exit the Manager system. The following chapter describes basic setup activities.
Overview

Before you are able to build Orders (Estimates, Repair Orders, and Invoices) in Manager, you must perform certain setup activities. You need to set up lists of descriptions, rates, and shop information. This chapter details how you set up Manager for order processing using the options available from the Setup menu.

Before You Begin

Before you begin this chapter, you should already have Manager installed and running on your computer. If you have not already done so, you must complete the installation instructions in Chapter 2, “Getting Started.” You may also wish to skim the first two chapters for general information about Manager.

This chapter supplements and adds detail to the setup information provided in the Putting Manager to Work workbook. It is highly recommended that you work through the setup steps detailed in the workbook before attempting to go live with Manager.

The following sections describe the dialog boxes that are accessed though the Setup menu. The Setup menu is selected by choosing Setup from the menu bar in any Manager screen. Selecting any option on the Setup menu brings up a dialog box in which you enter/edit lists of descriptions and rates necessary for order processing.

Standard Descriptions

The Standard Descriptions dialog box is where you create and maintain lists of standard descriptions to be used in the various pull-down menus in Manager. These standard descriptions simplify data entry into Manager while at the same time improving the consistency of terminology in the database.
The Standard Descriptions dialog box is comprised of several separate, but related, panels. The tabs on this dialog box work like a card file.

Click on any tab to move the selected panel to the forefront of the dialog box. The following sections describe how to use the panels available from within the Standard Descriptions dialog box.

**Category Descriptions**
Category descriptions are used throughout Manager to describe groupings of parts and labor operations. This allows for the opportunity to collect information on types of work performed.

Manager comes pre-loaded with a set of standard category descriptions (see figure below). Use this dialog box to Add, Edit, or Delete a Category description.

**To add a Category Description:**

1. Choose Category Descriptions in the Standard Descriptions dialog box.
The Category Descriptions panel displays.

**Category Descriptions**

2. Select **Add**.
   - The Enter Category Description dialog box appears.

**Enter Category Description**

3. Type in a new category description.
4. Select **OK**.
   - The new description is added to the list.

**To edit a Category Description:**

1. Move the cell marker to the cell of the category description entry you wish to edit. The cell marker can be moved by clicking your mouse-pointer on the desired description or by using your Up and Down arrow keys.
The selected description will be highlighted.

2 Select the **Edit** button. The Edit Category Descriptions dialog box displays the current Category description.

3 Make any desired edits.

4 Select **OK**. The new description appears in the Category Descriptions dialog box.

**To delete a Category Description:**

1 Move the cell marker to the cell of the category description entry you wish to delete. The selected description will be highlighted.

2 Select the **Delete** button. A message warns that a loss of information may occur if the category has ever been used in a previous order.

3 Select **OK** to delete the Category Description.

**NOTE:** The deleting of a category will not affect your open or historical records, but will affect any reports that collect information based upon Category.

**Part Code Descriptions**

Part Code Descriptions greatly improve the speed of data entry and the consistency of parts descriptions in the Manager database. These coded descriptions ensure that part names, category, and vendor information can be quickly and consistently retrieved by simply typing in a couple of keystrokes, or by selecting a part code from a list.
Part Codes are short cuts for entering part Description, Category and Vendor. For example, you could choose “AF” to pick the Description, Category and Vendor for an “Air Filter.” This saves time and improves consistency.

The program comes pre-set with a number of the descriptions you are likely to use most often. When you need to add, edit, or delete Part Code Descriptions, you work in the Part Code Descriptions panel of the Standard Descriptions dialog box.

The following options are available in the Part Code Descriptions dialog box:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
<td>Allows you to add a new part code and description.</td>
</tr>
<tr>
<td>Edit</td>
<td>Allows you to edit a part code/description.</td>
</tr>
<tr>
<td>Delete</td>
<td>Allows you to delete a part code/description.</td>
</tr>
</tbody>
</table>

To add a Part Code Description:


   The Part Code Descriptions dialog box displays.

2. Select **Add**.
The Add Part/Code dialog box displays.

![Add Part/Code dialog box]

3 Type in a new Part Code (up to eight characters, no apostrophes).
4 Enter a Description (up to 31 characters).
5 Select a Category from the pull-down list.
   OR
   Add a new category by selecting the Category button (refer to the Category Descriptions section of this chapter for instructions).
6 Select a Vendor from the pull-down list (refer to the Vendor Descriptions section of this chapter for instructions on setting up vendors).
   OR
   Add a new vendor by selecting the Vendor button (refer to the Vendor Descriptions section of this chapter for instructions).
7 Select OK.
   Your Part Code Description is added to the Part Code Descriptions list.

To edit a Part/Code Description:
1 Move the cell marker to the cell of the Part Code Description entry you want to edit.
The selected description is highlighted.

![Edit Parts/Code Dialog Box]

*Edit Parts/Code*

2 Select the **Edit** button.
   The Edit Part/Code dialog box displays.

3 Make any desired edits/selections (refer to the Add Part/Code Description procedure, if necessary, for instructions).

4 Select **OK**.

**To delete a Part/Code Description:**

1 Move the cell marker to the cell of the part/type entry you wish to delete.
   The selected description is highlighted.

2 Select the **Delete** button.
   You are asked to confirm your deletion.

3 Select **OK** to delete the part code description.
Phone Descriptions

The Phone Descriptions panel of the Standard Descriptions dialog box allows you to input/remove standard phone descriptions for your customers. These descriptions are used in the pull-down menus in panels in which customer information is used.

To add a Phone Description:

1. Click the Add button.

   The Phone Descriptions dialog box displays.

2. Type in a new description.

3. Select OK.

   The new description is added to the list.
To remove/edit a Phone Description:
1 Move the cell marker to the cell of the phone description entry you wish to delete or edit.
2 Choose Edit to edit the description or Delete to delete it

Title Descriptions
The Title Descriptions panel allows you to input/remove standard title descriptions for your customers. These descriptions are used in the pull-down menus in panels in which customer information is entered.

To add a Title Description:
1 Click the Add button.
The Title Descriptions dialog box displays.
2 Type in a new description.
3 Select OK. The new description is added to the list.

**To remove/edit a Title Description:**

1 Move the cell marker to the cell of the title description entry you wish to delete or edit.
2 Choose Edit to edit the description or Delete to delete it.

**IMPORTANT NOTE:** Do not change or remove your Title Descriptions once you have set them up and begun using them. This can cause undesired results in orders and reports.

**Location Descriptions**

The Location Descriptions panel of the Standard Descriptions dialog box is where you maintain a set of standard descriptions of common vehicle locations in your shop. These descriptions are used to track the locations of vehicles under repair.

You can Add, Edit, and Delete Location Descriptions.

**To add a Location Description:**

1 Select Add.
The Add Location Description dialog box appears.

![Add Location Description](image)

2 Type in a Location Description.

3 Designate if the location should be Red Flagged.
   Red Flagging a location highlights an order in the Work in Progress grid (in red) for
   vehicle(s) that are in that area. Red Flagging is intended to alert shop personnel to
   situations that warrant special attention.

4 Select OK.

**To edit a Location Description:**

1 Select the Location Description you wish to edit.

2 Select **Edit**.
   The Edit Location Description dialog box appears with the current Description and
   Red Flag settings displayed.

![Edit Location Description](image)

3 Overtype the current Description and/or change the Red Flag setting.

4 Select **OK** to save your change(s).
To delete a Location Description:

1. Select the Location Description you wish to delete.
2. Select Delete.
   A dialog box directs you to confirm your deletion.
3. Select Yes to delete the Location Description.

Status Descriptions
The Status panel of the Standard Descriptions dialog box is used to maintain a common set of repair status descriptions (for example, “Waiting For Parts”). These descriptions are used in pull-down choice lists for tracking the status of vehicles being repaired.

You can Add, Edit, and Delete Status Descriptions.

To add a Status Description:

1. In the Status Description dialog box, select Add.
The Add Status Description dialog box displays.

![Add Status Description dialog box](image)

### Add Status Descriptions

1. Type in a Status Description.
2. Designate if the status should be Red Flagged.
   Red Flagging a status highlights an order in the Work in Progress grid (in red) for vehicle(s) with that status. Red Flagging is intended to alert shop personnel to situations that warrant special attention (for example, a vehicle that is waiting for a part).
3. Select **OK** to save your change(s).

#### To edit a Status Description:

1. Select the Status Description you wish to edit.
2. Select **Edit**.
3. The Edit Status Description dialog box displays. Overtype the current Description and/or change the Red Flag setting.
4. Click **OK** to save your changes.

#### To delete a Status Description:

1. Select the Status Description you wish to delete.
2. Select **Delete**.
   A dialog box directs you to confirm your deletion.
3. Select **Yes** to delete the Status Description.
   The Status Description is removed from the list.
Vendor Type Descriptions

The Vendor Type Descriptions panel of the Standard Descriptions dialog box is used to maintain a common set of Vendor Type descriptions.

![Vendor Type Descriptions Panel]

To add a Vendor Type Description:

In the Vendor Type panel of the Standard Descriptions dialog box, select Add.

1. The Add Vendor Type Description dialog box appears.

![Add Vendor Type Description]

2. Type in a Vendor Type Description.
3. Select OK. The new description appears in the Vendor Type Descriptions dialog box.

To edit a Vendor Type Description:

1. Select a Vendor Type Description you want to edit.
2 Select **Edit**.
3 The Edit Vendor Type Description dialog box displays. Overtype the current Description with a new one.
4 Click **OK** to save your changes.

**To delete a Vendor Type Description:**
1 Select the Vendor Type Description you wish to delete.
2 Select **Delete**.
   A dialog box directs you to confirm your deletion.
3 Select Yes to delete the Vendor Type Description.
   The Vendor Type Description is removed from the list.

**Standard Notes**
Standard Notes contain pre-prepared text which you can attach to Manager Orders. Each note has a Title (which appears in a pull-down choice list when you are creating the repair lines of an order), and Note Text (the text that appears in the repair lines in the Work-In-Progress screen and on the printed order). The Standard Notes panel in the Standard Descriptions dialog box allows you to add, edit, and delete notes.
To create a Standard Note:

1. Choose the Add button.
The Add Standard Note dialog box appears.

2. Type in a Standard Note Title. This is the title that appears in your pull-down lists. Standard Note Titles can be up to 30 characters.

3. Type in the note text (up to 509 characters).

4. Select OK to save.
   You are returned to the Standard Notes dialog box and your note is added to the list.

To edit a Standard Note:

1. Highlight the title of the Standard Note you wish to edit.

2. Choose the Edit button.
The Edit Standard Note dialog box appears with the text from the current note displayed.

3. Edit the current Note Title and/or Text as desired.

4. Select OK to save.

To delete a Standard Note:

1. Highlight the title of the Standard Note you wish to delete.

2. Choose the Delete button.
A dialog box asks you to confirm your deletion.

3 Select Yes to delete.

Followup Postcards and Letters Setup
You can use Followup Postcards and Letters to maintain postal reminders, recommendations, and announcements to customers, such as “Thank You” postcards and standard form letters. The following procedures describe setup activity necessary prior to generating Followup Postcards and Letters. Refer to Chapter 13, “Marketing,” for complete details on generating followup postcards and letters.

Option buttons on the right-hand side of the dialog box allow you to switch the display between Post Cards, Mail Merge letters, and Followup letters.

Postcard Description Setup The first option button in the Followup dialog box provides access to Postcard Description setup.

To add a Postcard Description:
1 Select Add.
2 The Add Postcard dialog box displays.
3 Type in the Postcard Title.
4 Select a Postcard Type from the pull-down menu.
5 Type in your Postcard Text.
6 Select OK to save the changes.

To edit a Postcard Description:
1 Click on a description to highlight it.
2 Select Edit to display the Edit Postcard dialog.
3 Make any desired changes to the Postcard Description.
4 Select OK to save changes.

To delete a Postcard Description:
1 Highlight the description you want to delete.
2 Select Delete.
3 A dialog box appears asking you to confirm the deletion.
4 Select Yes to delete the Postcard Description.

Mail Merge Letter Setup Successful creation of a Mail Merge document requires that you perform extensive setup activity in Manager and in Microsoft Word. It also requires that you have the following software installed on your computer:
- Manager Plus or Manager.

Refer to Chapter 13, “Marketing,” for detailed instructions on setting up and running Mail Merge letters.
**Followup Letter Setup** FollowUp Letters provide a mechanism for you to write simple form letters, service reminders, recommendations, etc., to your customers. The Add/Edit FollowUp Letters dialog box displays as the result of an Add or Edit request in the Followup Post Cards and Letters Setup dialog box.

![Add/Edit FollowUp Letters](image)

*Add/Edit FollowUp Letters*

Two fields are available:

- The **FollowUp Letter** field is where you type the name for your letter. This is the name that will appear in the selection list you use when you go to process a followup request.
- The **Letter Text** field is where you type the text of your letter. This is the text that will appear in the body of your letter.

Click **OK** when finished with your entries/edits to save and exit.
Symptoms
Symptoms are added, edited, and deleted in the Symptoms panel of the Standard Descriptions dialog box. They can also be saved when created for an order.

Selecting Add or Edit (with a Symptom Description selected) opens the Add/Modify Standard Symptoms dialog box.
The Add/Modify Standard Symptoms dialog box is where you create and maintain Symptoms, and their descriptions, for use on Manager orders.

The Add/Modify Standard Symptoms dialog box contains the following fields/options:

<table>
<thead>
<tr>
<th>Field/Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Description</td>
<td>Standard (short) name for the symptom. Type a short description for the symptom in the field.</td>
</tr>
<tr>
<td>Symptom</td>
<td>Extended description of the symptom. Description fills in automatically if Standard Symptom is selected from the list.</td>
</tr>
<tr>
<td>Work Requested</td>
<td>Work requested by customer.</td>
</tr>
<tr>
<td>Category</td>
<td>The Category for the Symptom.</td>
</tr>
<tr>
<td>Charged Hours</td>
<td>Labor hours to be charged for the diagnosis/repair. These hours will be added to the order.</td>
</tr>
<tr>
<td>Labor Total $</td>
<td>Labor $ as calculated by Charged Hours extended at your shop rate.</td>
</tr>
<tr>
<td>Est. Parts $</td>
<td>Estimated Parts cost. This total will be added to the order.</td>
</tr>
<tr>
<td>Non-Standard Labor Rate</td>
<td>Select Non-Standard Labor Rate to charge a flat rate, ignoring the shop’s labor rate calculation.</td>
</tr>
</tbody>
</table>

When you have finished entering/editing data, click **OK**. The Standard Symptom will be available on future orders.
Manufacturers

Manufacturer names can be used in Manager to narrow parts searches by Manufacturer or further part identification. Manufacturers are added, edited, and deleted in the Manufacturer panel of the Standard Descriptions dialog box.

Manufacturers

Selecting Add or Edit (with a Manufacturer selected) opens the Add/Edit Manufacturer List dialog box.
**Standard Tables**

The Standard Tables dialog box (opened from the Setup menu) provides options for you to maintain Labor and Parts Rates, Tax Rates, and information about accounts. The tabs on this dialog box works like a card file. Click on any tab to move the selected panel to the forefront of the dialog box.

**Labor Rate Table**

The Labor Rates Table provides you with a mechanism to maintain up to ten labor rates for your shop. The table is opened by selecting Labor Rate Table from the Standard Tables submenu.

**NOTE:** Give careful consideration to which labor rate you enter in the first row of the Labor Rate Table! Your first entry becomes the default labor rate for all Manager customers.

**To add/edit a Labor Rate Item:**

1. Select the Labor tab in the Standard Tables dialog box.
The Labor Rate Table displays.

![Labor Rate Table](image)

**Add/edit the fields of the Labor Rate Table as necessary.** The Labor Rate Table contains the following two columns.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>The name of the labor item as it appears in the menus and on printed reports.</td>
</tr>
<tr>
<td>Rate</td>
<td>The dollar amount, per hour, at which the specified type of labor will be charged.</td>
</tr>
</tbody>
</table>

**Select Done** to save your additions/changes.

If you change the first (base) labor rate, you will get a message, “The Base Labor Rate has changed... Adjust sale price in Canned Jobs, Standard Symptoms, and Inventory?”

Click **Yes** to change the rate for these items or **No** to leave the items as is. Any items with Non-Standard Labor Rate checked will not be affected.
Parts Discount Table

The Part Discount Table provides a mechanism to maintain up to ten levels of parts discounts for your shop. The table is opened by selecting the Parts Discount tab in the Standard Tables dialog box. Parts discounts are automatically applied to all parts entered on an order but can be changed on a line-by-line basis by the user.

NOTE: Give careful consideration to which parts discount you enter in the first row of the Parts Discount Table! Your first entry becomes the default parts discount for all Manager customers.

To add/edit a Part Discount item:

1. Select the Parts Discount tab from the Standard Tables dialog box. The Parts Discount Table displays.

2. Add/edit the fields of the Parts Discount Table as necessary. The table is comprised of the following two fields.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>The name of the part rate category as it appears in the menus and on printed reports.</td>
</tr>
</tbody>
</table>
Select Done to save your additions/changes.

**Tax Rate Table**

The Tax Rate Table provides the ability to maintain up to seven tax rates. The table is opened by selecting the Tax Rate tab in the Standard Tables dialog box.

**To add/edit a Tax Rate item:**

1. Select the Tax Rate tab in the Standard Tables dialog box.

   The Tax Rate Table appears.

   ![Tax Rate Table Image]

   **Tax Rate Table**
2 Add/edit the fields of the Tax Rate Table as necessary. **Default** must be selected for a tax to be applied to new customers. The table is comprised of the following fields.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>The name of the tax rate category as it appears in the menus and on printed reports.</td>
</tr>
<tr>
<td>Material Rate</td>
<td>The percentage of an order's material list price that is applied as a tax to the order.</td>
</tr>
<tr>
<td>Labor Rate</td>
<td>The percentage of an order's labor charge that is applied as a tax to the order.</td>
</tr>
<tr>
<td>Default</td>
<td>Selects which items to apply to new customers as the default.</td>
</tr>
<tr>
<td>G.L. Code</td>
<td>The General Ledger Code applied to the tax item.</td>
</tr>
</tbody>
</table>

3 Select **Done** to save your additions/changes.

**Compound Tax Table**

The Compound Tax Table allows you to set up compound taxes. These taxes are applied to the order after sales tax (and any other tax, if applicable), has been applied. These taxes are only applied to parts and are normally used for tires. You can specify up to two excise taxes. If there are two excise taxes, you specify which tax is applied first and which tax is applied second.

**To add/edit an Compound Tax item:**

1 Select the **Compound Taxes** tab in the Standard Tables dialog box to display the Compound Taxes table.
Add/edit the fields of the Compound Tax Table as necessary. The table is comprised of the following fields.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>The name of the tax rate category as it appears in pull-down menus and on printed reports.</td>
</tr>
<tr>
<td>Rate</td>
<td>The percentage of a part's selling price that is applied as a tax to the order.</td>
</tr>
<tr>
<td>G.L. Code</td>
<td>The General Ledger Code which is applied to the tax item.</td>
</tr>
</tbody>
</table>

Select **Done** to save your additions/changes.

**Income/Cash Accounts**

Income accounts are the general ledger (GL) accounts into which you group your revenues for accounting purposes. Cash accounts are the form of payment from a customer.

**NOTE:** In Manager terminology, Cash refers to any payment by cash, credit card, check, etc.—in other words, any payment to an order balance other than a charge to a customer's in-house credit account.
When you select Income/Cash Accounts in the Standard Tables dialog box, the Income/Cash Accounts table opens with Income Accounts displayed, as shown below.

In the Income/Cash Accounts dialog box with Income Accounts selected, choose Add.

The Account Class Information dialog box displays.

Select the option button for Cash Accounts (top of display) to dynamically alter your display to show Cash Accounts.

**To add an Income Account Description:**

1. In the Income/Cash Accounts dialog box with Income Accounts selected, choose Add.
2 Type in a new **Income Account Description** and **General Ledger** (GL) **Code**.

3 Add Account Descriptions and GL Codes, as determined by your shops accounting needs, for:
   - **Cost of Sales**
   - **Expense/Asset/Liabilities**
   - **Cost of Commissions**
   - **Commissions Earned**

**NOTE:** Contact your accountant if you have any questions as to what to use for these values.

4 Select **OK**.

You are returned to the Income/Cash Accounts panel with your new Income Account(s) added to the list.

**To add a Cash Account Description:**

1 In the Income/Cash Accounts dialog box with Cash Accounts selected, choose **Add**. The Account Class Information dialog box displays.

![Account Class Information (Cash)](image)

2 Choose whether the account is a Cash, Check, or Credit Card account.

3 Type in an **Account Description**.

4 Type in a **GL Code**.

5 Choose **OK**.

You are returned to the Income/Cash Accounts dialog box with your new Cash Account added to the list.
To edit an Income/Cash Account:

1. In the Income/Cash Accounts dialog box, highlight the line of the account you wish to edit.
2. Choose Edit.
   The Account Class Information dialog box appears with the current information displayed in the data fields.
3. Enter/edit information as necessary.
4. Choose OK to save your new account information.

To delete an Income/Cash Account:

1. Highlight the line of the account you wish to delete.
2. Choose Delete.
   A dialog box directs you to confirm your deletion.
3. Choose Yes to delete.

Standard Accounts

The Standard Accounts Table is accessed via the Standard Accounts selection from the Standard Tables dialog box. This table is where you enter general ledger codes for Accounts Receivable, Customer Deposits, and Retained Earnings.
To change a Standard Account:

1. Overtake the existing account number with a new account number.
2. Select **Done** to save your changes.

**Zip Code Mapping**

A handy feature of Managers the ability of the program to look up a city and state when entering a customer's zip code. You simply enter the zip code in the Customer screen and press Tab, or click in any other field, and the City and State are automatically entered for you. This saves you time in entering customer information.

A problem that some of our customers have encountered, however, is that zip codes change and new zip codes are added more frequently than the Manager zip code table is updated. To account for these situations, the Zip Code Mapping dialog box has been added to allow you to map or re-map zip codes.

To map/re-map a zip code:

1. Select **Zip Code Mapping** from the Shop Data Setup submenu.
   The Zip Code Mapping dialog box displays.

2. Enter the zip code you want to map. Original Zip Code Mapping (if any) displays below.
3. Type the new City/State information in the Alternate Zip Code Mapping control group.
4 Choose **Save** to save the new mapping without exiting the dialog box.

**OR**

Choose **Done** to save the new mapping and close the dialog box.

**Removing the Alternate Mapping** Once you have mapped an alternate zip code, you can use the **Remove Alternate** button to restore the original zip code.

**Markup**

Selecting **Markup** in the Shop Data dialog box opens the MarkUp Add On Costs panel.

In this dialog box you are able to enter and maintain standard markups and add-on costs on the parts and labor rates with which you build orders. You can also enter overhead markups for use with the Profit Wizard.

**NOTE:** These markups are only the defaults and can be overwritten on any Manager order.

---

### MarkUp Add On Costs

**To enter/edit Markup Information:**

1 Select **Markup** from the Setup menu.

The MarkUp Add On Costs dialog box displays.
Select the appropriate option button to display percentages as a **MarkUp** over cost or as a percentage of the **Profit**.

For example, a part that costs $1.00 with a 100% **Mark Up** will be priced at $2.00 on the order. A $1.00 part with a 50% **Profit** will also be priced at $2.00 on the order.

Enter/edit data as necessary. The dialog box contains the following data fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sublet %</td>
<td>The percentage, <em>over/under cost, or profit percentage</em>, that sublet operations are priced at on the order.</td>
</tr>
<tr>
<td>Parts Guide %</td>
<td>The percentage, <em>over/under Estimating Guide list price</em>, that parts taken from the Estimating Guide will be priced at on the order. For example, a part with an Estimating Guide price of $1.00 that is marked up at 5% will be priced at $1.05 on the order.</td>
</tr>
<tr>
<td>Labor Guide %</td>
<td>The percentage, <em>over/under Estimating Guide labor time</em>, that labor operations taken from the Estimating Guide will be entered onto the order. For example, a labor operation with an Estimating Guide value of one hour that is marked up at 5% will be entered as 1.05 hours on the order.</td>
</tr>
<tr>
<td>Shop Overhead %</td>
<td>The percentage allocated for shop overhead of parts and labor subtotal (before taxes) for use in profit wizard analysis. These costs can include cost of doing business, shop rent, utilities, etc. Your accountant should be able to suggest an appropriate percentage.</td>
</tr>
<tr>
<td>Miscellaneous Overhead %</td>
<td>The percentage allocated for miscellaneous overhead of parts and labor subtotal (before taxes) for use in profit wizard analysis.</td>
</tr>
</tbody>
</table>

Select **Done** to save your entries and exit.
Account Classes

The Account Classes panel of the Standard Tables dialog box allows you to assign default Accounts to revenue and discount classes.

These default classifications can be overwritten in the Edit Part dialog box or at the time a part or labor item is added to an order in the Order Item Entry – Parts or Order Item Entry – Labor dialog box.

Price MarkUp Matrix

The Price MarkUp Matrix panel in Standard Tables allows you to apply markups to parts as they are added to orders and to inventory items. These markups can be structured based upon the item cost to create a tiered pricing structure.

To set up a Price Markup Matrix:

1. Select Standard Tables from the Setup menu.
   The Standard Tables dialog box displays.
2. Click the Price MarkUp Matrix tab to display the Price MarkUp panel.
3. Enter a From and To price in the first row of the Matrix for the parts cost range for the first markup tier.
4. Enter a Markup percentage.
Markup percentage is the percent over (or under, as represented by a negative number) cost at which you want the part to be priced at on Manager orders.

![Price MarkUp Matrix](image)

**Price MarkUp Matrix**

5. Repeat steps 3 and 4 to apply markups to as many pricing levels as you desire.

6. Choose whether you’d like to apply pricing to inventory items based on Average Cost (the average cost of each inventory item on an individual basis) or Last Cost (the cost of the most recently purchased inventory items).

7. Click **Apply Matrix to Inventory** if you want to overwrite the current inventory markups with the new pricing structure. **Choose this option carefully!** All inventory, parts kits, and canned jobs will be affected. In any case, User Entered List price items will not be affected.

**NOTE:** If you choose not to apply the matrix to your inventory, the new pricing structure will only apply to inventory items and parts added to orders as they are added in the future.

8. Click **Done** when finished.
Shop Data Setup

The Shop Data Setup dialog box contains selections which allow you to enter information about your shop. This shop information is automatically entered into your orders for you, reducing the need for data entry and increasing the accuracy of your orders.

The tabs on this dialog box works like a card file. Click on any tab to move the selected panel to the forefront of the dialog box.

Shop Data Setup Tabs

The following sections describe data input into the panels that are accessed through the Shop Data Setup dialog box.

Shop Data
The Shop Data 1 and Shop Data 2 dialog boxes are where you enter, and maintain, administrative information (name, address, phone number, etc.) about your business. This information can display on printed reports.
To enter/edit Shop Information:

1. Select **Shop Data 1** or **Shop Data 2** from the Shop Data Setup dialog box to display the selected Shop Data panel.

![Shop Data 1](image)

**Shop Data 1**

2. Enter/edit data as necessary. The two panels contain the following data fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shop Number</td>
<td>The number of your shop, if applicable (up to 10 characters.)</td>
</tr>
<tr>
<td>Shop Name</td>
<td>The name of your shop (up to 30 characters).</td>
</tr>
<tr>
<td>Street Address</td>
<td>Your shop's address (up to 30 characters).</td>
</tr>
<tr>
<td>Zip/City/State</td>
<td>The city, state, zip code of your shop.</td>
</tr>
<tr>
<td>Phone</td>
<td>Your shop's phone number.</td>
</tr>
<tr>
<td>Fax</td>
<td>Your shop's fax number.</td>
</tr>
<tr>
<td>License 1</td>
<td>Entry box for free-form entry of a license number. (For example, Bureau of Automotive Repair.)</td>
</tr>
<tr>
<td>License 2</td>
<td>Second entry box for free-form entry of a license number. (For example, Environmental Protection Agency.)</td>
</tr>
</tbody>
</table>
### Default Settings

Default Settings are the entries that your shop uses most often in creating orders in Manager. When you build a Manager order, the default information is automatically entered but can normally be overwritten if necessary.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Slogan</td>
<td>A slogan for your shop that you would like to have included on printed reports. This slogan prints under the shop address and phone number.</td>
</tr>
<tr>
<td>Comment</td>
<td>Any comments that you would like to include on printed reports. These comments print on the bottom of the page.</td>
</tr>
<tr>
<td>Manager Name</td>
<td>The name of the shop manager. <em>(Does not print on reports.)</em></td>
</tr>
<tr>
<td>Manager Title</td>
<td>The title of the shop manager <em>(“Manager,” “General Manager,” etc.)</em> <em>(Does not print on reports.)</em></td>
</tr>
</tbody>
</table>

**NOTE:** Defaults are used to save time by entering common choices into orders for you automatically. Any default setting can be overwritten at the time of order preparation.

To enter/edit Default Settings:

1. Select **Default Settings** in the Shop Data dialog box.

Select **Done** to save your entries and exit.
The Default Settings panel displays.

![Default Settings Panel]

### Default Settings

2. Enter/edit data as necessary. The panel contains the following data fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area Code</td>
<td>The area code you want to have automatically entered into phone number fields.</td>
</tr>
<tr>
<td>Promised Time</td>
<td>The default promised vehicle pick-up time.</td>
</tr>
<tr>
<td>Labor Technician</td>
<td>The default (most commonly used) repair technician.</td>
</tr>
<tr>
<td>Parts Tech.</td>
<td>The default technician for parts sales.</td>
</tr>
<tr>
<td>Service Writer</td>
<td>The default (most commonly used) service writer.</td>
</tr>
<tr>
<td>Income Acct.</td>
<td>The default accounting class for income accounts.</td>
</tr>
<tr>
<td>Use Phone # Mask</td>
<td>Allows you to enter a phone number mask (see Phone # Mask description below).</td>
</tr>
<tr>
<td>Phone # Mask</td>
<td>The Phone # Mask field allows you to specify the pattern of characters that are entered into phone number fields. Phone masks also expedite entry of phone numbers in Manager by pre-entering hyphens.</td>
</tr>
</tbody>
</table>
Shop Setup

3 Select Done to save your entries and exit.

**Shop/Hazmat**

Charges for shop supplies and hazardous materials can be automatically calculated and added to the order. The rates for these charges are entered and maintained in the Shop/Hazmat panel of the Shop Data dialog box.

**To enter/edit Shop/Hazardous Materials Costs:**

1 Select **Shop/Hazmat** in the Shop Data dialog box.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bal. Due Warning...</td>
<td>To enable the balance due warning, click on the Balance Due Warning check box and then enter the number of days past due. This configures Manager to issue a warning every time a new order is created for a customer who has a past due balance.</td>
</tr>
<tr>
<td>Warn on Program Exit</td>
<td>Turns on the “Exit” confirmation warning every time you exit the program.</td>
</tr>
<tr>
<td>Include Spouse on Invoice</td>
<td>Check to include spouse’s name on printed invoices (where applicable).</td>
</tr>
<tr>
<td>Include Tax in Estimates</td>
<td>Check to include taxes in estimates by default.</td>
</tr>
<tr>
<td>Include Recommendations on RO</td>
<td>Check to include recommendations on Repair Orders.</td>
</tr>
<tr>
<td>Perform backup on:</td>
<td>Allows you to specify how often Manager should perform automatic backups of your database.</td>
</tr>
<tr>
<td>Location</td>
<td>The location in which backup files are saved in a \BACKUP subdirectory.</td>
</tr>
</tbody>
</table>
The Shop/Hazmat panel displays.

![Shop Data Panel](image)

**Shop/Hazardous Materials**

2. Enter/edit shop supply costs as necessary in the Shop Supplies portion of the dialog box.

![Shop Supplies Section](image)

**Shop Supplies**

This portion of the dialog box contains the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shop Supplies Percent</td>
<td>Enter the percentage of parts or labor cost at which Shop Supplies should be extended on the order. Enter the percentage as a whole number. In other words, enter 10 (not .10) to apply a 10% charge.</td>
</tr>
</tbody>
</table>
3 Enter/edit shop Hazardous Materials costs as necessary in the Hazardous Material portion of the dialog box.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent of...</td>
<td>Choose between Labor Sales or Parts Sales as your basis for the Shop Supplies charge.</td>
</tr>
<tr>
<td>Taxable</td>
<td>Select if the shop supplies charge is taxable. (Will be taxed at part tax rate.)</td>
</tr>
<tr>
<td>Default (option button)</td>
<td>Select if the shop supplies charge should be applied as default.</td>
</tr>
<tr>
<td>Maximum</td>
<td>The maximum dollar amount allowable for shop supplies.</td>
</tr>
<tr>
<td>Account Class</td>
<td>The accounting class for shop supplies.</td>
</tr>
<tr>
<td>Report Desc</td>
<td>The description of the shop supply charge, as you want it to print on the order.</td>
</tr>
</tbody>
</table>

**Hazardous Materials**

This portion of the dialog box contains the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hazardous Material Percent Entry Field</td>
<td>Enter the percentage of parts or labor cost at which hazardous materials should be extended on the order. Enter the percentage as a whole number. In other words, enter 10 (not .10) to apply a 10% charge.</td>
</tr>
<tr>
<td>Percent of</td>
<td>Choose between Labor Sales or Parts Sales as your basis for the hazardous materials charge.</td>
</tr>
<tr>
<td>Taxable (option button)</td>
<td>Select if the hazardous materials charge is taxable. (Will be taxed at labor rate).</td>
</tr>
</tbody>
</table>
Chapter 3

4 Select **Done** to save your entries and exit.

**Screen View**
The Screen View panel of the Shop Data dialog box is where you set defaults for the cursor position in the Customer screen and specify if you wish to include a field for Out Odometer (required by law in some states) in the Vehicle display.

To change Default Screen View settings:

1 Select **Screen View** in the Shop Data dialog box. The Screen View panel displays.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include Sublet</td>
<td>Check to include hazardous materials charges for sublet operations.</td>
</tr>
<tr>
<td>Default (option button)</td>
<td>Select if the hazardous materials charge should be applied as default.</td>
</tr>
<tr>
<td>Maximum</td>
<td>The maximum dollar amount allowable for hazardous materials.</td>
</tr>
<tr>
<td>Account Class</td>
<td>The accounting class for hazardous materials.</td>
</tr>
<tr>
<td>Report Desc</td>
<td>The description of the hazardous materials charge, as you want it to print on the order.</td>
</tr>
</tbody>
</table>

**Include Sublet Check** to include hazardous materials charges for sublet operations.

**Default (option button)**: Select if the hazardous materials charge should be applied as default.

**Maximum**: The maximum dollar amount allowable for hazardous materials.

**Account Class**: The accounting class for hazardous materials.

**Report Desc**: The description of the hazardous materials charge, as you want it to print on the order.

Select **Done** to save your entries and exit.
2  Toggle settings as desired. The Default Screen View dialog box contains the following settings:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Odometer Out</td>
<td>Governs whether the Odometer Out field (the vehicle's odometer reading when it leaves the shop) displays on the Vehicle screen. Some states require that this reading is recorded.</td>
</tr>
<tr>
<td>Cursor Position</td>
<td>Determines whether the default cursor position in the Customer screen will be in the Company field or in the Customer field. You should choose the position that best represents the majority of your patrons. If most of your customers are individuals (not businesses), you should chose customer.</td>
</tr>
<tr>
<td>Display Customers OR Company name in WIP</td>
<td>This setting allows you to specify whether the Company Name or Customer name appears in the Customer field in the Work In Progress grid in orders where a company is specified.</td>
</tr>
<tr>
<td>Show Parts Search Speed Warning</td>
<td>Indicates whether the warning that a parts search in the Parts/Inventory List will take more than a minute is enabled.</td>
</tr>
<tr>
<td>Show Quick Estimates in Schedule</td>
<td>Indicates whether quick estimates should be displayed in the schedule.</td>
</tr>
<tr>
<td>Show Symptoms on New Order</td>
<td>Choose this setting to display the Symptoms dialog box every time you start a new order.</td>
</tr>
<tr>
<td>One Start Toolbar</td>
<td>Check this box to display the One Start Toolbar. The One Start Toolbar replaces the Estimate, Order, and Invoice icons with the Start icon. Clicking the icon opens the Customer List for Start Order dialog box, which allows you to look up a customer by Name, Phone Number, or License number, or start a new customer.</td>
</tr>
</tbody>
</table>

3  Select Done to save your entries and exit.
Estimate/Repair Order Validations

Before you can print an estimate or repair order, the system checks for missing information. All checks for missing information must be completed before you are able to print. The Estimate/Repair Order Validations dialog box is where you will select/deselect the individual checks that you want the system to conduct before printing an estimate or repair order.

To change Estimate/Repair Order Validation settings:

1. Select Estimate/RO Validations from the Shop Data dialog box (which is available from the Setup menu).

   ![Estimate/RO Validations](image)

   The Estimate/RO Validations panel displays. The function of each setting is clearly explained in its respective title.

2. Toggle warnings as desired.

3. Select Done to save your entries and exit.

Invoice Validations

The Invoice Validations panel is where you will select/deselect the individual checks that you want the system to conduct before printing an invoice.

To change Invoice Validation settings:

1. Select Invoice Validations from the Shop Data dialog box (which is available from the Setup menu).
The Invoice Validations panel displays.

![Invoice Validations panel]

The function of each setting is clearly explained in its respective title.

1. Toggle settings as desired.
2. Select **Done** to save your entries and exit.

---

**Disclaimer Setup**

The Disclaimer Setup panel is where you enter standard disclaimer information for estimates, repair orders, invoices, and counter sales. These disclaimers will automatically appear at the bottom of your printed orders (unless print footer is turned off in Reports/Printers dialog box).

**NOTE:** The maximum size of the disclaimer varies depending upon the type of order (Estimate, Repair Order, etc.). The maximum number of characters allowed is displayed in the lower left portion of the dialog box.

A standard set of disclaimers is provided with your program. You can customize these disclaimers, or re-write them entirely, if necessary, to fit your unique business requirements.

**To edit a Disclaimer:**

1. Select **Disclaimers** in the Shop Data dialog box.
Chapter 3

The Disclaimers dialog box displays.

Disclaimers dialog box

Disclaimer Setup

2 Select the option button for the disclaimer you wish to edit (Estimate, Repair, Invoice, or Counter Sale).

The text of the current disclaimer displays.

3 Edit the disclaimer text, as necessary. Disclaimer text cannot exceed 801 characters.

NOTE: You can initiate a spell check of the disclaimer text by pressing [F2].

Select a different radio button to edit another disclaimer, if necessary.

OR

Click Done to save your changes and exit disclaimer setup.

Vendor Setup

The Vendor Setup selection from the Setup menu opens the Vendor Setup dialog box. Vendors are used in Manager to create and track purchase orders. Vendor information is also useful in identifying a Vendor on Warranties, Returns, and Core charges.
You can add or delete Vendors, or edit Vendor information in this dialog box.

**Vendor Setup Examples**

**To add a New Vendor:**

1. Select **Add**.

   The Add Vendor dialog box displays.
Enter vendor information into the appropriate data fields. The Add Vendor dialog box contains the following fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>A short (up to eight characters) identification of the Vendor for use in pull-down choice lists.</td>
</tr>
<tr>
<td>Vendor Type</td>
<td>The type of business that the vendor operates. Vendor Type is selected from the pull-down choice list. If the type of vendor is not available in the list, select the Vendor Type button to add, edit, or delete vendor types. Vendor Type can be up to 30 characters in length.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the vendor's business.</td>
</tr>
<tr>
<td>Contact</td>
<td>Primary contact at the vendor's business.</td>
</tr>
<tr>
<td>Address</td>
<td>Vendor's street address.</td>
</tr>
<tr>
<td>Zip, City, State</td>
<td>Vendor's zip code, city, and state.</td>
</tr>
<tr>
<td>Phone/Ext.</td>
<td>Vendor's phone number and extension.</td>
</tr>
<tr>
<td>Fax/Ext.</td>
<td>Vendor's fax number and extension. Manager will automatically enter this number when faxing your vendor.</td>
</tr>
<tr>
<td>Account Class</td>
<td>The default accounting class that you wish purchases from the vendor to be charged to. This accounting class can be overwritten on individual parts purchased.</td>
</tr>
<tr>
<td>Terms</td>
<td>Financing terms applied by the vendor (for example, 30 days net).</td>
</tr>
<tr>
<td>Limits</td>
<td>Charge limit for vendor (for example, $1,000).</td>
</tr>
<tr>
<td>Comments</td>
<td>Miscellaneous comments about vendor.</td>
</tr>
</tbody>
</table>

After all entries have been completed, select OK. The new vendor is added to the Vendor List.

To edit Vendor Information:

In the Vendor Setup dialog box, highlight the Vendor's name whose information you wish to edit.
2 Select **Edit**.
   The Edit Vendor dialog box appears with the current Vendor information displayed.

3 Edit vendor settings as necessary (refer to the previous section for field descriptions).

4 Select **OK**.

**To delete a Vendor:**

1 In the Vendor Setup dialog box, highlight the Vendor you want to delete.

2 Select **Delete**.
   A dialog box asks that you confirm your deletion.

3 Select **Yes**. The Vendor is removed from the system.

**Technicians Setup**

The Technicians Setup menu selection opens the Technicians Setup dialog box. From this dialog box you can Add, Edit, or Delete technician administrative information.

![Technicians Setup dialog box](image)

**Technician's Setup**

**To add a Technician:**

1 Click the **Add** button to display the Add Technician dialog box.
Enter Technician information in the appropriate data fields.

The Add Technician dialog box contains the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Technician's name.</td>
</tr>
<tr>
<td>Address</td>
<td>Technician's home address.</td>
</tr>
<tr>
<td>City, State, Zip</td>
<td>Technician's city, state, and zip code (use the two-letter code for state).</td>
</tr>
<tr>
<td>Phone</td>
<td>Technician's home phone number with space for extension, if applicable.</td>
</tr>
<tr>
<td>Technician ID</td>
<td>Identification number for Technician.</td>
</tr>
<tr>
<td>Technician Wage Info</td>
<td>Hourly or Salary wage and the number of hours in a normal pay period (for example, 80 hrs. for two weeks).</td>
</tr>
<tr>
<td>Technician Type</td>
<td>Technician, Service Writer, or Manager.</td>
</tr>
<tr>
<td>Parts Commission Info</td>
<td>The type and rate of technician's commission on parts (percentage of profit or sale of parts).</td>
</tr>
<tr>
<td>Labor Commission Info</td>
<td>The type and rate of technician's commission on labor (percentage of profit or sale of labor).</td>
</tr>
</tbody>
</table>
3 Click OK to save your entries and return to the Technician Setup dialog box.

**To edit Technician information:**

1 From the Technician Setup dialog, select Edit.

   The Edit Technician dialog box displays.

2 Make changes to the technician's profile, as necessary.

3 Click OK to save changes.

**To delete a Technician:**

1 In the Technician Setup dialog box, highlight the Technician you want to delete.

2 Select Delete.

   A dialog box asks that you confirm your deletion.

3 Select Yes.
Reports/Printers

The Reports/Printers menu selection (available from the Setup menu) displays a dialog box in which you can set defaults for report formats and printer output.

For each of the four types of orders (Estimate, Repair Order, Invoice, and Counter Sale), you can select a Report and a Printer. The Alternate Printer selection allows you to specify a printer for miscellaneous reports such as Technician Worksheet and Receipts. The Fax selection allows you to select a Fax printer driver.

To select Reports/Printers:

1. Select Reports/Printers from the Setup menu.
The Report/Printer Selection dialog box appears.

2. Click on the option button for the type of document for which you desire to select a report and/or printer.

The Technician is removed from the system.

**NOTE:** Deleted Technicians will still show up under Reports for historical purposes.
The fields of the dialog box dynamically change to display your current selections. The following fields are available:

<table>
<thead>
<tr>
<th>Field/Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Report</td>
<td>Select from a pull-down list the Report form for the type of document (Estimate, Report Order, Invoice, Counter Sale, Alternate Printer, Fax Printer) you are working with.</td>
</tr>
<tr>
<td>Select Printer</td>
<td>Select a printer from the list of available printers.</td>
</tr>
<tr>
<td>NOTE: Printers are set up in the Windows Control Panel. Refer to your Windows documentation, if necessary, for instructions on setting up additional printers.</td>
<td></td>
</tr>
<tr>
<td>No. of Copies to Print</td>
<td>The number of copies of the selected report type to be printed.</td>
</tr>
<tr>
<td>Default Print to Screen</td>
<td>Defaults to a screen print rather than sending directly to the printer.</td>
</tr>
<tr>
<td>Include Header Info.</td>
<td>Includes Header Information, including Slogan, at the top of the printed report. Header Information is entered in the Shop Data 1 panel of Shop Data Setup. Slogan is entered in the Shop Data 2 panel of Shop Data Setup.</td>
</tr>
<tr>
<td>Include Comment</td>
<td>Includes Comment beneath the Order totals portion of the report, just above the Disclaimer. Comment is entered in the Shop Data 2 panel of Shop Data Setup.</td>
</tr>
<tr>
<td>Include Signature</td>
<td>Includes the Authorization Signature and Footer information (Technician name, page #, and Report Name) at the bottom of the printed report.</td>
</tr>
</tbody>
</table>

3 Make any desired changes.

4 Select OK to save your changes and close the dialog box.

Your changes will be in effect the next time you print.

**Fax Printer Selection** By default, the program sets you up to fax using FaxMan. If you would like to use a different fax printer, you can select a properly installed fax printer driver in the Reports/Printers dialog box.
To select a fax printer:

1. Select **Reports/Printers** from the Setup menu.
   The Report/Printer Selection dialog box appears.
2. Select the **Fax Printer** option button.
3. Select a fax printer from the Select Printer list. Refer to your fax modem documentation, if necessary, if a fax printer does not appear in the list.
4. Choose **OK** to save your fax printer selection and close the dialog box.

The next time you fax, you will print to the newly specified fax printer.

**End Of Day Reporting**

End of day reporting allows you to designate reports to be printed when you exit the program at the end of the day or over any other desired time period (e.g. weekly, monthly). End of day reporting is a two-step process: first you must designate those reports you want to include in your report batch, then you run the reports.

To set up end of day reporting:

1. Select **End of Day Reports** from the Setup menu.
   The End of Day Reports dialog box displays available End of Day Reports.

2. Click on a report name that you want to add to your end of day report run, and click **Tag**.
   A “+” appears in the Tag column, indicating that the report has been selected as part of the end of day report run.
3. Repeat step 2 for all reports you want to include in your end of day report run.
When finished defining End of Day Reports, select OK to close the dialog box.

**NOTE:** Refer to Chapter 4, “Utilities,” for details on running End of Day Reports.

---

### Packages and Discounts

The Packages and Discounts dialog box is where you Add, Edit, and Delete Packages and Discount Coupons. This dialog box is opened by choosing button from the repair lines button bar in the Order panel. You can choose to work with packages by choosing the Packages tab, or discount coupons by clicking on the Discount Coupons tab.

#### Packages and Discounts Setup

- **Packages** are parts and labor operations which are grouped together and sold for a (usually discounted) single price.
- **Discount Coupons** apply a flat dollar amount or percentage discount to the parts or labor on an order.

Three option buttons allow you to select views:

- **View All** displays current, future, and expired packages/coupons.
- **Current** displays only those packages/coupons which are currently valid.
- **Expired** displays packages/coupons which have passed their expiration date.

---

![Packages and Discounts dialog box](image-url)
Adding a Package: Packages are parts and labor operations which are grouped together and sold for a (usually discounted) single price. The Add/Edit Package dialog box is opened by selecting **Add** (to add a new package), or by clicking your mouse pointer on a package and selecting **Edit** (to edit an existing package) in the Packages panel of the Packages & Discounts dialog box.

The Add/Edit Packages dialog box contains the following fields/selections:

<table>
<thead>
<tr>
<th>Field/Selection</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Package #</td>
<td>Type in a unique set of up to eight (8) characters for the package.</td>
</tr>
<tr>
<td>Taxed as</td>
<td>Choose whether the Package will be taxed as Labor or Parts.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description (up to 50 characters) for the package that will appear in the Promotions grid and in the repair lines when added to an order.</td>
</tr>
<tr>
<td>Category</td>
<td>Choose a Category for the package.</td>
</tr>
<tr>
<td>Account</td>
<td>Choose an Account for the package.</td>
</tr>
<tr>
<td>Start Date</td>
<td>Type or select the date at which the package will begin.</td>
</tr>
</tbody>
</table>
Add/Edit Discount Coupons  
Discount Coupons apply a flat dollar amount or percentage discount to the parts or labor on an order. Discount Coupons are set up in the Add/Edit Discount Coupons dialog box.

<table>
<thead>
<tr>
<th>Field/Selection</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Date</td>
<td>Type or select the date at which the package will be completed.</td>
</tr>
<tr>
<td>Sale Amount</td>
<td>The amount that will be charged the customer.</td>
</tr>
<tr>
<td>Commision Grid</td>
<td>Enter up to six pay hour increments and/or commission amounts. These commissions can be assigned to technician(s) when the package is attached to an order.</td>
</tr>
</tbody>
</table>
The Add/Edit Discount Coupons dialog box is opened by selecting **Add** (to add a new coupon), or by clicking your mouse pointer on a coupon and selecting **Edit** (to edit an existing coupon) in the Packages & Discounts dialog box. If editing a coupon, the current values and selections are displayed.

Once in the Discount Coupons dialog box, you make the necessary changes/entries and then select **Ok** to save. The Discount Coupons dialog box contains the following fields/selections:

<table>
<thead>
<tr>
<th>Field/Selection</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coupon Type</td>
<td></td>
</tr>
<tr>
<td>- Dollar Off</td>
<td>Indicates that the coupon will apply a flat dollar discount to an order.</td>
</tr>
<tr>
<td>- Percent Off</td>
<td>Indicates that the coupon will apply a discount as a percentage of the sales amount.</td>
</tr>
<tr>
<td>Coupon #</td>
<td>The coupon control number, if any. (Can be up to eight digits.)</td>
</tr>
<tr>
<td>Description</td>
<td>A description of the coupon. For example, &quot;$10 off Tune-up and Lube.&quot; (Can be up to 50 characters.)</td>
</tr>
<tr>
<td>Start Date</td>
<td>The date that the coupon will begin to be in effect.</td>
</tr>
<tr>
<td>End Date</td>
<td>The date that the coupon will expire.</td>
</tr>
</tbody>
</table>
Tire Packages

Tire Packages are groupings of tires and additional parts and labor operations to create packages of varying levels.

<table>
<thead>
<tr>
<th>Field/Selection</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parts Dollar/Percent Off</td>
<td>This field is where you enter a parts discount dollar amount or percentage depending upon whether you selected &quot;Dollar Off&quot; or &quot;Percent Off&quot; for Coupon Type. A percentage discount is entered as a whole number, not as a decimal. For example, a Parts Percent Off value of 10.00 equals 10% off all parts on the order.</td>
</tr>
<tr>
<td>Labor Dollar/Percent Off</td>
<td>This field is where you enter a labor discount dollar amount or percentage depending upon whether you selected &quot;Dollar Off&quot; or &quot;Percent Off&quot; for Coupon Type. A percentage discount is entered as a whole number, not as a decimal. For example, a Labor Percent Off value of 10.00 equals 10% off all labor charges on the order.</td>
</tr>
</tbody>
</table>
Manager comes equipped with sample packages for **Tire Only**, **Tire and Mounting only**, **Platinum**, **Ultra Platinum**, and **Lifetime** packages. You can edit these packages as desired.

**UPGRADE NOTE:** If you are upgrading from a previous software version of Manager Plus/Manager you must run Import Jobs from the Utilities menu to get the sample tire packages. Refer to “Import Jobs” in Chapter 4, “Utilities,” for details.

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

The Repair Lines buttons at the bottom of the display allow you to add parts and labor items to the package. These buttons, and their underlying functions, are the same as used in adding Parts and Labor operations to Manager Orders. Refer to “Building Repair Lines” in Chapter 6 for details.

**NOTE:** You do not add the actual tires to the package here. All that is added here are labor items and accessories, e.g. Valve Stems. The tires are added when the package is added to the order. Tire Packages are applied to orders via the Promotions icon in the Order screen as described in Chapter 13, “Marketing.”
Brake Packages
Brake Packages are groupings of brake part and labor operations to create packages of brakes and services of varying levels to offer to customers.

Setup for Brake Packages

To add or edit a Brake Package, select Brake Packages from the Setup menu and then Add/Edit in the Packages Setup dialog box.
Manager comes equipped with sample packages for Silver, Gold, and Platinum in combination with Front and Rear Drum and Disc brakes. You can edit these packages as desired.

**UPGRADE NOTE:** If you are upgrading from a previous software version of Manager Plus/Manager you must run Import Jobs from the Utilities menu to get the sample brake packages. Refer to “Import Jobs” in Chapter 4, “Utilities,” for details.

The Repair Lines buttons at the bottom of the display allow you to add parts and labor items to the package. These buttons, and their underlying functions, are the same as used in adding Parts and Labor operations to Manager Orders. Refer to “Building Repair Lines” in Chapter Six for details.

Brake Packages are applied to orders via the Promotions icon in the Order screen as described in Chapter 13, “Marketing.”

### Lube, Oil, and Filter Packages

LOF Packages are groupings of LOF fluids, parts, and labor operations to create pre-made packages.
To edit an LOF Package, select Lube, Oil & Filter Packages from the Setup menu, pick the package and then Edit in the Packages Setup dialog box.

Manager comes equipped with sample packages for Standard, Premium, Synthetic, and Blended motor oils in combination with four and five quart quantities and lube service. You can edit these packages as needed.

**UPGRADE NOTE:** If you are upgrading from a previous software version of Manager you must run Import Jobs from the Utilities menu to get the sample brake packages. Refer to “Import Jobs” in Chapter 4, “Utilities,” for details.

The Repair Lines buttons at the bottom of the display allow you to add parts and labor items to the package. These buttons, and their underlying functions, are the same as used in adding Parts and Labor operations to Manager Orders. Refer to “Building Repair Lines” in Chapter Six for details.

LOF Packages are applied to orders via the Promotions icon in the Order screen as described in Chapter 13, “Marketing.”
Program Security
The Program Security menu selection opens the Program Security Setup dialog box. In this dialog box, a designated system administrator can administer user access to sensitive program functions.

Program Security Setup

Refer to Chapter 5, “Security” for complete details on program security.

Diagnostic Reports
The Diagnostic Reports menu selection opens the Diagnostic Reports dialog box. In this dialog box you are able to enable logging of errors to a file on your computer’s hard drive. This error log can be examined by technical support personnel to determine trends and troubleshoot problems.

To set up Error Logging:
Select Diagnostic Reports from the Setup menu.
The Diagnostic Reports dialog box displays.
The dialog box should appear as shown above, with all selection boxes checked and the default log file name already entered.

**NOTE:** It is recommended that you don't change the default settings.

The following settings are available:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Verbose Error Message</td>
<td>This option tells the program to include the program line number and other information in the error logging file to be used for customer support purposes.</td>
</tr>
<tr>
<td>Log to File</td>
<td>Enables file logging.</td>
</tr>
<tr>
<td>Log out-dated DLL version</td>
<td>This setting writes an entry into the error log file if an out-dated Dynamic Link Library (DLL) file is encountered when the program is started. This information can be especially helpful to technical support personnel in troubleshooting conflicts caused by other software programs.</td>
</tr>
<tr>
<td>Log File Name</td>
<td>The full path and file name of the Log File. Normally you will not need to change this location.</td>
</tr>
</tbody>
</table>

2. Make any necessary changes. An “x” appears in the check box next to selected options.
3. Select **OK** to accept the options and close the dialog box.

**Special Maintenance**

When you select Special Maintenance from the Setup menu, the Special Maintenance submenu displays. This menu allows options for setting your starting invoice number, resetting last used pointers, changing your grid line colors and removing history records.

**NOTE:** You must be at the Home screen to access the Special Maintenance submenu. To get to the front screen, select the In Progress icon from the Work In Progress Screen (click the In Progress icon twice from any other screen) until the Manager front screen image displays.
**Set Starting Invoice**  The Set Starting Invoice command displays the Starting Invoice Number dialog box in which you can enter a new starting invoice number. Once you have entered this starting invoice number, your future invoices will number sequentially from that number upwards.

**NOTE:** You should exercise care in choosing a starting invoice number. You can increase the number later, but you can never decrease it.

**To set a new Starting Invoice Number:**

1. Select Special Maintenance from the Setup menu, then select Set Starting Invoice from the submenu.

   The Starting Invoice Number dialog box appears.

2. Enter a new minimum invoice number. For example, if you enter 100, the next invoice number will be 101.

3. Select **OK** to save the new number.

   Your future invoices will number sequentially from that number upwards.

**Reset Lastused Pointers**  Selecting Reset Lastused Pointers from the Special Maintenance submenu causes the system to reset all system pointers (Estimate #, Repair Order #, etc.). This feature would normally only be used in the case of an import to your database, a backup that was restored, or in the case of a corrupted database.

**To reset Lastused Pointers:**

1. Select **Special Maintenance** from the Setup menu, then select Reset Lastused Pointers.

   A warning box appears.

2. Select **OK** to reset the pointers.
Grid Line Colors  The Grid Line Colors dialog box allows you to specify the colors of line items as they appear in the Work-In-Progress grid and the Order (Estimate, Quick Estimate, Repair Order, etc.) grids. You can also change the background color of the Work-In-Progress screen and other screens that use grids.

Grid Line Colors is selected from the Special Maintenance submenu, which is a Setup Menu selection.

To change a grid line color:

1 Select Special Maintenance from the Inventory menu.
   The Special Maintenance submenu displays.

2 Select Grid Line Colors from the Special Maintenance submenu.
   The Grid Line Colors dialog box displays. Each type of grid line item displays in its current color.

3 Click your mouse pointer on the grid line item for which you would like to change color.

4 Select Change Line Color.
   The text color of the selected grid line item changes automatically, displaying the new color.

5 Continue clicking the Change Line Color button until the desired color is achieved.

6 Repeat steps 3-5 for as many grid line items as desired.

7 Select a different Grid Background color, if desired (choices are White or Yellow).
   This changes the background color in the Work-In-Progress screen and other dialog boxes that use grids.

8 Click OK to save your changes and close the dialog box.
Remove History Records  The Remove History Records dialog box allows you to permanently remove specified history records from your program database. Remove History Records is selected from the Special Maintenance submenu, which is a Setup menu selection.

To Remove History Records:

1  Select Remove History Records from the Special Maintenance submenu, which is a Setup menu selection. The Remove History Records submenu displays.

2  Type, or select from the pull-down calendar, the invoice date before which you want to remove history records.

3  Select Remove Customer/Vehicles not serviced to permanently remove customer and vehicle records for those customers who haven't had service since the history record removal date.

4  Select Create Log file of deleted records if you want Manager to create a log file of Customers/Vehicles that are deleted.

5  Select OK to begin the deletion process. After several moments of processing, a dialog box informs you how many History records (and customer and vehicle records, if applicable) will be deleted.

6  Select Yes to continue. A message box informs you that the History record removal process is complete. You are informed of the full file and path name of the History log file, if you selected the Create Log file of deleted records option in step #4. You can access this text file by opening it in any word processor.

7  Select OK. The Remove History Records dialog box closes.
**Posted Invoice Accounting Transfer**  This menu selection is reserved for a future release of Manager.

**Setup Automated Database Repair**  The Setup Automated Database Repair selection allows you to specify a day of the week for compacting and repairing your database. This feature, provided primarily for network users, is recommended to repair potential damage to the database caused by multiple users writing to a shared database on a regular basis.

**To Setup Automated Database Repair:**

1. From the Setup menu, choose **Special Maintenance/Setup Automated Database Repair**.
   
The Automated Repair Options dialog box displays.

   ![Automated Repair Options](AutomatedRepairOptions.png)

2. Pick a day of the week from the pull-down and click **OK**.
   
The first time the program is opened on the designated day of the week, the Repair/Compact utility automatically runs.

**Summary**

This chapter detailed the procedures necessary to set up information about your shop and employees, standard descriptions, and rate tables that are essential for Manager processing.
Chapter 4
Utilities

Overview

Each order (Estimate, Repair Order, or Invoice) can be thought of as a collection of information about your shop and its technicians, the customer, the vehicle, and a calculation of the cost of the parts and labor elements of the repair. Although some of this information cannot be entered until the order is created, other information already resides in the database, from which it can be readily accessed. The more information you have in your database the easier order preparation becomes. The program provides the tools for you to efficiently maintain your database.

The Utilities menu provides options for creating parts kits and canned jobs and entering customers and vehicles into your database. The chapter also describes some handy utilities accessed via this menu that can help you in expediting the order process.

Before You Begin

Before you can perform the activities described in this chapter, you must already have the program installed and running on your computer. If you have not done so, go back and follow the installation instructions in Chapter 2, “Getting Started.” You must also have configured the lists, rates, and descriptions for your shop as described in Chapter 3, “Shop Setup.”

Utilities

The Utilities menu provides access to three handy utilities: Find Customer [F3], Find History Record [F4], and Batch Payment [F5]. These utilities are explained in the following sections as well as is the Spell Check utility [F2] (not available from the Utilities menu).
Find Customer

The Find Customer utility allows you to quickly locate a customer record from anywhere in the program. Using Find Customer, you can search the database for a customer based upon phone number, license number, last name, or company name. In fact, you can look up a customer based upon partial information such as the first couple of letters of a last name or digits of a license plate number.

For example, you might make out the first couple of digits of a customer's license plate as he drives into your shop. By selecting Find Customer and typing in the license plate number, you can select a customer and vehicle for your order in seconds. The order will be well underway by the time the customer gets to the counter (where she will be pleasantly surprised to be greeted by name!).

To find a customer:

1. Select Find Customer from the Utilities menu.

OR

Press [F3].

The Find Customer dialog box appears.

2. Choose whether you want to start an Estimate or a Repair Order in the From Find start control group.

3. Input known information. To conduct a search, you need to input one or more digits in any field except for Phone No., in which you must input at least 3 digits. However, the more information you enter, the higher the probability of an exact match.

4. Select Find to begin your search.

There are two possible outcomes to your search, you can:
• get an exact match, in which case the Customer Screen will display the customer and vehicle information.

OR

• have more than one matching customer record. In this case, a secondary panel allows you to choose from among the matching records.

Find History Record
The Find History Record dialog box allows you to quickly locate a history record from anywhere in the program. Using the Find History Record command, you can quickly search the Series database for the history record for a given invoice based upon the invoice number, or alternately, you can search the database for all history records for a selected vehicle.

The Find History Record dialog box is opened by selecting Find History Record from the Utilities menu or by pressing [F4].

Refer to Chapter 9, “History,” beginning on page 233 for complete details on working in program history.

Batch Payments
The Batch Payments dialog box allows you to quickly apply a payment, or a set of payments, to posted invoices. You would normally make batch payments to the posted invoices of a customer with an in-house credit account (for example, a fleet customer).
The dialog box is opened by selecting Batch Payment from the Utilities menu. OR

- By pressing [F5] while in any screen.

Refer to Chapter 9, “History” for comprehensive instructions on applying batch payments to posted invoices.

**Spell Check**

While working in any text entry box, pressing the [F2] function key initiates a spell check of the words in the box.

**To initiate a spell check:**

1. With your cursor in any text entry box, press [F2].

   The Word not Found in Dictionary dialog box displays for words not located in the program dictionary.

   ![Word Not Found In Dictionary](image)

   **Spell Check**

2. Use the available options to make any necessary corrections.

3. A dialog box informs you when the spelling check is complete.

**Your Series Database**

When you create an Order, you will need to know what parts to use and their cost, and the amount of labor time that will be required. To accomplish this, you will need to build a database of parts that your shop uses on a daily basis. You will want to have **Part Kits** set up of parts that are frequently used in combination with one another. You will want to have **Canned Jobs** set up of parts and labor operations required for frequently performed jobs such as Alignments. You will want to set up **Tire**, **Brake**, and **LOF** packages. You will want to have detailed information about your **Customers**
and their Vehicles. Although the program allows you to enter this information while creating the order, it is desirable to have as much information available, as possible, before the customer arrives.

How Much Setup to Begin With?
It is highly recommended that you work through the setup instructions in the Putting Manager to Work workbook that comes with Manager/Manager Plus before attempting to use the program in a live shop environment. It is also recommended that you take the time to enter as many of your current customers and their vehicles as possible into your database.

How much advance setup and routine database maintenance you do is a management decision of your shop. Although the program provides the tools, the quality of the database is ultimately your responsibility.

The Utilities Menu

Part Kits, Canned Jobs, and Customer and Vehicle information are all entered in dialog boxes accessed from the Utilities menu. The following sections describe the procedures for working in these database input dialog boxes. The Utilities menu also offers options for quickly finding a customer or history record. These options are described at the beginning of this chapter.

Parts List
(Manager Users) The Parts List is where you enter and edit parts information and where you search for and choose parts to be transferred to orders. (Manager Plus Users) The Inventory List replaces the Parts List but the functionality is essentially the same. Refer to Chapter 11, “Inventory,” beginning on page 253 for details on adding and choosing parts in the Inventory List.

Part Kits
Part Kits save you time when entering data into orders by grouping together parts which are frequently used in combination with one another (for example, the parts which you would use for a brake job). The Part Kits dialog box is where you add part kits in the Series database.

To open the Part Kits dialog box:
• Select Part Kits from the Utilities menu.
The Part Kits dialog box is designed to allow you to Add, Edit, or Remove a parts kit from the database.

**Adding a New Part Kit** Parts Kits are added in the Add Kit dialog box.

**To add a Part Kit:**

1. Select the **Add** button.

The Add Kit dialog box appears with the cursor in the Kit # field.
2 Type in a unique Kit No. (up to 20 characters in length).

3 Select/deselect that the kit is taxable.

4 Type in a Description for the kit.

5 Select a Category.

6 Select an Acct. Class.

7 Select Use bundled pricing in the Price Information section of the screen, if desired.

   Bundled pricing means that the individual parts in the kit will be listed and priced on the order at a single (bundled) price, rather than individually listing each price of the components. If you choose to use bundled pricing, an entry box appears to allow you to put in a List Price.

   NOTE: If you choose not to use bundled pricing, the parts will be listed and priced on the order as individual components. Enabling bundled pricing also disables the “Prompt on Use” function.

8 Enter a bundled List Price, if necessary.

9 Select Add to add a part to your Part kit. The Inventory List dialog box appears.

10 Type, or select from a pull-down list, identifying information for the part (as known):
   • Category
Part #  Description
11 Select the Search icon.
   The Inventory List displays the parts which match your request.
12 Highlight the part to add to the kit.
13 Select Transfer.
14 You are returned to the Add Kit dialog box. The new part is added to your kit list.
15 Repeat steps 10 through 14, as necessary to add additional parts to your kit.
   To remove a part from your kit, highlight the part and select Remove.

Editing an Existing Parts Kit  You may have a need to make a change to an existing parts kit. As with adding a new kit, this is accomplished in the Part Kits dialog box. This procedure details the steps for editing a parts kit.

To edit an existing part kit:
1  Select Part Kits from the Utilities menu.
   The Part Kits dialog box appears.
2  Type, or select from a pull-down list, identifying information for the kit (as known):
   • Category
   • Kit #
   • Description
3  Select the Search icon.
   The Kits List displays the kits which match your request.
4  Select the kit you wish to edit by clicking on it with your mouse pointer.
5  Select Edit.
   The Edit Kits dialog box appears with the information from the selected part number displayed in the appropriate fields. The data fields are identical to those in the Add Kit dialog box described earlier in the chapter.
6  Make any changes necessary.
7  Select OK.
   Your edits are saved and you are returned to the Parts List dialog box.

Editing a Parts Kit Line Item  Sometimes you will have a need to include a quantity of more than one of an item in a kit, or prompt a user before including a specific item with a kit. In these instances, you will work in the Edit Kit Line dialog box.
To edit a Kit Line:

1 In the Add/Edit Kit dialog box, with the desired line item selected, click Edit. The Edit Kit Line dialog box displays.

![Edit Kit Line dialog box](image)

2 Make desired edits and click OK. Two fields are available for editing:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantity</td>
<td>Quantity of the item to be included in the kit.</td>
</tr>
<tr>
<td>Prompt On Use</td>
<td>Click this check box to enable a special dialog box that prompts the user before including the part(s) on an order. You might select Prompt On Use for parts that are used sometimes, but not always, with the kit. Another use for this feature would be instances where it is desireable that the user have options when creating an order. For example, your shop might carry several different types of oil filters. Rather than set up individual parts kits for each type of filter, you could set up one kit including each of the filters with Prompt On Use selected. The user would then be able to specify which filter to use when the order is created as in the example below.</td>
</tr>
</tbody>
</table>
Optional Parts on Order Example

This dialog box displays when the Kit is transferred to the Order. You can then specify which type of oil filter (in the example given) to use for the Order.

Deleting a Part Kit  As a general housekeeping function, you will want to regularly delete part kits which are obsolete or for some reason unneeded.

To delete a part kit:

1 Select Part Kits from the Utilities menu.
   The Part Kits dialog box appears.
2 Type, or select from a pull-down list, identifying information for the part (as known):
   • Category
   • Kit #
   • Description
3 Select the Search icon.
   The Kits List displays the kit(s) which match your request.
4 Select the kit to delete by clicking on it with your mouse pointer.
5 Select Delete.
   A dialog box asks you to confirm your deletion.
6 Select Yes.
   The kit is removed from the database.
Canned Jobs

Canned jobs save you time in entering data into orders by grouping together parts and labor operations which are frequently used in combination with one another (for example, the parts and labor operations you would use to perform a tune-up). The Canned Job List is where you create canned jobs.

To open the Canned Job List:

- Select Canned Jobs from the Utilities menu.

The Canned Job List displays.

Adding a New Canned Job

To add a Canned Job:

1. In the Canned Job List, select the Add button.

**NOTE:** It is recommended to use parts from your Parts/Inventory List when building Canned Jobs. That way, if the part information changes, all the Canned Jobs using that part will be automatically updated, simplifying the update process.
The Canned Job dialog box appears with the cursor in the Number field.

![Canned Job Dialog Box]

2 Type in a unique **Canned Job Number** (up to 20 characters in length).
3 Type in a unique Description (up to 50 characters).
4 Select a **Category** for your Canned Job.
5 Select **Vehicle Year, Make**, and **Model** from the pull-down lists.

**NOTE:** You can select All for Year, Make, and/or Model, if desired. Doing so will make the canned job available for all entries in that category. For example, if you selected 1994 Acura and All for Models, your canned job would be associated with all 1994 Acuras.
6 Select **Add** in the Part Kits Attached to this Canned Job box if you want to add a Part Kit to your canned job. Skip to step 10 if not.

![Part Kits Attached to this Canned Job](image)

**Select Add**

Selecting Add opens the Part Kits dialog box. You are able to add an existing kit to your canned job, or create a new parts kit.

7 To add an existing kit, set up kit search criteria (Category, Kit #, and Description) and select **Search**.

The results of your kit search are displayed.

8 Highlight the name of the kit you wish to add to your canned job.

9 Select **Transfer**.

The selected kit is transferred to your canned job.

**NOTE:** Refer to the section on Parts Kit earlier in the chapter for instructions on adding a new part kit.

10 Add Labor, Parts, Sublet items, Notes, and Estimating items as necessary by selecting the appropriate icons from the lower button bar.

11 Select **Exit** to close the Canned Jobs dialog box and return to the Canned Job List. Your new canned job is added to the list.

**NOTE:** Use the **Labor** button (new labor item) or **Detail** button (existing item) to set non-standard labor rates, technician pay hours, or fixed commission. Use the List Price button to get a rollup (list price) for the job. Refer to Chapter 6, “Orders” for specific instructions on adding Labor, Parts, Sublet Operations, and Notes to orders. The procedures for adding these repair line items to Canned Jobs are identical.

**Copying an Existing Canned Job** Rather than creating a canned job from scratch, you can save time by copying an existing canned job and simply changing those data fields that are different. For example, a canned job for an oil change for a...
Ford Mustang might be identical to a canned job for an oil change for a Ford Probe. Rather than enter both jobs twice, it would be less time-consuming to enter the job once, copy it, and change the vehicle.

**To copy an existing canned job:**

1. Select **Canned Jobs** from the Utilities menu.
   The Canned Job List dialog box appears.
2. Type, or select from a pull-down list, identifying information for the part (as known):
   - Category
   - Year
   - Make
   - Model
   - Job#
   - Description
3. Select the **Search** icon.
   The Canned Job List displays the jobs which match your request.
4. Select the **Canned Job** you wish to edit by clicking on it with your mouse pointer.
5. Select **Copy**.
   A dialog box asks you to enter a new job number.
6. Type in a unique job number (up to 20 digits).
7. Select **OK**.
   The Canned Job List dialog box appears with the new canned job number added.
8. Edit the new canned job, as necessary. Refer to the Editing an Existing Canned Job procedure in the following section for details.

**Editing an Existing Canned Job** You may need to make a change to an existing canned job you have just copied, as explained above, or may need to change a canned job for some other reason. This procedure details the steps for editing an existing Canned Job.

**To edit an existing canned job:**

1. Select **Canned Jobs** from the Utilities menu to display the Canned Job List.
2. Type, or select from a pull-down list, identifying information for the part (as known):
   - Category
   - Year
   - Make
Utilities

1 Select the Search icon. The Canned Job List displays the canned job(s) which match your request.

2 Select the Canned Job you wish to edit by clicking on it with your mouse pointer.

3 Select Edit.

The Canned Jobs dialog box appears with the information from the selected job displayed in the appropriate fields. The data fields are identical to those in the Canned Jobs dialog box described earlier in this section.

NOTE: Refer to the Add Canned Jobs section for specific instructions on completing the data fields in the Canned Jobs dialog box.

4 Make any changes necessary.

Select OK.

Your edits are saved and you are returned to the Canned Job List dialog box.

Deleting a Canned Job

As a general housekeeping function, you will want to regularly delete canned jobs which are obsolete or for some reason unneeded.

To delete a canned job:

1 Select Canned Job from the Utilities menu.

The Canned Job List dialog box appears.

2 Type, or select from a pull-down list, identifying information for the canned job (as known):

• Category
• Year
• Make
• Model
• Job#
• Description

3 Select the Search icon.

The Canned Job List displays the part(s) which match your request.

4 Select the canned job you wish to delete by clicking on it with your mouse pointer.

5 Select Delete.

A dialog box asks you to confirm your deletion.
6 Select Yes.

The canned job is removed from the database.

**Importing and Exporting Promotional Packages**

Series has the ability to export and import the packages available as Promotions. These include the Tire, Brakes, and LOF packages, but do **NOT** include regular canned jobs. Multiple location chains can use the feature to standardize a promotional price structure. The feature can also be used to backup promotions information.

**IMPORTANT UPGRADE NOTE:** If you are upgrading from a previous version of Series, you must run the Import Jobs procedure to load the Tire, Brakes and LOF packages that come with the system.

**Exporting** Promotions Packages are exported by selecting Export Packages from the Utilities menu. This creates a file that contains all of the Promotions packages. The file is placed in the Series database directory.

The default location for this file is
\[C:\MITCHELL\MANAGER\SERIES2(x)\EXPORT\]. The file name is **CANJOB.DAT**.

**Importing** Importing of Promotions Packages is performed as described in the following procedure. The import file (the file obtained from the export procedure) first needs to be copied to the Import directory located beneath the Series database directory and then the jobs need to be imported into Series via the Import Jobs command from the Utility menu.

**To import Promotions Packages:**

1. Copy **CANJOB.DAT** to the Import directory (usually \[C:\MITCHELL\MANAGER\SERIES2(x)\IMPORT\].

2. Select Import Packages from the Utilities menu.

You are asked to confirm your request.

---

*Database Backed Up?*
It is highly recommended that you back up your database. If you did not backup your database before starting this procedure, it is recommended that you cancel and do so.

**NOTE:** The import process is a complete replacement operation. When importing, all the current Option Specific Promotions Packages that are marked as imported are removed from the system.

3. Click Yes. The Promotions packages are overwritten with the new packages. This procedure does not effect canned jobs created from the normal Canned Job screen.

**Customer Screen**

The Customer Screen allows you to add a customer to the database, delete a customer from the database, or edit a customer's attributes.

**NOTE:** Normally, you will enter new customers into the database while you are in the process of creating orders. Access the Customer screen via the Utilities menu when you need to enter/edit groups of customers, in the same manner as when you are entering your existing customers as part of your initial setup.

The Customer Screen works in conjunction with the Vehicle Screen so that when a customer is added, you can switch to the Vehicle Screen to add vehicles to the customer record. Similarly, when you edit an existing customer record, and switch to the Vehicle Screen, the customer's vehicles display.

**To open the Customer Screen:**

- Select **Customer Screen** from the Utilities menu.
The Customer Screen displays.

To add a new Customer:

1. In the Customer Screen, enter available customer information. The following sections describe the various data entry fields and additional data entry options.

2. Press Enter to enter the customer information and switch to the Vehicle Screen where you can enter vehicle(s) for the customer.

   OR

   • Select the Vehicle thumb-tab to switch to the Vehicle Screen where you can enter one or more vehicles for the customer.

   OR

   • Select the Exit button (lower-right corner of your display) to exit to the Work in Progress screen.

The following sections describe the various data entry fields and data entry options. The Customer Screen features Thumb-Tabs which dynamically change your display so that you can view or input different types of information; Buttons, which bring up additional, related dialog boxes, and Editable Fields into which you can enter and edit customer information. Finally, the Customer Screen contains status boxes in which you can view Credit History and Vehicle Information.
**Customer Screen Thumb Tabs**  The thumb-tabs in the Customer Screen act like the tabs in a notebook. Selecting a tab causes your display to dynamically alter to display different, but related information. For example, if you enter customer information and then click on the Vehicle tab, you are taken to the Vehicle panel where you can enter one or more vehicles for that customer. Click on the thumb-tab for Customer, and you are returned to the Customer Screen with the vehicle(s) entered in the vehicle box at the bottom of the display.

<table>
<thead>
<tr>
<th>Thumb-Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td>Opens the Customer Screen. This is the display in which you enter/edit customer information.</td>
</tr>
<tr>
<td>Vehicle</td>
<td>Switches your display to the Vehicle view allowing you to enter/edit Vehicle(s) associated with a particular customer.</td>
</tr>
<tr>
<td>History</td>
<td>Switches your display to History, where you can view historical information about the customer, and/or his vehicles.</td>
</tr>
</tbody>
</table>

**Customer Screen Buttons**  Buttons are available in the Customer Screen which allow you to make additional selections or enter information into your customer record. Each of these buttons is described in the following table.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company</td>
<td>Brings up the Customer List with the Company display selected. Clicking your mouse pointer on a letter on the left side causes the screen to display those companies whose names begin with that letter. Highlighting the Company name and selecting OK returns you to the Customer Screen, with the Company name and vehicle(s) entered into the appropriate fields.</td>
</tr>
<tr>
<td>Button</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
</tr>
<tr>
<td>Name</td>
<td>Brings up the Customer List with the Customer display selected. Clicking your mouse pointer on a letter on the left side causes the screen to display those customers whose names begin with that letter. Highlighting the Customer name and selecting OK returns you to the Customer Screen, with the Customer's name and vehicle(s) entered into the appropriate fields.</td>
</tr>
<tr>
<td>Remarks</td>
<td>Brings up a text entry box allowing you to add remarks to the customer record.</td>
</tr>
<tr>
<td>Telephone</td>
<td>Brings up the Telephone List, where you can select which numbers appear on your Customer Screen display.</td>
</tr>
<tr>
<td>New</td>
<td>Clears out any customer/vehicle information that is displayed, allowing you to enter another customer.</td>
</tr>
<tr>
<td>Tax</td>
<td>Allows you to overwrite the shop default tax rate for a particular customer.</td>
</tr>
</tbody>
</table>
Customer Screen Data Entry Fields  The Customer Screen features a number of fields in which you can enter, and edit, information. Each of these fields is described below.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company</td>
<td>The name of the Company, if applicable.</td>
</tr>
<tr>
<td>Name</td>
<td>A title (e.g. Mr., Ms., etc.) selected from a pull-down list.</td>
</tr>
<tr>
<td>Last, First</td>
<td>Fields for entry of the customer's last and first names.</td>
</tr>
<tr>
<td>Spouse</td>
<td>First name of the spouse.</td>
</tr>
<tr>
<td>Address, City, State, Zip</td>
<td>Customer's address information.</td>
</tr>
</tbody>
</table>

Customer Credit Status Box  The Customer Credit Status Box in the upper-right corner of the Customer screen provides information about the credit status and history for the customer.

The fields of the Customer Credit Status Box are defined below.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charged Balance</td>
<td>Dollar amount owed on posted orders.</td>
</tr>
<tr>
<td>Credit Balance</td>
<td>Some form of overpayment (a deposit, for example).</td>
</tr>
<tr>
<td>Sales (YTD)</td>
<td>Year-to-date sales for the current customer.</td>
</tr>
<tr>
<td>Sales (Total)</td>
<td>Total sales for the current customer.</td>
</tr>
<tr>
<td>Charge Status</td>
<td>Indicates if the customer is approved to charge.</td>
</tr>
</tbody>
</table>
The Vehicle section in the lower part of the Customer Screen provides information about the Customer’s vehicle(s).

## Customer Vehicle Status Grid

The Vehicle section in the lower part of the Customer Screen provides information about the Customer’s vehicle(s).

### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Status</td>
<td>Indicates if the customer is current, or past due.</td>
</tr>
<tr>
<td>Update Customer</td>
<td>Opens the Update Customer dialog box, in which you can update the customer’s credit and charge information. Access to this dialog box can be password protected (highly recommended). Mitchell only recommends updating customer balance here if balance has been transferred from another system. Use Payment functions for maintaining customer balances.</td>
</tr>
</tbody>
</table>

### Customer Vehicle Status Grid

The rows of this grid provide status information about a Customer’s vehicle(s). When you enter a new customer, the grid is empty. As you add vehicles for the customer, the rows of the grid are filled with vehicle information.

The fields of the Customer Vehicle Status grid are defined below.

<table>
<thead>
<tr>
<th>License</th>
<th>Year</th>
<th>Make</th>
<th>Model</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOL1</td>
<td>82</td>
<td>MERCEDES B</td>
<td>388SEC</td>
<td>None</td>
</tr>
</tbody>
</table>

**Customer Vehicle Status Grid**

The rows of this grid provide status information about a Customer’s vehicle(s). When you enter a new customer, the grid is empty. As you add vehicles for the customer, the rows of the grid are filled with vehicle information.

The fields of the Customer Vehicle Status grid are defined below.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>License</td>
<td>Vehicle license number.</td>
</tr>
<tr>
<td>Year</td>
<td>Vehicle year of manufacture.</td>
</tr>
<tr>
<td>Make</td>
<td>Vehicle make.</td>
</tr>
<tr>
<td>Model</td>
<td>Vehicle model.</td>
</tr>
<tr>
<td>Recommendation</td>
<td>Service/repair recommendation entered during a previous visit.</td>
</tr>
</tbody>
</table>
Vehicle Screen

Once you have finished adding a customer, you will normally want to add one or more vehicle(s). You may also need to delete a vehicle from a customer record. These activities are accomplished in the Vehicle screen.

To open the Vehicle screen:

- Click your mouse pointer on the Vehicle thumb-tab from the Customer screen after entering customer information. This associates the vehicle you are about to enter with the customer you entered.

OR

- Select Vehicle Screen from the Utilities menu. This creates a new vehicle record to which you can later associate a customer.

The Vehicle Screen displays.

Vehicle Screen

Entering and deleting Vehicle(s)

To enter a new Vehicle:

1. In the Vehicle Screen, enter a license number.
2 Select Year, Make, and Model from the pull-down lists.

3 (Optional) Enter Sub/Model (for example, 4 Door, Conv., etc.) for extra identification, if desired, and Unit # (an identifying number such as Cab #, Fleet #, etc.).

4 (Optional) Type in, or select from the pull-down calendar, a Manufacturer Date. This is the date of manufacture for the vehicle.

5 (Optional) Type in, or select from the pull-down calendar, an Inspection Date. You can use this field to enter the date that the vehicle is due for a regular inspection of some sort (for example, a Smog Inspection).

6 Select Add in the Recommendations grid, if necessary, to add recommendations to the customer/vehicle record.
The Recommendations dialog box appears.

7 Type in any recommendations to be viewed at the next customer visit. Select OK to save and close the Recommendations dialog box.

8 Select the Vehicle Detail button to open the Vehicle Detail dialog box, if necessary. Open this dialog box if you wish to attach the engine type, brakes, drive type, transmission type, and/or vehicle weight to the vehicle record.

9 Type, or select from pull-down lists, required information. Select OK to close the dialog box.

10 Select the Tax button to change the tax rate from the default, if necessary.
The Tax List appears.

11 Select/Deselect tax rates by clicking your mouse pointer in the appropriate Apply box(es). Select OK when tax changes are complete.

You have now completed entries to the vehicle screen.

12 Select Exit, or any other system function, to exit the Vehicle Screen. Your Vehicle Screen input will be saved.

OR

Select any other menu item, icon, or thumb tab option to switch to a different program function. Your vehicle input will be added to the customer record in the database.

To add additional vehicles to a customer record:

1 After you have finished inputting information for the current vehicle, select New. A dialog box asks if you wish to clear the current customer.

2 Select No because you are adding additional vehicles to the same customer.

The Vehicle Screen is cleared.
3 Type in a unique License number and complete the remaining fields as detailed in the previous procedure.

4 Select Exit, or any other system function, to exit the Vehicle Screen. Your Vehicle Screen input will be saved.

OR

Select any other menu item, icon, or thumb tab option to change to a different panel. Your vehicle input will be saved.

To delete a vehicle:

1 In the Vehicle Screen, with the vehicle you wish to delete selected, select Remove Vehicle from the Edit menu.

A message asks that you confirm the deletion.

2 Select Yes to permanently remove the vehicle from your database.

To change a vehicle’s ownership:

1 In the Vehicle Screen, with the vehicle you want to change ownership on selected, click the Change Ownership button.

2 Pick a new customer from the Customer List.

You are prompted to confirm your action.

3 Click Yes to assign the vehicle to a different owner.
End Of Day Reports

End Of Day reporting allows you to designate reports to be printed when you exit Series at the end of the day or over any other desired time period (e.g. weekly, monthly). The End Of Day selection from the Utilities menu initiates the end of day reporting process.

**NOTE:** The reports to be included in the End Of Day report run are designated in end of day report setup. Refer to Chapter 3, “Shop Setup” for details.

To run End Of Day reports:

1. Select **End Of Day** from the Utilities menu. The End Of Day Procedure dialog box displays.

   ![End Of Day Procedure](image)

   The top part of the dialog box displays the processing period for the End Of Day reports. The processing period encompasses the time between the last time you ran the End Of Day procedure ("From" date/time) to the present ("To" date/time).

   The lower portion of the dialog box displays the number of reports to be printed (as designated in End Of Day Reports Setup) and provides a check box that allows you to Disable Report Printing.

2. Click on the **Start** button to send the end of day reports to the printer.

Summary

This chapter began with a description of program utilities followed by a discussion of the steps required to create parts kits, and canned jobs. The screens and dialog boxes in which customer and vehicle information are recorded were described as well. The following chapter describes the procedures for setting up and administering the program security function.
Chapter 5
Security

Overview

The program offers password protected access to certain system functions. This chapter describes the steps required to designate system functions as protected and then the steps required to define user access to protected functions. The chapter concludes with a description of how the user enters a password to access a protected function.

How Manager Security Works

A single user, usually designated the system administrator, must define which system functions should be protected and then define which users should have access to protected functions.

Program security works via password protection. When you attempt to work in a protected dialog box, or perform a protected function, the program requires that you enter a password. If you correctly enter a valid password, you are allowed to continue. If not, you are not allowed to perform that function.

What this means is that, unlike many other security-protected programs, you don't need to log on when you start to work, or when you take over from another user at a work station. The security system design eliminates the risk that one user will forget to log out creating an opportunity for unauthorized users to access sensitive functions.

Setting Up Protected Functions

The program is shipped without security enabled. It is up to the designated system administrator to determine which, if any, functions to protect and who in your shop should be allowed to access protected functions.

Program Security is opened from the Setup menu.
To open Program Security:

- Select **Program Security** from the Setup menu.

The Program Security Setup dialog box appears.

The first step in creating password protection for your shop is setting up protected areas.

**To set up protected areas:**

1. In the Program Security Setup dialog box, select **Change Protected Areas**.
The Protected Areas dialog box appears.

```
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master Password</td>
<td>The password that is used by the designated system administrator to access all areas of the system.</td>
</tr>
<tr>
<td>Select</td>
<td>The check boxes determine which functional areas a user will be able to access.</td>
</tr>
<tr>
<td>Rights Description</td>
<td>A description of the dialog box, or system function, to which protection can be applied.</td>
</tr>
</tbody>
</table>
```

2 Enter a **Master Password**.

This password will allow access to all areas of the system. If you are the person who is responsible for managing the security of the system, you will want to be the only person who knows the Master Password. If someone else will be responsible for administration of security in your shop, that person should enter the Master Password.

**NOTE:** Write down your password and keep it in a safe place. If you forget your password you will need to call technical support for a new master password.
3 Select areas to be protected by clicking your mouse pointer in the box next to the desired area in the “Select” area.

The protected areas that you choose is a management decision of your shop that should reflect the need to control access to sensitive system functions such as customer payments, tax rates, etc.

**NOTE:** You must choose <Supervisor> Program Security as a protected area to prevent any system user from being able to change security access.

4 Choose Done when finished designating areas to be protected.

You are returned to the Program Security Setup dialog box. The dialog boxes and system functions that you have designated to be protected now appear in the Select Protected Areas of the dialog box.

Select Protected Areas

```
Select          Rights Description
---              ------------------
[ ] <Supervisor> Program Security
[ ] Batch Payment - Apply Credit
[ ] Batch Payment - Save
[ ] Canned Jobs - Add
[ ] Canned Jobs - Copy
[ ] Canned Jobs - Delete
```

You are now ready to add users and to designate which protected functions each will be allowed to access.

**User Setup**

Individual users are added, and deleted, and their access to protected system functions are defined, in the Program Security Setup dialog box. These users are different than, and should not be confused with, the users set up in the User List for Display Preferences.

**NOTE:** Any time that you exit the Program Security Setup dialog box after designating the <Supervisor> Program Security function as protected, you will need to use your master password to get back into Program Security Setup.

To enter Program Security after it has been protected:

1 Select Program Security from the Setup menu.
The Password Validation dialog box requires that you enter a password.

Validate Password

2 Enter the master password that you designated when you set up the protected areas (refer to previous section, if necessary).

3 Select OK.

The Program Security Setup dialog box appears.

Program Security Setup

The system functions that have been designated as protected display in the Select Protected Areas portion of the dialog box.
Adding Users
Once you have defined the areas of the system that you would like to password protect, the next step is to add users and provide them with passwords.

To add a user:

1. In the Program Security Setup dialog box, select Add.
The Add Password dialog box appears.

![Add Password dialog box]

2. Enter a user name (up to 30 characters).
3. Enter a password (up to 8 characters).

**NOTE:** Make sure to record all passwords so that they can be provided to the users.

4. Select OK.
You are returned to the Program Security Setup dialog box with the name of the newly entered user displayed in the Users Name portion of the display. Repeat the above steps as many times as necessary until all users have been added to the Users Names list.

**Defining User Access**

Once all users are added, the next step is to define which of the protected functions each user will be allowed to access. Over time, you may need to edit a user's name and/or password, or delete a user from the program security system.

**Setting up Users** Security access for each system user must be individually defined.

**To define user security access:**

1. Click your mouse pointer on the name of the user. The user's name is highlighted.
2. Click your mouse pointer on the box beside the name of each protected area that you wish the user to be able to access. An “x” in the box appears indicating that it has been selected.

You can also use the Select All button to select all protected functions for a given user or the Select None button to clear all selections and start over.

Use the scrollbar on the right-hand side of the Rights Description box to view additional protected areas, as necessary.
3 Repeat steps 1 and 2 above to define security for additional users until password protection for all system users has been defined.

4 Select **Done** when finished.

**Editing a User's Name/Password**
Periodically, as a security precaution, you will want to change user passwords. You may also have a need to change a user's name. The Edit command in the Program Security Setup dialog box is where you change user's passwords.

**To edit a user's name and/or password:**
1 In the Program Security Setup dialog box, select **Edit**.
   The Edit Password dialog box displays.

   ![Edit Password](image)

   *Edit Password*

   2 Overtype the User Name and/or Password as desired.
   3 Select **OK** to save and return to the Program Security dialog box.

**Deleting a User**
Once a user no longer requires access to the system, you will want to remove his security access.

**To remove a user's security access:**
1 In the Program Security Setup dialog box select **Delete**.
A dialog box asks that you confirm your deletion.

![Confirm Delete](image)

2 Select Yes.

The user is removed from the Users Name list. That user will no longer be able to access any of the protected system functions.

**Accessing Protected Functions**

This section describes the steps required for users to access protected functions. Program security works via password protection. When you attempt to work in a protected dialog box, or perform a protected function, the program requires that you enter a password. If you correctly provide a valid password, you are allowed to continue. If not, you are not allowed to perform that function.

Program Security works differently for some functions than it does for others. Sometimes protection is enabled when you try to enter a certain screen or dialog box; at other times, you are able to get into the screen or dialog box, but are not able to use a designated function or are not able to save once you have finished. In any case, the procedure for supplying your password to the system to gain access to a protected function is the same.

When you attempt to perform the protected activity, the Password Validation dialog box displays.

![Validate Password](image)

**To access a protected function:**

1 Enter your password.
2 Select **OK**.
You are allowed to continue.

**Summary**

This chapter described the steps required to set up and administer the password protection feature of the program. It concluded with a discussion of user access to protected system functions.
Chapter 6
Orders

Overview

This chapter details the steps you will follow to create Quick Estimates, Counter Sales, Estimates, Repair Orders, and Invoices. The chapter concludes with a discussion of the Work In Progress (W.I.P.) screen.

Before You Begin

Before you can perform the activities described in this chapter, you must already have the program installed and running on your computer. If you have not already done so, complete the installation instructions in Chapter 2, “Getting Started.” You must also have configured the lists, rates, and descriptions for your shop as described in Chapter 3, “Shop Setup.”

Order Lifecycle

An order typically starts out as an estimate of the cost of parts and labor to perform a repair or vehicle maintenance service. You can choose to start from a Quick Estimate, a bare-bones quote, or you can create a regular Estimate. If the customer agrees to the Estimate, it is converted to a Repair Order, and printed for the customer to sign as acceptance of the work to be performed. Once the work is completed, the order is converted to an Invoice—a request for payment.

As estimates, repair orders, and invoices use exactly the same data, and look the same in the program, they are generically referred to as “orders” throughout this chapter. The terms estimate, repair order, and invoice actually are more indicative of order status than order type. In fact, it is not necessary to begin with an estimate; you can start with a repair order, or even an invoice.
For example, a regular customer might drive his car into your shop for his bi-monthly oil change. He doesn't need an estimate—he knows how much it is going to cost. You don't need a repair order—you know he's not going to dispute the charges. So you do the work and create an invoice when you're done. The program offers the flexibility to adapt to your needs.

This chapter, however, is structured to follow the more conventional scenario of estimate leading to repair order leading to invoice.

**Quick Estimate**

The Quick Estimate panel allows you to create a quick quote using a bare minimum of information. This screen is particularly useful in situations where you may not get the sale, for example, a phone call from a customer who is calling several shops for the lowest price on a job. In this case, you would create a quick estimate so that you can quickly quote a price. If the customer decides to accept the job, the quick estimate can be easily converted into a regular estimate.

**To create a Quick Estimate:**

1. Select Quick Estimate from the toolbar.

   OR

   Select Quick Estimate from the View menu.
The Quick Estimate Panel displays.

Quick Estimate

2 Select a Service Writer from the pull-down menu in the Written By field.
3 Select a Year, Make, and Model.
4 Add repair lines using the dialog boxes accessed via the Repair Line buttons.

NOTE: The tools accessed via the Repair Line Buttons are discussed in detail later in the chapter.
5 Check the profit margin on your Quick Estimate, if desired, by selecting the Check Profit button. The Profit Wizard displays.

![Check Profit](image)

**Check Profit**

The Profit Wizard provides you with a graphical representation of your profit margin on the estimate in the form of a pie chart and a summary of the profit detail in the form of the Summary Detail matrix. The cost elements of the profitability calculation displayed in the Profit Wizard are described below:

<table>
<thead>
<tr>
<th>Cost Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labor Cost</td>
<td>The estimated cost of labor as a percentage of the order total.</td>
</tr>
<tr>
<td>Sublet Cost</td>
<td>The estimated cost of sublet operations as a percentage of the order total.</td>
</tr>
<tr>
<td>Parts Cost</td>
<td>The estimated cost of parts as a percentage of the order total.</td>
</tr>
<tr>
<td>Misc.</td>
<td>Miscellaneous Overhead is a fixed percentage of order total.</td>
</tr>
<tr>
<td>Overhead</td>
<td>Overhead is a fixed percentage of order total.</td>
</tr>
</tbody>
</table>

**NOTE:** Labor and Parts markups and overhead percentages are applied in the MarkUp selection in the Shop Data Setup submenu in the Setup menu.
6 Select **Convert to Estimate** to convert your quick estimate into a regular estimate. You are taken to the Customer Screen.

**OR**

- Select **Cancel** to cancel your quick estimate. You are returned to the Work in Progress screen.

**OR**

- Select **Exit** to save your quick estimate and return to the Work in Progress screen. The unnamed quick estimate appears in the W.I.P. screen as displayed below.

<table>
<thead>
<tr>
<th>Type</th>
<th>Number</th>
<th>Customer</th>
<th>License</th>
<th>Vehicle</th>
<th>Sched</th>
<th>Promised</th>
<th>RO/Pn</th>
</tr>
</thead>
<tbody>
<tr>
<td>E</td>
<td>01163</td>
<td></td>
<td></td>
<td></td>
<td>12:30PM 04/2</td>
<td>12:30PM 04/24</td>
<td>No</td>
</tr>
<tr>
<td>E</td>
<td>01165</td>
<td></td>
<td></td>
<td></td>
<td>12:30PM 04/2</td>
<td>12:30PM 04/24</td>
<td>No</td>
</tr>
<tr>
<td>CS</td>
<td>00060</td>
<td>ADAMS, BARBARA</td>
<td>ZMV</td>
<td>1993 Acura - Legend</td>
<td>04:00PM 12/23</td>
<td>08:25PM 03/21</td>
<td>No</td>
</tr>
<tr>
<td>CS</td>
<td>00062</td>
<td>ADAMS, BARBARA</td>
<td>ZMV</td>
<td>1993 Acura - Legend</td>
<td>04:00PM 12/23</td>
<td>03:29PM 03/21</td>
<td>No</td>
</tr>
<tr>
<td>INV</td>
<td>00053</td>
<td>ALGER, BETTY</td>
<td>IAM</td>
<td>1994 Cadillac - Eldorado</td>
<td>12:30PM 03/1</td>
<td>12:30PM 03/15</td>
<td>No</td>
</tr>
<tr>
<td>INV</td>
<td>01088</td>
<td>LANTIER, CARLA</td>
<td>MOW</td>
<td>05 MERCEDES B - 230SL</td>
<td>12:30PM 04/0</td>
<td>12:30PM 04/4</td>
<td>No</td>
</tr>
<tr>
<td>INV</td>
<td>00063</td>
<td>LARSON, KAREN</td>
<td>ZNR-40</td>
<td>04 TOYOTA - Celica</td>
<td>12:30PM 03/1</td>
<td>12:30PM 03/11</td>
<td>Yes</td>
</tr>
<tr>
<td>INV</td>
<td>01064</td>
<td>LARSON, KAREN</td>
<td>ZNR-48</td>
<td>04 TOYOTA - Celica</td>
<td>12:30PM 04/0</td>
<td>12:30PM 04/7</td>
<td>No</td>
</tr>
<tr>
<td>INV</td>
<td>00066</td>
<td>Lafount, Clyde</td>
<td></td>
<td></td>
<td>12:30PM 03/1</td>
<td>12:30PM 04/6</td>
<td>No</td>
</tr>
<tr>
<td>INV</td>
<td>01069</td>
<td>Lafount, Clyde</td>
<td></td>
<td></td>
<td>12:30PM 04/2</td>
<td>12:30PM 04/21</td>
<td>Yes</td>
</tr>
<tr>
<td>ES</td>
<td>01118</td>
<td>Quickest Customer</td>
<td></td>
<td></td>
<td>09:31AM 05/0</td>
<td>09:31AM 05/9</td>
<td>No</td>
</tr>
<tr>
<td>ES</td>
<td>01167</td>
<td>Quickest Customer</td>
<td></td>
<td></td>
<td>04:14PM 04/2</td>
<td>04:12PM 04/24</td>
<td>No</td>
</tr>
<tr>
<td>ES</td>
<td>01165</td>
<td>Quickest Customer</td>
<td></td>
<td></td>
<td>01:13PM 05/0</td>
<td>01:13PM 05/8</td>
<td>No</td>
</tr>
<tr>
<td>ES</td>
<td>01093</td>
<td>RASSIHECK, SEAN</td>
<td>AAA</td>
<td>1992 Chevrolet - Camaro</td>
<td>12:30PM 04/4</td>
<td>12:30PM 04/13</td>
<td>No</td>
</tr>
<tr>
<td>ES</td>
<td>01091</td>
<td>RARI, SHERRY</td>
<td>ZYJUZ</td>
<td>1991 Toyota - Celica</td>
<td>12:30PM 04/1</td>
<td>12:30PM 04/11</td>
<td>No</td>
</tr>
<tr>
<td>INV</td>
<td>01090</td>
<td>THOMAS, BILL</td>
<td>M22LM</td>
<td>07 MERCEDES B - 230SL</td>
<td>12:30PM 04/1</td>
<td>12:30PM 04/26</td>
<td>No</td>
</tr>
</tbody>
</table>

**Quick Estimates in W. I. P. Grid**

Selecting a quick estimate from the Work in Progress screen converts it into a regular estimate.

**Estimates, Repair Orders, and Invoices**

As described earlier in the chapter, the order generation process normally begins with an **Estimate**—a customer request for a quote of the cost and time required to make a repair, or provide a maintenance service. If the customer agrees to the estimate, it is converted to a **Repair Order**, and printed for the customer to sign. This is considered to be an agreement to the terms of the work to be performed. Once the work is completed, the order is converted to an **Invoice**—a request for payment.

The dialog boxes used to complete an estimate, repair order, or an invoice are essentially the same. Rather than representing different types of orders, the terms estimate, repair order, and invoice are more indicative of order status—the stages that an order progresses through as it moves through the system. This section will therefore begin with a discussion of the Panels used in creating the order and then conclude with a discussion of the process of converting an estimate to a repair order to an invoice.
Order Entry Panels

Selecting the Estimate, Repair Order, or Invoice icons from the button bar, or selecting any of these functions from the View menu, brings up the Order Entry Panels.

Alternatively, if you are working in the One Start toolbar mode, you can choose the Start icon to begin the order.

To begin an order:

- Select the Estimate, Repair Order, or Invoice icon from the button bar.

OR

- Select the Start icon if operating in the One Start toolbar mode.

The Customer Screen, the first of the Order Entry panels displays.
There are five Order Entry panels. Selecting any of the tabs at the top of the Order Entry display causes a new panel, with related information, to come to the forefront of the display.

**Thumb Tabs**

The five panels are:

<table>
<thead>
<tr>
<th>Panel Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td>Enter information about the customer, or if a business, about the company.</td>
</tr>
<tr>
<td>Vehicle</td>
<td>Add, change, or delete vehicles from the customer record.</td>
</tr>
<tr>
<td>Order</td>
<td>Create parts and labor repair lines for the order and perform other tasks (print order, convert order status, check profit, etc.).</td>
</tr>
<tr>
<td>Revision</td>
<td>Prepare up to nine individual estimates for additional work which can be selectively applied to the order.</td>
</tr>
<tr>
<td>History</td>
<td>View order history for the current vehicle or for all of a customer’s vehicles.</td>
</tr>
</tbody>
</table>
Customer Panel

The Customer panel is where you enter customer information into the order. You can select a current customer from the Customer List, or you can add a new customer to the order and at the same time add that customer to the Customer List.

Customer Panel

This is the panel that will be displayed first when you create a new Estimate, Repair Order, or Invoice.

To select an existing customer:

1. In the Customer panel, select Name to select a customer, or Company to select a business customer.
The Customer List displays.

**Customer List**

**NOTE:** You can toggle the list between Customer and Company by selecting the appropriate button in the Display by box.

2. Click your mouse pointer on the tab with the first letter of the desired name along the left side of the list.

3. Highlight the appropriate Customer/Company name.

4. Select **OK**.

You are returned to the Customer panel with the Customer/Company information transferred to your order.

5. Add any additional information to the customer record.

**NOTE:** Chapter 4, “Utilities” contains detailed instructions on available options and on completing the fields of the Customer panel.
6 If the customer has more than one vehicle, highlight the desired vehicle in the Vehicle Selection box.

**Vehicle Selection Box**

<table>
<thead>
<tr>
<th>License</th>
<th>Year</th>
<th>Make</th>
<th>Model</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>444 666</td>
<td>1994</td>
<td>BMW</td>
<td>325i</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>1994</td>
<td>BMW</td>
<td>318i</td>
<td>None</td>
</tr>
</tbody>
</table>

7 Select **Next** to continue the order at the Vehicle panel.

OR

Select **Exit**. A dialog box asks if you would like to save Customer Information. Choose **Yes** to save.

**To create a new customer:**

1 Complete the data fields in the Customer Screen.

**NOTE:** Chapter 4, “Utilities” contains detailed instructions on available options and on completing the fields of the Customer panel.

2 Select **Next** to add the customer to the order and to the customer database. You are taken to the Vehicle screen. The next time the customer visits your shop, you can pull his name from the Customer List.

**To delete an existing customer:**

1 In the Customer Panel, select the **Name** button to bring up the Customer List, or the Company button to bring up the Customer List with companies listed.

2 Select the customer/company you wish to remove from the list.

3 Select **OK**.

You are returned to the Customer panel with information from the selected customer/company entered in the appropriate fields.

4 Select **Remove Customer** from the Edit menu.

You are asked to confirm your deletion.

5 Select **Yes** to remove the Customer from the database.
Vehicle Panel

Once you have either added a new customer, or selected a current customer, you will work in the Vehicle screen. If you have just added a new customer, you will need to add a vehicle(s) to the customer record. Procedures for entering vehicle information, along with a description of fields, are provided in Chapter 4, "Utilities."

Vehicle Panel

The following options are available in the Vehicle panel.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
<td>Opens the Recommendations dialog box, allowing you to add a recommendation to the customer record.</td>
</tr>
<tr>
<td>Edit</td>
<td>Opens the Recommendations dialog box, allowing you to edit an existing recommendation.</td>
</tr>
<tr>
<td>Delete</td>
<td>Removes a recommendation.</td>
</tr>
</tbody>
</table>
### Recommendations

The Recommendations dialog box allows you to add reminder text to the customer record. This information will be displayed in the Vehicle screen as a reminder of repairs, or maintenance activity, that have been noted, but not yet performed.

**To open the Recommendations dialog box:**

- Select **Add**, in the Vehicle screen, to add a new recommendation.

**OR**

- Select **Edit** in the Vehicle screen to edit an existing recommendation.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vehicle Detail</td>
<td>Opens the Vehicle Detail dialog box, in which you can add, or edit, the Brakes, Drive Type, Transmission, and Gross Vehicle Wt. information.</td>
</tr>
<tr>
<td>Tax</td>
<td>Opens the Tax List, in which you select the tax rate(s) to apply to the order.</td>
</tr>
<tr>
<td>New</td>
<td>Clears the vehicle information from the screen. A second dialog box asks if you wish to clear the current customer also.</td>
</tr>
<tr>
<td>Next</td>
<td>Closes the Vehicle panel and switches you to the Order panel.</td>
</tr>
<tr>
<td>Exit</td>
<td>Closes the Vehicle panel, returning you to the Work In Progress grid.</td>
</tr>
</tbody>
</table>
The Recommendations dialog box appears.

![Recommendations dialog box](image)

**Recommendations**

The Recommendations dialog box contains the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Recommended</td>
<td>The date that the repair was recommended to the customer.</td>
</tr>
<tr>
<td>Date Work Needed</td>
<td>The date that the repair work should be performed by.</td>
</tr>
</tbody>
</table>

Orders 167
Once customer and vehicle information has been entered, it is time to create the order. The Order panel is where the parts and labor repair lines, the heart of the order, are created.

To complete the Order:

1. Add/select the Customer and Vehicle as described in the previous section and choose the Order Tab to display the Order Panel.
   Customer and Vehicle information are displayed between the repair line buttons and the repair line display.

2. Select a service writer from the Written By pull-down choice list.

3. Change the Promised time, if necessary.

4. Change the Promised date from the current date, if necessary. Overtype the current date or select a new date from the popup calendar, as you prefer.
Orders

5 Type in a Hat #, and/or Ref #, in accordance with your shop's policy for identifying customer vehicles.

6 Enter the incoming odometer reading in the In field.

7 Add repair lines using the dialog boxes accessed from the Repair Lines Button Bar.

Repair Line Buttons

Refer to the “Building Repair Lines” section later in the chapter for detailed instructions on creating repair lines.

Once your repair lines have been built, your Order is complete. Although you can start an Order as a Repair Order, or an Invoice, most orders begin as an Estimate. Once the customer agrees to the work to be performed, the Estimate is converted to a Repair Order. Once the repairs are complete, the Repair Order is converted to an Invoice.

The Order Options dialog box provides options for changing the status of your order as well as a number of other functions.

8 Select Options, if necessary, to open the Order Options dialog box.
The options available in this dialog box are briefly described below.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convert to Order</td>
<td>Converts an estimate into a repair order.</td>
</tr>
<tr>
<td>Convert to Invoice</td>
<td>Converts an estimate, or a repair order, into an invoice.</td>
</tr>
<tr>
<td>Post Invoice</td>
<td>Allows you to post an invoice without posting payment, or to charge a residual balance to the customer's account.</td>
</tr>
<tr>
<td>Apply Payments</td>
<td>Opens the Apply Payments dialog box, where you can apply payments to an invoice.</td>
</tr>
<tr>
<td>Discounts</td>
<td>Opens the Add/Edit Discount dialog box in which you can change the parts and/or labor discount on the order.</td>
</tr>
<tr>
<td>Confirm all Parts</td>
<td>Confirms all parts on the invoice as having been used on the order.</td>
</tr>
<tr>
<td>Revision History</td>
<td>Opens the Revision History dialog box where you can view the date, authorization, and reason for any order revisions.</td>
</tr>
<tr>
<td>Tech. WorkSheet</td>
<td>Select to print a Technician Worksheet for the order.</td>
</tr>
<tr>
<td>30/60/90 Interval</td>
<td>Opens the Service Maintenance Interval dialog box which allows you to view service maintenance information and, if desired, transfer that information in the form of a canned job to the order. This dialog box is described at the end of this chapter.</td>
</tr>
<tr>
<td>Schedule Work</td>
<td>Opens the Schedule Work dialog box, in which you can put the job on the shop calendar. Scheduling is described in Chapter 8, “Work in Progress.”</td>
</tr>
<tr>
<td>Check Profit</td>
<td>Opens the Profit Wizard, a graphical representation of order profitability. The Profit Wizard is described earlier in this chapter.</td>
</tr>
<tr>
<td>Pick List</td>
<td>(Series II only) Select to generate a Pick List for the parts on the order.</td>
</tr>
<tr>
<td>Purchase Order</td>
<td>(Series II only) Select to generate a Purchase Order for the parts on the order.</td>
</tr>
</tbody>
</table>
9. Select **Done** to close the Order Options dialog box.

10. Select **Exit** to close the Order panel.

The new order displays in the Work-In-Progress screen.

**Building Repair Lines**

The Repair Lines Button Bar provides options for adding parts, labor, and notes to your order.

---

### Repair Line Buttons

The buttons available are briefly described below.

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labor</td>
<td>Add labor hours and cost to the order.</td>
</tr>
<tr>
<td>Parts</td>
<td>Opens the Order item entry dialog box in which you can enter parts into your order.</td>
</tr>
<tr>
<td>Sublet</td>
<td>Add subcontracted parts and labor to the order.</td>
</tr>
<tr>
<td>Notes</td>
<td>Select a prepared note or add a unique note to order.</td>
</tr>
<tr>
<td>Canned Jobs</td>
<td>Opens the Canned Jobs dialog box where you can transfer canned jobs to the order.</td>
</tr>
<tr>
<td>Parts Kits</td>
<td>Opens the Part Kits dialog box from which you can transfer parts kits to the order.</td>
</tr>
<tr>
<td>Promotions</td>
<td>Opens the Promotions dialog box in which you Add, Edit, and Delete Packages and Discount Coupons or transfer them to an Order.</td>
</tr>
<tr>
<td>Symptoms</td>
<td>Opens the Symptoms Reported by Customer dialog box. Use this dialog box to record symptoms of poor vehicle performance reported by the customer.</td>
</tr>
</tbody>
</table>
The following sections detail procedures for adding repair lines to your order.

**Labor** Selecting the Labor repair line button opens the Order item entry - LABOR dialog box. You use this dialog box to add labor hours, and calculated cost to your orders.

To add Labor to your Order:

1. Select Labor from the repair line button bar.
   The Order item entry - LABOR dialog box displays.
2. Enter a description of the labor item in the Work Requested box.
3. Enter hours to be charged in the Charged Hrs. field.
   OR

```
<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>30/60/90 Maintenance</td>
<td>Opens the Scheduled Maintenance Service Intervals dialog box. This screen allows you to view service maintenance information and, if desired, transfer that information in the form of a canned job to the order.</td>
</tr>
<tr>
<td>Repair</td>
<td>Connects you to Mitchell ON DEMAND, if installed. Year/Make/Model information, if available, is automatically passed over.</td>
</tr>
<tr>
<td>Parts and Labor</td>
<td>Connects you to the Mitchell Parts and Labor Estimating Guide from which you can import parts and labor information (prices and times) into your MMS orders.</td>
</tr>
</tbody>
</table>
```
Enter a dollar amount in the Labor Total field.

Order Item Entry - Labor

The other field will automatically calculate at your shop's default labor rate as soon as you make another entry/selection. Click the Non-Standard Labor Rate check box if you want to de-link the labor hours and labor dollars, overriding them with non-calculated values.

4 Add an estimate of parts amount in the Est. Parts $ field if you want to add a rough estimate of parts cost to your order rather than actually adding parts and their cost.

NOTE: Normally you will want to add parts, and their associated cost, through the Add Parts and Inventory List dialog boxes described in the following section.

5 Select a Category.
6 Select an Account.
7 Change the Pay Hours and/or Actual Hours amount(s) in the Technician Detail box.
8 Select Tax, if necessary, to change from the default tax rate for this labor item.
9 Select Cust Type, if necessary, to change the labor rate for this line item from the Shop/Customer default.
10 Select Save to save your input and clear the panel so that you can enter an additional labor line item.
OR
Select Done to save your labor entry and return to the Order panel.
The new labor entry will appear in the repair lines.

**Parts**  Selecting the Parts repair line button opens the Order item entry- PARTS dialog box. There are two ways that you can approach the task of adding parts to your orders. You can:

- Type parts information directly into the Order item entry-PARTS dialog box. This has the effect of adding the parts information to your order without using information from your database and without saving any information to your database.

OR

- Select part(s) that have already been entered into your database from the Inventory List. You can enter the part directly to your order if you know the part number or select the part from the Inventory List if you don't know the part number.

To add Parts information to your order:

**NOTE:** Follow this procedure to enter parts information into your order for a part that is not in your Inventory List.

1. Select Parts from the repair line button bar.
   The Order item entry-PARTS dialog box displays.

2. Enter a part number (up to 20 characters) in the Part No. field.

3. Select a part type from the Part Type pull-down choice list. The Description field fills in automatically.
4. Complete the remaining fields and check boxes of the Order item entry-PARTS dialog box.

*Order Item Entry - Parts*

The fields and check boxes are described in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qty.</td>
<td>The number of units of the item that will be used on the order.</td>
</tr>
<tr>
<td>Unit Cost $</td>
<td>The cost of each individual item.</td>
</tr>
<tr>
<td>Unit Retail $</td>
<td>The cost of each unit multiplied by the shop markup.</td>
</tr>
<tr>
<td>Unit Sale $</td>
<td>The unit retail amount less customer discount—if applicable. This amount can also be manually overwritten, as necessary, if the Fixed Unit Sale Amount check box (see below) is selected.</td>
</tr>
<tr>
<td>Manufacturer</td>
<td>The manufacturer of the item selected from a pull-down choice list.</td>
</tr>
<tr>
<td>Vendor</td>
<td>The vendor of the item selected from a pull-down choice list.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Category</td>
<td>The parts category of the item selected from a pull-down choice list.</td>
</tr>
<tr>
<td>Account</td>
<td>The general ledger account name of the item selected from a pull-down choice list.</td>
</tr>
<tr>
<td>Technician</td>
<td>The technician who is to be associated with the sale of the item selected from a pull-down choice list.</td>
</tr>
<tr>
<td>Fixed Unit Sale Amount</td>
<td>Select this check box to manually overwrite the calculated sale amount. Once selected, enter the desired sale amount in the Unit Sale $ field.</td>
</tr>
<tr>
<td>No Commission</td>
<td>When selected, indicates that no commission is to be paid on the part sale.</td>
</tr>
<tr>
<td>Fixed Commission</td>
<td>Indicates that a fixed commission, rather than a commission calculated on the sale price, is to be paid on the sale of the part. When selected, the Commission $ field becomes enabled, allowing you to apply a commission dollar amount.</td>
</tr>
<tr>
<td>Part Confirmed On Invoice</td>
<td>Tags the part as having been used on the order.</td>
</tr>
<tr>
<td>Inventory Part</td>
<td>Select this field when you have entered part information that you want to use to create an inventory item record. A confirmation message asks, 'Do you want to create a new entry in Inventory?' Select Yes to create a new inventory item record with the information you have entered in the Order item entry - PARTS dialog box.</td>
</tr>
<tr>
<td>Accessory Part</td>
<td>Designates that the part is an accessory to be used in combination with another specified part.</td>
</tr>
<tr>
<td>Core</td>
<td>Designates that the part is a core (refund) item.</td>
</tr>
<tr>
<td>Display Off</td>
<td>Turns the Unit Cost $ field off for the Order item entry - Parts dialog box.</td>
</tr>
</tbody>
</table>

5 Select **Tax**, if necessary, to change from the default tax rate for this part.

6 Select **Cust Type**, if necessary, to change the labor rate for this line item from the Shop/Customer default.
7 Select **Save** to save your input and clear the panel so that you can add additional parts to your order.

**OR**

Select **Done** to save your parts input and return to the Order panel.

The new part entry appears in the repair lines.

**To transfer a part from the Inventory List to your order (when you know the part number):**

**NOTE:** Follow this procedure to transfer parts information into your order for an existing part that you have a number for.

1 Select **Parts** from the repair line button bar. The Order item entry- PARTS dialog box displays.

2 Type the part number in the Part No. field.

   The remaining fields of the dialog box fill in with information about the part.

3 Make changes to the part data, if necessary.

4 Select **Tax**, if necessary, to change from the default tax rate for this part.

5 Select **Cust Type**, if necessary, to change the discount rate for this line item from the Shop/Customer default.

6 Select **Save** to save your input and clear the panel so that you can add additional parts to your order.

   **OR**

   Select **Done** to save your parts input and return to the Order panel.

   The new part entry appears in the repair lines.

**To transfer a part from the Inventory List to your order (when you don't know the part number):**

1 Select **Parts** from the repair line button bar. The Order item entry- PARTS dialog box displays.
2 Choose the **Inventory** button in the lower left corner of the display (choose the Parts List button if working in Series I). The Inventory List (Parts List for Series I users) dialog box displays.

![Inventory List](image)

**Inventory List**

**NOTE:** This is the same screen as the Inventory List dialog box used to add, edit, and delete parts from the parts database as described in Chapter 11. The only difference is that a Transfer button now appears in the dialog box allowing you to transfer parts to your order.

3 Type, or select from a pull-down list, identifying information for the part (as known):
   - **Category**
   - **Part #**
   - **Description**

**NOTE:** You can use wildcards to conduct a search on partial information. For example, “AF%” in the Part Number field will find all part numbers starting with AF. As another example, “%OIL” will generate all part numbers with OIL in it.

4 Select the **Search** icon.

   The Inventory List displays the parts which match your request.
5 Highlight the part you want to add to the order.

6 Select Transfer. Or use the Tag button to select multiple parts, then choose Transfer. You are returned to the Order Item Entry-PARTS dialog box with the information from the selected part entered into the appropriate fields.

7 Edit any data fields, if necessary.

8 Select Tax, if necessary, to change from the default tax rate for this part.

9 Select Cust Type, if necessary, to change the labor rate for this line item from the Shop/Customer default.

10 Select Save to save your input and clear the panel so that you can add additional parts to your order.

OR

Select Done to save your parts input and return to the Order panel.

The new part entry appears in the repair lines. If you tagged multiple parts, the Parts dialog box displays until the transfer queue is empty.

Sublet Selecting the Sublet repair line button opens the Order item entry- SUBLET dialog box.

Use this dialog box to add a repair line for subcontracted operations.

To add a sublet operation:

1 Select Sublet from the repair line button bar.
The Order item entry-SUBLET dialog box displays.

2 Add a description of Work Requested. This is a required field.
3 Add a description of Work Performed, if necessary.
4 Select Vendor, Category, and Account from the pull-down list.
5 Click the No Commission check box to not include any commission on the sublet item.
6 Enter Cost $.
   The Total $ calculates automatically based upon the mark-up you entered during setup.

   **NOTE:** You can change the Total $ amount simply by overtyping it with any amount you choose.

7 Select Tax if you need to add tax to the Sublet item.
8 Select Save to save your input and clear the panel so that you can add additional sublet operations to your order.

   **OR**

Select Done to save your sublet input and return to the Order panel.
The new sublet entry appears in the repair lines.

**NOTE:** Selecting the Notes repair line button opens the Order item entry- NOTES dialog box. Use this dialog box to add notes, either standard, or customized, to your order.

To add a note to your repair lines:

1. Select **Notes** from the repair line button bar.
   The Order item entry- NOTES dialog box displays.

2. Select a standard note from the Standard Notes pull-down choice list. The text of the standard note appears in the large text entry box below.
   OR
   Type your own custom note in the large text entry box.

3. Click **Print on Order** if you want the description text to print on the order.
   **NOTE:** You can conduct a spell check on the text of the note by pressing [F2].

4. Select **Save** to save your input and clear the panel so that you can add additional notes to your repair lines.
   OR
Select Done to save your input and return to the Order panel.
The note appears in the repair lines.

**Estimating**  The Estimating icon opens the Mitchell Parts and Labor Estimating program. This feature allows subscribers to transfer labor times and component prices from this industry-standard information source directly into their orders.

If you are a subscriber to Mitchell Estimating, the Estimating Guide splitter window displays. (As shown in the following figure.)

![Parts and Labor Estimating Splitter Window](image)

The splitter window is where you begin your search for parts and labor information. Refer to Chapter 7, “Parts and Labor Interface” for instructions.

If you are not currently a subscriber, a dialog box provides ordering information. Call the displayed phone number for pricing and availability information on the Estimating module.

**Canned Jobs**  Selecting the Canned Jobs repair line button opens the Canned Job List. You use this dialog box to transfer an existing canned job to your order.
To transfer a canned job to your order:

1. Select **Canned Jobs** from the repair line button bar.
   The Canned Job List displays.

![Canned Job List](image)

2. Set up search criteria for locating the desired canned job.

**NOTE:** If you have selected a vehicle, year, make, and model information appears in the appropriate Search Criteria fields. You can use the Clear button, if desired, to Clear current vehicle information.

Aside from year, make, model, the following search fields are available:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category</td>
<td>The category, or component grouping of jobs types, within which you wish to conduct your search.</td>
</tr>
<tr>
<td>Job #</td>
<td>Enter as many characters of the job number as desired. The program will locate all canned jobs that begin with matching characters.</td>
</tr>
</tbody>
</table>
3 Select the **Search** icon.

The Canned Job List displays the canned jobs which match your request.

4 Highlight the canned job you wish to add to the order.

5 Select **Transfer**.

You are returned to the Order dialog box with the repair lines from the canned job added to your order.

**Part Kits** Selecting the Parts Kits repair line button opens the Part Kits List. You use this dialog box to transfer an existing parts kit to your order.

**To transfer a parts kit to your order:**

1 Select **Parts Kits** from the repair line button bar.

The Part Kits List displays.
2 Set up search criteria for locating the desired parts kit(s).

The following search fields are available:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category</td>
<td>The category, or component grouping of kit types, within which you wish to conduct your search.</td>
</tr>
<tr>
<td>Kit No.</td>
<td>Enter as many characters of the kit number as desired. The program locates all parts kits that begin with matching characters.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter as many characters of the kit description as desired. The program locates all parts kits that begin with matching characters.</td>
</tr>
</tbody>
</table>

![Search Icon]

**NOTE:** You can use the Clear button, if desired, to clear current entries in the Category, Kit No., and Description fields.

3 Select the **Search** icon.

The Part Kits list displays the parts kits which match your request.

**NOTE:** You are also able to add a new parts kit to your Parts Kits List to add to your order, if necessary. Refer to the procedure on adding parts kits in Chapter 4, “Utilities” for instructions.

4 Highlight the parts kit you wish to add to the order.

5 Select **Transfer**.

You are returned to the Order dialog box with the repair lines from the parts kit added to your order.

**Copying Repair Lines** You can copy line items from an Order, Canned Job or Parts Kit and then paste it into another Order, Canned Job or Parts Kit. Simply highlight the lines to be copied and press Ctrl + C (to copy the lines to your computer’s “clipboard”) and then click in the grid area of the Order, Canned Job or Parts Kit you want to paste to and press Ctrl + V to paste.

**Removing Order Items** You can remove any item from an order simply by clicking on it and pressing the Delete key. The repair line is removed and all totals are adjusted automatically.
Special Orders

Special Orders are provided to allow for an extra measure of tracking of orders to be completed in the future. The most common use for special orders are instances where you have the parts in stock to complete some, but not all, of the repairs on an order. What you can do is remove the order item(s) from the current order and use them to initiate a new special order.

For example, let's suppose that you have an order for an air conditioning recharge, cooling system flush and check, and replacement of a door handle. You have the parts in stock to do the first two jobs but the door handle needs to be ordered from the manufacturer. You could create a special order for the door handle as described in the procedure below.

To create a Special Order:

1. In the Order panel of the estimate or repair order, highlight the repair line(s) to be transferred.

**NOTE:** Normally, you wouldn't create a special order from an invoice. However, if you do create a special order from an invoice, you cannot transfer parts that have been confirmed on an invoice to a special order. You must first unconfirm the parts in Parts Detail before transferring.
2 Choose **Special Order** from the View menu.

**Special Order Selection**

A message box asks if you want to start a Special Order for the selected repair line(s).

**Start Special Order**

3 Choose **Yes**.

4 The parts are removed from the original order and used to create a new order. Customer and Vehicle information are automatically entered.

**Series II User’s only** - You probably will need to create a Pick List and then Purchase Order for the Special Order parts. Complete the steps below if you need to create a pick list.

5 Select the **Options** button.
The Order Options dialog box displays.

6 Select Pick List.

The Special Order parts appear in the Order Pick List dialog box. You can now convert the Pick List into a Purchase Order, if desired. Refer to Chapter 12, “Purchase Orders,” for details.

**Changing Order Status/Revision**

Once the repair lines for an order have been constructed, the heart of the order is complete—you now have created an itemized, totalled summary of the work to be performed. There are still a number of activities that must take place, however, before the order can be closed and completed.

As was discussed earlier in this chapter, the program offers you the flexibility to start out at any of the three stages of order status: estimate, repair order, or invoice. Most of the time, however, you will start out with an estimate—a request for a quotation of the time and cost required to perform a repair or maintenance activity.

Once the customer agrees to the service required, the estimate is converted to a repair order and printed for the customer to sign as acceptance of the terms of the service. Once the repair order has been signed, the next step is to go to work.

Invariably, as you begin to create orders you will need to revise your original estimates to reflect additional work. To accommodate this need, the program allows you to create up to nine sub-estimates that can be selectively attached to your order. The system even offers the versatility to perform “what-if” analysis of the cost of the order with various sub-estimate combinations.

Once work is complete, the order is converted to an invoice—a request for payment.

The following sections describe the procedures for converting an estimate to an order, and then converting the order to an invoice. Also described are the procedures for preparing sub-estimates and attaching them to your order.

**Converting an Estimate to a Repair Order** Once the estimate is complete and the customer has agreed on the work to be performed, the estimate is normally converted to a repair order and printed for the customer to sign.

To convert an Estimate to a Repair Order:

1 In the Order panel, select Options.
The Order Options dialog box appears.

![Order Options dialog box]

2 Select **Convert to Order**.

You are asked to confirm the conversion.

![Confirm Estimate to Order Conversion]

3 Select **Yes**.

You are returned to the Order Panel with the order status changed to repair order. This is indicated by the designation Repair Order #, rather than Estimate #, in the upper right-hand corner of the display.

4 Select the **Print** button, in the lower right-hand corner of your display, to print your repair order.

**Converting an Estimate or Repair Order to an Invoice** Once the repair has been completed, the estimate or repair order is normally converted to an invoice—a request for payment. It is not necessary for an estimate to be converted to a repair order before it is converted to an invoice.
To convert an Estimate or Repair Order to an Invoice:

1. In the Order panel, select **Options**.
   The Order Options dialog box appears.

2. Select **Convert to Invoice**.
   A dialog box asks that you confirm the conversion.

   ![Confirm Conversion to Invoice](image)

3. Select **Yes**.
   A dialog box asks if you wish to confirm all parts on your invoice.

   ![Confirm All Parts](image)

   Confirming all parts means that all parts on the order were used and should be included in the invoice total. Confirming parts also removes the parts from inventory.

4. Select **Yes** to confirm all parts.
   **OR**
   Select **No** to not confirm the parts on this invoice.
   You are returned to the Order Panel with the order status changed to invoice. This is indicated by the designation Invoice #, in the upper right-hand corner of the display.

5. Select the **Print** button, in the lower right-hand corner of your display, to print your invoice, if desired.

**Order Revisions** Once work has begun, you may discover the need for additional repair work. These repairs may be a part of the originally estimated repair that was undetectable at the time that the original order was created. Or you may discover the
need for repair or maintenance work that is totally unrelated to the original order. In any case, you need to estimate the additional time and cost of these repairs so that your customer can make an informed decision.

To accommodate this need, the program allows you to create up to nine sub-estimates that can be attached to your order. The program even offers the versatility to perform “what-if” analysis of the cost of the order with various sub-estimate combinations.

For example, while performing a repair, you may find that a vehicle needs five additional repairs ranging in importance from minor to critical. You can create five individual sub-estimates before you call the customer. While the customer is on the phone, you can quote him prices for all combinations of the five repairs. Once he has agreed to some, or all, of the repairs, simply transfer them to the order.

So revising an order is basically a two step process. First you create the sub-estimate(s). The second step is to selectively apply the revision(s) to the order.

**To create a Sub-Estimate:**

1. Select the Revision tab in the Order Screen.

   The Revision Panel displays.
2 Using the Repair Line Button Bar, add parts and labor to create repair lines just like you would for any regular order. (Refer to the descriptions of the dialog boxes accessed via the individual repair line buttons earlier in the chapter.)

3 Click your mouse pointer of the SubEst tab and repeat step #2. Repeat for as many revisions as you wish to complete. You may notice that the SubEst tabs change colors to reflect the status of a sub-estimate. Blue represents the current order, light blue represents an empty sub-estimate, and red represents a sub-estimate (not currently open) which has completed repair lines.

Once your sub-estimates are complete, Series affords the opportunity to perform “what-if” analysis to look at various repair/pricing scenarios and then to selectively apply them to the open order.

To attach Sub-Estimates to an open order:

1 After all sub-estimates are complete, select **Transfer Revision**.

The Revision Authorization dialog box displays.

2 Select the revision(s) you want to include in the order.
The **Include in this Revision** fields are where you select revisions for inclusion in your order.

![Include in This Revision](image)

<table>
<thead>
<tr>
<th>Include in this Revision</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sub Estimate 1</td>
<td>30.00</td>
</tr>
<tr>
<td>Sub Estimate 2</td>
<td>306.20</td>
</tr>
<tr>
<td>Sub Estimate 3</td>
<td>90.00</td>
</tr>
<tr>
<td>Sub Estimate 4</td>
<td>0.00</td>
</tr>
<tr>
<td>Sub Estimate 5</td>
<td>0.00</td>
</tr>
<tr>
<td>Sub Estimate 6</td>
<td>0.00</td>
</tr>
<tr>
<td>Sub Estimate 7</td>
<td>0.00</td>
</tr>
<tr>
<td>Sub Estimate 8</td>
<td>0.00</td>
</tr>
<tr>
<td>Sub Estimate 9</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Revision Amount</strong></td>
<td>30.00</td>
</tr>
<tr>
<td><strong>Original Estimate</strong></td>
<td>1430.00</td>
</tr>
<tr>
<td><strong>New Total Estimate</strong></td>
<td>1460.00</td>
</tr>
</tbody>
</table>

*Include in This Revision*

Select/deselect revisions by clicking your mouse pointer in the selection box next to the revision. The Revision Amount and the New Total Estimate Amount dynamically change with each new combination of revisions.
You may also find it helpful to move around the Revision Authorization box so that you can look at the detail of the individual sub-estimates. A Revision Authorization box staggered against the Sub-Estimate panel is displayed below.

![Staggered Revision Auth./SubEst Panels](image)

Once you have staggered the panels in this fashion, you are able to switch between sub-estimates by selecting the desired SubEst tab. This can be an especially helpful capability when talking on the phone with a customer and explaining the detail of each of the sub-estimates.

3. Complete/edit the remaining fields of the Revision Authorization panel. These fields are:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revision Date</td>
<td>Fills in automatically with the date that the revision is created. Change the date, if necessary, by selecting a new date from the pull-down choice list.</td>
</tr>
<tr>
<td>Initiated by</td>
<td>Choose Shop or Customer as desired.</td>
</tr>
</tbody>
</table>
Orders

The selected sub-estimate(s) are transferred to the order.

**Counter Sales**

The Counter Sales selection allows for quick and easy creation of the counter sale order. The program offers tremendous flexibility in handling counter sales. How much, or how little, information you enter is up to you and the policy of your shop.

**To generate a Counter Sale order:**

1. Select the **Counter** button from the button bar.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Written by</td>
<td>Choose a Service Writer from the pull-down choice list.</td>
</tr>
<tr>
<td>Authorized by</td>
<td>Defaults to the customer name. Change by overtyping as necessary.</td>
</tr>
<tr>
<td>Reason</td>
<td>Reason for the revision.</td>
</tr>
<tr>
<td>Phone (Called)</td>
<td>Phone number at which the customer was reached to approve the revision.</td>
</tr>
<tr>
<td>Time (Called)</td>
<td>Time that the revision was created/approved. This field defaults to the time that the Revision Authorization dialog box was opened.</td>
</tr>
<tr>
<td>Clear Sub Estimates after Transfer</td>
<td>Removes the sub-estimates after they have been transferred to the order.</td>
</tr>
</tbody>
</table>

**NOTE:** Only those sub-estimates that are transferred to the order are removed.

**NOTE:** If there are recommendations for the Vehicle an additional dialog box displays, allowing you to delete any recommendations addressed by the current revision.
The Counter panel displays.

Counter Sale Panels

2 (Optional) Select the Customer and/or Vehicle panel tabs to input customer/vehicle information. Use of these panels is described earlier in this chapter.

3 Add Parts, Notes, or Part Kits using the repair line buttons. Use of the dialog boxes accessed via these buttons is described earlier in this chapter.

4 Select the Print button to print a Counter Sale Invoice.
5  Once the customer has paid for the order, select Payment to apply payment. If you apply payment in full, you will be asked if you wish to post the invoice.

![Post Invoice?](image)

Posting the invoice closes the order out of Work in Progress and creates a history record of the transaction.

6  Select Yes to post the invoice.

The counter sale is now complete.

### Symptoms

Use the Symptoms dialog box to record symptoms of poor performance reported by the customer. You can also add labor to the order. The dialog box is opened by choosing the Symptoms icon in the Order screen.

![Symptoms Reported by Customer](image)
You can choose to run the program in a symptom-driven fashion by selecting **Show Symptoms on New Orders** in the Screen View dialog box (page 88). Doing this configures the program so that the Symptoms reported by Customer dialog box displays every time you start a new order.

The Symptoms reported by Customer dialog box contains the following fields/options:

<table>
<thead>
<tr>
<th>Field/option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Description</td>
<td>Standard (short) name for the symptom. You can type a symptom in or select one from the grid, in which case the remaining fields of the dialog box fill in automatically. Standard Symptoms are maintained in Shop Data Setup.</td>
</tr>
<tr>
<td>Symptom Description</td>
<td>Extended description of the symptom.</td>
</tr>
<tr>
<td>Work Requested</td>
<td>Work recommended by shop to correct the symptom.</td>
</tr>
<tr>
<td>Charged Hours</td>
<td>Labor hours to be charged for the diagnosis/repair. These hours will be added to the order.</td>
</tr>
<tr>
<td>Labor Total $</td>
<td>Labor $ as calculated by Charged Hours extended at your shop rate. This dollar amount will be added to the order.</td>
</tr>
<tr>
<td>Non-Standard Labor Rate</td>
<td>Click this box to disable the automatic calculation of hours/dollars. You can then change hours without changing dollars and vice-versa.</td>
</tr>
<tr>
<td>Save as Standard Symptom</td>
<td>Check this box to save the current symptom as a Standard Symptom. You are then able to apply the symptom to subsequent orders.</td>
</tr>
<tr>
<td>Come Back/Invoice Number</td>
<td>Click Come Back to enter an Invoice number from original invoice in the event of a customer come back. (This field is used for reference purposes only.)</td>
</tr>
<tr>
<td>Est. Parts $</td>
<td>Estimated Parts cost. (Note: This cost is not added to the order.)</td>
</tr>
<tr>
<td>Category/Account</td>
<td>The Category and Account for the Labor $ amount.</td>
</tr>
</tbody>
</table>

Click the **TSB** button to open a dialog box that allows you to look up TSBs in Series Repair, if installed. This dialog box is described in the following section.
**TSB**

The TSB link within the Symptoms Reported by Customer dialog box opens the Symptoms and TSBs dialog box. You can use this dialog box to perform a search of TSBs based on customer-reported symptoms and then link out to Series-Repair (if installed) directly to the desired TSB.

**To Search TSBs in Series:**

1. In the Symptoms Reported by Customer dialog box, click the TSB button. The Symptoms and TSBs dialog box displays.

2. Pick a **Symptom** in the Symptoms grid. Available TSBs for the selected vehicle display in the Category and System grid.

3. Pick a **Category/System**. Series-Repair is launched (if not already running) and opens to the selected TSB.
Maintenance Service Interval (30/60/90) Database

Choosing 30/60/90 Interval from the Order Options dialog box opens the Scheduled Maintenance Service Intervals screen. This screen allows you to view service maintenance information and, if desired, transfer that information in the form of a canned job to the order.

To add Maintenance Service Interval information:

1. In the Order screen, click Options.
   The Order Options dialog box displays.

2. Choose 30/60/90 Interval in the Order Options dialog box.
The Maintenance Service Interval screen displays.

Option buttons below the vehicle information allow you to toggle between Severe and Regular Interval service information. The next scheduled maintenance interval (mileage) is highlighted in the first column of the display and scheduled replacement and inspection items are listed in the Replace, Inspect, and Notes fields. You can pick a different mileage interval, if desired, to view service information for a different maintenance interval.

Choose the Print button to print the information or the Transfer button to transfer a canned job for the selected scheduled maintenance to the order.

Summary

In this chapter, you learned how to create Orders. You learned how to enter Customer, Vehicle, and Order information and how to create revisions to the order. You also learned to create Quick Estimates and Counter Sales.

The following chapter describes Series Parts and Labor Estimating and its interface with the program.
Chapter 7
Parts and Labor Interface

Overview

The interface with Mitchell’s Parts and Labor Estimating Guide is a value-added software enhancement available to all Manager users who have also purchased Mitchell1 OnDemand Estimator.

Estimator makes it possible for you to import parts and labor estimating information from the Parts and Labor CD into your Manager orders. Using Parts and Labor's Parts Locator feature, you can process a search request of dealerships for selected parts.

NOTE: The description of the Parts and Labor interface supplied in this chapter is accurate as of the time of printing this User's Guide. However, Estimator is a continually improving software program. Because of timing considerations, there may be features in the estimating program that differ from those described in this chapter. Refer to your estimating software User's Guide for the most current instructions on working with the system.

Before You Begin

To access parts and labor information from Estimator, you must first have the program installed on your computer and have the current version of the Estimating CD inserted in your CD-ROM drive. To use Parts Locator, you must have a properly configured modem. Refer to your estimating software User's Guide for details.

Using Parts and Labor

Before accessing estimating information, you must be in the Order panel of an order in which you have already specified the year, make, and model of the vehicle.
To add parts and labor items from Parts and Labor to your order:

1. Select the Parts & Labor button in an order in which you have specified a vehicle. The Parts & Labor viewer displays.
2. Choose parts and labor items to be added to your order.

3. Click Transfer.
If you have selected parts in Parts and Labor (not just labor items), the Enter Cost of Parts dialog box displays.

![Enter Cost of Parts](image)

**Enter Cost of Parts**

This dialog box allows you to enter a cost for the parts. This cost is used by the program in profitability calculations.

4. Enter a cost for each of the parts and click **Done**.

Parts and Labor is closed and the Parts/Labor items are added to the repair lines of your order.

**Vehicle not Defined**

If you select the Parts and Labor button before specifying vehicle information, the following error message appears:

![Undefined Vehicle Message](image)

**Undefined Vehicle Message**

You will also get this message, or a similar message, if the vehicle you've selected is not in the Parts and Labor database. If this happens, go back to the Vehicle screen and reselect the vehicle.
Summary

In this chapter, you learned how to copy parts and labor information from Parts and Labor into your Manager orders. Because of timing considerations, different versions of the Estimator product may be slightly different than described in this chapter. Refer to the user guide that came with your estimating software for detailed instructions.
Chapter 8
Work In Progress

Overview

This chapter describes the options available in the Work In Progress (W.I.P.) screen and how its view can be customized for individual users. Also described, in detail, are the options for making payments, scheduling, and viewing scheduled work in the program.

The Work in Progress Screen

The Work in Progress screen is where you access open orders. In addition to being able to select any open order to work in, you can also easily access the other areas of the system. As such, this is likely the screen you will most often be working in when you are not working with an open order.

The rows of the Work in Progress screen list your shop's open orders. You select an order by highlighting it with your mouse pointer, or by moving the highlight bar up and down with your arrow keys.

To access the Work in Progress screen:

- Select the In Progress button from the button bar.

The rows of the Work in Progress screen list your shop's open orders. You select an order by highlighting it with your mouse pointer, or by moving the highlight bar up and down with your arrow keys.
The Work in Progress screen displays.

Work in Progress Screen

Options
The buttons along the bottom of the Work in Progress screen provide a number of options for working with open orders. These options are described briefly below, and in detail in the following sections of this chapter.

Work in Progress Button Options

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purge Ests</td>
<td>Opens a dialog box in which you can purge all estimates older than a specified date.</td>
</tr>
</tbody>
</table>
Colors
To ease identification, orders displayed in the Work in Progress Screen, by default, are color coded as follows:

<table>
<thead>
<tr>
<th>Color</th>
<th>Order Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gray</td>
<td>Estimate, Counter Sale</td>
</tr>
<tr>
<td>Black</td>
<td>Repair Order, Special Order</td>
</tr>
<tr>
<td>Blue</td>
<td>Invoice</td>
</tr>
</tbody>
</table>

You can change these settings in the Grid Line Settings dialog box, selected from the Special Maintenance submenu. Refer to Chapter 3, “Shop Setup” for details.

Red Flagging In addition to color-coding types of orders, the program also highlights entries in some data fields in red, indicating a condition that may require attention. This type of exception highlighting is commonly known as “red flagging.” The system automatically red flags orders whose promised date is prior to the current date. For example, if an order was promised to be completed by February 6 and the current date is February 7, the date in the promised field appears in red.
You can also red flag certain vehicle location and status designations. Refer to Chapter 3, “Shop Setup” for details.

**Opening an Order**

To open an existing order, you go to the W.I.P. screen.

**To open an order from the Work in Progress screen:**

1. Click your mouse pointer in any cell on the row of the order you wish to access in the order grid.
   - The entire row is highlighted.

2. Select **Order**.
   - OR
   - Double-click your left mouse button on the order.
   - You are taken to the Order panel for the selected order.

**Removing an Order**

Normally, orders are removed from Work in Progress when the order is completed and the invoice is posted. However, estimates do not always turn into actual jobs, and repair orders occasionally get cancelled without any work being performed. These orders will remain in the Work In Progress Grid until you delete them. As a general housekeeping function, you will want to regularly remove orders that are no longer needed.

To remove an order you must first open it, then remove it by selecting Remove from the Edit menu.

**NOTE:** Exercise caution in removing orders from Work in Progress. Once an order is removed, it cannot be retrieved.

**To remove an Order:**

1. Click your mouse pointer in any cell on the row of the order you wish to access in the order grid.
2 Select Order.

OR

Double-click your left mouse button.
The selected order opens.

3 Select Remove Order from the Edit menu.
A dialog box asks that you confirm your request.

4 Select Yes.
If the order is an estimate, or quick estimate, it is removed and you are returned to the Work in Progress grid. If the order is a repair order or invoice, an additional dialog box prompts you to enter a reason.

5 Enter a reason and choose OK to remove the order.
Purging Estimates
Selecting Purge Ests. in the Work in Progress screen initiates a procedure to delete any estimates created before a specified number of days. Use this procedure to clean up old estimates in your Work in Progress screen.

Purge Estimates
Text within the dialog box details the procedure. Just specify the number of days, click the Yes option button and click OK.

NOTE: This feature only works with estimates created with Manager version 4.4 and later. Estimates created earlier will need to be manually removed via the Removing an Order procedure on the previous page.

Schedule
Scheduling is done in the Schedule screen, where you can work with scheduled orders displayed by day, or by month, and in the Schedule Work dialog box, where you can edit the system-assigned order completion time and date.

When an order is created, the system automatically schedules it for completion that day. You can change the scheduled date and time as desired. You can also add non-order generated items to the schedule.

Schedule Screen
The Schedule screen is comprised of two panels: one showing scheduled orders by day, and the other displaying scheduled orders by month. The Schedule screen is opened by selecting the Schedule icon from the toolbar.
To open the Schedule screen:

- Select Schedule from the toolbar.

The Schedule screen opens.

Schedule (Month View)

**NOTE:** The Schedule screen automatically opens to the date and view that it was in when last used.

**Month View** The Month view of the schedule provides summary information (number and total hours) on the jobs scheduled for each day. You can use this panel to provide an assessment of your shop’s overall work flow for the month.

You can use the forwards and backwards buttons to change the month and year of your schedule view.

Forwards and Backwards Buttons
You can switch to the Schedule Day view by selecting the Day thumb-tab or by double-clicking on the desired day with your mouse pointer.

**To switch to the Schedule Day view:**

- With the desired date highlighted, select the Day thumb-tab at the top of your display.

OR

- Double-click your mouse pointer on the desired date.

The Schedule screen switches into the Schedule Day View.

**Schedule (Day View)**

**Schedule Day View** The Day view of the Schedule screen provides details on the jobs for each day.

You can page forward and backwards between days, and months, using the forwards and backwards buttons.

**Forwards and Backwards Buttons**
The schedule grid contains the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time</td>
<td>The time the order was promised for completion.</td>
</tr>
<tr>
<td>Est. Hrs.</td>
<td>An estimate of the number of hours required to complete the repair.</td>
</tr>
<tr>
<td>Customer</td>
<td>The Customer, or Company, requesting the repair(s).</td>
</tr>
<tr>
<td>Category</td>
<td>The category of the repair work.</td>
</tr>
<tr>
<td>Type + Number</td>
<td>The order type or status. Possible Types would include: Scheduled (non-order schedule item), Estimate, Order, Invoice, Posted (Invoice).</td>
</tr>
<tr>
<td>Notes</td>
<td>Room for the free-form entry of notes into the record.</td>
</tr>
</tbody>
</table>

The Day view of the Schedule screen also contains a number of button options.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimate</td>
<td>Opens a selected order to the Order panel.</td>
</tr>
<tr>
<td>Add</td>
<td>Opens the Schedule Work dialog box, allowing for the addition of a scheduled item.</td>
</tr>
<tr>
<td>Edit</td>
<td>Opens the Schedule Work dialog box with the data from the selected item displayed. You are able to freely edit any of the fields in the dialog box.</td>
</tr>
<tr>
<td>Delete</td>
<td>Allows for removal of a schedule item that wasn't created by an actual order (non-order item).</td>
</tr>
<tr>
<td>Exit</td>
<td>Closes the Schedule screen.</td>
</tr>
</tbody>
</table>

To add an item to the Schedule:

1. In the Schedule Day panel, select Add.
The Schedule Work dialog box appears with empty data fields.

**NOTE:** Use the Add command only to add a non-order item to the schedule. For example, to reserve a block of time for a major, but unconfirmed, repair. When the actual order is generated, it should be scheduled into the reserved time block and the original scheduled item should be deleted.

2. Complete the data fields (described in the following section, “Schedule Work Dialog Box”).

3. Select **OK** to save your entries and exit.

**To edit an item in the Schedule:**

1. In the Schedule Day panel, with the desired schedule item selected, choose **Edit**.
   The Schedule Work dialog box appears with data from the selected item displayed in the appropriate fields.

2. Edit the data fields (described in the following section).

3. Select **OK** to save your entries and exit.

**Schedule Work Dialog Box**

As discussed earlier, all orders are automatically scheduled at their time of creation. The Schedule Work dialog box allows you to reschedule the order as necessary. This dialog box can be accessed via the Schedule button in the Work in Progress screen, by using the Add or Edit buttons from within the Schedule dialog box, or from within the Order Options dialog box.

**To reschedule an order:**

1. Using your mouse or arrow keys, highlight the row of the order you wish to access in the Work in Progress screen.
   The entire row is highlighted.

2. Select **Schedule**.
   **OR**
   From within the Schedule dialog box, select **Add** to add a new order, or select a current order and select **Edit**.
   **OR**
   From within the Order panel, select **Options** and then **Schedule Work**.
The Schedule Work dialog box appears.

![Schedule Work dialog box]

3 Edit the fields of the dialog box as desired. The Schedule Work dialog box contains the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Customer's name.</td>
</tr>
<tr>
<td>Scheduled</td>
<td>The time and date the work is scheduled to be completed. When the order is created, the program automatically enters the time you created the order, and the current date. The Scheduled time and date can be overwritten as necessary.</td>
</tr>
<tr>
<td>Promised</td>
<td>The time and date the completed order has been promised to the customer. When the order is created, the program automatically enters the default time that you entered during setup (for example, 5:00 pm), and the current date. The Promised time and/or date can be overwritten.</td>
</tr>
<tr>
<td>Category</td>
<td>The Category of the repair work.</td>
</tr>
</tbody>
</table>

Note: This field is for schedule reference only. It does not overwrite the Categories assigned to parts and/or labor operations.
Select OK to save your edits and return to Work In Progress.

**Payment**

The Payment selection from the Work In Progress screen or the Order Options dialog box brings up the Apply Payments dialog box. You can use this dialog box to make a full or partial payment on an order or to split payments between two payment types.

**Applying Payment in Full**

Most of the time, when you need to make a payment, it will be to pay off the entire balance of the invoice.

**To make payment in full on a repair order or invoice:**

1. With the order highlighted in the Work in Progress grid, select Payment.

**NOTE:** You can also open the Apply Payments dialog box from within the Order Options dialog box.
The Apply Payments dialog box appears.

![Apply Payments dialog box]

2 Complete the fields of the dialog box:

<table>
<thead>
<tr>
<th>Field/Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Current date fills in automatically—change if necessary.</td>
</tr>
<tr>
<td>Payment Type</td>
<td>Choose a payment type—cash, check, or charge (American Express, Visa, etc.).</td>
</tr>
<tr>
<td>Payment Amount</td>
<td>The total due fills in automatically—overtype if necessary.</td>
</tr>
<tr>
<td>Check/ Reference #</td>
<td>Fill in check number, if applicable.</td>
</tr>
<tr>
<td>Authorization #</td>
<td>The credit card authorization number—enter if applicable.</td>
</tr>
<tr>
<td>History</td>
<td>Opens the Payment History dialog box, in which you can view a history of payments for the current invoice or for the current customer.</td>
</tr>
<tr>
<td>Apply Credit</td>
<td>Allows you to apply a credit, if available, to the current invoice.</td>
</tr>
</tbody>
</table>
3 Select **Done**.

If you have paid less than the full invoice amount, a message box asks if you want to post additional payments.

4 Select **Yes** to post additional payments.

Once the invoice has been paid in full, a dialog box asks if you want to post the invoice. Posting an invoice closes the invoice record from Work In Progress into Vehicle History.

**NOTE:** Posting an Invoice should not be confused with posting payment. When you post a payment, you are merely applying payment towards the unpaid balance on the order. When you post an invoice, you are closing the order. The record is closed out of Work In Progress and a history record is created.

5 Select **Yes** to Post the Invoice.
Applying a Partial Payment
Occasionally, you may need to make a partial payment on an order, as in the case of a customer leaving a deposit.

To make a partial payment:
1 With the order highlighted in the Work in Progress grid, select Payment. The Apply Payments dialog box appears.

**NOTE:** You can also open the Apply Payments dialog box from within the Order Options dialog box.

2 Overtype the total in the Payment Amount field with the amount you wish to pay.
3 Complete the remaining fields of the dialog box.
4 Select Pay.

A message box asks if you want to post additional payments.

5 Choose No.

The new invoice balance will be reflected the next time you open the Apply Payments dialog box.

Splitting Payment Types
Occasionally, you may need to split a payment between two payment types. An example of this situation might be an instance where a customer desires to pay part of an invoice in cash and part of it by credit card. The following procedure details the steps that would be undertaken to accomplish this task.

To split payment of an order between payment types:
1 With the order highlighted in the Work in Progress grid, select Payment.
The Apply Payments dialog box appears.

**NOTE:** You can also open the Apply Payments dialog box from within the Order Options dialog box.

2. Select **Payment Type**.
3. Overtype the total in the Payment Amount field with the amount to be applied by the first payment type.
4. Select **Pay**.
   The payment is posted and the outstanding balance reduced. A message box asks if you wish to post additional payments.

   ![Post Additional Payments?](image)

5. Select **Yes**.
   The Apply Payments dialog box displays again.
6. Repeat Steps 2-5 as many times as necessary to post additional payments.
7. Select **No** in the Post additional payments now message box when all payments have been posted.
   OR
   Select **Done** in the Apply Payments dialog box to post payment of the remaining balance in full. An additional message box asks if you wish to post the remaining balance of the invoice.
8. Select **Yes** to post the remaining balance for the invoice.
   A message asks if you want to post the invoice.
9. Select **Yes** to post the invoice.
   OR
   Choose **No** if leaving the remaining balance unpaid.
Posting an Unpaid Invoice

In addition to posting a paid invoice, you are also able to post an unpaid invoice by charging the balance to a house credit account. Doing so creates an account receivable for which the customer can later be billed.

To post an unpaid invoice:

1. With the order highlighted in the Work in Progress grid, select Post.

   The Posting Date dialog box displays the current date in the Post Order With This Date field.

   ![Posting Date](image)

   **Posting Date**

2. Enter or select a new date if desired.

   **NOTE:** The capability to change the posting date is provided primarily for instances where you unpost an invoice and then re-post the invoice on a later date. Normally you will not change this date.

   A dialog box asks if you wish to charge the remaining balance to the customer.

   ![Charge Balance to Customer](image)

   **Charge Balance to Customer?**

3. Select Yes to post the invoice.

   The invoice record is closed from Work in Progress into Vehicle History. An account payable is created for which the customer can later be billed. Refer to “Batch Payments” in Chapter 9, “History” for details on making payments on posted orders.
Work In Progress Detail

The Work in Progress Detail dialog box provides summarized information about a single, selected order. The information fields are the same as in the Work in Progress screen. You are able to update Vehicle Status and Location, Hat No., and Completion Time/Date in this dialog box.

To open the Work in Progress Detail dialog box:
• With the desired order highlighted in the Work in Progress grid, select Detail. OR
• Right-click your mouse pointer on any WIP item.

The Work in Progress Detail dialog box displays.

The Work In Progress Detail dialog box contains administrative information about the customer and his vehicle, the service writer, the scheduled and promised time, and the time that the vehicle arrived in the shop. In addition, the Work In Progress Detail dialog box contains the following fields that can be edited.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Choose from available status designations (for example Waiting For Parts, or Completed) or type in a status designation.</td>
</tr>
<tr>
<td>Location</td>
<td>Choose from available shop locations (for example, Rack #1, or Paint Shop) or enter a location designation.</td>
</tr>
</tbody>
</table>
Customizing your Screen View

The program offers the ability to customize the look of your screens to fit the individual needs of system users. You are able to specify which records (Estimates/Repair Orders/Invoices/Counter Sales) are displayed in the Work In Progress screen as well as choose a sort order based on a number of criteria. You can look up a record in W.I.P. based upon a specified word or character string. You can also change the size and placement of the columns in the W.I.P. screen and certain other order entry screens.

Status Display Preferences

Selecting the Display button in Work In Progress opens the Status Display Preferences dialog box. These settings are user-specific, that is, they remain in effect for the currently selected user until a different user logs on to the system or different preferences are specified.

You can use this dialog box to choose a Sort Order for the Records viewed in the Work In Progress grid and to choose which types of records to display.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hat No.</td>
<td>The Hat, or Tag number, or other identifier.</td>
</tr>
<tr>
<td>Reference #</td>
<td>Identifying number that you add to the order in the Order screen or Work In Progress Detail dialog box. You can use this field for any purpose you like (Cab #, for example).</td>
</tr>
<tr>
<td>Phone Numbers</td>
<td>Customer's home and office phone numbers (if available).</td>
</tr>
<tr>
<td>Time/Date In</td>
<td>Enter the time and date that the car entered the shop.</td>
</tr>
<tr>
<td>Completion Time/Date</td>
<td>Enter the time and date that the work is expected to be completed.</td>
</tr>
<tr>
<td>Schedule Time/Date</td>
<td>The time and date that the work is scheduled to be completed.</td>
</tr>
<tr>
<td>Promised Time/Date</td>
<td>The time and date that the work is promised to be completed.</td>
</tr>
<tr>
<td>Repair Order Printed</td>
<td>Box is checked if Repair Order has been printed.</td>
</tr>
<tr>
<td>Invoice Printed</td>
<td>Box is checked if Invoice has been printed.</td>
</tr>
</tbody>
</table>
To change your Work In Progress screen display preferences:

1. Select the Display button in Work In Progress. The Status Display Preferences dialog box displays.

![Status Display Preferences dialog box]

**Status Display Preferences**

2. Choose a sort order in the Sort Order box, if desired.

![Sort Order]

**Sort Order**

**NOTE:** The default sort order is by Order # (oldest order first, based upon creation date).

The Work In Progress screen sorts in ascending alphanumerical sequence (for example 1, 2, 3 ..., or a, b, c ...).

3. Click the Display Phone setting, if desired to display customer phone numbers in the Work In Progress and Order screens (800x600 resolution, or greater, required).
4 Choose which types of records (Estimates/Repair Orders/Invoices/Counter Sales) you wish to display, if desired, in the Show Record Types dialog box.

OR

Select All to select all record types.

NOTE: The default is to display all record types.

5 Select OK to save your Work In Progress screen display preferences.

The Work In Progress screen reflects your saved preferences. These settings are valid every time the specified user uses the system. Refer to the “User List” section later in the chapter for details.

Word Search  The Status Display Preferences box also allows you to search for a record in the Work In Progress screen based on a word or other character string. You are able to conduct a word search on any entry in the following data fields:

- Customer Name
- License Number
- Status
- Location
- Year/Make/Model

You can search for a part of a word (for instance, a search on “JO” would result in selection of “JONES”). You can also use the “%” character as a “wild card,” substituting it for an unknown character or group of characters. For example, “SM%TH,” or even, “S%H” will yield “SMITH.” Just remember that the more characters that you substitute for, the higher your probability of unwanted matches to your search.
To conduct a word search:

1 In the Status Display Preferences dialog box, in the Search Word text entry box, type the word or character string on which you wish to conduct your search.

![Search Word](image)

2 Select OK.
The Work In Progress grid displays the records which match your search criteria.

**Sizing/ Rearranging Columns**
The Work In Progress and certain other screens allow you to customize the width and positioning of the displayed grids. These settings will remain in effect for the currently selected User (refer to the “User List” section later in the chapter) until different column width and position choices are made.

**To resize a column's width:**

1 Move your mouse pointer directly over the right edge of the column heading of the column you wish to resize. The mouse pointer will change its shape as shown to the left.

2 Holding down your left mouse button, drag the column border to increase or decrease the column width, as necessary. When the column width is the desired size, release the mouse button.

**To rearrange a column's location in the grid:**

1 First, select the column you want to move by clicking on the column heading to highlight it.

2 Hold down the Shift key with your mouse pointer directly over the heading of the column that you wish to move, press, and hold down your left mouse button.

   Your mouse pointer changes to the pointer shape shown to the left.

3 Move the mouse pointer arrow to the grid location to which you wish to move the column.

4 Release the mouse button.
The column is moved to its new location.

**User List**

As described above, the program offers the ability to customize the look of your screens to fit the individual needs of system users. The User List offers users the ability to save these custom view settings.

**To open the User List:**
- Select the User List Button.

**OR**

- Select User List from the View menu.

The User Selection List dialog box displays the users from your shop.

The User List is where you select the current user of the system. You should always select a user, normally yourself, before beginning to work in the program. That way, any screen view settings that you change during the course of your session are saved for you the next time you use the system.

The following screen view settings are controlled by the user:

- **Display for Work-In-Progress Grid** - The sizing and placement of columns in the Work-In-Progress grid.

- **Display Sort/Filter for Work-In-Progress Grid** - The types of orders (Estimates, Repair Orders, Counter Sales, etc.) that are displayed, and their sort order, in the Work In Progress grid. These settings are selected in the Status Display Preferences dialog box described earlier in the chapter.
- **Display for Order Grid** - The sizing and placement of columns in the Order grids (Estimate, Repair Order, Special Order, etc.).

- **Last Four Orders List** - The File menu lists the last four orders that the user worked on for quick retrieval.

- **Schedule Position and Size** - The program “remembers” the screen position and size of the schedule when the selected user last worked with it.

- **Inventory List Sort Order** - The sort order (by Part Number or by Description) that the Inventory List is initially sorted by.

- **History Screen Display** - Determines whether the history screen will initially display by Customer or by Vehicle.

**To select the current user:**

1. Click your mouse pointer on the desired name to highlight.
2. Select OK.

The User Selection List closes and your screen view changes to reflect the attributes of the selected user. Any changes made to screen view settings (as described in the previous sections) will be saved as part of the selected user’s profile.

You are also able to add and delete users in the User Selection List and to change the screen view back to default values.

**To add a user:**

1. In the User Selection List, select Add.

   You are prompted to enter a user name.

2. Enter the user name.
3. Select OK.

   The new user is added to the User Selection List.

**To delete a user:**

1. In the User Selection List, with the user you wish to delete selected, choose Delete.
You are asked to confirm your deletion.

2 Select Yes.
The user is removed from the User Selection List.

To restore a user's view to default values:

1 In the User Selection List, with the user whose view you wish to restore to default values selected, choose Default. Restoring a user's view returns the screen view settings to the original state.
You are asked to confirm your request.

2 Select Yes.
Your screen view settings are returned to their original state.

Summary

This chapter described the options available in the Work In Progress screen and how its view can be customized for individual users. Also described, in detail, were the options available for scheduling, and looking at scheduled orders.
Chapter 9
History

Overview

Once an order is closed by posting the invoice, a history record is created. This record contains all of the pertinent information about the service that was performed as well as providing a history of all payments. If the invoice has not been paid, an account receivable is created. The customer balance is tracked in history until it has been satisfied. The batch payment facility makes applying payment to a group of posted invoices a breeze.

This chapter details the options available for working with historical records and for making batch payments.

Find History Record

The Find History Record allows you to quickly locate a history record from anywhere in the system. Using the Find History Record command, you can quickly search the database for the history record for a given invoice based upon the invoice number, or alternatively, you can search the database for all history records for a selected vehicle.

History Search (by Invoice number)

The Find History Record selection allows you to quickly find a history record based upon an invoice number. This capability is particularly useful in locating posted invoices in order to make payments.

To find a history record based on an invoice number:

1. Select Find History Record from the Utilities menu.
2. OR
   Press [F4].
The Find History Record dialog box appears. Depending upon the previous selection, the Invoice or Vehicle Panel displays.

Find History Record (Invoice Panel)

2 Type the invoice number in the Invoice No. field and press **Enter**.

**NOTE:** You do not need to enter the 0's, if any, at the front of the invoice number.

OR

Highlight the invoice record for which you wish to view the history record and select **View Record**. Use your scroll bar to view additional invoice records, if necessary.
The History Screen displays the historical record(s) for the vehicle with the selected invoice number highlighted.

**History Screen**

**History Search (by Vehicle)**

The Find History Record selection allows you to quickly find a history record for a specified vehicle type.

The program offers you the ability to search for history records based upon vehicle information (for example, 1993 Honda Accord LX) and/or for history records containing certain types of repairs (for example, Transmission Rebuild). This powerful capability is especially useful when used in conjunction with the copy and paste capability to create repair lines for a new order from the repair lines of a history order. This capability is described later in the chapter.

**To find a History Record based upon Vehicle Information:**

1. Select **Find History Record** from the Utilities menu.
2. OR

   Press **F4**.

   The Find History Record dialog box appears.

2. Select the **Vehicle** tab if not already selected.
The Vehicle panel of the Find History Record dialog box displays.

3 Select, as known, Vehicle **Year**, **Make**, and **Model**.

**AND/OR**

Enter the text you wish to search for in the Word Search field (Battery, Oil Change, etc.). You can search on a part of a word (for instance, a search on “BAT” can result in a selection of “BATTERY.” You can also use the “%” character as a “wild card,” substituting it for an unknown character or group of characters. For example, “BATT%RY,” or even, “B%Y” will yield “BATTERY.” Just remember that the more characters that you substitute for, the higher your probability of unwanted matches to your search request.

4 Select **Search**. A dialog box informs you of the progress of your search.
After a moments processing, the grid area displays any match(es) to your search request.

5. Highlight the desired History Record and select **View Record**.

The History screen displays the history records for the selected Customer or Vehicle.

---

**History Screen**

This screen allows you to access all of the History records (closed Invoices) for a given vehicle or customer. The grid displays all of the history records for the customer or vehicle depending upon your display selection.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display for: (option button)</td>
<td>Choose between displaying all history records for the current customer, or for just a single vehicle.</td>
</tr>
<tr>
<td>Un-Post Invoice</td>
<td>Allows you to re-open an invoice into Work-In-Progress.</td>
</tr>
</tbody>
</table>
Chapter 9

Un-Post Invoice

You must unpost an invoice if there are any changes that need to be made to the posted invoice other than payments. The Un-Post Invoice command closes the history record and re-opens the invoice into Work-In-Progress. Any unpaid balance is returned to the invoice and removed from Accounts Receivable.

To Un-Post an Invoice:

1. With the desired invoice highlighted, select **Un-Post Invoice**.
   A dialog box asks that you confirm your request.

   ![Un-post Invoice dialog box]

2. Choose **Yes** to un-post the invoice.

   **Search** The Search Criteria field allows you to enter a text string on which the program will search the Part Number and Description fields of the history records displayed in the History Panel. Once you have conducted your search, only those history record(s) which match your request are displayed in the History Panel.

   **To initiate a History Panel word search:**
   1. In the History Panel, select **Search**.

   **Option**

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
</tr>
<tr>
<td>Detail</td>
</tr>
</tbody>
</table>

   **Un-Post Invoice**

   ![Un-post Invoice dialog box]

   **Un-post Invoice?**
The Enter Information dialog box displays.

Enter Information

2 Enter the text you wish to search for (Battery, Oil Change, etc.). You can search on a part of a word (for instance, a search on “BAT” can result in a selection of “BATTERY.” You can also use the “%” character as a “wild card,” substituting it for an unknown character or group of characters. For example, “BATT%RY,” or even, “B%R” will yield “BATTERY.” Just remember that the more characters that you substitute for, the higher your probability of unwanted matches to your search request.

3 Select OK.

4 You are returned to the History Panel, with only those history records matching your request displayed.

History Detail Dialog Box The History Detail dialog box allows you to view comprehensive information about the invoice including parts and labor detail, along with payment history.

To open the History Detail dialog box:
* With the desired invoice highlighted, select Detail.
The History Detail dialog box displays.

### History Detail

Aside from allowing you to view detailed invoice information, the History Detail dialog box provides the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment</td>
<td>Allows you to view a history of payments, apply a payment to an unpaid balance, and to post payment(s).</td>
</tr>
<tr>
<td>Detail</td>
<td>Allows you to view detail about the selected repair line.</td>
</tr>
<tr>
<td>Print</td>
<td>Sends a copy of the invoice to the printer.</td>
</tr>
<tr>
<td>Fax</td>
<td>Allows you to fax using the Faxman driver.</td>
</tr>
<tr>
<td>Done</td>
<td>Returns you to the History panel.</td>
</tr>
</tbody>
</table>

**Copying Repair Lines from a History Record** One exciting aspect of the vehicle history capability is that you can copy information from a history order to a current order.

For example, while preparing an estimate for an engine rebuild on a '68 Chevy Pickup, you may recall that you prepared a similar estimate in the past. Rather than having to put together the estimate from scratch, you can copy repair lines from the historical order and paste them into the new order. Your parts, labor, and tax rates are automatically updated to current values.
As another example, you may have a regular customer who comes in every three thousand miles for an Oil Change/Lube Job. Once you have begun the order, and selected her name in the Customer panel, simply click on the History tab to view her history records, open a history record for a previous Oil Change/Lube Job, copy the repair lines, and paste them into your current order. Your order is complete without you ever having to look up a part, labor item, or canned job.

To copy repair lines from a history record:

NOTE: This procedure details one method of copying information from a history record into an estimate. Actually, there are a number of different ways that copying and pasting can be employed within the program. And you aren’t limited to copying from history—you can also copy from one open order into another, from a canned job into an order, etc. In any case, the procedure is essentially the same as described below.

1. Locate the history record from which you wish to copy repair lines. Refer to Find History Record (By Vehicle), if necessary.
2. Select Detail to open the History Detail dialog box.
3. Highlight the line items you want to copy.

   Highlight cells by moving your mouse pointer to a cell in the first row in the range of rows you wish to copy and, holding your left mouse button down, dragging the mouse pointer to a cell in the last row in the range.

   Release the mouse button. The rows are highlighted as shown in the figure above.

4. Press Ctrl + C to copy the repair lines.
5 Select the **In Progress** icon to open Work In Progress.
6 Open the Order you wish to paste into.
7 Select **Paste** from the Edit menu.

OR

Press **Ctrl + V** to paste the selected repair lines.
A dialog box asks if you wish to update your parts cost from inventory.
8 Select **Yes**. The repair lines are added to your order.

**Batch Payments**

The **Batch Payments** dialog box allows you to quickly apply a payment, or a set of payments, to invoices. You would normally make batch payments to the posted orders of a customer with an in-house credit account (for example, a fleet customer).

**To apply a batch payment:**

1 Select **Batch Payment** from the Utilities menu.

OR

Press **[F5]** while in any program screen.

The Batch Payments dialog box appears.

![Batch Payments dialog box](Image)

**Batch Payments (empty)**

The fields of the screen are initially empty, as displayed in the previous figure.

2 Select the **Name** or **Company** button to open the Customer List to select a customer.
3 Select a customer from the Customer List.
The Batch Payments dialog box displays all of the invoices for the customer with unpaid balances.

![Batch Payments dialog box](image)

**Batch Payments (w/ customer selected)**

The current date is automatically entered in the Date field and the default payment type is automatically entered in the Type field. You can select a different date or payment type from the pull-down choice lists if necessary.

4 Choose **Print Receipt**, if you would like to print a receipt of the payment.

5 Enter the amount of the payment in the Amount field.

**NOTE:** You can skip this step if you plan to Auto Distribute payment in full (refer to Step #7).

6 Enter the Reference # and/or the Authorization #, as necessary.

7 Apply the payments to the posted invoices. There are two ways you can do this. You can:
   - Choose **Auto Distribute** to distribute payment among invoices.
   - OR
   - Apply payments to the invoices individually.

Each of the payment methods are described in the following sections.

8 Select **Save** to save your batch payment(s) while still remaining in the Batch Payments dialog box.
OR

Select **Done** to save your batch payment(s) and exit the dialog box.

**Auto Distribute**  Automatic distribution is the easiest way to apply a payment to an invoice, or a group of invoices. Once you have entered a payment amount, simply select Auto Distribute to apply that amount beginning with the oldest invoice and working forward chronologically through the posted invoices. If you wish to automatically distribute a payment in full, you don’t need to enter anything in the Amount field—simply selecting Auto Distribute automatically sets up payment in full for all invoices.

For example, if you had three invoices totalling $987.57, and auto distributed payment in full, the payment amount would be disbursed in such a way as to satisfy the balances for all three invoices as shown.

### Payment in Full Auto-Distributed

<table>
<thead>
<tr>
<th>Date</th>
<th>Invoice #</th>
<th>License</th>
<th>Amount</th>
<th>Balance</th>
<th>Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/22/95</td>
<td>000009</td>
<td>On Account</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>06/22/95</td>
<td>001137</td>
<td>2BYL432</td>
<td>71.89</td>
<td>71.89</td>
<td>71.89</td>
</tr>
<tr>
<td>06/22/95</td>
<td>001138</td>
<td>2BYL432</td>
<td>225.69</td>
<td>225.69</td>
<td>225.69</td>
</tr>
<tr>
<td>06/22/95</td>
<td>001139</td>
<td>2BYL432</td>
<td>689.99</td>
<td>689.99</td>
<td>689.99</td>
</tr>
</tbody>
</table>

As an example of a partial payment, if you had three invoices totalling $987.57, and auto distributed a payment of $500.00, the payment amount would be disbursed in such a way as to satisfy the balances on the first two invoices and partially satisfy the balance on the third as shown in the following figure.

### Partial Payment Auto-Distributed

<table>
<thead>
<tr>
<th>Date</th>
<th>Invoice #</th>
<th>License</th>
<th>Amount</th>
<th>Balance</th>
<th>Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/22/95</td>
<td>000009</td>
<td>On Account</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>06/22/95</td>
<td>001137</td>
<td>2BYL432</td>
<td>71.89</td>
<td>71.89</td>
<td>71.89</td>
</tr>
<tr>
<td>06/22/95</td>
<td>001138</td>
<td>2BYL432</td>
<td>225.69</td>
<td>225.69</td>
<td>225.69</td>
</tr>
<tr>
<td>06/22/95</td>
<td>001139</td>
<td>2BYL432</td>
<td>689.99</td>
<td>689.99</td>
<td>689.99</td>
</tr>
</tbody>
</table>

**Apply Payments**  You can choose to apply payments to invoices on an individual basis using the Apply button.
To apply payments individually:

1. In the Batch Payments dialog box, enter the total payment amount in the Amount field.

**NOTE:** You MUST enter an Amount in this field or no payments will be applied.

2. Enter the payment for each invoice in the appropriate cell in the Payment column.

   OR

   Click the **Apply** button, repeatedly as necessary, to automatically enter payments for each invoice.

**NOTE:** If at any time you wish to clear all payment amounts, select the **Clear** button.

3. Select **Save** when done.

   The payments are applied to the designated invoices.

**NOTE:** The sum total of the payments entered in the Payment column in the grid cannot exceed the total payment amount entered in the Amount field. If you attempt to apply individual invoice payments which are in excess of the total payment amount, an error message appears and you will not be allowed to continue. You are also unable to apply an individual invoice payment in excess of the amount due.

**NSF Funds**

The Non-Sufficient Funds (NSF) function allows you to debit a customer's outstanding balance for the amount of the returned item. The following procedure describes how to process a returned check.

**To process an NSF check:**

1. Press [F5] to open the Batch Payments dialog box.

   Find the customer using the Company or Name button, once in the 'rolodex' highlight the company or customer name and click on the **OK** button.

   You are returned to the Batch Payments dialog box.
2 Click the NSF button to open the Check Payment History dialog box.

3 Highlight the line that corresponds with the returned check, and click on the NSF button.

   You are prompted to confirm your request.

4 Click OK.

5 Exit the batch payment function. The amount of the NSF item is now included in the customer balance.

**Deleting a Payment**

You can delete a prior payment in Manager.

**NOTE:** It is highly recommended that you password-protect this dialog box. Refer to Chapter 5 for details.
To delete a payment:

1. In either the Apply Payments or Batch Payment [F5] dialog box, choose **History**. The Payments History dialog box displays a history of payments for the order, or customer, as applicable.

   ![Payment History dialog box](image)

   **Payment History**

2. Select the Payment and click the **Delete Payment** button. A dialog box cautions that the deletion cannot be reversed.

   ![Warning dialog box](image)

   **Warning**

3. Click **Yes** to remove the payment.

**Summary**

This chapter detailed the options available for working with history records and for making batch payments on posted invoices.
Chapter 10
Reporting

Overview
A report is a collection of information formatted for printing. Reports can be printed to the screen for viewing, or sent to the printer for hard-copy output. Manager reports take many forms. Printed estimates, repair orders, and invoices are some examples of reports which have already been described in this User's Guide. Other types of reports include management reports which provide information to help you intelligently manage your shop; accounting reports which help you track accounts receivable and which provide insight into shop profitability; and follow-up letters and postcards designed to help you maintain customer satisfaction and create opportunities for additional business.

Printing Reports
The Reports button allows access to the Report Selections dialog box.

To open the Report Selection dialog box:

1. Select Reports from the far right end of the button bar. The Report Selections dialog box displays.

![Report Selections dialog box](image)
2 Select the thumb-tab which represents the type of report you want to work with. The dialog box dynamically alters to display the selection of reports available in the selected report classification.

3 Click your mouse pointer on the desired report.

4 Choose **Report to Screen** to view a copy of the report on your computer monitor.

   OR

   Choose **Report to Printer**, to send a copy of the report to the printer.

5 Select a printer, if necessary, from the pull-down choice list.

![Select Printer](image)

**NOTE:** The program automatically selects the printer that you have selected as your Windows default printer. Normally, you will not have to change this selection.

6 Overtype, if necessary, the “1” in the No. of Copies To Print field with the desired number of copies.

7 Select **Print**.

   An additional dialog box appears for many reports, asking for additional information. Most of the time you will be required to provide a range of dates for the records you wish to include in your report as displayed below.

![Date Range](image)

**Date Range**

You may also be asked to provide additional criteria for record selection.
Provide record selection criteria, if applicable.

Select OK.

The report is sent to the screen, or the printer, depending upon your selection.

---

**Report (printer to screen) Example**

**Screen Reports**

If you choose to print your report to the screen, a number of status indicators and viewing options are available along the top of your display.

---

**Print Options**
The available options are described below:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="First Page" /></td>
<td>Displays the first page of the report.</td>
</tr>
<tr>
<td><img src="image" alt="Previous Page" /></td>
<td>Moves the screen display back a single page.</td>
</tr>
<tr>
<td><img src="image" alt="Next Page" /></td>
<td>Moves the screen display forward a single page.</td>
</tr>
<tr>
<td><img src="image" alt="Last Page" /></td>
<td>Displays the last page of the report.</td>
</tr>
<tr>
<td><img src="image" alt="Not Available" /></td>
<td>Not currently available. Reserved for future releases.</td>
</tr>
<tr>
<td><img src="image" alt="Print" /></td>
<td>Prints the current report.</td>
</tr>
<tr>
<td><img src="image" alt="Not Available" /></td>
<td>Not currently available. Reserved for future releases.</td>
</tr>
<tr>
<td><img src="image" alt="Zoom" /></td>
<td>Allows you to zoom in or out on the report window.</td>
</tr>
</tbody>
</table>

**Faxing Reports**

You can fax any of the reports by selecting the Fax button in the Report Selections dialog box. Refer to the section on faxing in Chapter 2, “Getting Started,” for complete details on faxing.

**NOTE:** Do not attempt to fax by selecting the FaxMan driver in the Select Printer field and then choosing Print. You may experience problems. Use the Fax button instead.

**Summary**

This chapter detailed the procedures for working with reports. Refer to Chapter 13, “Marketing” for procedures for working with mail-merge postcards and letters.
Chapter 11
Inventory

Overview

The Inventory menu provides options for creating and editing inventory records, conducting inventory transactions such as updating records of on-hand inventory, recording transfers, and recording parts returned to vendors. Month and Year End Close transactions are available as well.

Inventory Menu

The functions accessible from the Inventory menu are described in this chapter.

Inventory List

The Inventory List dialog box has two primary functions:

- The Inventory List is where you search for and choose inventory items to be transferred to orders. The procedures for selecting and transferring Inventory List items to orders is described in Chapter 6, “Orders.”
The Inventory List is where you enter or edit inventory item information. Procedures for adding, editing, and deleting inventory items are detailed below. Additional sections describe procedures for setting up Alternate Parts, Attached Items, and Superseded Parts.

**NOTE:** The Inventory menu is available only to users of Manager Plus. For Manager users the Parts List, the equivalent of the Inventory List, is selected from the Utilities menu.

To open the Inventory List dialog box:

- Select **Inventory List** from the Inventory menu.

The Inventory List dialog box displays.

The Inventory List dialog box allows you to Add, Edit, Copy, or Delete an Inventory List item or Update Inventory List prices.

### Adding an Inventory Item

To add a part:

1. Select the **Add** button.
The Add New Part dialog box appears with the cursor in the Part # field.

2 Type in a Part Number (up to 20 characters in length).
3 Type in or choose a Part Code.
   The Description field fills in automatically.
4 Select a Category.
5 Select an Account Class.
6 Type in a Last Cost.
   The List price automatically fills in based upon the default shop discount. You can
   overwrite this price with a different price, if desired, by clicking the User Entered List
   $ check box and entering a price in the List field. This fixes the price at the designated
   amount and protects it from system-generated pricing updates.
7 Designate that the part is Taxable, an Accessory, and/or a Core, as necessary.
8 Apply an Excise Tax, if necessary.
9 Select Attached to choose an attached part, if necessary. Refer to the section on
   Attached Parts, on page 259, for details.
10 Select Alt Price to set up alternate pricing for the part, if necessary. Refer to the section
    on Alternate Pricing, on page 262, for details.
11 Select Alt Parts to set up alternate part number(s) for the part, if necessary. Refer to
    the section on Alternate Parts, on page 261, for details.
12 Select OK to save your new part.
The new part is added to the Manager database. You are returned to the Inventory list dialog box with your new part added to the Inventory list.

**Editing an Existing Part**
You may need to make a change to an existing part. As with adding a new part, this is accomplished in the Inventory List dialog box. This procedure details the steps for editing a part.

**To edit an existing part:**
1. Select **Inventory** list from the Inventory menu.
2. Type, or select from a pull-down list, identifying information for the part (as known):
   - Category
   - Part #
   - Description
3. Select the **Search** icon.
The Inventory list displays the parts which match your request.
4. Select the Part you wish to edit by clicking on it with your mouse pointer.
5. Select **Edit**.
The Edit Part dialog box appears with the information from the selected part number displayed in the appropriate fields. The data fields are identical to those in the Add Part dialog box described earlier in this chapter.
6 Edit the individual fields of the dialog box, as necessary.
7 Select OK.
   Your edits are saved and you are returned to the Inventory list dialog box.

**Copying a Part**
An easy way to create a new inventory item is to copy a similar existing item and simply change those fields that are different.

**To copy an Inventory item:**
1 In the grid of the Inventory List dialog box, click your mouse pointer on the part you wish to make a copy of.
   The grid line for the part is highlighted.
2 Select Copy.
   A dialog box asks you to confirm your request.
3 Select Yes to create a copy of the part record.
   A copy of the part record appears in the Inventory List grid.

![Copied Part in Inventory Grid]

4 Highlight the copied record.
5 Select Edit.
   The Edit Part dialog box appears with information from the copied part displayed in the appropriate fields.
6 Change the Part Number and/or description and edit any other fields, as necessary.
7 Select OK.
   Your new inventory item is now available for placement on Manager orders.

**Inventory Update**
The Inventory Update dialog box allows you to make list price percentage changes. Selections are available that allow you the flexibility to globally update all prices for all vendors, some prices for all vendors, or some prices for some vendors. The way you do this is to perform a query in the Inventory List and then use the Update button to open the Inventory Update dialog box.

Updates made via the Inventory Update dialog box are only applied to those parts that are currently selected in the Inventory List dialog box.
To Update a Vendor’s List Prices:

1. In the Inventory List dialog box, use the Search feature to look up all inventory items that you desire the price update to effect.

2. Choose the Update button.
   The Inventory Update dialog box displays.

3. Select a Vendor from the pull-down Primary Vendor list or select All from the list to update list prices for all Vendors.

4. Enter the whole number that represents the percent change that you wish to make in the List Price Update (%) field. For example, if you desire to increase prices by "5%", enter a "5", not a ".5" or a "0.5". Enter a negative number (-5) to reduce prices.

5. Choose your Matrix Pricing options. This allows the User Entered List price (set in the Add/Edit Part dialog box) to be set or reset. There are three choices:
   - No Change - Leave user-entered price and settings unchanged.
   - Disable Matrix Markup - Updates the user-entered list price (if available) with the new price. Updated user-entered list price remains in effect, overwriting the matrix pricing.
   - Enable Matrix Markup - Overwrite any user-entered list prices with matrix calculated price.

6. Select OK.
   A dialog box asks that you confirm your price change.

7. Select Yes.
   The list price percentage change is made for all effected parts.
Deleting a Part
As a general housekeeping function, you will want to regularly delete parts which are obsolete or for some reason unneeded.

To delete a part:
1 Select **Inventory List** from the Inventory menu.
2 Type, or select from a pull-down list, identifying information for the part (as known):
   - **Category**
   - **Part #**
   - **Description**
3 Select the **Search** icon.
The Inventory list displays the parts which match your request.
4 Select the Part you want to delete by clicking on it with your mouse pointer.
5 Select **Delete**.
   A dialog box asks you to confirm your deletion.
6 Select **Yes**.
The part is removed from the database.

Attached Items
The program allows you to associate parts that are frequently used in combination with one another. For example, your shop might sell an A/C Receiver Drier that requires a set of O-Rings. By designating the O-Rings as an attached item, you can be reminded to include the O-Rings as part of every A/C Receiver Drier sale.

Attached parts can be thought of as having a parent/child relationship. The parent part, normally the larger of parts, is the one that will generate the prompt for parts that have been designated as attached items.

**NOTE:** You may only attach a single item to a parent part.

To associate an Attached Item:
1 In the Add or Edit Part dialog box for the parent part, select the **Attached** button.
The Select Attached Parts dialog box displays currently attached items, if any.

![Select Attached Parts dialog box](image)

*Attached Item*

2 Select **Add**.

The Attached Item dialog box displays the available items in the selected Category of the parent item.

![Attached Item dialog box](image)

*Attached Item*

3 Select a different Category, if necessary, from which you wish to choose a part from the pull-down choice list.

Parts available in the selected Category display.

4 Select the item you wish to attach.

5 Click in the Prompt for Attached Part check box, if you wish to be prompted for the attached part when the parent part is placed on an order.

6 Select **OK**.
You are returned to the Add/Edit Part dialog box, with the number of attached items displayed next to the Attached button.

**Alternate Part Numbers**
The program allows you to associate multiple part numbers to the same part. For example, you may normally carry AC-brand Oil Filters, but get in a one-time shipment of Fram filters. Since you don't plan on reordering Fram filters, you decide that you do not want to enter the Fram filter into your inventory list. What you can do, in this instance, is set up the Fram filter as an alternate part. Every time you use a Fram filter, the program will offer the opportunity to use the AC Oil Filter information from the Inventory list on the order.

**To add an Alternate Part Number to an existing part:**

*NOTE:* You can also add an alternate part number to a new part. The steps are identical to the steps in this procedure except that you will work in the Add Part dialog box.

1. In the Edit Part dialog box, select **Alt Parts**.
   The Edit Alternate Parts dialog box displays.

2. Select **Add**.
   The first available cell in the grid is marked for text entry.

3. Enter an alternate part number.
Select **OK**.

The alternate part number is added.

**Using Substitute Parts** The next time that you enter the alternate part number in the Order item entry - PARTS dialog box, the Select Substitute Part dialog box appears.

- Simply pick the correct duplicate or alternate part from the selection list and choose Select Part. The selected part is entered into the Order item entry - Parts dialog box.

**OR**

- Select New Part to use the base part number.

**Alternate Price**

Alternate pricing provides the opportunity to overwrite the system-generated discount structure for selected parts. This capability is especially useful for parts that are sold at a lower than normal mark-up.

For example, let's say that due to market pressures you find that you can only sell a short-block rebuilt motor that costs you $900 for $1,000—a price well below your standard mark-up. A customer that receives a 15% discount would only be charged $869.57—$30.43 less than your cost. To avoid this unprofitable circumstance, you could use alternate pricing.
To establish alternate pricing on an existing part:

**NOTE:** You can also apply alternate pricing to a new part. The steps are identical to the steps in this procedure except that you will work in the Add Part dialog box.

1. In the Edit Part dialog box, select **Alt Price**.
   The Edit Alternate Prices dialog box displays.

![Edit Alternate Prices](image)

*Edit Alternate Pricing (before)*
2 Overtype the system-generated prices (Price column) with new prices. In the example in the following figure, all discount prices have been overtyped with new prices of $1,000.00. The alternate prices appear in red.

![Edit Alternate Prices](image)

*Edit Alternate Pricing (after)*

3 Select **OK** to save your changes. The alternate pricing will be used on all future orders.  

**OR**  
Select **Default** to restore the pricing to reflect the calculated discounts.

**Supersede**  
Selecting Supersede in the Edit Part dialog box initiates a procedure to allow the creation of a part to supersede the current inventory item.

**To supersede an inventory item:**  
1 Select a part from the Inventory List.  
2 Choose **Edit** to display the Edit Part dialog box.  
3 Choose **Supersede**.  
A dialog box explains that the procedure will allow the creation of a part to supersede the current part.

4 Choose **OK**.  
The Edit Part dialog box displays information from the previous part for the new part.

5 Enter a new part number. If you do not enter a new part number, the supersession will not take place.
6. Change any other fields or selections.
7. Select **OK** to save your superseded part number.
   A dialog box asks if you want to save the new part number.
8. Select **Yes** to create the new part number.

**Inventory Balance**

The inventory system provides on-hand balances of inventory items as well as requirements on inventory items. This information is then passed along to the Purchasing system for use in generating Purchase Orders. (Refer to Chapter 12, “Purchase Orders,” for details.)

To maintain an accurate ongoing inventory balance, the program must track the movement of parts into and out of the shop. The on-hand balance for a part is automatically increased every time purchased parts are received into the shop. The on-hand balance for a part is decremented every time parts are committed on a Repair Order or confirmed on a Purchase Order.

Below are general discussions on how parts are “committed” and “confirmed” in the program.

**Committing Parts** Parts on an order are committed when the Repair Order is printed or when a part is added to an order that has already been printed. Committing a part informs the inventory system that the part is required for a valid repair order. That way, the requirement for the part can be taken into consideration when creating a pick list of parts for a Purchase Order.

The theory behind committing parts by printing a Repair Order is that traditionally a signed Repair Order indicates customer agreement to the estimated repairs. Commitment of parts by printing a Repair Order indicates to the Inventory System that the parts on the order are not to be considered available inventory.

**Confirming Parts** Parts are confirmed when the Invoice is printed or when the user chooses to commit the parts by selecting Confirm All Parts in the Order Options dialog box. When a committed part quantity is confirmed, the confirmed quantity is subtracted from the on-hand balance in inventory.

The theory behind confirming parts by printing an Invoice is that the printing of the Invoice indicates that the repair work was performed and that the parts on the order were used.

**Inventory Transactions**

The Inventory Transactions submenu is selected from the Inventory menu. Three selections are available:

- Physical Count Update
• Transfer (not available in this release)
• Return Part to Vendor

**Physical Count Update**  The Physical Count Update dialog box allows you to change the on-hand quantity of an inventory item. The Physical Count Update dialog box is available from the Inv. Transactions submenu, which is an Inventory menu selection.

**To change the on-hand quantity of an Inventory item:**

1. Select **Physical Count Update** from the Inv. Transactions submenu.

   The Physical Count Update dialog box displays.

2. Enter the Part Number and select **Find**. (Skip to Step 5.)

   OR

   Enter a partial Part Number and select the Inventory button. The Inventory List displays with the partial part number entered in the Show Part Number field.

3. Choose **Search**.

   The Inventory List displays the part number(s) that match your request.

4. Click on the desired part number and choose **Transfer**.

   OR

   Double-click on the part number.

   You are returned to the Physical Count Update dialog box.

5. The fields in the dialog box fill in automatically. The New Quantity field displays a highlighted 0.00 and the Current Qty field displays the on-hand inventory.

   Overtype the 0's in the New Quantity field with the correct item quantity.

6. Select **Update** to record your quantity adjustment.

7. Repeat this procedure to update additional inventory records as necessary.
Transfer  This feature is not available in this release of the program.

Return Part To Vendor  The Return Part to Vendor dialog box allows you to reduce the on-hand quantity of an inventory item to account for parts that are returned to the Vendor. The Return selection is available from the Inv. Transactions submenu, which is an Inventory menu selection.

To adjust inventory levels for returned parts:
1  Select Return Part to Vendor from the Inv. Transactions submenu, an Inventory menu selection.
   The Return Part to Vendor dialog box displays.

   Return Part to Vendor

   2  Enter the Part Number or enter a partial Part Number and select the Find button.
   The remaining fields in the dialog box fill in automatically. The Quantity field displays a highlighted 0.00.
   3  Overtype the 0's in the Quantity field with the quantity to be returned and change any other fields, including the Vendor field, if necessary.
   4  Type in a reason for the return.
   5  Select Post Return to record your return quantity.
   6  Repeat steps 2 through 5 to record additional returns as necessary.
   7  When all transfers have been recorded, select Cancel to close the dialog box.

Month End Close

The Close Month dialog box allows you to close a month for accounting purposes. This totals sales and cost information for the current month and begins accumulation of the next month's totals.
To close an Accounting Month:

1 Select **Month End Close** from the Inventory menu.

   The Close Month dialog box displays.

   ![Close Month](image)

   *Close Month*

2 A drop-down menu allows you to close any month up to the present. Choose the month you wish to close from the drop-down menu.

3 Select **OK** to close the accounting month.

**Year End Close**

The Year End Close menu selection allows you to close a Year for accounting purposes. This totals sales and cost information for the current year and begins accumulation of the next year's totals. Year End Close is selected from the Inventory menu.

To close an Accounting Year:

1 Select **Year End Close** from the Inventory menu.

   A dialog box asks if you want to Perform Year End Close.

   ![Close Year](image)

   *Close Year*

2 Select **Yes** to continue.
A second dialog box asks that you confirm that you have performed a backup of all data files.

Backup Files

3 Select Yes to close the year.

Summary

This chapter described the options available from the Inventory menu save for Purchase Orders, which is the subject of the following chapter.
Chapter 12
Purchase Orders

Introduction

This chapter describes the various options that are available for generating and working with purchase orders.

Purchase Orders Dialog Box

The Purchase Orders dialog box lists all open POs along with providing options for creating new purchase orders, viewing open purchase orders, and performing certain maintenance activities on open POs (Edit PO, Receive Parts, Delete PO). The Purchase Orders dialog box is opened from the Inventory menu.

To open the Purchase Orders dialog box:

- Select **Purchase Orders** from the Inventory menu.
The Purchase Orders dialog box displays.

Depending upon the view option that you have selected, the grid area of the Purchase Order dialog displays All POs, Open POs, or Closed POs.

A number of options for working with POs are available.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restock from Inventory</td>
<td>Opens the Restock from Inventory dialog box in which you can generate a PO based upon parts with inventory levels that have dropped below a calculated restocking level.</td>
</tr>
<tr>
<td>Pick List from Orders</td>
<td>Generates a PO based upon the parts that are committed to open orders.</td>
</tr>
<tr>
<td>Print Recv’d Check List</td>
<td>Select to print preview (and print if desired) a check list of all of the parts on a selected PO.</td>
</tr>
<tr>
<td>Add</td>
<td>Opens the Purchase Order Worksheet, in which you can manually build a purchase order.</td>
</tr>
<tr>
<td>Edit/Receive</td>
<td>Select to edit items on the purchase order or to receive items to the PO.</td>
</tr>
<tr>
<td>Delete</td>
<td>Select to permanently remove a purchase order.</td>
</tr>
<tr>
<td>Done</td>
<td>Closes the Purchase Orders dialog box.</td>
</tr>
</tbody>
</table>
The options available in the Purchase Orders dialog box are discussed in detail in the following sections.

**Restock From Inventory**
Selecting Restock from Inventory in the Purchase Orders dialog box opens the ReStock from Inventory dialog box.

The ReStock from Inventory dialog box allows you to generate a Purchase Order based upon items with inventory levels that have dropped below a calculated re-order point. A part re-order is triggered if the re-order point is greater than or equal to on-hand quantity minus items committed to orders.

The ReStock from Inventory calculation is performed as follows:

Order Qty = Re-stock level - On-Hand Qty. - On-Order Qty.

To create a Purchase Order using the ReStock Function:

1. In the Purchase Orders dialog box, select **ReStock from Inventory**.
   The ReStock from Inventory dialog box appears.

2. Select a **Vendor** from the pull-down choice list.

3. Click on each Vendor classification (Vendor #1, Vendor #2, Vendor #3) for which parts should be included.

   For example, if you are generating a PO for Acme Parts Inc. and want to include all inventory items for which Acme has been designated Vendor #1, you would check the Vendor #1 box only.
4 Choose OK.

The Purchase Order Worksheet lists the parts and order quantities that match the ReStock from Inventory request. The Purchase Order Worksheet is the dialog box that you work in to complete the PO. Refer to “Purchase Order Worksheet” later in this chapter for details.

**Pick List From Orders**

The Order Pick List is generated whenever you request a pick list based upon open orders. This pick list can then be readily converted to a purchase order. There are two ways you can generate an Order Pick List:

- An Order Pick list can be generated for an individual order using the Pick List selection in the Order Options dialog box. When you choose this option, the program scans the current order for committed parts and builds the Pick List.

OR

- An Order Pick list can be generated for all open orders, using the Pick List from Orders option in the Purchase Orders dialog box. When you make this selection, the program scans all orders for committed parts and builds the Pick List.

**To convert the Order Pick List to a Purchase Order:**

1 Create a pick list using either of the two methods described above.

The Order Pick List dialog box displays.
2 Select a **View** option.

Two options are available, you can choose to:

- **Show parts needed to complete order**. This is the default view. Choose this option if you wish to build your pick list with parts that do not have sufficient inventory available to fill the order(s).

**OR**

- **Show all committed parts**. Choose this option if you wish to look at all committed parts in building your purchase order even if the parts are already in inventory or on order.

**NOTE:** When you view all committed parts, the parts that are in stock or already on order appear in a different color.

3 Highlight the parts you wish to tag.

You can select a single part by clicking on it with your mouse pointer, or you can highlight a range of parts by clicking your mouse pointer on the first part, and holding down the left mouse button with your index finger, “dragging” the mouse pointer to select additional part numbers.

4 Select **Tag**.

A “+” appears in the “+” Tag column of the grid, indicating that the part has been selected for inclusion in the purchase order.

**NOTE:** You can also double-click on a part to tag it for inclusion.

5 Select **OK**.

The Purchase Order Worksheet opens, with the part(s) you selected displayed in the worksheet grid. The Purchase Order Worksheet is the dialog box that you work in to complete the PO.
**Detail for Part**  The Detail for Part dialog box allows you to view status information on a part listed in the Order Pick List dialog box. Detail for Part is opened by highlighting a part number and selecting Detail from within the Order Pick List.

The top left portion of the dialog box lists the Part Number and description, quantity required, and quantity to order. The Inventory Info control group lists the quantity on hand, quantity on order, quantity committed to open orders, and the last cost.

Two grids are displayed in the dialog box:

- The top grid displays detail on open orders on which the part is listed.
- The bottom grid displays detail on purchase orders on which the part is listed.

**Purchase Order Worksheet**

The Purchase Order Worksheet provides access to a wide range of options in working with newly generated purchase orders and editing and receiving parts to existing POs.
PO Creation

POs may be automatically generated, as in the case of orders created via the ReStock from Inventory, or the Pick List from Orders functions, or you can create a PO from scratch by selecting the Add button in the Purchase Orders dialog box. Regardless of the method used, you will be automatically taken to the Purchase Order Worksheet.

![Purchase Order Worksheet]

You can Add an item to the PO, Edit an existing item, or Delete an item in this dialog box. Options for receiving parts are also included.

The Purchase Order Worksheet contains the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Written By</td>
<td>Select Purchase Order writer from pull-down list.</td>
</tr>
<tr>
<td>P.O. Date</td>
<td>Current date is automatically entered. Select a new date, if necessary, from the pull-down calendar.</td>
</tr>
<tr>
<td>Date Required</td>
<td>Current date is automatically entered. Select a new date, if necessary, from the pull-down calendar.</td>
</tr>
<tr>
<td>Vendor</td>
<td>Select a Vendor from the pull-down choice list. Select the Vendor button to open Vendor Setup, in which you can add a Vendor, edit a Vendor's attributes, or delete a Vendor.</td>
</tr>
<tr>
<td>Phone/Ext</td>
<td>Phone Number/Extension.</td>
</tr>
</tbody>
</table>
The Purchase Order Worksheet screen contains a number of buttons that provide access to additional options, or dialog boxes. The Purchase Order Worksheet contains the following options:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>P.O. Number</td>
<td>Automatically generated PO number.</td>
</tr>
<tr>
<td>P.O. Status</td>
<td>Indicates whether PO is opened or closed.</td>
</tr>
<tr>
<td>Ship Via</td>
<td>Text box for free-form entry of shipping information.</td>
</tr>
<tr>
<td>Taxable</td>
<td>Check if PO parts are taxable.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comment</td>
<td>Opens the Comment Lines for Purchase Order dialog box in which you can add free-form comments to be printed on the PO, or for internal use only. This dialog box is described later in the chapter.</td>
</tr>
<tr>
<td>Receive All</td>
<td>Opens the Receive All Parts - Options dialog box which provides options for receiving parts into inventory. This dialog box is described later in the chapter.</td>
</tr>
<tr>
<td>Receive to R.O.</td>
<td>Opens the Receive and Confirm Part on Repair Order dialog box which allows you to receive an individual part and confirm its usage on an open repair order or orders. This dialog box is described later in the chapter.</td>
</tr>
<tr>
<td>Fax</td>
<td>Allows you to fax a copy of the PO to the vendor.</td>
</tr>
<tr>
<td>Print</td>
<td>Allows you to print, or print preview, the PO.</td>
</tr>
<tr>
<td>Add</td>
<td>Opens the Add Part to Purchase Order dialog box. This dialog box is described later in the chapter.</td>
</tr>
<tr>
<td>Edit</td>
<td>Opens the Edit/Receive Parts for Purchase Order dialog box. This dialog box is described later in the chapter.</td>
</tr>
<tr>
<td>Delete</td>
<td>Allows you to delete a selected item from the purchase order.</td>
</tr>
<tr>
<td>Done</td>
<td>Closes the Purchase Order Worksheet.</td>
</tr>
</tbody>
</table>
Once you have finished working in the Purchase Order Worksheet, select **Done** to save the Purchase Order. A Purchase Order number is automatically assigned.

**Receiving Parts**
The Purchase Order Worksheet is where you receive parts into the program. You can choose to Receive All parts, or to Receive Parts to a Repair Order.

**Receive All** Selecting Receive All in the Purchase Order Worksheet opens the Receive All Parts - Options dialog box.

Three options are available:

- **Receive parts to Repair Orders when possible** - this option instructs the program to scan open repair orders for back ordered items. When back ordered parts are found, the Receive and Confirm Part on Repair Order dialog box (described later in this chapter) allows you to receive and confirm parts to a repair order.

- **Create an Inventory record for parts received that are not in Inventory** - this option instructs the system to create a new inventory record, using information from the purchase order, for those parts not currently in inventory. Do not select this option if there are parts on the order for which you do not wish to have an inventory record (e.g. supplies).

- **Warn if a part received is not in Inventory or on a Repair Order** - a warning will be issued if the received part is not in inventory or on a repair order. This warning is valid only if the second option (immediately above) “Create an Inventory record ...” is not selected.

Make the appropriate selection(s) and choose **OK** to receive parts. Depending upon your selection(s), additional dialog boxes may display.

**Receive Parts to a Repair Order** This option instructs the program to scan open repair orders for back ordered items. When back ordered parts are found, the Receive and Confirm Part on Repair Order dialog box allows you to receive and confirm an individual part to a repair order.
To Receive and Confirm a Part on a Repair Order:

1 In the Purchase Order Worksheet grid, select the Part Number you want to receive and confirm.

2 Select Receive to R.O.

The Receive and Confirm Part on Repair Order dialog box displays.

3 Double-click your mouse pointer in the selection box in the Tag field for each order for which you wish to receive and confirm parts.

OR

Choose order(s) with your mouse pointer, or up and down arrow keys, and select Receive and Confirm.

4 Select OK.

You are asked to confirm your request.

5 Select Yes.

The parts are received and confirmed on the applicable order(s).

Comment Lines for Purchase Order

The Comment Lines for Purchase Order dialog box allows you to add comments to your purchase orders. You can also view and edit existing notes in this dialog box.
To add Comment Lines to a Purchase Order:

1. Select the Comment button in the Purchase Order Worksheet. The Comment Lines for Purchase Order dialog box displays.

![Comment Lines for Purchase Order](image)

2. Choose whether Internal Notes (for use of your shop only) or Notes to be included on PO (printed on the purchase order).

3. Type in the text of your note.

4. Select OK. The note is added to the PO.

Add/Edit Part on Purchase Order
This dialog box allows you to add an item to a Purchase Order or to edit a part that is already on a Purchase Order. You can also receive parts into inventory using this dialog box.

To add/edit a part on a Purchase Order:

1. Select Add in the Purchase Order Worksheet to add an item to a purchase order.

   **OR**

   Click your mouse pointer on an item and select Edit in the Purchase Order Worksheet to edit a purchase order item.

   Depending upon your selection, the Add Part to Purchase Order or Edit/Receive Parts to Purchase Order dialog box displays.

   The Add Part to Purchase Order and Edit/Receive Parts to Purchase Order are identical except that some fields in the dialog box may not be available depending upon whether you are adding or editing a part.
Enter/Edit information in the dialog box as necessary. Certain fields in the dialog box may not be available for editing depending on whether you are adding or editing a part.

**Edit/Receive Parts for Purchase Order**

The dialog box contains the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part No.</td>
<td>The part number of the item.</td>
</tr>
<tr>
<td>Part Type</td>
<td>The part type of the item.</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the item.</td>
</tr>
<tr>
<td>Qty. to Order</td>
<td>The order quantity of the item.</td>
</tr>
<tr>
<td>Current Cost</td>
<td>The current cost of the item.</td>
</tr>
<tr>
<td>Extended Cost</td>
<td>The extended cost of the item.</td>
</tr>
<tr>
<td>Inventory Part</td>
<td>Selecting this option while adding a part to a purchase order indicates that you would also like to add the part to your Inventory List.</td>
</tr>
<tr>
<td>Last Cost</td>
<td>The last cost at which you purchased the part.</td>
</tr>
<tr>
<td>On Hand</td>
<td>The quantity of the part that is in inventory.</td>
</tr>
</tbody>
</table>
The Inventory Button opens the Inventory List, allowing you to add an inventory item to your purchase order. When you select an item from the Inventory List, the fields of the dialog box fill in automatically.

Select **OK** to accept your input.

**Summary**

This chapter described the various options that are available for generating and working with purchase orders.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On Order</td>
<td>The quantity of the part that is on order on all open POs (including the one with which you are currently working).</td>
</tr>
<tr>
<td>Re-Order Point</td>
<td>The point below which an order is indicated.</td>
</tr>
<tr>
<td>Stocking Level</td>
<td>The inventory level to which the order should build.</td>
</tr>
<tr>
<td>Received</td>
<td>The quantity that has been received on the PO.</td>
</tr>
<tr>
<td>Back Ordered</td>
<td>The quantity of the item that is on back order.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>The quantity of the item that has been cancelled.</td>
</tr>
<tr>
<td>Notes</td>
<td>This field allows for the free-form entry of text (50 characters) for internal (shop) use. This text will not appear on the printed purchase order.</td>
</tr>
<tr>
<td>Qty Received</td>
<td>(To Date) Quantity of the item that has been received.</td>
</tr>
<tr>
<td>Qty Remaining</td>
<td>(On Order) Quantity of the item that has not been received.</td>
</tr>
</tbody>
</table>
Chapter 13
Marketing

Introduction

Manager provides you with a number of ways to reach out to your customers. You can set up Promotions in the form of Packages (parts and labor operations grouped together and sold at a discounted price) and Discount Coupons (a flat dollar or percentage discount to the parts or labor on an order). Marketing Data can be gathered on your customers including referral information, customer work information, and customer personal information. The Mail Merge capability allows you to set up targeted mailings of post cards and letters to your customers.

Promotions

The Select Package dialog box provides options for adding packaged parts and labor operations to orders. This dialog box is opened by selecting the Promotions icon in the Order screen.
The tabs on this dialog box work like a card file. Click on any tab to move the selected panel to the forefront of the dialog box.

**UPGRADE NOTE:** If you are upgrading from a previous software version of Manager you must run Import Jobs from the Utilities menu to get the sample brake packages. Refer to “Import Jobs” in Chapter 4, “Utilities,” for details.

The following sections describe each of the five panels.

**Tires**

The Tires panel of the Select Package dialog box allows you to add parts and labor packages for tire replacements.

You can sort the grid area by **Tire Size**, **Description**, or **Price**.

**To add a tire replacement package:**

1. Open the Tires panel of the Select Package dialog box, if not already open.
2 Search Inventory for the desired Tire. To do this, just click on the Search button. To narrow your search by Tire Size or Description, enter a value into one of these fields and click Search.

**Note on Searching for Tires:** Tires are designated in the Add/Edit Part dialog box selected via the Add or Edit commands in the Inventory List. Only those items designated by a mark in the Tires check box in the Add/Edit Part dialog box will be located in a Tires search. See Add/Edit Part on page 254.

Double-click on the desired Tire or click the tire and choose OK.

3 The Tire Package Selection screen displays.

![Tire Package Selection](image)

**Tire Package Selection**

4 Choose a **Quantity** of tires. (Note that the package pricing changes with the quantity selected.)

5 Pick a Package. Choices are **Tire Only**, **Tire and Mounting only**, **Platinum**, **Ultra Platinum**, or **Lifetime** package.

6 Click **OK** to add the package to the order

**Brakes**

The Brakes panel of the Select Package dialog box allows you to add parts and labor packages for brake servicing.
To add a brake servicing package:

1. Open the Brakes panel of the Select Package dialog box. (Select **Promotions** from the Order screen, and then choose the **Brakes** tab.)

   The Brakes panel of the Select Package dialog box displays.

   ![Select Package (Brakes)](image)

2. Choose any combination of **Front** and **Rear Disc** and **Drum** Brakes.

3. Choose between **Silver**, **Gold**, and **Platinum** packages. Note that the package pricing changes with the package and brake combination selected.

4. Click the **OK** button to add the package to the order. A dialog box asks you to confirm your selection.

   **OR**

   Click a different tab to switch to another of the Select Packages panels.

**LOF**

The LOF panel of the Select Package dialog box allows you to add Lube, Oil, and Filter packages.
To add an LOF package:

1. Open the LOF panel of the Select Package dialog box. (Select Promotions from the Order screen, and then choose the LOF tab.)

2. Click on the Lube, Oil, and Filter package you want to add to the order.

3. Click the OK icon to add the package to the order
   OR
   Click a different tab to switch to another of the Select Packages panels.
Packages

Packages are parts and labor operations which are grouped together and sold for a (usually discounted) single price. The Packages tab allows you to add packages to orders.

To add a package to an order:

1. Open the Packages panel of the Select Package dialog box. (Select Promotions from the Order screen, and then choose the Packages tab.)
2. Choose the Package you want to add to the order.

**NOTE:** You can use the View All, Current, or Expired option buttons at the top of the panel to filter the packages displayed.

3. Click **OK**.
   
   A dialog box asks you to confirm your selection.

4. Click **Yes** to add the Package to the order.
Discounts
Discount Coupons apply a flat dollar amount or percentage discount to the parts and/or labor on an order.

To add a discount to an order
1. Open the Discounts panel of the Select Package dialog box. (Select Discounts from the Order screen, and then choose the Packages tab.)
2. Choose the Discount you want to add to the order.
3. Click OK.

NOTE: You can use the View All, Current, or Expired option buttons at the top of the panel to filter the packages displayed.

A dialog box asks you to confirm your selection.
Click Yes to add the discount to the order.
The Marketing Data dialog box is where you collect information about your customers for use in selectively marketing your products and services. Presently, this data can be used for reference purposes only. It is anticipated that future releases of the program will provide a capability to target mailings and postcards based upon the marketing data collected in this dialog box.

The Marketing Data dialog box is opened by selecting the Market button in the Customer screen.

The Marketing Data dialog box is divided into three sections:

- Referral Information
- Customer Work Information
- Customer Personal Information

**Referral Information**

The Referral Information portion of the dialog box is where you collect information about how the customer found out about your shop. You are able to select up to two referral sources for each customer.

1. Select a referral source from the Referral #1 pull-down choice list. The referral source becomes a part of the customer record.
2. Repeat for a second referral source, if desired.
**Referral Setup**  The Referral Setup dialog box is where you maintain a choice list of referral sources for the Marketing Data dialog box. The choice list should include all regular sources of referral business (other shop, newspaper ad, etc.).

Select the **Referral Setup** button to open the Referral Setup dialog box.

![Referral Setup dialog box](image)

Referral Setup

You can add, edit, and delete referral descriptions in this dialog box.

**To add a Referral Description:**

1. In the Referral Setup dialog box, select **Add**.
   The Enter Information dialog box appears.

2. Type in a **Referral Description**.

3. Select **OK**.
   The new Referral Description appears in the grid area of the Referral Setup dialog box.

**To edit a Referral Description:**

1. In the Referral Setup dialog box, click on the **Referral Description** you want to edit.

2. Select **Edit**.
   The Enter Information dialog box displays the current Referral Description.

3. Overtype the current Description.

4. Select **OK** to save your change(s).

**To delete a Referral Description:**

1. In the Referral Setup dialog box, click on the **Referral Description** you wish to delete.
2 Select **Delete**. A dialog box directs you to confirm your deletion.

3 Select **Yes** to delete the Referral Description.

**Customer Work Information**

This is where you add or edit administrative information (Company Name, Address, etc.) about where the customer works. To add work information simply type the appropriate entries in the text entry fields. To edit a work information field, simply overtype the current entry with new information.

**Customer Personal Information**

You can enter customer's Date of Birth and select from among seven (7) Marketing Groups. These groups, set up in Group Setup, can be defined in any way that you might find useful.

**Followup Letters and Postcards**

Followup Letters and Postcards merge text that you set up in the Followup Postcards/Letters Setup dialog box with Customers/Vehicles selected from your Customer/Vehicle database.

- **Followup Postcards** can be used to maintain postal reminders, recommendations, and announcements to customers, such as “Thank You” postcards, etc. Follow-Up Postcards, are formatted to print out on a standard 3” x 5” card.

- **Followup Letters** are simple letters consisting of your shop's name and address, the customer's name and address, and text you enter in the FollowUp Letters Setup dialog box.

The program allows you to target those customers you most want to reach with pinpoint accuracy. For example, you could select only those customers who haven't had their brakes serviced in the last two years for a brake special. Or you could mail thank-you cards to all of the customers who visited your shop last week. These are only a couple of examples—literally thousands of targeting possibilities exist.

The following sections describe how to query the database for records to create a followup letter or a postcard.

**Letters and Postcards Setup**

Followup Letters and Postcards must be set up before you can process a mail-merge request. The Followup Postcards and Letters dialog box is opened by selecting Followup Postcards/Letters in the Standard Descriptions dialog box.

The procedure below assumes that your postcard, or letter, has already been set up. Refer to Chapter 3, “Shop Setup” for complete details on setting up postcards and letters.
Creating a Followup Postcard or Letter

The following procedure describes the steps necessary to create a follow-up letter or postcard. The basic steps are that you select the Follow-up document (letter or postcard) in the Report Selections dialog box, then you select the records you want to work with in the Followup dialog box.

To create a Follow-up Postcard or Letter:

1. Select Reports from the Button Bar.
   The Report Selections dialog box displays.

2. Select the Followup tab to display available postcards, followup and mail merge letters.
   Available letters and postcards are displayed. Followup Letters are prefaced by the initials “FL,” Mail Merge letters are prefaced by the initials “MM,” and Postcards are prefaced by the initials “PC.”

3. Select the name of the Followup letter or Postcard you wish to use. (If you need to add a letter or postcard, refer to Follow-up Postcards and Letters Setup in Chapter 3, “Shop Setup.”)

4. (Optional) Select Report to Screen or Report to Printer, select a Printer, and/or specify the number of copies to print.

5. Select Print.
The Followup dialog box displays.

![Followup Dialog Box - History](image)

**Followup Dialog Box**
The Followup dialog box is where you determine which customers you will select for a mail-merge letter or postcard. The Followup dialog box displays automatically whenever you select a mail merge letter or postcard in the Follow Up Letters and Postcards dialog box and then choose to Print.

The Followup dialog box consists of five (5) panels:

- The **History** panel is where you select the types of customers that you want to include in a search of Order History.
- The **Customer** panel allows you to choose individual customers to add to your list.
- The **Recommend** panel allows you to choose customers for which there are recommendations for followup correspondence.
- The **Inspections** panel allows you to choose customers for which inspections are indicated for followup correspondence.
- The **View List** panel allows you to look at the results of the list that you have developed, remove customers if desired, and print your mail merge request.

**History Panel**
The History panel is the first panel in the Followup dialog box to display when you select a letter or postcard in the Followup Letters and Postcards dialog box and then choose to Print. To conduct a history search, you set up search criteria and then choose Search.
To conduct a History search:

- Set up search criteria and select **Search**. The available search options are described below.

The View List panel displays the results of your search request.

The following search options are available:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Date From</td>
<td>Choose the range of service dates in vehicle history for which you wish to find Customers or Vehicles. Type or select a beginning range in the From field and an ending range in the To field.</td>
</tr>
<tr>
<td>Category</td>
<td>Select the Category of repairs from the pull-down choice list.</td>
</tr>
<tr>
<td>Select for Customer/Vehicle</td>
<td>Choose whether you want to conduct a database search based upon Customer or Vehicle. Note that if you choose a Vehicle search you may generate multiple records for the same customer.</td>
</tr>
<tr>
<td>Selection Option Buttons</td>
<td>Allows you to choose records by Customer or by Vehicle.</td>
</tr>
<tr>
<td>Selection Method</td>
<td>Allows you to choose whether to include or exclude customers/vehicles in your search based upon the Selection Criteria you have entered above. Click the down arrow to display a list of options.</td>
</tr>
<tr>
<td>Vehicle Make</td>
<td>Choose the Make of vehicle you want to include in your search, or alternately, to exclude vehicles in your search. Option buttons to the right of the field allow you to choose “This Make Only” to conduct a search for a specified vehicle make only, or choose “Exclude this Make” to conduct a search for all but the selected vehicle make.</td>
</tr>
<tr>
<td>Zip Code</td>
<td>Type or choose the Zip Code you want to include in your search, or alternately, to exclude Zip Codes in your search. Choose the “This Zip Only” option button to conduct a search for customers/vehicles in the specified zip code only, or choose “Exclude this Zip” to conduct a search for customers/vehicles in all but the selected zip code.</td>
</tr>
</tbody>
</table>
Chapter 13

Mileage Since Service Type in the number of miles since the vehicle was last serviced. Manager performs a calculation based upon the date that the vehicle was last serviced, the odometer reading at the time, and the amount of time since the last service date.

Choose the “Include if greater” option button to search for vehicles that have gone more than the specified number of miles since the last visit or choose “Include if less” to search for vehicles that have gone less than the specified number of miles since the last visit.

For example, let’s say that a customer visited the shop on January 1 with an odometer reading of 1,000 and again visited the shop three months later on March 1 with an odometer reading of 3,000. Manager calculates that the vehicle averages 1,000 miles a month. Nine months later, you conduct a history search for vehicles with greater than 10,000 miles since the last visit. Since the calculated mileage for the example vehicle is 9,000 (9 months times 1,000 miles/mo.), the example vehicle is excluded.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mileage Since Service</td>
<td>Type in the number of miles since the vehicle was last serviced. Manager performs a calculation based upon the date that the vehicle was last serviced, the odometer reading at the time, and the amount of time since the last service date. Choose the “Include if greater” option button to search for vehicles that have gone more than the specified number of miles since the last visit or choose “Include if less” to search for vehicles that have gone less than the specified number of miles since the last visit. For example, let’s say that a customer visited the shop on January 1 with an odometer reading of 1,000 and again visited the shop three months later on March 1 with an odometer reading of 3,000. Manager calculates that the vehicle averages 1,000 miles a month. Nine months later, you conduct a history search for vehicles with greater than 10,000 miles since the last visit. Since the calculated mileage for the example vehicle is 9,000 (9 months times 1,000 miles/mo.), the example vehicle is excluded.</td>
</tr>
</tbody>
</table>
**Customer Panel**  The Customer panel allows you to select individual customers or companies and add them to your mail merge list.

*Followup Dialog Box - Customer*

Simply type in the Customer ID, if known, or choose the **Company** or **Name** button to display the Customer/Company List from which you can make selections. Once you have made each selection, choose **Add**. A dialog box informs you that the customer has been added to the list. The Records Selected total increments by one.

Select **OK** to add the customer to the list. Once you have added all customers, select the **View List** tab to display the customers, and their vehicles, that you have selected.
**Recommendations Panel** The Recommendations panel allows you to select customers for which there are Recommendations to be added to your Followup List.

The following selection options are available:

**Selection Criteria**

The fields in this area of the dialog box allow you to specify the Service Date—the range of service dates in vehicle history for which you wish to find Customer/Vehicle records with recommendations and the Category of repair work for which you wish to search. A check box allows you choose to print recommendation text.

**Selection Filters**

Selection filters allow you to include or exclude records based upon your choices of Vehicle Make or Zip Code. Use the option buttons to the right side of each selection field to include or exclude records based upon your selection.

Once your selection criteria is complete, select Search to scan the vehicle history file for matching records. The View List panel displays the results of your search.
**Inspections Panel**  The Inspections panel allows you to select customers for which inspections have come due for follow up correspondence.

![Followup Dialog Box - Inspections](image)

The following selection options are available:

**Selection Criteria**
The fields in this area of the dialog box allow you to specify the Service Date -- the range of service dates in vehicle history for which you wish to find Customer/Vehicle records with inspection dates.

**Selection Filters**
Selection filters allow you to include or exclude records based upon your choices of Vehicle Make or Zip Code. Use the option buttons to the right side of each selection field to include or exclude records based upon your selection.

Once your selection criteria is complete, select Search to scan the vehicle history file for matching records. The View List panel displays the results of your search.
View List Panel  The View List panel displays automatically as a result of a history search or whenever you select the View List tab in the Followup dialog box.

![Followup Dialog Box - View List](image)

The View List panel lists the customers that you have selected in the History, Customer, Recommend, and Inspections panels. The following options are available:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone</td>
<td>Displays the Telephone number(s) of the selected customer.</td>
</tr>
<tr>
<td>Clear List</td>
<td>Clears the list, allowing you to generate a new list.</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes the selected customer from the View List.</td>
</tr>
<tr>
<td>Print</td>
<td>Selecting Print sends the postcard or letter request to the screen, or the printer, depending upon your choice in the Report Selections dialog box.</td>
</tr>
</tbody>
</table>

You can move back and forth between the View List and the History and Customer List panels to add additional customers to your list. Once you have finished, choose Print to process your request. If you are processing a request for a postcard, the Printing Postcards dialog box displays. If you are processing a request for a mail-merge letter, Microsoft Word opens allowing you to edit or print your letter.
Printing Reports/Postcards  The Printing Reports/Postcards dialog box displays as the result of a Print request in the Followup Dialog Box.

![Printing Reports/Postcards dialog box]

**Printing Reports**

The uppermost portion of the dialog box displays the name of the postcard (AC Recharge Special, for example) and the number of records that have been selected for printing.

The Reports and Print Labels settings allow you to print one side of the postcard and then print mailing labels for placement on the other side.

The Restart Printing field allows you to restart a print run that has been aborted due to a printer problem or for some other reason. Simply enter the last name of the last customer to correctly print and the run will restart with the following customer.

**EXAMPLE** If you were printing a postcard run that was stopped at the post card for “Johnson” because the printer ran out of paper, you would enter “Johnson” in this field.
Once you have made your selections in this dialog box, select **OK** to begin your print run. The following figure displays a completed followup letter.

![Completed Followup Letter](image)

**Mail Merge Letters**

The program’s Mail Merge feature allows you to merge information from your database into a document you have created and formatted in Microsoft® Word.

**NOTE:** Mail merging in any program can be an inherently complicated task. The information in this section is provided to help you learn mail merge setup activity specific to the task of Mail Merging in Manager/Manager Plus. This information does not replace the detailed information on mail merging that is provided in the *Microsoft Word User’s Guide* and the Word online help system.

If you are not experienced in mail merging, it is highly recommended that you study these information sources **before** attempting to create a mail merge document.

To run mail-merge, you must have the following software installed on your computer:

- OnDemand5 Manager or Manager Plus.
- Microsoft Access 97.
The following procedure describes the steps necessary to set up and run a mail-merge request.

**To create and print a mail-merge document:**

1. Select **Reports** from the View menu.
The Report Selections dialog box displays.
2. Select the **Follow Up** tab to display available postcards and letters.

![Report Selections](image)

3. Double-click on an existing letter or postcard. It doesn't matter which letter or postcard you pick, it is necessary to perform a search in order to populate the database before WORD will allow the preparation of the merge document.
The Followup dialog box displays.

Perform a search to generate some records. Again, the only purpose of this request is to populate the database for you to generate a mail-merge document in WORD. The actual results of the search don't matter so long as some records are found. Refer to the Followup dialog box section earlier in this chapter, if necessary, for instructions on generating a followup request.

Open WORD 2000.
From the WORD Tools menu, select **Mail Merge** to open the Mail Merge Helper dialog box.

![Mail Merge Helper](image)

**Mail Merge Helper**

Select **Create** and then **Form Letter** and then select to use the **Active Window**, which should be an empty document.

![Use Active Window?](image)

**Use Active Window?**

Select **New Main Document** if you already have a document open.
From the Mail Merge Helper dialog box, select **Get Data** and then **Open Data Source**.

The **Mail Merge Helper**

The Open Data Source dialog box displays. Change the file type to MS Access Databases and locate the database. The database is located in the \MDB subdirectory (C:\Mitchell 1\ManagerSeries(x)\mdb\ by default).

Highlight SMCORE32 and click **Open**.

The Mail Merge Helper dialog box displays.

Click on **Get Data** to open the Microsoft Access dialog box. Select the Queries tab, select **MailMerge2** from the displayed list and click **OK**.

The **Microsoft Access**
WORD responds with a message that no merge fields were found in the document.

No Merge Fields Found

This is true since it is still blank.

11 Select the Edit Main Document option.

You are presented with the blank WORD document screen with an additional toolbar that starts with Insert Merge Field. You can combine text with any of the merge fields provided in the list provided when Insert Merge Field is selected.

12 Complete the document, adding Merge fields and text as desired.

13 Once edits are complete, save the document in WORD 2000 format. Do not save the document in any other format (WORD 6, for example). The name you use must not have any embedded blank characters and the directory structure you save in must not have any spaces.

14 Close WORD.

15 Back in the Manager program, select Followup from the Standard Descriptions dialog box (selected from the Setup menu).
The Followup Postcards and Letters dialog box displays.

16 Choose the **Mail Merge Letters** option button in the Pick FollowUp Type control group.

17 Choose **Add**.

The Add New Mail Merge Letter dialog box displays.

---

**Followup Postcards and Letters**

---

**Add New Mail Merge Letter**
Fill in the fields of the dialog box:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letter Name</td>
<td>The name for the mail merge letter. This is the name that will be used within the Manager program selection lists to identify the letter.</td>
</tr>
<tr>
<td>Mail Merge Document</td>
<td>Use the Browse button to look for and select the full path and file name of the mail merge document you just created. Alternatively, you can type in the path and file name.</td>
</tr>
<tr>
<td>Microsoft Word Location</td>
<td>Use the Browse button to look for and select the full path and file name of the Microsoft Word program executable file (WINWORD.EXE).</td>
</tr>
<tr>
<td>Mail Merge Macro</td>
<td>Leave this field empty.</td>
</tr>
</tbody>
</table>

18 Click Done to close the Followup panel.

The WORD location and Mail Merge macro are saved. You are returned to the Followup Postcards and Letters dialog box with your new letter added to the list.

19 Click OK again to close the Followup Postcards and Letters dialog box. Setup is now complete. The following steps are required to generate and run the mail merge.

20 Select Reports from the View menu.

The Report Selections dialog box displays.

21 Select the Follow Up tab, if not already selected, to display available postcards and letters.
22 Click on the mail-merge document and choose **Print**.

The Followup dialog box displays.

![Followup dialog box](image)

**Followup**

23 Create the desired customer list by using the History, Customer, Recommendation, and/or Inspection screens. Refer to the Followup dialog box section earlier in this chapter, if necessary, for instructions on generating a followup request.

24 When the list has been prepared, select **Print**.

25 Click on the **Merge to Printer** icon to print all.

**NOTE:** Each time the mail-merge macro is run, a copy of WORD will be opened. Be sure to shut down WORD when the printing of your mail-merge document has been completed.

**Summary**

This chapter described the many ways that the program offers to get to know your customers better and to reach out to promote your products and services.
Appendix A
Customer Service

Who to Call for Help

Manager Technical Support 1-888-724-6742
General Manager Information 1-888-724-6742
Technical Support E-mail techsupport@mitchell1.com

Internet Address: http://www.mitchell1.com
Support Website: http://www.mitchellsupport.com
Find your local Sales Rep: http://www.mitchellrep.com

Questions & Answers

What do I do if I have a question about my account; billing status or other Mitchell products?
Call us at 1-888-724-6742.

What do I do if I have a software or hardware problem?
If you have a software or hardware related problem (installation or configuration problems, error messages on the screen, etc.), please call us at 1-888-724-6742.

What do I do if I have a mechanical estimating labor time or part number problem?
Call us at 1-888-724-6742.

What do I do if I have suggestions for improving future releases of Mitchell’s electronic products?
If there are certain topics or types of information that you would like to see covered, or any options or functions you would like us to improve, please fax us at 1-858-746-8912.
Hours of operation for customer service information:
Manager Support is available Monday through Friday, 6:30 A.M. to 4:30 P.M., Pacific Time. We are closed on the weekend and major holidays.
Appendix B
Backup

Overview

Backups protect against data loss due to a disk crash, fire, theft, software/hardware failure, accidental deletion, or power fluctuations. Periodic backups provide insurance against the inconvenience and high reconstructive costs associated with data loss.

Manager features Automatic Backups. This feature prompts you to automatically back up your data at pre-defined intervals (program startup, shut-down, or end of day) and then copies the files you need to restore your database to a location you specify.

Automatic Backups

You can set up the program to perform automatic backups at a defined interval in the Default Settings panel of the Shop Data dialog box.
You can choose to backup at **Program Startup, Program Exit, or at End of Day.** You also set the backup location. See “How Backups Work” below for information on setting a backup location.

Once backups are enabled and a backup is indicated, a dialog box asks if you want to backup.

Select **Yes** to begin the backup.

**How Backups Work**

The automated backup program creates a rotating set of seven (7) compressed .zip files; one for each time a backup is performed. These files can be used (normally with the help of Manager’ Technical Support department) to restore your database.

The files are saved in a `\BACKUP` directory in the directory you set in the Default Settings dialog box. The naming convention for the files is:

```
d[x].zip
```

Where `[x]` represents the day of the week the backup is performed (d1.zip = Sunday, d2.zip = Monday ... d7.zip = Saturday). When a new backup is created, the previous backup for that day of the week (if there is one) is overwritten.

The backup function is workstation specific. You can set each workstation to make its own backup copy of the database.

**NOTE:** Although you can back up your data to a different location on your hard drive, this is not recommended as this will not protect your data in the event of a hard drive failure. Mitchell recommends that you always back up your data to an external source such as a ZIP drive, or to multiple workstations on a network, if operating in a multi-user environment.

Although there are a number of reliable external backup solutions, we recommend the Iomega™ ZIP drive as a dependable, easily configurable backup source that has been fully tested by our engineering staff.
Restoring Your Database
Manager stores backup files in a compressed .zip format. Third-party software is required to extract (“unzip”) these files. PKZIP and WINZIP are two programs, available as shareware, that you can use to restore your database. You can download these programs from www.pkware.com or you can purchase from your local software retailer.

NOTE: Windows XP comes with its own zip software.

Contact Manager Technical Support if you need help restoring your database.

Multi-User Backups
If you are using a multi-user version of the program, each workstation can maintain its own copies of the backup files. Simply set the location to the workstation’s hard drive (normally C:\). The backup will then be automatically be performed in a \BACKUP subdirectory on the workstation.

There is no limitation as to how many workstations you can back up to and as a general rule, the more backups you make, the higher your level of protection.

Files
Manager data files that must be backed up are contained in the directory:
C:\Mitchell \Manager\Series(x)\mdb\ or
C:\Mitchell \Manager\Series(x)\mdb\
These files are automatically backed up by the autobackup program and are listed below for reference purposes only:
SMCORE32.MDB
LASTUSED.DAT

NOTE: This list represents the most current file structure. Refer to the Readme First document for any changes to the list.

Recommended System
Although there are a number of reliable external backup solutions, Mitchell recommends the Iomega ZIP® drive as a dependable, easily configurable, cost-effective backup source that has been fully tested by our engineering staff.
ZIP disks are small and portable, making them highly suitable for off-site storage. For an extra measure of protection, it is recommended that you store your backup disks in a fire-proof safe or take them home with you. This will protect you in the event of a fire or theft.

**What is a Zip File?**
Zip files contain other files that are archived into one compressed file. Zip files make it easy to group files and make transporting and copying these files faster.

**How can I restore my database from a Zip file?** If you elect to use the internal backup that creates Zip files, you will need to obtain a third party software package that can decompress the backed-up file. Recommended software packages are PKUNZIP® or Winzip®. Mitchell can offer only limited support on either program.

**NOTE:** Windows XP comes with its own zip software.

**Summary**

This chapter provided a discussion of how to perform backups in the program.
Appendix C
Multi-User

Overview
This appendix describes the procedure for setting up the program on a network, as well as describing technical considerations for using it in a multi-user environment.

The Manager Multi-User Environment
The multi-user environment allows a number of users (limited by the number of users in your multi-user agreement) to use the system simultaneously. This offers the tremendous advantage of allowing a number of users to access and update a common shop database.

This appendix makes use of some common networking terminology:

- The **Host** is the computer on which the database, the installation program for the individual client computers, and all of the program files reside.
- **Workstation** computers are the additional computers that access information from the Host. Depending upon the options specified during installation, the Workstation may contain program files or may run the program using files resident on the Host.

Network Installation
Network installation is a three step process: First, you must perform an administrative installation of the network version software on the Host. Then you must perform a workstation installation on the Server and on each workstation. Finally, you must upgrade your user limits with a phone call to Manager’ customer support department.

Before You Begin
While setting up the program in a multi-user environment is not especially difficult for persons with previous networking experience, it is highly recommended that anyone without networking experience acquire the assistance of a Microsoft Certified Systems
Engineer (MCSE) or other trained networking professional. This appendix assumes a basic knowledge of networking and Mitchell can not provide technical support on networking functions external to the Shop Management software.

**NOTE:** Manager Technical Support will not provide technical support on networking functions external to the Shop Management software.

**Approved Platforms** Manager has been approved by Manager to run under Windows 95/98, Windows 2000, Windows NT 4.0 (Service Pack 4, or greater). Hardware requirements are the same as for single-user installations except that the networking hardware (cabling, etc.) must be installed and operational and you should have 64 mb. of RAM and allow for additional free hard drive space (140 mb.) on the Host.

**Host Setup**

**NOTE:** Windows NT users should refer to the “Supplemental NT Server Installation Instructions” starting on page 323 for additional NT setup information.

To perform Host Setup:

1. Insert the Key Diskette into your 3.5” floppy drive.
2. Insert the CD into your CD-ROM drive.
3. Open the Run dialog box by choosing Run from the Start Menu. The Run dialog box displays.
4. In the Open field, type: x: \setup
   Where x is your CD-ROM drive letter.
5. Click Next to continue.
6. A screen welcomes you to the setup program and recommends that you close down all open Windows programs if you have no Click Next to continue. The Select Program Install Options dialog box explains the installation process you are about to undergo. This process is determined by the Key Diskette you have inserted in your floppy drive.
7. Choose Next to continue. Another Welcome dialog box and a note about installing other Manager products may appear. If so click Next to continue. The Customer Information dialog box displays.
8 Enter your **Account Number**. This account number is located on the mailing label of the package in which the product was shipped. Ignore the leading number followed by a space. The next set of numbers is your account number. It can be four to six digits. After entering your Account Number, enter the other requested shop information.

9 Click **Next** to continue.

**NOTE:** If you own other Manager products, some of this information may be automatically entered for you. You can change any customer information simply by overtyping, if necessary.

The Host Installation Location dialog box displays.

10 Specify the Drive Letter and Directory for the Installation and choose **Next** to continue.

**NOTE:** Normally, the default directory is specified. You may either accept this directory or choose the **Browse** button to specify a shared directory that can be accessed by the other computers on your network. In instances where a default directory is not suggested by the program, you **must** browse to create one.

The program files begin to load. You are notified of the progress.

*(UPDATE ONLY)* If performing an update installation, the Select Components dialog box displays.

This dialog box allows you to choose whether you want to update your current database, or overwrite it with a new (empty) database. If performing a new installation, skip to step 15.

11 Choose **Update old database** to update your current database (recommended).

**OR**

Choose **Overwrite old database** to erase your current database and create an empty database on your computer.

12 Choose **Next** to continue. The Convert dialog box asks if you want to make a backup of the database on your hard drive.

13 Choose **Yes** to make a backup copy of your database (recommended). After a moments' processing, a dialog box asks if you want to begin Workstation Setup.

14 Choose **Yes** to complete the Host Installation and begin installation of first workstation. Skip to Step 4 of the following procedure.
Workstation Setup

NOTE: Before beginning workstation installation on any workstation that does not also serve as the host, you must have a drive mapped to the host workstation. The drive mapping must match the exact path in which you performed host installation.

Once you have performed a host installation, it is necessary that you install the program individually on the host workstation (if the host is to be used as a workstation) and then individually on each of the other workstations on the system. The setup is similar to the host installation except that rather than using the CD to install, you will load the program using a setup file that was loaded in the host program directory during host installation.

To install/update Manager Multi-user on an individual workstation:

1. Open the Run dialog box by choosing Run from the Start Menu.
   The Run dialog box displays.

2. In the Open field, type:
   x:\...\setup
   Where x is the shared network drive letter and “...” is the full path of the Host Installation (d:\Mitchell 1\Manager\Series(x)\setup.exe, for example).

3. Choose OK.
   After a note about installing other Manager products a screen welcomes you to the Setup program.

4. Select Next to continue.
   The Select Components dialog box displays.

5. Select Install Workstation and Next to continue.
   The Workstation Installation dialog box displays.
   Two Options are available:
   • Standard Install (recommended) - Loads all program files. This option requires 10 MB of disk space.
Minimum Install - Loads all program files except for the program executable file. This option requires 3.5 MB of disk space.

**NOTE:** When installing on a workstation other than the host, unless hard disk space is an issue, it is highly recommended that you choose Standard Install for best program performance. If you are performing a workstation installation on the host workstation, the setup program will automatically use the minimum installation, even if you select Standard Install.

6 Choose an installation option and select Next to continue.
You are asked to specify the location of the program. This is the directory on the workstation which contains the program files.

7 The default location is the workstation drive location. You probably will not need to change this location. You can, however, choose Browse to select a new directory if necessary. Choose Next to continue.
The Choose Destination Location dialog box asks that you specify a directory for the database.

8 Click Next to accept the default directory (recommended) or type, or select Browse to pick a new directory.
After a moments' processing, the Enter Information dialog box displays.
This dialog box asks you to enter a Station Name for the primary user on this workstation. This name must be entered for security purposes. The name may be any combination of alphabetic and/or numeric characters with the only requirement being that the workstation name you use be unique from any of the other users on the system.

9 Enter the Station Name and choose Next to continue.
The program files begin to load. You are informed of installation status as the setup progresses.
When workstation installation has finished, the Setup Complete dialog box displays.

10 Click in the Yes I want to run Manager now check box, if desired, and then Finish to close the dialog box.

Upgrade User Limits Before you can run the multi-user program on more than five workstations, you must upgrade your user limits. This requires that you call Manager' Customer Support department and order additional user licenses.

**Supplemental NT Server Installation Instructions**

Installing Manager on a Windows NT System is essentially a three-step process:

- Create a resource
- Map drive letters
• Install software

To create a resource:

1 Log onto the Server as Administrator and create a folder on the Volume called **Apps** (or use a different name if you’d like).

2 Right click on the new folder and select the **Sharing** tab. Select the **Shared as** option button and leave the share name **Apps** alone.
Click on the Permissions button to open the Access Through Share Permissions dialog box.

If Everyone has Full Control click OK. Otherwise, change access settings as desired and then click OK.

To map drive letters from workstation:
1. Log on to Windows from one of the workstations.
2. Click on Network Neighborhood.
3. Click on the Server’s name
4. Right click on the Apps folder and choose Map Network Drive.

Select the appropriate drive letter (k:\). Don’t forget to include a checkmark in the Reconnect at Logon check box.
To install software:

1. Insert the key diskette and installation CD-ROM on a Workstation. Run the setup.exe from the root of the CD-ROM drive. Following the convention provided in this procedure, change the installation path to k:\Mitchell 1\Manager\Series(x) (where x = “1” for Manager or “2” for Manager Plus).

2. Run the workstation setup.exe on each workstation from the k:\Mitchell1\Manager\Series(x) directory on the server.

Using NT Server as a Workstation

**NOTE:** This is not recommended, but it can be done via the following procedure.

To install Manager/Manager Plus on an NT Server:

1. Log out of the server as administrator.
2. Log on to the server with a user account, not as administrator.
3. Click on Network neighborhood and map a drive letter (k:) to the APPS directory exactly as you did from the workstation.
4. Run setup.exe from program directory on the mapped drive
5. Perform a Minimum install.

Technical Considerations

This section provides general tips and potential problem areas encountered while working in the Manager network environment.

**Tips**

- Before shutting down the Server, make sure all shop personnel are out of Manager.
- You cannot update the same order simultaneously from different workstations. Edits for the workstation that exits the order first will be saved and edits for the workstation that exits afterwards are lost.
- A workstation used for both Client/Server and print sharing will encounter performance bottlenecks.

**Errors**

Described below are some common error messages and the source of the problem:
• When two technicians are working with the same program function (customer, order, vehicle, etc.), the last technician to save will get the following error.

_change will be lost_

• When a technician uses the Convert to button (to convert an estimate to a repair order, repair order to invoice, etc.) and conversion has already been completed on another workstation, the following error message will occur.

_**Order Already Changed**_

• When saving to an Order that has been removed, the following message occurs:

_**Order No Longer Exists**_

• As jobs are added on the various workstations, the Work in Progress screen needs to be refreshed. The program automatically refreshes the screen every 10 seconds. To see a job added on another workstation prior to the automatic refresh, click the Work In Progress icon twice.
Summary

This chapter provided instructions for setting up Manager on a network. The chapter concluded with some tips for operating the program in the multi-user environment.
Appendix D
Importing Data Into Manager

Overview

The Import Utility allows you to import Customer, Vehicle, and Vendor information from a correctly structured Microsoft Access 2000 database into Manager. The Database Creation Utility allows for easy entry of information in Manager.

Installation

The Import and Database Update utilities are installed via their own installation program. These utilities are not installed as part of the regular Manager installation.

To install the Import/Database Update Utilities:

1. Browse your Manager CD for the Update Utility. The file is located at:
   x:\utils\tools\import\setup.exe
   Where "x:" is the location of your CD drive.

   **NOTE**: You can browse your CD from the Installation screen or choose Run from the Windows Start menu.

2. Click OK. Follow the onscreen prompts to complete the installation. You will be given a choice of installing the Complete Import Utility Package or just the Manual Entry Utility. Mitchell recommends that you install the complete package. When prompted for a
Importing Records Into Manager

The Shop Management Import Utility dialog box allows you to import Customer, Vehicle, and Vendor data into Manager. This information may be in the form of a properly structured Access 2000 database of information from another program or may be an import of data you input via the Database Creation Utility (page 333).

To Import Records into Manager:

1. Select Start/Programs/Mitchell 1/Import Utility (or Program Group where you installed the utility).

The Shop Management Import Utility dialog box displays.

2. Browse for the Import Database. If you have entered information via the Database Creation Utility, the database will be C:\Mitchell 1\Manager\Series2\Shop Management Import Utility Package\Import.mdb. If you are not using the Import.mdb database, it must be structured as specified in the Database Structure section on page 331.

3. Select the Export Product from the pull-down list. This is the version of Manager you want to add records to.

4. Select the Overwrite existing records check box, if desired. If Overwrite is selected, all existing records that have a matching import record will be replaced, otherwise, duplicate records will be unaffected.

**NOTE:** Select Overwrite if you want to replace matching records in your Manager database. Leave this checkbox blank if you don’t want to replace any records.

5. Click OK.
The Import Status dialog box displays the number of different types of records the import process will update.

![Import Status Dialog Box]

6. Click **Start Import** to begin the import process.

**Database Structure**

A properly structured Microsoft Access 2000 database is required for input using the Import Utility. The following tables detail the structure. A blank Import.mdb database is located at: C:\MITCHELL\REPAIR\Shop Management Import\Import.mdb

**Vendors**

<table>
<thead>
<tr>
<th>Field</th>
<th>Type/Size</th>
<th>Required</th>
<th>Default</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>Text [8]</td>
<td>Yes</td>
<td></td>
<td>This must be a unique field</td>
</tr>
<tr>
<td>Name</td>
<td>Text [31]</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact</td>
<td>Text [31]</td>
<td>No</td>
<td>Blank</td>
<td></td>
</tr>
<tr>
<td>Address</td>
<td>Text [40]</td>
<td>No</td>
<td>Blank</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>Text [25]</td>
<td>No</td>
<td>Blank</td>
<td></td>
</tr>
<tr>
<td>State</td>
<td>Text [20]</td>
<td>No</td>
<td>Blank</td>
<td></td>
</tr>
<tr>
<td>Zip</td>
<td>Text [10]</td>
<td>No</td>
<td>Blank</td>
<td></td>
</tr>
<tr>
<td>Phone1</td>
<td>Text [15]</td>
<td>No</td>
<td>Blank</td>
<td></td>
</tr>
<tr>
<td>Phone1Ext</td>
<td>Text [5]</td>
<td>No</td>
<td>Blank</td>
<td></td>
</tr>
<tr>
<td>Phone2</td>
<td>Text [15]</td>
<td>No</td>
<td>Blank</td>
<td></td>
</tr>
<tr>
<td>Phone2Ext</td>
<td>Text [5]</td>
<td>No</td>
<td>Blank</td>
<td></td>
</tr>
</tbody>
</table>
### Inventory

<table>
<thead>
<tr>
<th>Field</th>
<th>Type/Size</th>
<th>Required</th>
<th>Default</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>PartNo</td>
<td>Text[20]</td>
<td>Yes</td>
<td></td>
<td>PartNo &amp; PartDesc must be unique.</td>
</tr>
<tr>
<td>PartDesc</td>
<td>Text[50]</td>
<td>Yes</td>
<td></td>
<td>PartNo &amp; PartDesc must be unique.</td>
</tr>
<tr>
<td>Cost</td>
<td>Double</td>
<td>No</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>List</td>
<td>Double</td>
<td>No</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Taxable</td>
<td>Integer</td>
<td>No</td>
<td>0</td>
<td>Set to 1 to make inventory item taxable, non-taxable set to 0.</td>
</tr>
<tr>
<td>Category</td>
<td>Text[25]</td>
<td>No</td>
<td>Blank</td>
<td>Part Category. This will fill the Category table.</td>
</tr>
<tr>
<td>Comment</td>
<td>Memo</td>
<td>No</td>
<td>Blank</td>
<td></td>
</tr>
<tr>
<td>MfgCode</td>
<td>Text[6]</td>
<td>No</td>
<td>Blank</td>
<td>This will fill the Manufacturer table.</td>
</tr>
<tr>
<td>MfgName</td>
<td>Text[30]</td>
<td>No</td>
<td>Blank</td>
<td>This will fill the Manufacturer table.</td>
</tr>
<tr>
<td>Tire</td>
<td>Integer</td>
<td>No</td>
<td>0</td>
<td>Must be 0 for not a tire item or 1 for tire inventory record.</td>
</tr>
<tr>
<td>TireSize</td>
<td>Text[20]</td>
<td>No</td>
<td>Blank</td>
<td>If the Tire field is set to 1, enter a tire size here.</td>
</tr>
<tr>
<td>OnHand</td>
<td>Double</td>
<td>No</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>PartLocation</td>
<td>Text[30]</td>
<td>No</td>
<td>Blank</td>
<td></td>
</tr>
<tr>
<td>VendorCode</td>
<td>Text[8]</td>
<td>No</td>
<td>Blank</td>
<td>Lookup for the Vendor Table.</td>
</tr>
<tr>
<td>RestockQty</td>
<td>Double</td>
<td>No</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>OrderPoint</td>
<td>Double</td>
<td>No</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>CoreCost</td>
<td>Double</td>
<td>No</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>CoreSale</td>
<td>Double</td>
<td>No</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td>Text[15]</td>
<td>No</td>
<td>Blank</td>
<td>This field must match what is in the CustTitle table, the current default values are as follows: Mr., Ms., Miss, Mrs., Dr., Rev., Sgt., Captain</td>
</tr>
<tr>
<td>FirstName</td>
<td>Text[20]</td>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Customer

<table>
<thead>
<tr>
<th>Field</th>
<th>Type/Size</th>
<th>Required</th>
<th>Default</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Text[15]</td>
<td>No</td>
<td>Blank</td>
<td>This field must match what is in the CustTitle table, the current default values are as follows: Mr., Ms., Miss, Mrs., Dr., Rev., Sgt., Captain</td>
</tr>
<tr>
<td>FirstName</td>
<td>Text[20]</td>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
A sample database is provided in a zip file (SAMPLE.ZIP) in the \UTILS\TOOLS\IMPORT\DOCS\ directory on your CD.

If you are manually populating the IMPORT.MDB file, the process may be easier if your source file is a comma delimited file and you use Access 2000 “Get External Data” function.

### Using the Database Creation Utility

The Database Creation Utility allows you, or a data entry person, to quickly create a shop database or add information to your existing shop database. All information is saved to the Import.mdb database which can then be imported into Manager using the Database Import procedure described in the previous section.

#### Using the Database Creation Utility to add Information into Manager:

1. Select Start/Programs/Mitchell Repair/Shop Management Entry Screens.Exe.
The Shop Management Entry Screens dialog box displays

Record Entry Type

2 Choose a **Record Entry Type** and then **Enter Information**. You can choose between forms for Customer, Inventory, or Vendor.

Record Entry Form - Customer and Vehicle Info.
Enter information in the data entry forms. The following options are available for working with data records.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Next</td>
<td>Move to the next record in the database.</td>
</tr>
<tr>
<td>Previous</td>
<td>Move to the previous record in the database.</td>
</tr>
<tr>
<td>New Customer</td>
<td>Clear all entries in the edit box in preparation for a new record entry.</td>
</tr>
<tr>
<td>Save Customer and Add Another Vehicle</td>
<td>Saves a record to the database and clears the edit boxes in the Vehicle Information section. Also this button will allow you to change a record that is displayed in the dialog box.</td>
</tr>
<tr>
<td>Save Customer</td>
<td>Saves a record to the database and clears all edit boxes on the dialog. Also this button will allow you to change a record that is displayed in the dialog box.</td>
</tr>
<tr>
<td>Exit</td>
<td>Exit the dialog box and return to the Shop Management Entry Screens dialog box.</td>
</tr>
<tr>
<td>Delete Customer</td>
<td>Delete the record shown in the dialog box.</td>
</tr>
</tbody>
</table>

All information is written to the Import.mdb database, where it can then be imported into Manager via the Import procedure described in the “Importing Records Into Manager” section, beginning on page 330.

Summary

This chapter provided instructions for importing data into Manager.
Appendix E
Parts Ordering

Overview

OnDemand5 Manager allows for the import and ordering of parts from participating Warehouse distributors. This appendix provides setup and basic usage instructions for using these products with Manager. Refer to the documentation that came with the Parts Catalog CD for detailed instructions on installing and using specific Parts Catalog software.

Setup

When opened, Manager looks for software for participating Parts Distributors on your computer. If it finds the software, you are able to add parts to your Manager orders and conduct price and availability checks and order parts from linked vendors.

NOTE: You must have the software for a participating vendor already installed to proceed to Vendor Setup.

The linked vendor setup process allows you to define the link between Manager and a specific distributor. This link is necessary for the program to be able to pull availability and pricing data from the distributor.
To setup a Linked Vendor for Parts Ordering:

1. Choose Vendor Setup from the Setup menu to open the Vendor Setup dialog box.

2. Click on the Vendor you want to link to and choose **Edit** to open the Edit Vendor dialog box.
3 Choose **Setup Link**.

**NOTE:** This option will be available only if you have already installed the software from a participating distributor.

If you have more than one vendor, the Link Type Setup dialog box asks that you pick the appropriate linked software for the distributor.

![Link Type Selection dialog box](image)

4 Make your selection and click **OK**.

The Vendor Link dialog box displays. Depending on the linked software program, setup will vary. Refer to the documentation that came with your Parts Catalog software for instructions on setting up specific Vendors.

**NAPA Parts Ordering**

NAPA parts are added to your Manager orders from within the Parts & Labor viewer. Once you have added NAPA parts to your order(s) and setup a linked NAPA vendor, you can conduct price and availability checks and order parts from within Manager.

**To add NAPA parts to an order:**

1 Select the Parts & Labor icon from within any Manager screen.

The Parts & Labor Viewer displays.

2 Choose NAPA from the menubar to open the NAPA parts viewer. Refer to the documentation that came with your NAPA software for details on working in the NAPA viewer.

**Ordering NAPA Parts**

Once you have setup a linked NAPA vendor, you can conduct Price and Availability checks and order parts. This is done by selecting Order Parts from within the Order Panel.
To order NAPA parts:

1. In the Manager Order screen, with NAPA parts added to the order, choose **Order Parts**. The Parts Ordering dialog box displays.

![Parts Ordering](image)

**Parts Ordering**

2. Select a Linked Vendor from the pull-down list and click **Order Parts**. The NAPA Parts Ordering dialog box opens and launches a connection with your linked NAPA vendor. Refer to the documentation that came with your NAPA CD for complete details on ordering NAPA parts.

**Summary**

This appendix provided general information on working with Parts Catalog software of participating warehouse distributors. Refer to the documentation that came with the Parts Catalog CD for detailed instructions on installing and using specific Parts Catalog software.
Index

A
About this User's Guide 1
Accessing Protected Functions 153
Account Classes 79
Add a New Vendor 93
Add a note to your repair lines 181
Add a Referral Description 293
Add a sublet operation 179
Add a Technician 95
Add a user 230
Add an Alternate Part Number to an existing part 261
Add Labor to your Order 172
Add Parts and Labor to your order 204
Add Parts information to your order 174
Add/Edit Part on Purchase Order 281
Adding a New Canned Job 127
Adding a New Part Kit 122
Adding an Inventory Item 254
Adding Users 150
Adjust inventory levels for returned parts 267
Alternate Part Numbers 261
Alternate Price 262
Apply a batch payment 242
Apply Payments 244
Applying a Partial Payment 221
Approved Platforms 320
Associate an Attached Item 259
Attached Items 259
Auto Distribute 244
Automated Database Repair 115
Automated Repair Options 115
Automatic Backups 315

B
Backups
   How They Work 316
   Multi-User 317
   Recommended System 317
Batch Payments 119, 242
Before You Begin 3
Begin an order 160
Building Repair Lines 171

C
Canned Jobs 127, 182
   Add a Canned Job 127
   Copy an existing canned job 130
   Delete a canned job 131
   Edit an existing canned job 130
   Open the Canned Job List 127
Category Descriptions 46
   Add 46
   Delete 48
   Edit 47
Change Customer 143
Change Protected Areas 146
Change the on-hand quantity of an Inventory item 266
Changing Order Status/Revision 188
Changing Vehicle Ownership 143
Close an Accounting Month 268
Close an Accounting Year 268
Comment Lines for Purchase Order 280
Committing Parts 265
Complete the Order 168
Compound Tax Table 71
Confirming Parts 265
Convert the Order Pick List to a Purchase Order 274
Converting an Estimate or Repair Order to an Invoice 189
Converting an Estimate to a Repair Order 188
Copying a Part 257
Copying an Existing Canned Job 129
Copying Repair Lines 185
Copying Repair Lines from a History Record 240
Counter Sales 195
Create a new customer 164
Create a Purchase Order using the ReStock Function 273
Create and print a mail-merge document 305
I
Import Utility 329
Importing Data Into Manager 329
Income/Cash Accounts 72
Inspections Panel 301
Install/Update Manager 19
Inventory Balance 265
Inventory List 253
Inventory Transactions 265
Inventory Update 257
Invoice 159
Invoice Validations 90

K
Kit Line 124

L
Labor 172
Labor Rate Table 67
Letters and Postcards Setup 294
Linked Vendor Setup 338
Live Setup Instructions 19
Location Descriptions 54

M
Mail Merge Letter Setup 62
Mail Merge Letters 304
Maintenance Program Utilities 43
Manager Screen 26
Manager Technical Support 313
Marketing Data 292
Markup 77
Menu Bar
  File 30
  Help 37
  Setup Menu 33
  Utilities 34
  View 31
Microsoft System Information 39
Month End Close 267
Mouse 4
Moving Around in Manager 29
  Using a Mouse 29
  Moving Around Manager

Menu Bar 30
  Using Hot Keys 30
  Using the Keyboard 29
Multi-User Environment 319

N
NAPA Parts Ordering 339
Network Installation 319
New Customer
  starting order for 41
Notational Conventions 11
  Commands 11
  Keys 11
  Notes 12
  Procedures 12
  Select 12
  Text 11
NSF Funds 245

O
Order Revisions
  Attach Sub-Estimates to an open order 192
OnDemand5 Estimator 203
One-Start Toolbar 27
Online Help 9
  Online Assistance 9
Open an order from the Work in Progress screen 210
Open the Inventory List dialog box 254
Open the Recommendations dialog box 166
Open the Schedule screen 213
Open the User List 229
Open the Work in Progress Detail dialog box 224
Opening an Order 210
Order Entry Panels 160
Order Lifecycle 155
Order Panel 168
Order Revisions 190
  Create a Sub-Estimate 191

P
Part Code Descriptions 48
Batch Payments 119
Find Customer 118
Find History Record 119
Utilities Menu 121
Part Kits 121
Parts List 121

V
Vehicle not Defined 205
Vehicle Ownership, changing 143
Vehicle Panel 165
Vehicle Screen 139
  Add additional vehicles 142
  Add additional vehicles to a customer record 142
  Delete a vehicle 143
  Enter a new Vehicle 139
  Open the Vehicle screen 139
Vendor 338
Vendor Setup 92
  Add a New Vendor 93

Delete a Vendor 95
Edit Vendor Information 94
Vendor Type Descriptions 58
View List Panel 302

W
Who to Call for Help 313
Word Search 227
Work In Progress Detail 224
Work In Progress Screen
  Button Options 208
  Colors 209
  Removing an Order 210
  Work in Progress Screen 207

Y
Year End Close 268

Z
Zip Code Mapping 76
Zip File 318
# Index

## A
- About this User's Guide 1
- Accessing Protected Functions 153
- Account Classes 79
- Add a New Vendor 93
- Add a note to your repair lines 181
- Add a Referral Description 293
- Add a sublet operation 179
- Add a Technician 95
- Add a user 230
- Add an Alternate Part Number to an existing part 261
- Add Labor to your Order 172
- Add Parts and Labor to your order 204
- Add Parts information to your order 174
- Add/Edit Part on Purchase Order 281
- Adding a New Canned Job 127
- Adding a New Part Kit 122
- Adding an Inventory Item 254
- Adding Users 150
- Adjust inventory levels for returned parts 267
- Alternate Part Numbers 261
- Alternate Price 262
- Apply a batch payment 242
- Apply Payments 244
- Applying a Partial Payment 221
- Approved Platforms 320
- Associate an Attached Item 259
- Attached Items 259
- Auto Distribute 244
- Automated Database Repair 115
- Automated Repair Options 115
- Automatic Backups 315

## B
- Backups
  - How They Work 316
  - Multi-User 317
  - Recommended System 317
- Batch Payments 119, 242
- Before You Begin 3
- Begin an order 160
- Building Repair Lines 171

## C
- Canned Jobs 127, 182
  - Add a Canned Job 127
  - Copy an existing canned job 130
  - Delete a canned job 131
  - Edit an existing canned job 130
  - Open the Canned Job List 127
- Category Descriptions 46
  - Add 46
  - Delete 48
  - Edit 47
- Change Customer 143
- Change Protected Areas 146
- Change the on-hand quantity of an Inventory item 266
- Changing Order Status/Revision 188
- Changing Vehicle Ownership 143
- Close an Accounting Month 268
- Close an Accounting Year 268
- Comment Lines for Purchase Order 280
- Committing Parts 265
- Complete the Order 168
- Compound Tax Table 71
- Confirming Parts 265
- Convert the Order Pick List to a Purchase Order 274
- Converting an Estimate or Repair Order to an Invoice 189
- Converting an Estimate to a Repair Order 188
- Copying a Part 257
- Copying an Existing Canned Job 129
- Copying Repair Lines 185
- Copying Repair Lines from a History Record 240
- Counter Sales 195
- Create a new customer 164
- Create a Purchase Order using the ReStock Function 273
- Create and print a mail-merge document 305
Creating a Follow-up Postcard or Letter 295
Customer Credit Status Box 137
Customer List for Start Order 40
Customer Panel 162
Customer Personal Information 294
Customer Screen 133
  Add a new Customer 134
  Open the Customer Screen 133
Customer Screen Buttons 135
Customer Screen Thumb Tabs 135
Customer Vehicle Status Grid 138
Customer Work Information 294
Customizing your Screen View 225

D
Database Repair, setting up 115
Database Update Utility 329
Default Settings 83
Defining User Access 151
Delete a Referral Description 293
Delete a Technician 97
Delete a user 230
Delete a Vehicle 143
Delete an existing customer 164
Deleting a Canned Job 131
Deleting a Part Kit 126
Deleting a User 152
Demo Setup Instructions 14
Detail for Part 276
Diagnostic Reports 110
Disclaimer Setup 91

E
Edit a Referral Description 293
Edit Technician Information 97
Edit Vendor Information 94
Editing a Parts Kit Line Item 124
Editing a User's Name/Password 152
Editing an Existing Canned Job 130
Editing an Existing Part 256
Editing an Existing Parts Kit 124
End Of Day Reporting 100
End Of Day Reports 144
Entering and deleting Vehicle(s) 139
Errors 326
Establish alternate pricing on an existing part 263
Estimate 159
Estimate/Repair Order Validations 90
Estimating 182
Exiting the Program 43

F
FAQs 11
Fax Printer Selection 99
Faxing 41
Faxing Reports 252
Find Customer 118
Find History Record 119, 233
Followup Dialog Box 296
  Customer Panel 299
  History Panel 296
Followup Letter Setup 63
FollowUp Letters 294
Follow-Up Postcards 294
Followup Postcards and Letters Setup 61

G
General Mitchell Information 313
Generate a Counter Sale order 195
Grid Lines Colors 113

H
Hardware and Software Requirements
  Optimum System 4
History Detail Dialog Box 239
History Panel 237
  Search 238
History Screen 237
History Search (by Invoice number) 233
History Search (by Vehicle) 235
Host Setup 320
Hours of operation for customer service information 314
How Much Setup to Begin With? 121
How Manager Works 2
How To Use This Guide
  User’s Guide Contents 7
  How to Use this Guide 7
Add 49
Delete 51
Edit 50
Part Kits 121, 184
Adding a New Part Kit 122
Delete a part kit 126
Edit an existing part kit 124
Parts 174
Parts Discount Table 69
Parts List 121
Parts Ordering 337
Password 147
Payment 218
Applying Payment in Full 218
Make a partial payment 221
Post an unpaid invoice 223
Split payment of an order between payment types 221
Phone Descriptions 52
Physical Count Update 266
Pick List From Orders 274
PO Creation 277
Postcard Description Setup 61
Posted Invoice Accounting Transfer 115
Posting an Unpaid Invoice 223
Price MarkUp Matrix 79
Printing 41
Printing and Faxing 40
Faxing with Third Party Software 42
Printing Reports 249
Printing Reports/Postcards 303
Program Security 110
Promotions 285
Prompt On Use 125
Protecting Your Data 6
Uninterruptible Power Supply (UPS) 7
Protecting your Data
Back Up Your Data 7
Purchase Order Worksheet 276
Purchase Orders Dialog Box 271
Purging Estimates 212
Quick Estimate 156
R
Rearrange a column’s location in the grid 228
Receive Parts
Receive and Confirm a Part on a Repair Order 280
Receive Parts to a Repair Order 279
Receiving Parts 279
Receive All 279
Recommendations 166
Recommendations Panel 300
Referral Information 292
Referral Setup 293
Remove History Records 114
Removing Repair Lines 185
Repair Order 159
Reports/Printers 98
Reschedule an order 216
Reset Lastused Pointers 112
Resize a column’s width 228
Restock From Inventory 273
Restore a user’s view to default values 231
Return Part To Vendor 267
Run End Of Day reports 144
S
Schedule Screen 212
Add an item to the Schedule 215
Edit an item in the Schedule 216
Month View 213
Schedule Day View 214
Switch to the Schedule Day view 214
Schedule Work Dialog Box 216
Screen Layout 26
Screen Reports 251
Screen View 88
Security
Adding Users 150
Enter Program Security after it has been protected 148
How Manager Security Works 145
Remove a user’s security access 152
Setting Up Protected Functions 145
Q
Questions & Answers 313
Setting up Users 151
User Setup 148
Select an existing customer 162
Select the current user 230
Set Starting Invoice 112
Set up Error Logging 110
setting up linked 338
Setting Up Protected Functions 145
Setup 13
demo 14
Setup Menu
  Standard Descriptions 45
Shop 81
Shop Data 81
Shop Data 1 81
Shop Data Setup 81
  Default Settings 83
  Disclaimer Setup 91
  Estimate/Repair Order Validations 90
  Invoice Validations 90
  Screen View 88
  Shop Data 81
  Shop/Hazmat 85
Shop Setup
  Before You Begin 45
Shop/Hazmat 85
Show Symptoms on New Orders 198
Sizing/ Rearranging Columns 228
Special Maintenance 111
  Grid Line Colors 113
  Posted Invoice Accounting Transfer 115
  Remove History Records 114
  Reset Lastused Pointers 112
  Set Starting Invoice 112
Special Orders 186
  Create a Special Order 186
Spell Check 120
Splitting Payment Types 221
Standard Accounts 75
Standard Notes 59
Standard Tables 67
  Account Classes 79
  Compound Tax Table 71
  Income/Cash Accounts 72
Labor Rate Table 67
Markup 77
Parts Discount Table 69
Price MarkUp Matrix 79
Standard Accounts 75
Tax Rate Table 70
Zip Code Mapping 76
Start icon 41
Starting the Program 25
Status Descriptions 56
Status Display Preferences 225
Sublet 179
Supersede 264
Supersede an inventory item 264
Supplemental NT Server Installation Instructions 323
Symptoms 64, 197
System Setup 13
T
Tax Rate Table 70
Technical Considerations 326
Technicians Setup 95
  Add a Technician 95
  Delete a Technician 97
  Edit Technician information 97
Title Descriptions 53
Tool Tips 11
Toolbar 27
Training Videos 36
Transfer 267
Transfer a canned job to your order 183
Transfer a part 177
Transfer a parts kit to your order 184
U
Un-Post Invoice 238
Update a Vendor's List Prices 258
Upgrade User Limits 323
User Entered List 255
User List 229
Using a Mouse 5
Using Estimator 203
Using Substitute Parts 262
Utilities 117
Batch Payments 119
Find Customer 118
Find History Record 119
Utilities Menu 121
Part Kits 121
Parts List 121

V
Vehicle not Defined 205
Vehicle Ownership, changing 143
Vehicle Panel 165
Vehicle Screen 139
  Add additional vehicles 142
  Add additional vehicles to a customer record 142
  Delete a vehicle 143
  Enter a new Vehicle 139
  Open the Vehicle screen 139
Vendor 338
Vendor Setup 92
  Add a New Vendor 93
  Delete a Vendor 95
  Edit Vendor Information 94
Vendor Type Descriptions 58
View List Panel 302

W
Who to Call for Help 313
Word Search 227
Work In Progress Detail 224
Work In Progress Screen
  Button Options 208
  Colors 209
  Removing an Order 210
Work in Progress Screen 207

Y
Year End Close 268

Z
Zip Code Mapping 76
Zip File 318