Once the rep-assisted BASICS portion is completed, we recommend users complete the BASICS (OVERDRIVE) sections of this book as well, learning additional concepts at their own pace.
Management Training & Setup Overview

1. Get Overview with Jumpstart Guide (#1)
2. Teach Yourself Manager/ManagerPlus with DEMO Program (book #2)
   a. Rep Assisted Program BASICS
   b. Self-Instruction with BASICS (OVERDRIVE) Topics
   c. Watch Training Videos / Use F1 Help
3. Setup Shop Information in LIVE program (book #3)
   a. Rep-assisted Setup of BASICS
   b. Self-Setup of Additional Settings
   c. GET READY, GET SET, GO! LIVE

Tips for a Better Software Launch Experience

- Copy the demo (training version) onto as many computers as you want! Shop personnel take to the program faster when they’ve had some relaxed time to get familiar with it. They can even use the CD to install demo at home.

- Don’t rush it; the more you use the demo, the easier it gets. Depending on your schedule, it may take longer to achieve a comfort level, but your live experience will be better right away. Your time investment pays off later.

- Consider all program aspects carefully; a number of settings require a decision before going live. To change it later (after using live program for a while) may skew some reporting and results may be less than accurate.

- Take advantage of MANY keyboard shortcuts throughout program. If you learn these shortcuts, tasks are completed with reduced effort.

Self-Instruction Guide is intended to compliment detailed program reference information in the User’s Guide, located on the installation CD under ‘View Documentation’.

**TIP**: Open the Users Guide (manager.pdf) file and select Save As and copy to your Desktop! This eliminates the need to have an installation CD loaded. The latest copy of the User’s Guide and other Management System documents may also be downloaded from: [http://www.mitchellsupport.com/docs](http://www.mitchellsupport.com/docs).
Getting Started with Management Software

Locate your Management installation CD and insert it in your PC; it should automatically display a menu; if not, browse the CD and find autorun.exe

Choose ‘Install: Training/Jump Start’ to install the demo software. Install same product as the LIVE software you will be using – either Manager or ManagerPlus.

Install Training Videos; when prompted to install training videos to your hard drive; be sure to select ‘Yes’. That way they can always be viewed.

Follow the exercises in this booklet in the order they are presented. Having a printer connected is optional.

What’s the best way to use this Self-Instruction Guide?

Always use the Demo version of the program for these practice steps. Do NOT enter any data you wish to keep in Demo; Book 3 covers entry of data into LIVE.

Start at the beginning - your rep will assist with program basics. When you’re ready, continue on with self-study portion to learn even more about your software.
**Work exercises in order** - Screen pictures match where you should be for most steps. Because we’re teaching the functionality as a story in progress, each step should be carried out in the intended order as the best way to learn the workflow.

Many keyboard shortcuts are included in the tutorial steps throughout the book. By holding down the Alt key of the keyboard and then pressing the letter specified, the command is executed without having to use the mouse.

These shortcuts will follow button/mouse commands in parentheses like this typical example:

1. Click on **Order** *(Alt + O)* to advance to the Order Screen.

Many keyboard shortcuts in the program are also listed within menus below:

<table>
<thead>
<tr>
<th>Edit</th>
<th>View</th>
<th>Setup</th>
<th>Utilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cut</td>
<td>Ctrl-X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Copy</td>
<td>Ctrl-C</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paste</td>
<td>Ctrl-V</td>
<td></td>
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</tr>
<tr>
<td>Delete</td>
<td>Del</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Utilities</th>
<th>Training Videos</th>
<th>Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find Customer</td>
<td>F3</td>
<td></td>
</tr>
<tr>
<td>Find History Record</td>
<td>F4</td>
<td></td>
</tr>
<tr>
<td>Batch Payment</td>
<td>F5</td>
<td></td>
</tr>
</tbody>
</table>

Each time the demo is started, users are invited to view training videos.

Manager includes a comprehensive set of multimedia (audio and video) demonstrations on how to use many program features.

To start a demonstration, simply click on any video title listed after clicking on the **Yes** button.

Putting a check in ‘Don’t show me this again’ will cause this prompt to not display next time you start the program. Please don’t do this until everyone is reasonably familiar with program.

**Tip**: We strongly suggest copying the User Guide to your desktop as part of your product installation. This will provide fast access to answers for questions that occur during program operation. It’s always loaded and ready to review.
BASICS: Entering Customer & Vehicle Information

*Always start from the Customer Screen to create customer and vehicle records.*

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

2. Type the information below into the Customer screen:

   **Tip:** Use the Tab key to advance from one entry field to the next; it’s faster than the mouse. Use Shift + Tab to back up a field if needed. Do **NOT** use the enter key as it will take you off this screen; click on Customer tab to return.

   **Switch from Customer to Vehicle screen for entry of the vehicle record.**

3. With customer data entered, click on Vehicle (Alt + V).
4. Type in the license plate '2ABC123 and select the Vehicle data from the menus:

5. Click on (Alt + X).

**Note:** Use “drop down menus” when selecting Year-Make-Model (YMM), so you may use the Estimator (1981-up OE parts & 1974-up labor). Type in the YMM information for any vehicles that may be older or not covered in the Estimator.

6. Click Yes (type a 'Y' or Enter) to confirm Vehicle and Customer into database.

**Work In Progress (WIP) screen displays.**

**Note:** There is no Estimate, RO or Invoice for John Jones as yet. This customer will not appear on this (WIP) screen until one is created in the next chapter.
The ‘WIP’ button can be clicked while in most areas to display the Work In Progress screen. Think of this as the rack that holds your existing handwritten work orders. WIP screen gives you an instant overview of all current business in your shop. We’ll look at this in detail later.

This concludes the basic customer / vehicle information entry exercise.

Next: Learn the cycle from creating an Estimate thru posting a paid Invoice into History.
BASICS: Creating an Estimate

Creating an Estimate for customer ‘John Jones’ (2002 Ford Taurus LX)

1. Click on (press F6 key) to begin writing this Estimate.

Note: Start/F6 remembers last setting. Be sure Estimate is selected, not R.O.

This Customer List for Start Order dialog box allows you to quickly locate a customer record from anywhere in the program.

2. In the Name field, start typing: ‘Jones’ like this: When ‘Jones, John’ appears, double-click on it (or press Enter) to select it and start an estimate.

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jones</td>
<td>John</td>
</tr>
</tbody>
</table>
The Customer information is retrieved and Customer screen displays automatically. Now proceed to the Order screen to build the estimate.

3. Click on **Order** (Alt + O) to advance to the order screen.

The Order Screen now displays.

4. Enter the vehicle mileage here: **Odom. In 45657**

**Note:** Make a habit to enter mileage now; program warns you later if missing. Also, when two or more mileage readings are on file, averages are established. That's useful for follow-ups like service letters and LOF postcard reminders.

5. Click on **Symptoms** (Alt + Y) to add the customer’s vehicle complaint.
6. Select ‘AC Won’t Cool’ and click (or double-click on the Symptom line itself).

7. Click on **Done** (Alt + D) to copy the Symptom into the estimate.

8. Click on OK (press Enter) to confirm the process.

**Note:** Symptoms save time when creating estimates by using repeatable descriptions. Symptoms make it faster to receive vehicles and process the customer transaction. It also helps shops capture associated diagnostic time that should always be billed out. You can always apply it to a costlier repair.
Order Screen now displays the Estimate with the transferred symptom.

Note: When the customer or Service Writer already knows what the answer is, they may quickly add actual solutions stored in Manager. Canned jobs save entry time by grouping parts and labor operations together so multiple items transfer as a single entry to the Order screen.

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

This screen is where you create, manage and select canned jobs you build. We'll select one already in our demo list, using a partial word in the Description field.

9. Tab down to Description, enter ‘rec’ as a partial search phrase.

10. Click on **Search** to find ‘A/C Rech’ Recharge A/C (1 lbs).
11. Click on (Alt + T) to transfer 1 lb. of Freon with related labor to the estimate.

The Order Screen displays the Estimate with Diagnostic Time (Symptom) and the A/C Recharge Canned Job.

**Note:** Demo Canned jobs are used only to learn the software. In the LIVE software, you’ll create your own canned jobs tailored for your specific business.
BASICS: The Completed Estimate

The Estimate is now complete and ready to print.

1. Click on **Print (Ctrl + P)** to preview the Estimate on screen.

**Note:** Since this is only a preview, a printer is NOT required for this exercise.

Validation message appears regarding mileage, missing technician assignments, possibly inspection date. We won’t enter additional information at this time.

2. Click on **Continue Print (press Enter)** to proceed with printing the estimate to the screen.
The Print Preview window displays how your printed estimate would appear.

3. Click on the △ in the upper RH corner of the screen (press Alt + F4) to close the Print Preview window.

Closing the Print Preview screen returns you to the order screen.

*While on the Order screen, let’s move on to the next page and check the profit levels on this estimate.*
BASICS: Using the Profit Wizard

The Profit Wizard provides you with a representation of your profit margin on the order in the form of a pie chart. Use the F12 key as a shortcut at anytime, while the order is open.

1. Click on Options, select Check Profit. (or F12 shortcut key)

2. Click on OK (Esc key) to close the Profit Wizard.

Note: To get the most accurate picture, use the Profit Wizard after actual labor & parts costs have been entered to that specific Estimate, RO or Invoice. Please, Select labor tech provides a labor cost.

Miscellaneous & Overhead charges are entered during Setup. These numbers don’t impact invoice totals; they help users see a more realistic profit picture.

With the profit verified, the next step is to convert to a Repair Order.
BASICS: Converting an Estimate into a Repair Order

Convert an Estimate into a Repair Order upon customer's approval.

Manager/ManagerPlus is built to mirror the way you run your shop. You can start out at any stage; 1) **Estimate**, 2) **Repair Order**, or 3) **Invoice**. Typically, a shop starts out with an estimate of time and cost required to perform a repair service or maintenance activity.

Once that customer agrees to the service required, the estimate is converted to a repair order. Generally, shops proceed to work on vehicles with either a printed and signed estimate or repair order as acceptance of the terms of the service.

1. Click on **Convert to Order** (Alt + O) in lower left corner.

The system will ask for confirmation to convert to a Repair Order.

2. Click on **Yes** (‘Y’ or press Enter).

**Note:** Shops create many Estimates daily; these get temporary “throwaway” numbers. When an Estimate is converted to a Repair Order, it’s assigned a **permanent** number that is kept thru the Invoice stage into the History file.

*Order Screen now displays as Repair Order (with permanent number).*
Now that we have a Repair Order, we need to assign the technicians. This is done from within the Options window on the Order screen.

1. Click on **Options** to access the drop-down lists for default technicians.

The Order Options box displays.

Rather than change each line in the order one at a time, make a selection here to change them all at once.

2. Use the drop-down lists to select and set the Technicians to:

   Labor: ‘Charbonneau, Wayne’
   Parts: ‘DiVerde, Nick’

3. Click on **Done** to complete the technician assignment process.

**Note:** The Order Option Screen allows you to assign (or re-assign) technicians at anytime during the Estimate, Repair Order or Invoice phases. Technicians may also be added during Part or Labor item entry.

While this screen is displayed press F1 and click on the Training Video icon to reveal the numerous options available on the Order Options screen.

The Repair Order is now complete and ready to print.

You may not currently print repair orders in your shop, but we want to take you through the program flow to see where Technician Worksheet printing usually happens. Be sure to check out Entering Recommendations on page 53.
4. Click on **Print** (Ctrl + P) to preview the completed Repair Order.

5. Click **Continue Print** (press Enter) to continue printing to screen, as we will not be entering the Out mileage at this time.

**Note:** You may also increase/decrease the screen preview by adjusting % in the top line drop-box. See next page where it reads ‘75%’.
Inspect the Repair Order content in Print Preview.

6. Click on \(\times\) in upper RH corner of screen (\(\text{Alt} + \text{F4}\)) to close the Preview.

**Mark the Repair Order as Printed.**

7. Click on \(\text{Yes}\) (‘Y’ or press Enter) to mark this Repair Order as printed.

**Note:** Marking the Repair Order as printed will do two things: It sets the ‘Time/Date In’ field (WIP Detail). In ManagerPlus, it also commits the parts to the RO, making parts need visible to Pick List or Purchase Order process. You don’t have to actually print to paper, but marking it as printed is worthwhile.

**During Repair Order printing, you’ll be prompted for a Tech Worksheet.**

18 BASICS: Assigning Technicians to a Repair Order
8. Click on Yes (‘Y’ or press Enter) to print preview the Technician Worksheet.

9. Click on [x] in upper RH corner of screen (Alt + F4) to close the Preview.

**Note:** It is possible to re-print a Technician Worksheet at any time as needed from the Order Options window.
BASICS: Converting a Repair Order to an Invoice

Convert an existing Repair Order to an Invoice when the job is completed.

1. Click on Convert to Invoice (Alt + O) (lower LH corner of Order screen).
2. Click on Yes (‘Y’ or press Enter) to confirm conversion from R.O. (Order) to an Invoice.

When Repair Order is converted to an Invoice, program also ‘confirms’ all parts previously committed to the order were put on the vehicle.

Note: All Invoices use same number assigned during Repair Order phase. An Invoice can be changed back to a Repair Order if last minute items are added to it. This setting can be turned on or off in Setup, Shop Data – Default Settings.

Invoice screen looks exactly like the R.O. screen except it now reads Invoice #.

Before we advance to Pay & Post, use this Invoice to view WIP Options.

3. Click on Exit (or press Esc) to return to the Work-In-Progress screen.
When customer arrives to pick up vehicle, we will pay and post Invoice to history.
The ‘WIP’ screen provides overview of all current shop business.

The Work in Progress screen is where you access any open orders. This is likely the screen you will most often be in when not working directly with an open order.

**Note:** Use the Up and Down arrow keys or Page Up or Page Down on your keyboard to move up and down through the WIP screen grid. You may also simply press Enter key to open any highlighted order once it’s been selected.

The buttons along the bottom of the Work in Progress screen provide a number of options for working with orders. Some of these options are discussed on the following pages.
1. Click on **Purge Ests** to explore this feature.

This will permanently delete all estimates older than the number of days specified. They cannot be recovered.

2. Click **Ok** once to confirm and then again to complete the process.

3. Click on **Display** (Alt + Y).

Selecting Display brings up the Status Display Preferences dialog box. It includes controls for Sort Order and Record Types which allow you to tailor your WIP to display records you wish to see.

**TIP:** These preferences are also stored to each name found in the User List. This way each user can see the WIP screen the way they wish to see it.

4. Click **Ok** to save changes or **Cancel** (Esc) to exit without changes.

**Note:** To save changes made to WIP screen (and Order screen if any changes made), select (or create) a name from User List. If ‘DEFAULTUSER’ is seen in the lower RH corner of the screen, changes made to default display settings will be LOST when the user exits and re-starts the program.

Orders are automatically scheduled for the current day at default Promised time, at time of creation. Scheduler allows you to reschedule THIS order as needed.
5. Click on **Scheduler** to enter additional details.

Tab down to each field and enter the following (bold) information:

Scheduled: 9:32 AM (auto fills)
Promised: 5:00 PM (auto fills)
Category: ‘A’ (for AC/Heating/Cooling)
Estimated Hours: (auto fills from Inv)
Notes: fixing the weak A/C
Status: In Progress

6. Click **Ok** to save your input.

**WIP Detail** provides summarized information about an order. Detail includes several fields to edit (below). To open Detail: Highlight a customer/vehicle order and click the Detail button (or right-click your mouse on order). In this example; with **Jones, John** highlighted, we will check order details and update the status.

7. Click on **Detail** to display details of the highlighted record (Invoice for Jones, John; your invoice # may vary).

Update the following in the Work In Progress Detail screen:

Status: Completed
Location: Front Lot

8. Click on **Ok** to finish the process.

WIP screen will be visible once more with the Invoice for Jones, John highlighted.

9. Click on **Order** (Alt + O) to open the Invoice again.
BASICS: Apply Payments & Post the Invoice

John Jones is here to pickup the vehicle; complete the order cycle by collecting payment, printing a finished invoice and posting it to history.

1. Click on **Pay/Post Invoice** (Alt + O) to apply the payment to the invoice.

2. Enter Payment Type: M (MasterCard) and Authorization #: 228163

3. Click on **Pay** to continue.

**Note:** Apply Payment window: Default payment type of Visa is displayed; this is selected in Shop Data Setup. Payment Amount = balance due on the Invoice.

**Note:** If customer had a credit balance on file, Apply Credit will be lit. You need not checkmark *Print Receipt* as payment will appear on the finished Invoice.
4. When the Post Invoice dialog box displays, click on Yes (‘Y’ or Enter) to continue the process.

**System will automatically display the Posting Date dialog window below.**

5. Click in the Print Invoice before Posting? checkbox.
   Once a checkmark is placed in this box, the system will remember this preference.

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

**Invoice Validation window displays, reminding you to enter Out Mileage.**

7. Enter the following Out Mileage: **45661**

8. Click on **Continue Print** (or press Enter).

**Note:** Print Preview allows users to see the program output before they print it.
   Once comfortable with the program, many users save time by going to Setup – Reports/Printers area and turning off the Default Print to Screen option.

Print Preview displays what your final printed invoice would look like.
9. Click on \[\text{X}\] in upper RH corner of screen (\text{Alt} + \text{F4}) to close Preview.

**Mark the Invoice Order as Printed.**

10. Click on \[\text{Yes}\] (‘Y’ or Enter) to mark this Invoice as printed.

This Invoice will no longer appear on WIP screen, as it’s automatically posted to history.

*_Posted Invoices in History can be found easily for reference, parts warranty, Invoice re-printing and un-posting if necessary. See next page._*
How to find the John Jones Invoice in the History file:

11. Go to Utilities menu, select Find History Record (press F4 key).

View Record button allows access to view, re-print or un-post an Invoice.

End of the BASICS

This concludes the rep-assisted portion of management product training. Refer back to install/training checklist for other items. We recommend users continue on to learn more about the management software functionality.

Tip: Remember to use F1 Help on every screen, review the Training Videos and copy the User Guide to your desktop for ready reference.
ManagerPlus includes inventory functions; you’ll be working with an Inventory List. These database parts that can be applied to estimates and orders, over and over again.

If you are teaching yourself to use Manager skip to page 30.

In this exercise you will enter a part into the Inventory List.

The Inventory List screen has two primary functions:

This is where you search for existing inventory items to be transferred to an Estimate, R.O., Invoice or Revision. This screen also provides for adding new inventory part records.

1. Using menu bar at top of screen, click on Inventory, Inventory List.

2. Click on Add (Alt + A)

Note: When accessed from Order Screen, Revisions, Part Kit or Canned Job creation screens, a Transfer button is included to paste copies of part records.
3. Enter the following:
   Part No.: **70-5YR**
   Part Code: **bat**
   Re-Order Point: 1
   Stocking Level: 3
   On Hand: 2
   Last Cost $: **43.60**

4. Press **Tab** key to have Markup Matrix calculate the List (Selling) Price.

5. Click on **Ok** to save the new part record.

6. Click on **Yes** (press **Enter**) to save new part record.

   **The Inventory List screen will display with the newly added part listed.**

7. Click on **Done** to close the Inventory List window.
Manager includes a Parts List, containing database parts that can be applied to estimates and orders, over and over again.

If you are teaching yourself to use Manager Plus, refer back to page 28.

In this exercise you will enter a new part record into the Parts List.

1. Using menu bar at top of screen, click on Utilities, Parts List.

Parts List dialog has two primary functions:
The Parts List is for searching existing parts to be transferred to an estimate, repair order, invoice or revision. It is also where you add new part records.

2. Click on Add (Alt + A).
3. Enter the following information:

Part No.: **70-5YR**
Part Code: **bat**
Last Cost $: **43.60**

4. Press **Tab** key to trigger the Markup Matrix to calculate the List (Selling) Price.

![Add Part](image)

5. Click on **Ok** to save the new part record.

*The Part List screen will display with the newly added part listed.*

7. Click on **Done** (Alt + D) to close Parts List window.
Part Kits save time entering parts data into orders by grouping any number of items frequently sold together. (Examples: tune-up parts or radiator hose replacement).

In this exercise you will create a 'Radiator Hose' Part Kit from records stored in the Inventory System.

1. Click on Utilities, Part Kits.

Add a New Part Kit to the database.

2. Click on the Add button to open the Add Kit screen.

Note: Screens with the Search flashlight are used primarily to locate existing items, which users do about 90% of the time. The other 10% is spent adding new items as demonstrated in this exercise.
3. Enter Kit description:
   Kit No.: **7202-Kit**
   Description: **Radiator Hose Kit**
   Category: **Belts & Hoses** (’B’ twice)

   Now that this kit has a “name” with a Kit No., it’s time to transfer parts into it.

4. Click on **Add** (Alt + A) to open Inventory Parts List to add a part to the new kit.

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

6. Click on **Search** (press Enter).

7. Click on **Transfer** (Alt + T) to place a copy in the Part Kit.

   **Note:** Program will also automatically transfer two hose clamps that have been attached to the radiator hose to the Kit. See User documentation for more information about the ‘Attached Parts’ feature.
8. From ‘Add Kit’ screen, click on (Alt + A) to open the Inventory List to transfer another part into the kit.

9. Click on Clear in Inventory List; we need a part in a different category.

10. With Category cleared, enter ‘anti’ in Description.

11. Click on (Enter), ‘afc1/2 Anti-Freeze Coolant ½ Gal’ is located automatically.

12. Click on (Alt + T).
Add Kit displays with transferred hose, 2 hose clamps and Anti-Freeze.

There is a simple adjustment necessary that makes the kit more useful. You will change the quantity of the anti-freeze to two (2) units in the steps below.

13. Double-click on the line detailing the anti-freeze; Edit Kit Line box opens.

14. Change the quantity to **two** (2) and click on **Ok**.
15. Click on **Ok** once more in the Add Kit window to save your work.

16. Click on **Done** (Alt + D) in Part Kits window.

The 7202-Kit is now listed and ready to use.
BASICS (OVERDRIVE) Creating a Part Kit with the Parts List

Part Kits save time entering parts data into orders by grouping any number of items frequently sold together. (Tune-up, radiator hose replacement, etc).

In this exercise you will create a ‘Radiator Hose’ Part Kit from records stored in the Parts List.

Add a New Part Kit to the database.

1. Click on Utilities, Part Kits.

If you are teaching yourself to use Manager Plus, refer back to page 32.

2. Click on \(\text{Alt} + \text{A}\) to open the Add Kit screen.

Note: Screens with the Search flashlight are used primarily to locate existing items, which users do about 90% of the time. The other 10% is spent adding new items as demonstrated in this exercise.
3. Enter the Kit
description information:

Kit No.: 7202-Kit
Description: Radiator Hose Kit
Category: Belts & Hoses

Now that this kit has been “named” with a Kit No., it’s time to begin transferring parts into it.

4. Click on [Add] (Alt + A) to open Parts List to add a part to the new kit.

5. Enter the following information:

Part No.: 7202

6. Click on [Search] (press Enter).

7. Click on [Transfer] (Alt + T) to place a copy in the Part Kit.

**Note:** Program will also automatically transfer two hose clamps that have been attached to the radiator hose to the Kit. See User documentation for more information about the ‘Attached Parts’ feature.
8. From 'Add Kit' screen, click on **Add** *(Alt + A)* again to open the Inventory List to transfer another part into the kit.

9. Click on **Clear** in Parts List; we need a part in from a different category.

10. With Category cleared, enter ‘anti’ in Description.

11. Click on **Search** (press Enter), ‘afc1/2 Anti-Freeze Coolant ½ Gal’ is located automatically.

12. Click on **Transfer** *(Alt + T)*.
Add Kit displays with transferred hose, 2 hose clamps and Anti-Freeze.

However, there is an adjustment necessary to make the kit more useful. You will proceed to change the quantity of the anti-freeze to two (2) in the steps below.

13. Double-click on the line detailing the anti-freeze; Edit Kit Line box opens.

14. Change the quantity to two (2) and click on Ok.

15. In Add Kit, click on once more to close it.

16. Click on Done (Alt + D) to close the Part Kits list screen.

**TIP:** Part Kits can also be used to provide multiple choice options when attached to Canned Jobs. After you complete the Canned Job section of this book, take a look at LOF EZ Select 4 & LOF EZ Select 5 in demo; these Canned Jobs have Part Kits attached and setup to offer filter & oil options, both accurate & fast to apply.
**BASICS (OVERDRIVE) Creating a Canned Job**

_Add a Canned Job to the database._

1. Using the menu bar at top of screen, click on Utilities, Canned Jobs.

Canned jobs save time entering data into orders by grouping together parts and labor operations, which are used in frequently repeated combinations.

In this exercise, we'll set up a canned job consisting of parts and labor operations used to perform a Cooling System Flush and Pressure check.

2. From the Canned Job List search screen, click on (Alt + A) to open the Canned Jobs creation screen.

Note: Screens with the Search flashlight are used primarily to locate existing items, which users do about 90% of the time. The other 10% is spent adding new items as demonstrated in this exercise.
Add a Canned Job to the database.

3. From the Canned Job List screen, enter the following information:

Number: Flush-1
Description: Cooling System Flush and Check
Category: Maintenance ('M')

4. Click on (Alt + L) to begin adding content to the Canned Job.

Add a Labor item to the Canned Job.

5. In Order item entry – LABOR screen enter the following information:

Work Requested: Flush Cooling System, Install New Anti-Freeze, Pressure Check.
Work Performed: Drain & flush radiator, inspect hoses & clamps. Add cooling system lubricant. Add up to 1 gallon of coolant. Check thermostat and electric cooling fan operation.
Charge Hrs.: 1.2
Category: AC/Heating/Cooling

6. Click on Save (Alt + V).

This copies Labor item to Canned Job while keeping entry box open for more.

**Tip:** If Work Performed will read the same as Work Requested, you can use Windows copy (Ctrl + C) and paste (Ctrl + V) to save typing. While entering the labor, press the F2 key to check your spelling.
**Add Part items to the Canned Job.**

7. After saving the Labor, click on the Parts (Alt + P) tab to begin adding Parts or Inventory items to the Canned Job.

8. In the Order item entry – PARTS screen enter the following information:
   - Part No.: *afc1/2*
   - Press Tab key
   - Change the Quantity to 2

9. Click on **Save** (Alt + V). This keeps the entry box open for the next part.

**Note:** When the part number is known, enter it and press Tab, many details (Vendor, Category) fill in automatically.

**Now proceed with entry of the second part into the Canned Job.**
10. Enter the following:
Part No.: **bar1**
Press **Tab** key and part details fill in automatically.
(Quantity: 1 is fine)

11. Click on **Done** (**Alt + D**) to save the part and close entry screen.

The completed Canned Job displays.

12. Click on **Exit** (**Alt + X**) to close the Canned Job list window and return to the screen you were working on before the Canned Job exercise.

**Note:** Year-Make-Model left open (All) so that the Canned Job Search would find it no matter what vehicle was selected.

**Note:** Quick Canned Jobs Menu; ten selected (checkmark in box) entries for faster access on Order screen. Done with a right click on .00 line in the grid.
BASICS (OVERDRIVE) Writing a Counter Sale

Counter Sale provides a fast method to sell parts to walk-in customers. How much information you enter is up to you. This exercise will show you how to write a Counter Sale and (Optional) how to add an existing Customer name to the sale.

1. Click on (press F11 key) to begin.

The Counter Sale version of the Order screen displays.

2. Click on (Alt + P).

3. Enter the following information:
   Part No.: WB14
4. Press Tab key.
   Part record details fill in.
5. Change Quantity: 2
6. Click on (Alt + D) to save part to the sale & close the entry screen.

Note: When part number is known, enter it and press Tab; details such as Description, Vendor, Category, and Account Class fill in automatically.

This completes adding a part to a Counter Sale; continue on to process payment and learn how to add Customer information. This is useful for items with warranties like batteries.
7. Click on to access list of existing customers.

**Customer screen displays for this Counter Sale.**

8. Click on (Alt + A) to open the existing customer list.

![Customer List Screenshot]

**Note:** If the customer name was not found, you’d click on New to add name.

9. Select any name from list and then click or double-click directly on the name itself to select it.

10. Click on (Alt + O) to Pay, Print and Post this Counter Sale.
11. Click on Payment to process the customer payment.

12. Type the following in Payment Type: C (shortcut for cash)

13. Click on Pay to record the payment.
14. Click on Yes (‘Y’ or Enter) to confirm posting.

15. Click on Yes (‘Y’ or Enter) to answer Post printing question.

The system will display the Posting Date window. **Make certain there is a check mark in the** “Print Invoice before Posting?” box. This only has to be entered once.

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

The Invoice Validations dialog box displays.

17. Click on **Continue Print** (press Enter).

**Note:** Since a Counter Sale is really an Invoice at the end of the cycle, it shares the Validations (with mileage questions) of the regular in-shop repair Invoices.
The Print Preview window displays a preview of the Counter Sale.

18. Click on \( \times \) in upper RH corner of screen (\( \text{Alt} + \text{F}4 \)) to close Preview.

Mark the Counter Sale Printed.

19. Click on Yes (‘Y’ or Enter) to mark Counter Sale as printed.

Counter Sale is posted into History and disappears from WIP screen.
BASICS (OVERDRIVE) Entering Recommendations

Recommendations (future work) for newly discovered repair needs

This area allows you to add recommended services or repairs to the customer’s vehicle record. These Recommendations are typically handwritten on the Tech Worksheet and returned to the Service Writer for entry in this customer’s Vehicle screen. This information will be displayed in the Vehicle Screen as a reminder of noted repair needs, but not performed yet.

1. Click on **Start (Press F6)** and select Jones, John (any name will do)

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

3. Click on **Add** to begin entry of our first Recommendation.
Today’s date (default) is fine; use drop-down calendars or type dates if desired.

4. Press the Tab key to advance to Category field. Use your down arrow to open the drop-down list. Select ‘Automatic Trans/Transaxle’ (or press ‘A’ 3 times to advance the list).

5. Type: ‘Test drive: shifting not smooth; perform trans service first.’

6. When Recommendation entry is finished, press **F2** to check your spelling. Dictionary will suggest other word(s) to replace ‘trans’.

7. Select **Add To Custom** option.

8. Click **OK**.

**Note:** Custom Dictionary allows you to store any number of automotive terms to keep the “Not Found” warning from bothering you every time you use them.
9. Click **Ok** in Recommendations to save our first entry.

**With separate Recommendations, follow-up marketing can be focused.**

10. Click on **Add** *(Alt + A)* again in Vehicle screen to create a second Recommendation.

11. Press the Tab key to move to Category field. Scroll down the Category list and select Brakes. *(press 'B' 3 times)*.


13. Click on **Ok** to save this Recommendation.

<table>
<thead>
<tr>
<th>Date Recommended</th>
<th>Date Work Needed</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/26/2004</td>
<td>05/26/2004</td>
<td>Test Drive: Poor braking; perform ABS brake inspection.</td>
</tr>
<tr>
<td>05/26/2004</td>
<td>05/26/2004</td>
<td>Test Drive: not shifting smooth; performs trans service first</td>
</tr>
</tbody>
</table>

**Tip:** It is now possible to save repeated Recommendations as Standard Notes.

All recommendations will be listed on the Vehicle screen as shown above.

**Vehicle** When tab is green, it indicates Recommendation(s) are on file for this vehicle. The Vehicle tab will **not** turn green until you leave the vehicle screen. *(quite visible from Order or Revision screens)*

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52 BASICS (OVERDRIVE) Entering Recommendations
BASICS (OVERDRIVE) Entering Revisions

Create Revisions for additional work discovered. Then transfer them to an existing estimate or order, once the customer has approved them.

Once work on a vehicle begins, additional repair work is usually discovered. The program provides separate workspace to create Sub-Estimates, pending customer approval. This feature provides ability to perform "what-if" cost analysis of the original repair order along with various Sub-Estimate combinations.

The test drive inspired Recommendations; now we need to work up actual costs.

1. Go to **Revision** screen (**Alt + R**) to create a Sub-Estimate.

![Revision Screen]

**Note:** Sub-Estimates can contain any combination of order items; Parts, Labor, Sublet, Notes, Canned Jobs, Part Kits, etc.). Up to 9 separate Sub-Estimates can be stored and then later transferred to Estimates, Repair Orders or Invoices in any combination. Any Sub-Estimates not applied today, remain on file for this vehicle until later sold or deleted.

**Transferring a Canned Job into a Sub-Estimate storage area**
2. In Revisions screen, click on **Canned Jobs** (Alt + J) to open the Canned Job list.
3. Tab down to Job # field and enter ‘trans’.

4. Click on **Search** (or press Enter). Program finds one matching entry.

5. Click on **Transfer** (Alt + T or double-click on TRANS job itself) to copy into Revision (Sub-Estimate 1).

*Revision screen now displays SubEst1 with TRANS Canned Job added.*
6. Click on the **SubEst2** tab to open the next Revision area.

   *The Revision screen now displays the SubEst2 workspace.*

7. Click on **Canned Jobs** (Alt + J) to open the Canned Job list.
8. Enter **Brakes** as Category (press ‘B’ 3 times).

9. Click on **Search** (or press **Enter**). Program finds several matching entries.

![Search](image)

10. Select ‘BRK Inspect (ABS)’ from the Canned Job list.

11. Click on **Transfer** (Alt + T or double-click on ‘BRK’ job itself) to copy into Revision (Sub-Estimate 2).

**Revision screen now has 2 Sub-Estimates, ready to transfer, once approved by customer.**

**Tip:** While the Revision Screen is displayed, press **F1** and click on the training video icon to learn more about Revisions.
BASICS (OVERDRIVE) Transferring Revisions

We will use the Revision Authorization mechanism to add these Sub-Estimate(s) to the order.

1. Click on Transfer Revision to display the Revision Authorization screen.
2. Select the following:
   
   **Initiated by:** Shop
   **Written by:** Darrin, Dan
   **Authorized by:** Jones, John (auto-filled)
   
   **Reason:** Wants Problems Fixed
   **Phone:** Customer Called In
   **Time:** (auto-filled; default is OK)

![Revision Authorization Screen]

Review the pricing options.

Before completing transfer, experiment with checking and un-checking the two newly-created Sub-Estimates. Usually there is current estimate to add into total.

This allows users to give customers some repair cost options. If the customer can’t handle all the repairs today, un-check a Sub-Estimate and quote a revised figure. Any un-sold Sub-Estimate(s) remains on file for future service visits.

3. Click on Transfer to move the Revisions onto the Order screen.
Clearing the Related Recommendations

Transferring Revisions to the Order automatically prompts you to clear any Recommendations about the vehicle that triggered the creation of these Revisions.

4. Highlight a Recommendation you wish to remove and click on \(\text{(Alt + D)}\).

5. Click on ('Y' or press Enter) to confirm each deletion.

Repeat steps 4-5 to remove the second Recommendation being taken care of by a Revision.

6. Once all appropriate Recommendations have been deleted, click on \(\text{Ok}\) to close the Recommendations window.

Order Screen now displays with both transferred Sub- Estimates.
The Revision Tab will still be green if you did not transfer both Sub-Estimates.

- **SubEst 1** = presence of Parts & Labor content within that Sub-Estimate.
- **Revision** = presence of 1-to-9 Sub-Estimates within Revisions.

**Note:** No matter how many vehicles this customer brings in, Recommendations are stored for each individual vehicle. Recommendations are added on the Vehicle screen because they’re linked to each specific Vehicle, and not the Customer. This is very useful when generating follow-up postcards and letters.
BASICS (OVERDRIVE) Invoice History

Press F4 to display posted history records. Users can search for a specific invoice number or for history records on certain vehicles and/or repair work in history.

In the default view, the most recent Invoices appear first. Note that the first line contains The Invoice for Jones, John. It was posted earlier in this book, probably with today’s date and for the total amount of the invoice.

Double click on the line for Jones, John. The History panel will display all of the history records for the customer or vehicle depending upon your Display selection.

**Display:** all history records for this customer or just one of his vehicles.

**Un-Post Invoice:** Allows un-posting an invoice for corrections.

**Search:** History Records based upon key word(s) in Enter Information box. Program searches Description field of each invoice in grid to find matches to your search request.

**Detail:** see selected invoice including parts and labor detail, and a history of payments. History Detail window also allows you to view Payments and individual order lines.

Click on **Exit** or hit **Esc** to return to the WIP (Work in Progress) screen.
BASICS (OVERDRIVE) Installing Training Videos

This section describes how to install or re-install Training Videos. If you missed the chance to copy them during installation, follow these steps.

**Note:** You must already have Management System software installed first.

1. Insert the management installation CD, a menu will automatically appear.
2. Click on the ‘**Install Training Videos**’ menu choice.

The Video Training installation program will begin. Videos require approximately 375 megabytes of free hard disk space.
3. Click on the **Next <N>** button to continue the process.

If you installed both Demo and Live, installation will display this window offering a choice of which version folder to copy video files to. We recommend Demo as this is the most helpful time to be viewing them.

![InstallShield Wizard](image1)

**Note:** Data movie path can be linked to Live program later, by browsing to the ScreenCam folder in Demo and clicking Open to re-establish that path.

4. Make sure the bullet is next to Demo if installed.
5. Click on the **Next <N>** button to continue.

![InstallShield Wizard](image2)

**Note:** Menu displays the name of the database; MMS Series II 32 Training videos are for OnDemand5 ManagerPlus, MMS Series I 32 Training videos are for OnDemand5 Manager. Choose the option that apply to your installation.
The Training Videos installation program will start copying files advising you of the progress. This process may take several minutes to complete.

6. Click **finish** to close the window.

Your system is now ready to run training videos from the hard drive. While in the Management software, click on **Training Videos / How do I...** to view the master list and select any topic you wish.
The installation CD includes the **User Guide** and a **Network Administrators guide** used for Multi-User installations. Both documents are stored in Adobe PDF format. We have also included the Adobe PDF reader installation program.

Click on Documentation and then follow the on-screen prompts.

**Tip:** We strongly suggest copying the User Guide to your desktop as part of your product installation. This will provide fast access to answers for questions that occur during program operation. It’s always loaded and ready to review.