Mitchell 1 / ShopKey Management Solutions

LEARN: SE Management Software

Self-paced tutorial of program basics with DEMO version of SE 9.x

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Contents

This workbook is intended to get users started; detailed reference information is found in the Online Help and Training Videos. This is accessed from top screen menu bar **Help** option or clicking on the **Help** button. [Pressing F1 key from most screens too]

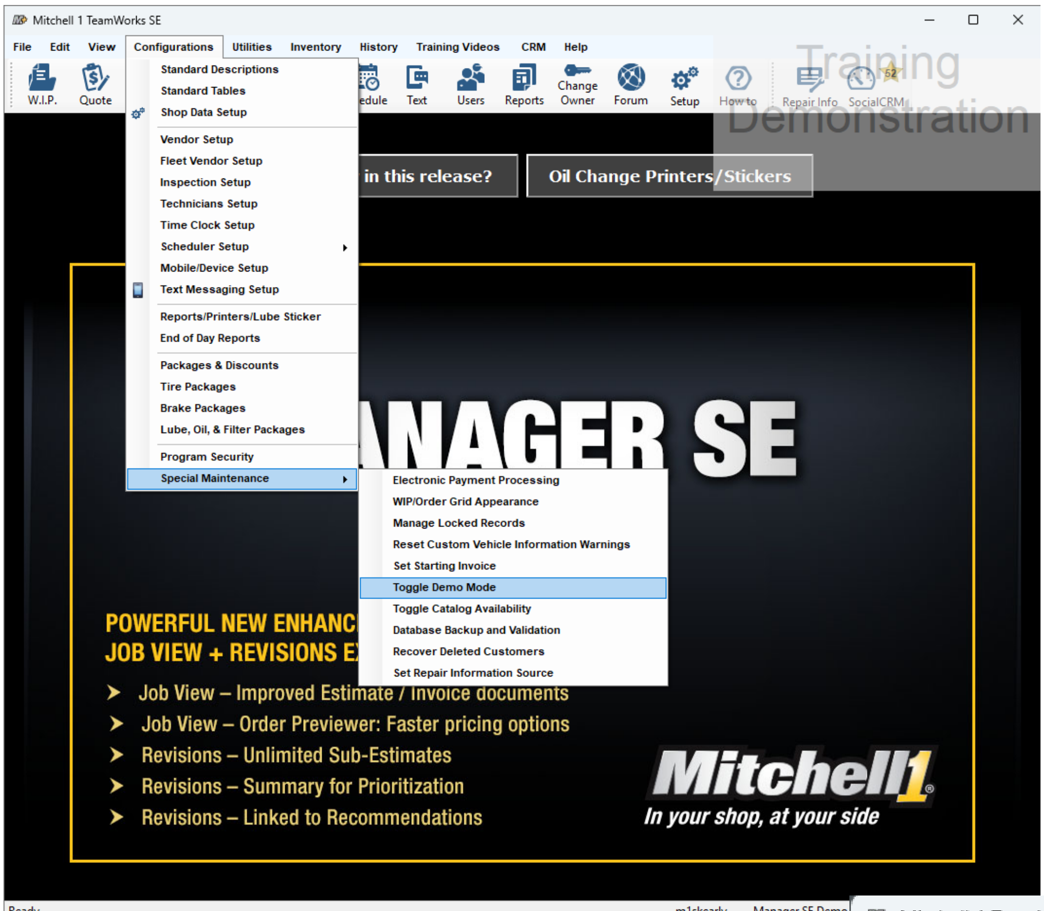
Assisted Program Basics

This self-paced tutorial assumes that you have the Manager SE v.9.1.x installed on your PC. If you do not have the software installed, the most current released version is available for download at: **https://kb.mitchell1.com/manager-files/**. [SE update is always line item #1]

Once the SE software has been installed, change it to **DEMO** mode using the instructions on this page. (Then you'll have samples to work with)

IMPORTANT: *Always use this book with the DEMO version*. It will be easier to understand the concepts working with sample customers, vehicles, parts, orders and jobs. Be sure to switch back to LIVE mode once you start entering data you wish to keep. **Data added in DEMO mode cannot be transferred into the LIVE version later**.

Work these exercises in order as one section of the tutorial builds upon previous entries. Use of a printer is optional, although recommended, if one is available.



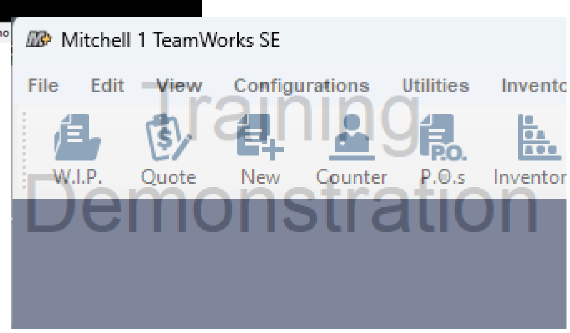
Switching SE live program to DEMO mode

1. From "home" (splash) screen, click on **Configurations**, **Special Maintenance**.

2. Select **Toggle Demo Mode**; program will prompt you to restart.

Once restarted, an on-screen text box indicates *"Training Demonstration"* (**DEMO**) mode.

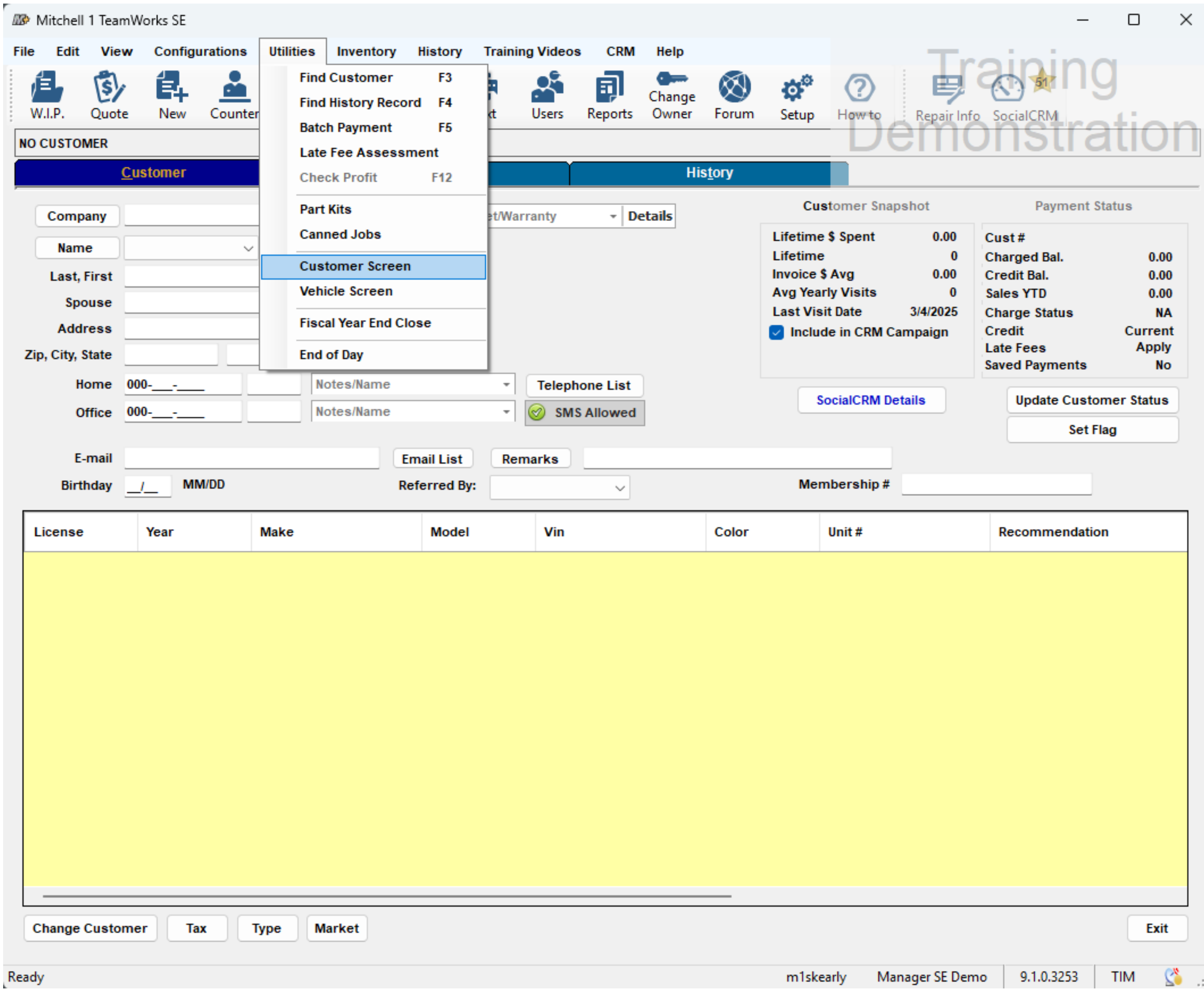
Note: Look for the **Training Demonstration Overlay** to ensure you are working in Demo mode. This will allow you to access the pre-built demo database examples of Parts, Canned Jobs, etc.



Entering Customer & Vehicle Information

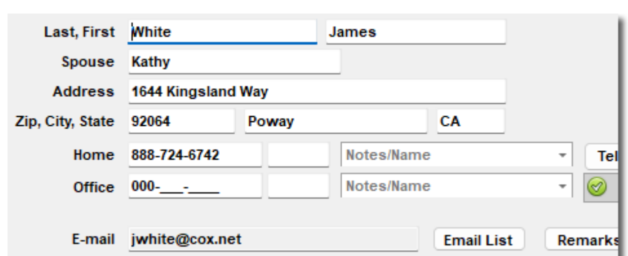
Create a new customer / vehicle record as follows.

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



2. Type the customer's information into your Customer screen: (entering Zip Code then pressing the Tab key* automatically fills City + State fields)

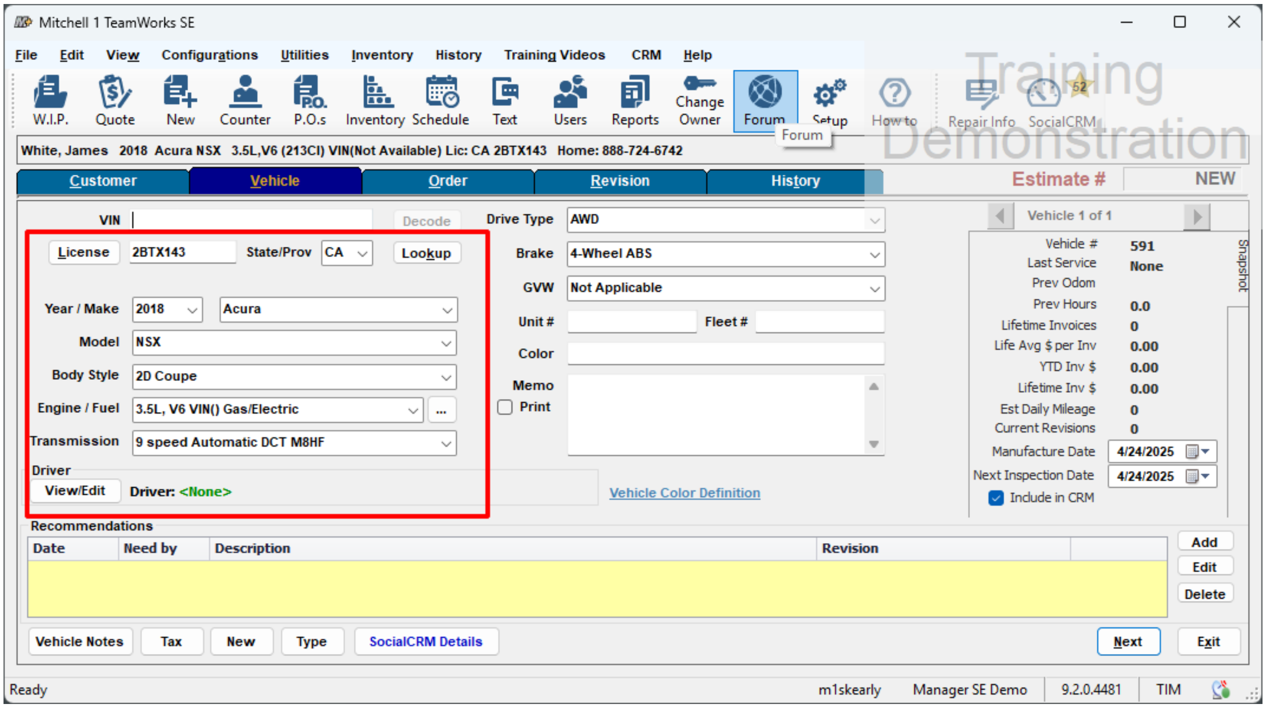
   - James White
   - Kathy (Spouse)
   - 1544 Kingsland Way
   - 92064 (zip + Tab). Zip, City, State enter automatically
   - 888-724-6742
   - jwhite@cox.net

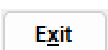


3. With customer data entry finished, click the **Vehicle Tab (or Alt + V).**

Vehicle screen displays for vehicle entry. Type in the license plate and select Year / Make / Model, Body Style & Engine/Fuel vehicle data from the drop-down menus to match the values in the screen below (**2018 Acura NSX, 2D Coupe**).

Note: DEMO has no VIN Decode or Plate Lookup functions; enter license # (**2BTX143**)+ year-make-model (**2018 Acura NSX, 2D Coupe**).

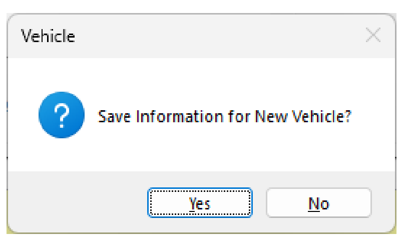




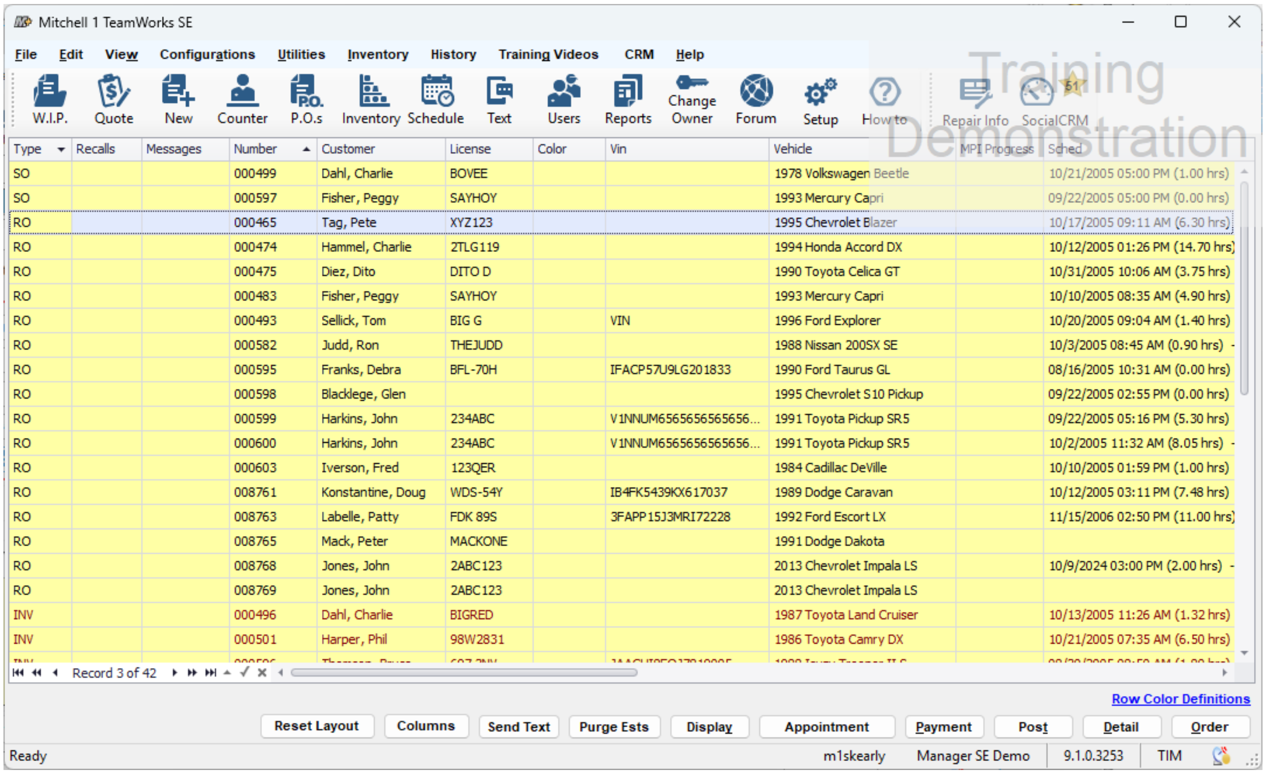
4. Then click on the **Exit** Button **(Alt + X)** in the bottom right corner to finish entry and close the Vehicle screen**.**

Note: Use 'drop-down menus' when entering vehicles to ensure Estimator access to OE parts, labor, maintenance or TSBs. Manually type in Y-M-M only when vehicle is pre- 1974 or if it is a type of vehicle not covered in Estimator.

5. You are prompted to save your changes. Click **Yes** to confirm this vehicle and customer information is being added to the SE database for future use.



The Work In Progress (W.I.P.) screen is displayed. Think of W.I.P. as the rack that held hand orders. WIP screen provides an overview of all current business in your shop. We will provide more details on this screen later.



Note: The Customer/Vehicle you just entered should not show in the WIP screen yet as you have yet to create an estimate.

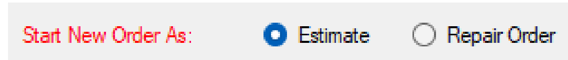
This concludes the basic customer / vehicle entry exercise. Continue on to **Creating an Estimate** with this data entered.

Creating an Estimate

Creating an Estimate for customer 'James White' (2018 Acura NSX)

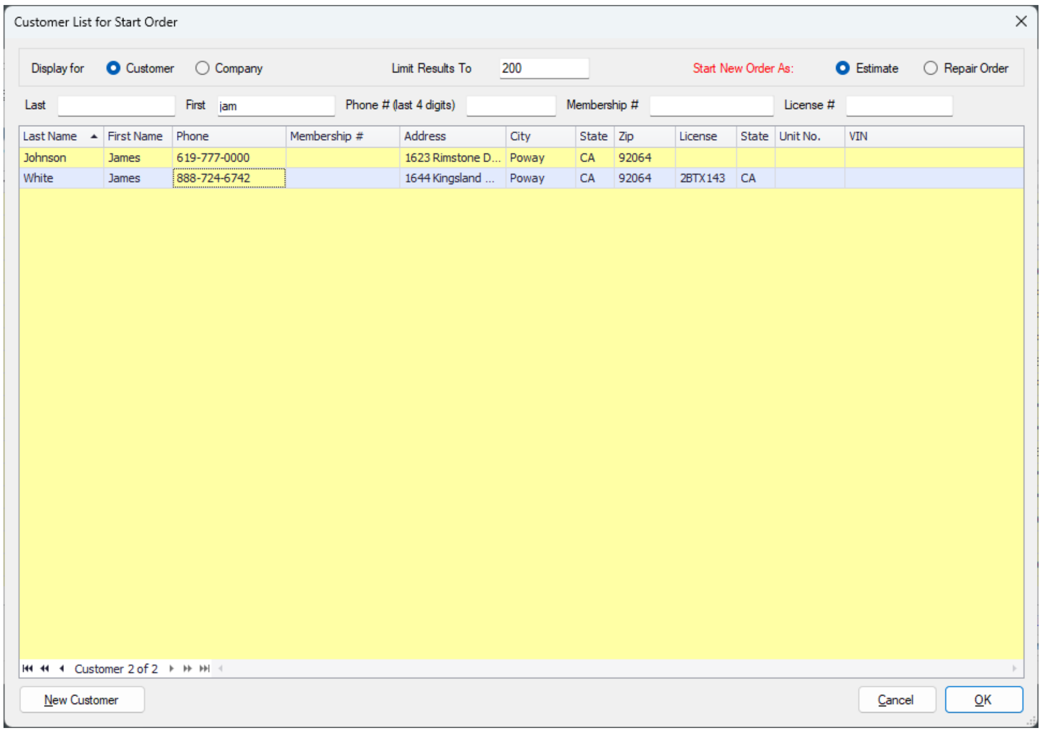
1. Click on **'New' (press F6 key)** to begin writing this Estimate.

Note: 'New'/F6 key "remembers" last setting. Be sure Estimate is selected, NOT Repair Order.



Customer List for Start Order window quickly verifies a customer exists in database. If not found, **New Customer** button would be used to start entry.

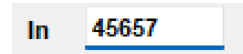
In the **First** field, type 'J-a-m'.

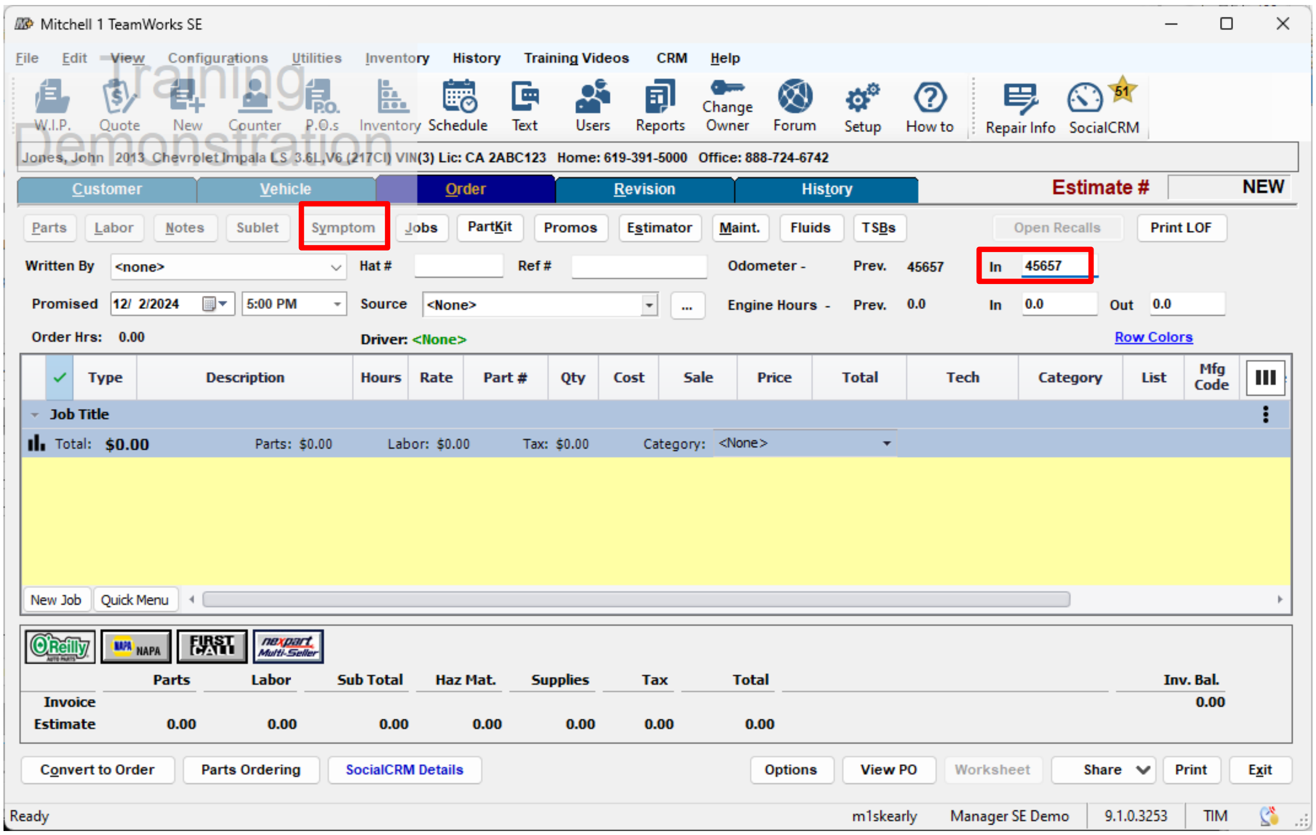


2. When 'White, James' appears in results, double-click on it (**or press Enter**) to select James White and start an estimate.
3. Customer information is retrieved and Customer screen displays automatically. The customer we entered (James White) has only one vehicle so it is automatically selected. Click on the Order Tab **(Alt + O)** to advance to the Order screen.

4. The Order Screen displays with the cursor in the Odometer – In number entry field. Enter Vehicle Mileage as **45657**

Note: Enter mileage; program warns later if it's missing. It is crucial for your customer communications and SocialCRM reminders to have accurate mileage.



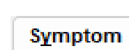


Begin adding order items to the Estimate, starting with a Symptom.

NOTE: If Symptoms is not set to pop-up automatically, click button as shown above.

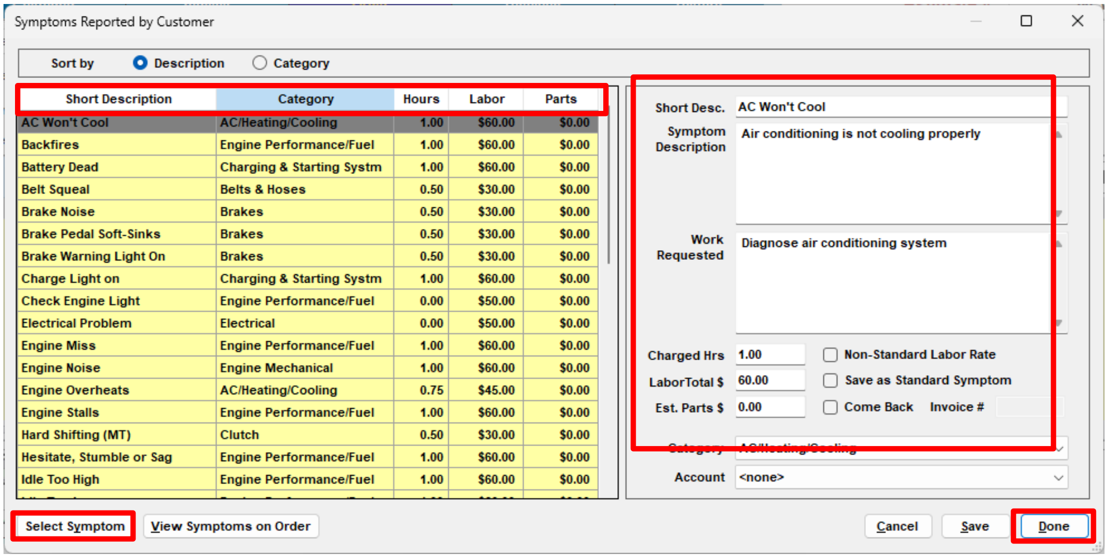
A Symptom is a vehicle complaint that the customer is requesting your shop investigate. These include description, category and labor time to diagnose it. Additional text can be entered; this input helps the tech figure out the cause.

5. Click on **Symptom (Alt + Y)** to add the customer's vehicle complaint.



The **Symptoms Reported by Customer** screen displays a listing of symptoms to select from.

6. Choose the first Symptom, **AC Won't Cool** and click **Select Symptom**. The symptom details display in the right screen panel. You may change any of the values in this screen as needed. Once you are finished, click on the **Done** Button **(Alt + D)** to copy the Symptom into the estimate.

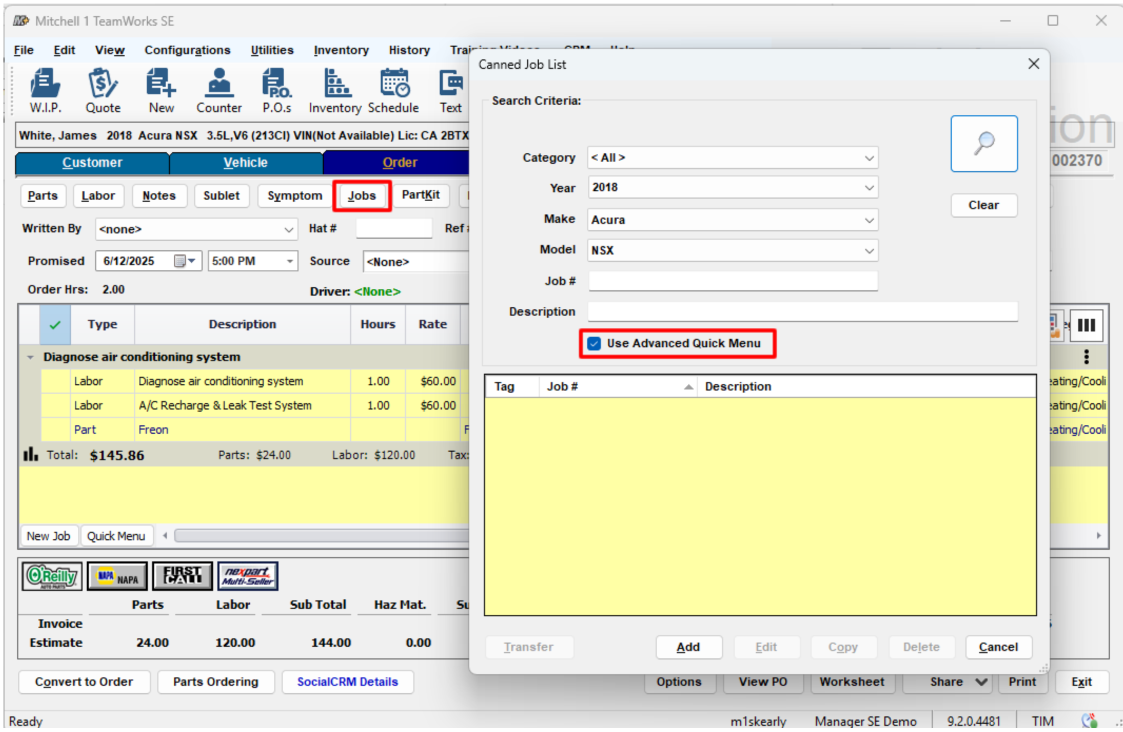


Note: Symptoms use stored descriptions with labor times & prices. This makes it faster to receive vehicles and process customers; captures diagnostic time that should always be billed out. See tip below to set automatic list pop-up.

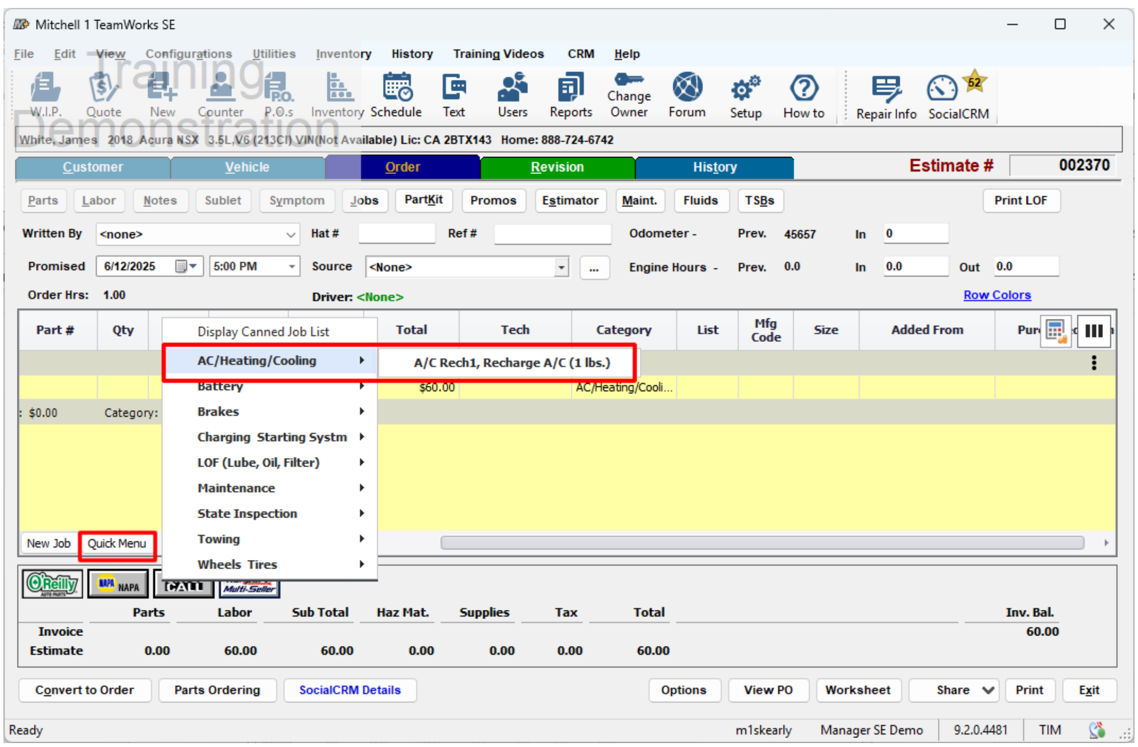
The Order Screen displays the Estimate with transferred Symptom as a labor item.

Now that we've added the symptom, it is time to add some parts and labor to the estimate in the form of a Canned Job. Before we begin, you will set Manager to use the Advanced Canned Job feature.

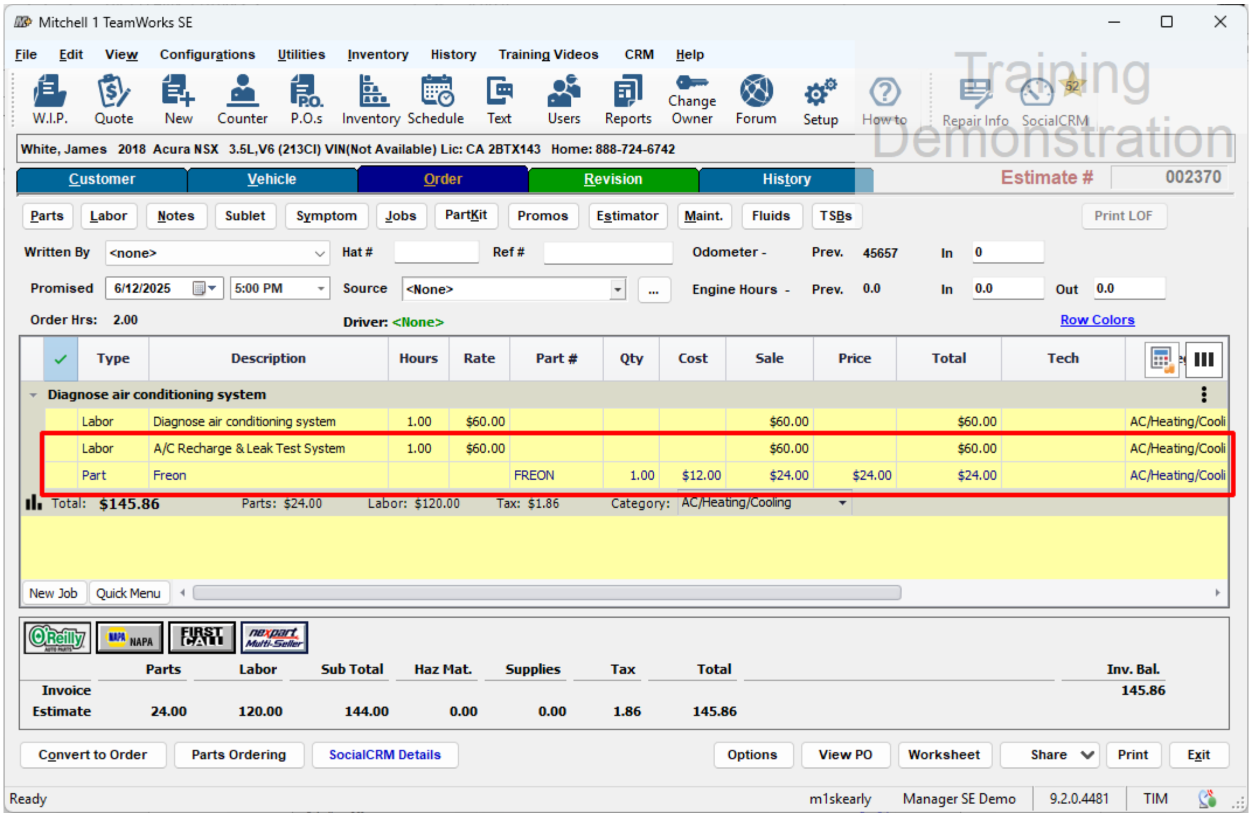
7. Click on the **Jobs** button to open the **Canned Job List**.
8. Select **Use Advanced Quick Menu** (if not already selected). Then click on **Cancel** or **X** to exit the dialog box.



9. Click on the **Quick Menu** button **(Alt + J)** to open the Quick Menu.
10. Browse the **AC/Heating/Cooling** Category and **pick A/C Rech 1, Recharge A/C (1 lbs.)**

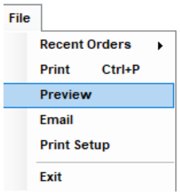


The Canned Job part and labor repair lines display in the Estimate.

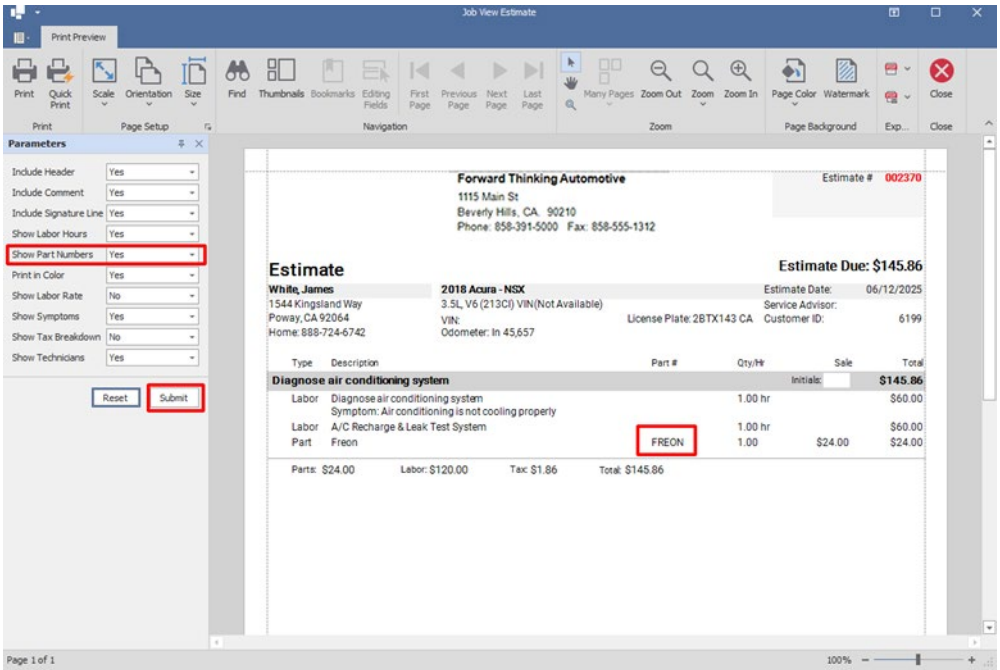


The original estimate is now complete. Before moving on to the repair order, let's print the Estimate.

Printing the Job View Estimate



1. Choose **Preview** from the **File** menu to preview this Repair Order on your screen.
2. The **Print Preview** displays how printed Repair Order appears.
3. The Parameters box in the left sidebar allows you to change some of the settings in the print preview. Change the **Show Part Numbers** setting to **Yes** and press the **Submit** button.



You will see that the Part Number (FREON) has been added to the estimate print preview.

4. (Optional) Click the **Print** button to print the estimate.
5. Closing the Print Preview **X** returns you to the estimate on Order screen.

Revisions

Let's say that in addition to the original estimate, you found a couple of additional repair/maintenance issues to recommend to the customer. You would record these issues as **Sub-Estimates** to have available when you contact the customer for approval.

Creating Sub-Estimates:

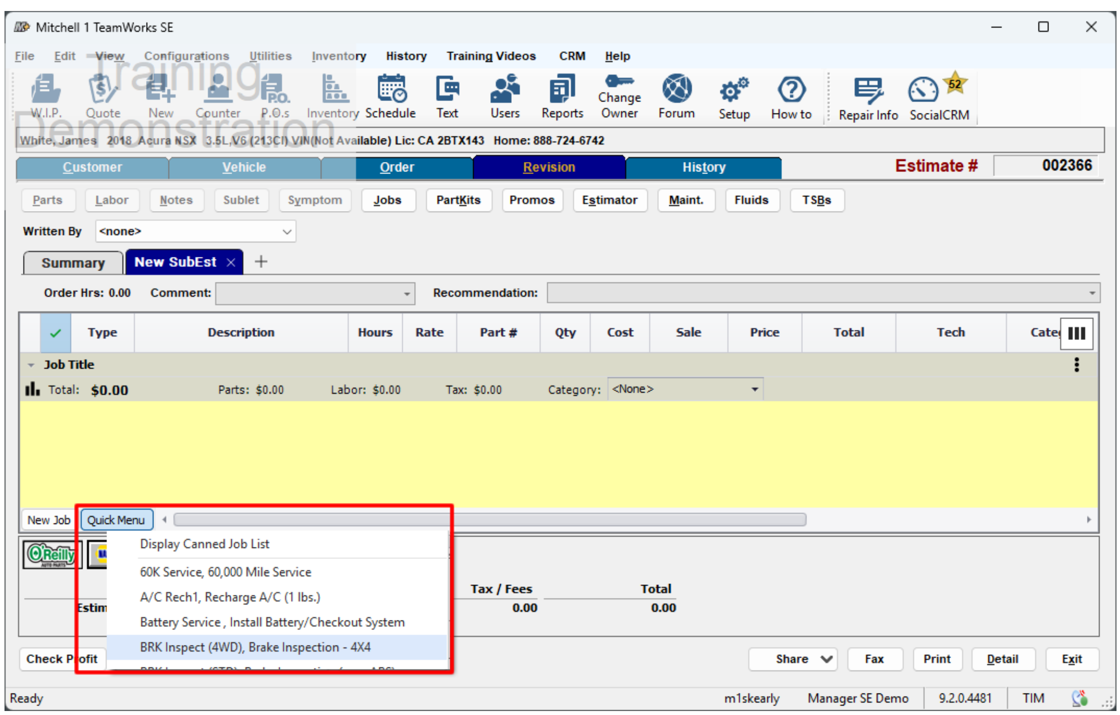
1. You begin the Sub-Estimate/Order Revision process by clicking the **Revision** tab.

   This opens the Revision panel, initially blank.

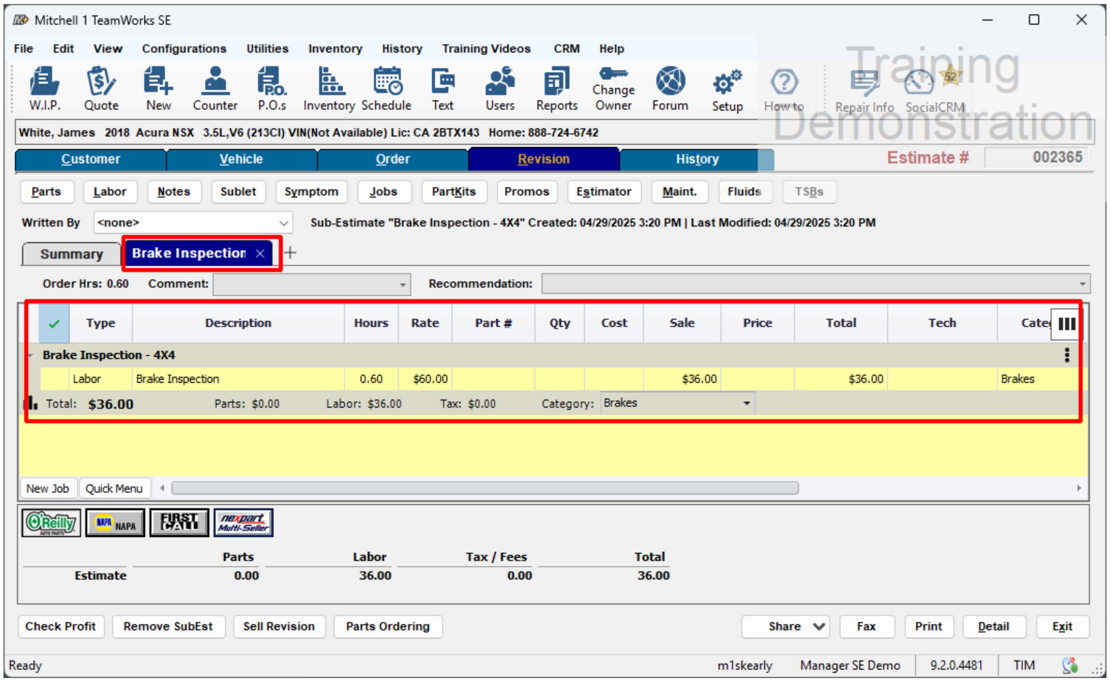
2. Click the "+" tab to create a new **Sub-Estimate**.

3. We are going to use the Quick Menu to create the Sub-Estimate.

4. Click on the **Quick Menu** button to open the Quick Menu. Choose **BRK Inspect (4WD), Brake Inspection – 4x4**



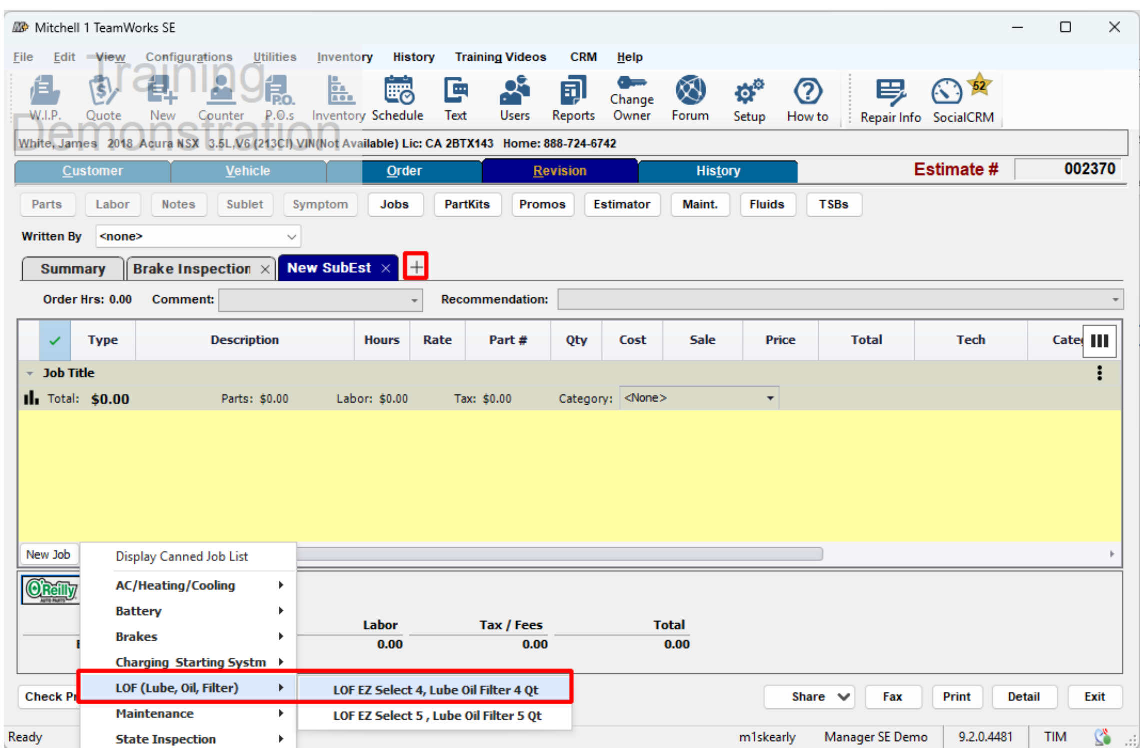
   The canned job is added to the Sub-Estimate.



The Labor is added to the Sub-Estimate and the title of the tab changes from **New Sub-Est** to **Brake Inspection**.

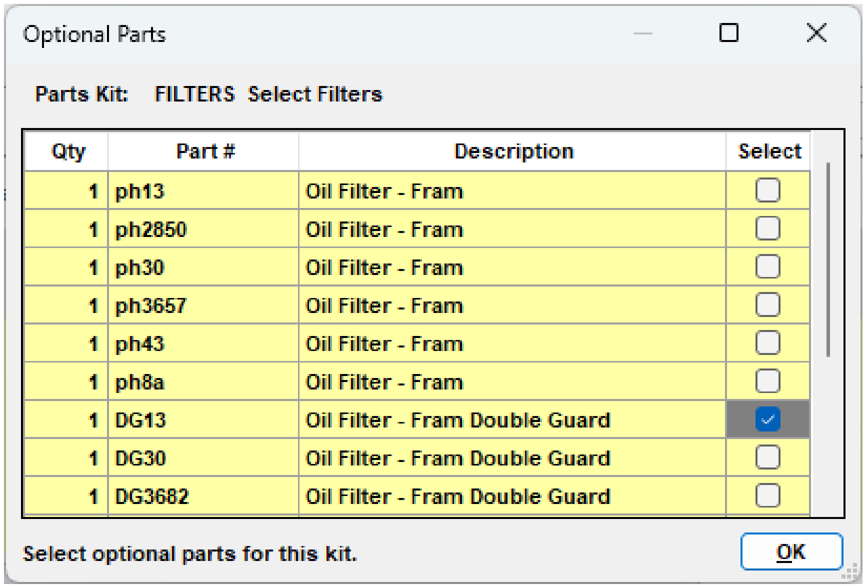
Based on the vehicle mileage you anticipate that a Front Disk Brake job may be needed upon completion of the Brake Inspection.

5. Click the "+" tab to create another **Sub-Estimate.**



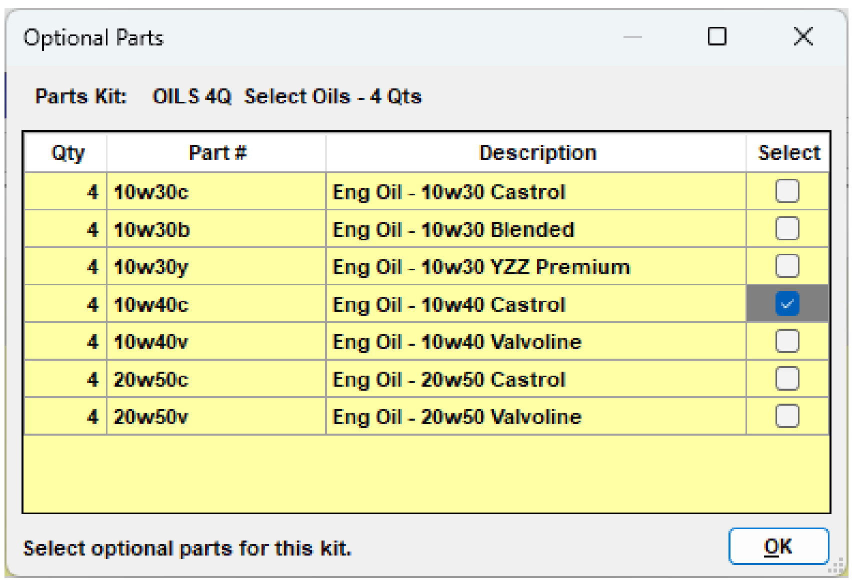
6. Click **LOF** and **LOF EZ Select 4, Lube Oil Filter 4 qt**.

   You are prompted to select the filter.



7. Pick **DG13 Oil Filter – Fram Double Guard** and click **OK**.

   You are prompted to select the Oil.



8. Choose **10w40c Castrol** and click **OK.**

   The parts and labor are added to the Sub Estimate.

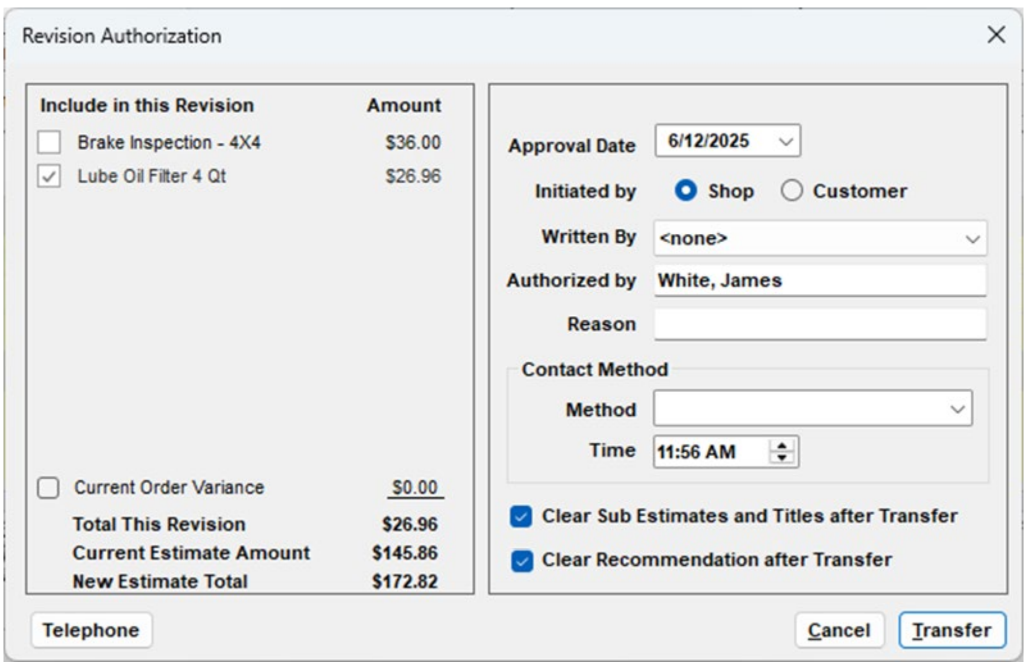
Selling Revisions

This basic Estimate (Symptom - diagnostic time + 'A/C Recharge' Job) along with two Sub-Estimates are now complete. The next logical step might be to contact the customer to authorize the repair and sell the revision(s). Once you have gotten the repairs approved, you will convert the Estimate to the Repair Order.

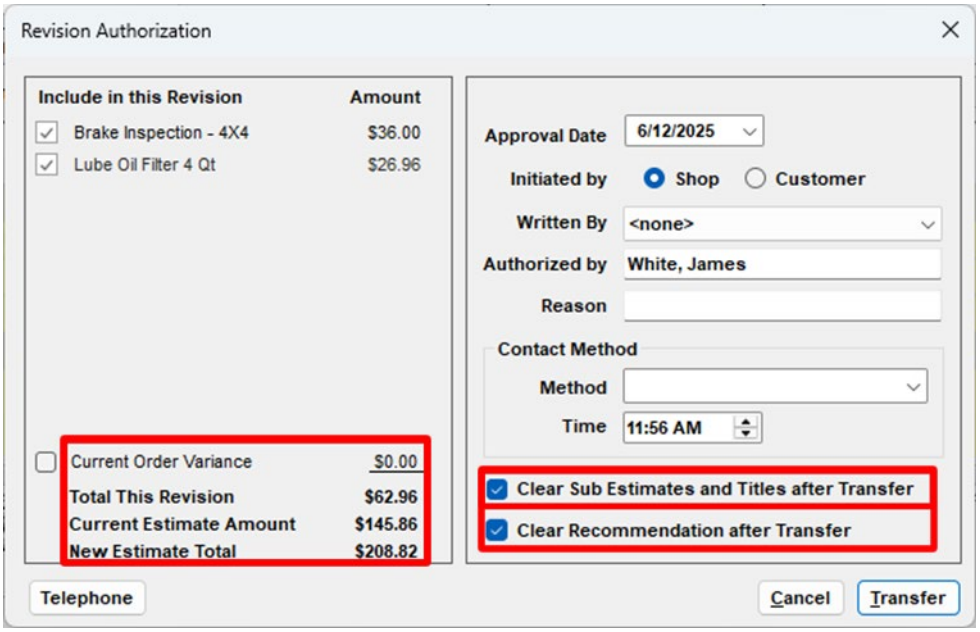
To Sell Revisions:

1. In the Revisions panel, with the **LOF** Tab selected (continuing from previous step), choose the **Sell Revision** button (bottom right corner)

This opens the Revision Authorization dialog box. Your two Sub-Estimates are displayed with Lube **Oil Filter 4 Qt** selected along with the Current Estimate amount and Revision Total.



2. Click on Brake Inspection 4X4 also and note how the Totals at the bottom of the Revision Authorization screen update to reflect your selection.

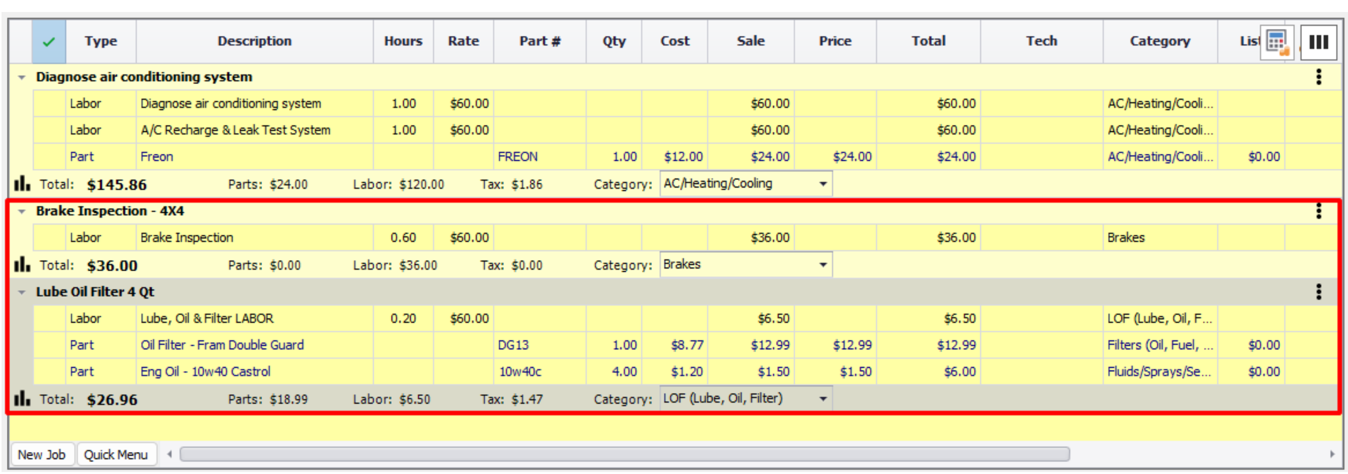


3. You will also want to make sure that the **Clear Sub Estimates and Titles after Transfer** and **Clear Recommendation after Transfer** boxes are checked. This clears the Sub Estimates and Recommendations from the Order as the work having been addressed once you have Transferred them to the Order.

Note: You can supply "what if" scenarios for your customer by clicking on/off the selection boxes of the available sub-estimates. The **Total This Revision** amount and **New Estimate Total** fields change dynamically so that the customer can consider the cost of the various sub-estimate combinations. Please feel free to experiment with this capability before moving on.

4. Click the **Transfer** button to add the Revision work to the estimate. You are returned to the Order panel with the Revisions transferred to the Estimate. You may be prompted about missing information. Click **Yes** to continue.

   The two sub-estimate jobs **Brake Inspection** and **LOF** are added to the order grid.



Type	Description	Hours	Rate	Part #	Qty	Cost	Sale	Price	Total	Tech	Category	List
Diagnose air conditioning system												
Labor	Diagnose air conditioning system	1.00	$60.00				$60.00		$60.00		AC/Heating/Cooli...	
Labor	A/C Recharge & Leak Test System	1.00	$60.00				$60.00		$60.00		AC/Heating/Cooli...	
Part	Freon			FREON	1.00	$12.00	$24.00	$24.00	$24.00		AC/Heating/Cooli...	$0.00
Total: **$145.86**	Parts: $24.00	Labor: $120.00	Tax: $1.86	Category: AC/Heating/Cooling								
Brake Inspection - 4X4												
Labor	Brake Inspection	0.60	$60.00				$36.00		$36.00		Brakes	
Total: **$36.00**	Parts: $0.00	Labor: $36.00	Tax: $0.00	Category: Brakes								
Lube Oil Filter 4 Qt												
Labor	Lube, Oil & Filter LABOR	0.20	$60.00				$6.50		$6.50		LOF (Lube, Oil, F...	
Part	Oil Filter - Fram Double Guard			DG13	1.00	$8.77	$12.99	$12.99	$12.99		Filters (Oil, Fuel, ...	$0.00
Part	Eng Oil - 10w40 Castrol			10w40c	4.00	$1.20	$1.50	$1.50	$6.00		Fluids/Sprays/Se...	$0.00
Total: **$26.96**	Parts: $18.99	Labor: $6.50	Tax: $1.47	Category: LOF (Lube, Oil, Filter)								

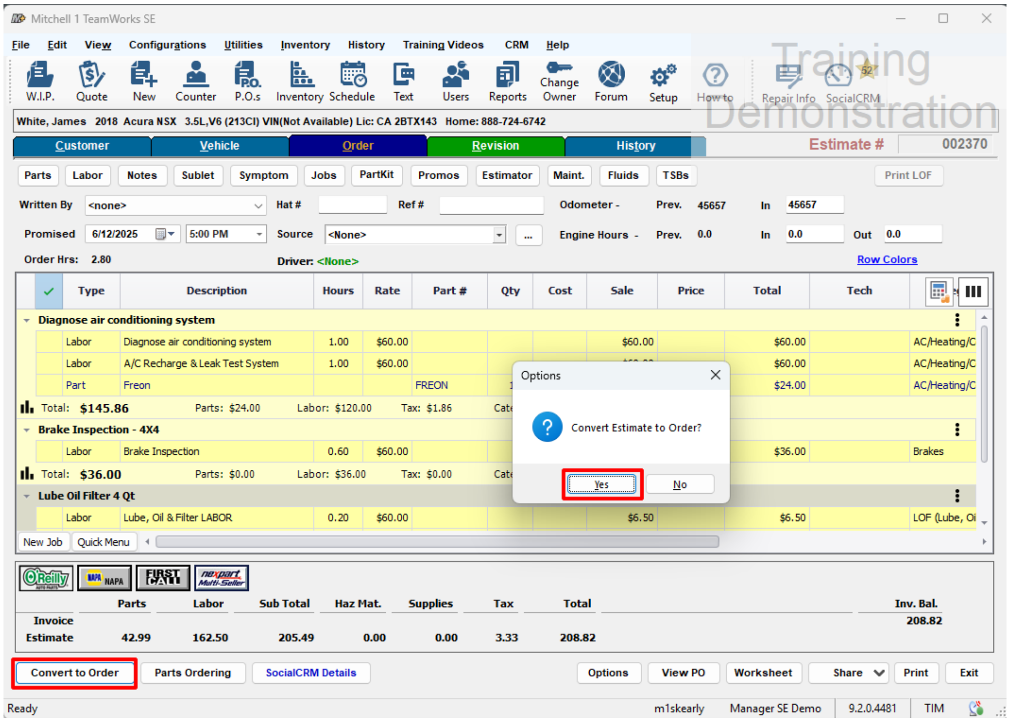
New Job | Quick Menu

   Next, we will convert the Estimate to a Repair Order.

Converting an Estimate into a Repair Order

Typically, an estimate is prepared to get customer approval for the work. Once the customer agrees, that estimate is printed, signed, then converted to an active R.O. [your state regulations may vary on this]

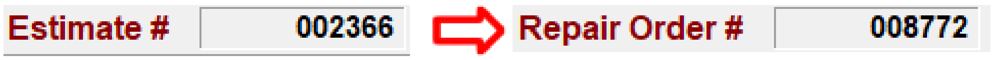
1. Click on **Convert to Order (Alt + O)** in the lower left corner of the Order screen.



The System will then ask for confirmation to convert this Estimate to a Repair Order.

2. Click on Yes **(type 'Y' or press Enter)**. Order Screen now displays as **Repair Order#**(with permanent # assigned).

Note: Shops create many Estimates; some don't result in actual work. These get temporary "throwaway" numbers. When an EST is converted to an R.O., it's assigned a new **permanent** number kept through the INV stage into History.

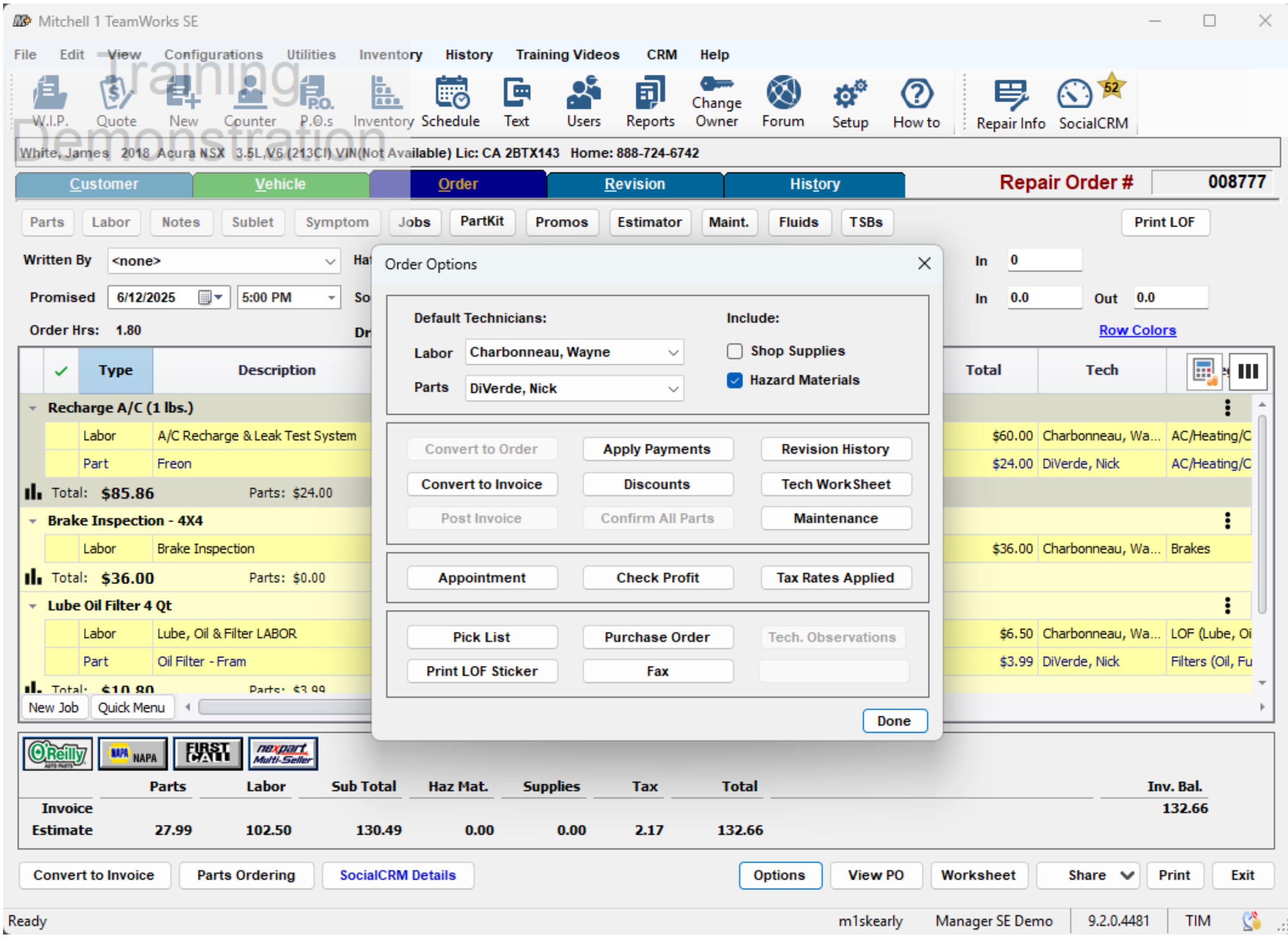


Note: Your numbers will be different than these examples

You should also notice that the Tech fields in the Order Screen are highlighted. This is to prompt you to assign default technicians for the parts and labor of the order. You do this in Order Options.

3. Click the **Options** button.

4. In **Order Options** select **Charbonneau, Wayne** for **Labor** and **DiVerde, Nick** for your **Parts** technicians.



5. Click **Done** to close Order Options.

   The Technician assignments are displayed in the grid.

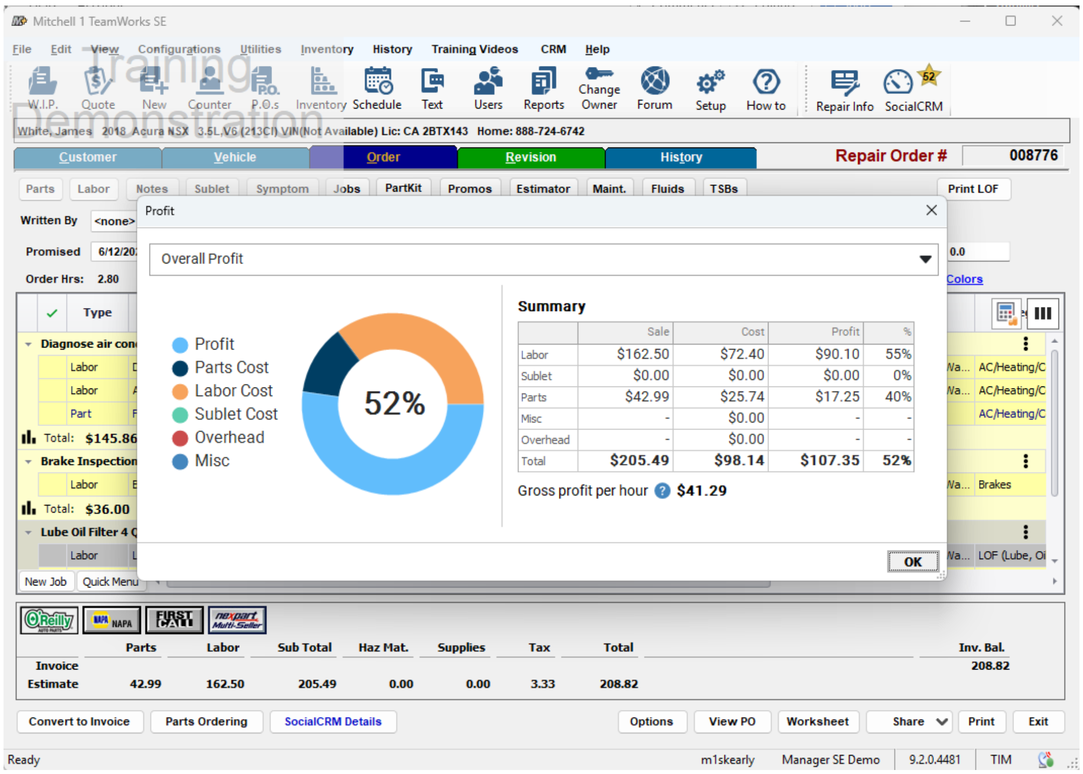
NEXT: F12 key = Check Profit

Using the Profit Wizard

Profit Wizard provides a pie chart overview of costs / profit for this entire order OR at the job level by selecting a specific job from the drop-down list. Use the **F12** function key as a shortcut to open this or by selecting **Options > Profit Wizard**.

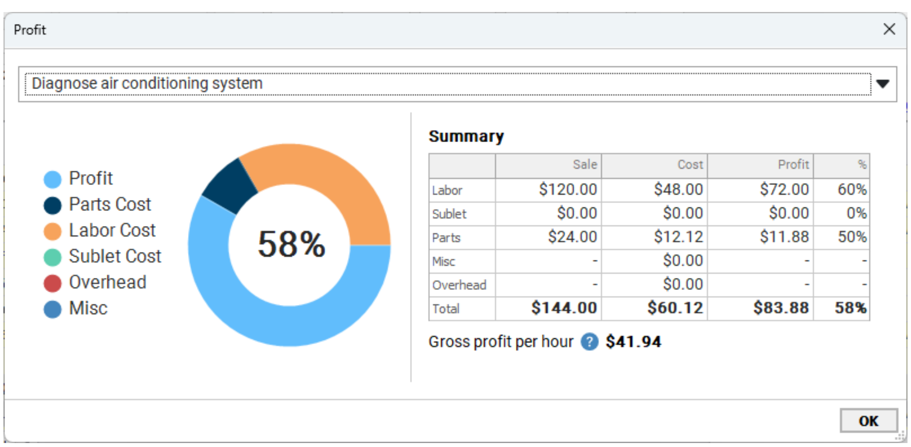
To Check Profit:

1. Click **F12** (or pick Profit Wizard from Utilities) to display the Profit Wizard.



You can also display the Profit margin for a single job.

2. Pick the **Diagnose Air Conditioning System** Job from the pulldown menu.



Your Profit totals change to reflect the profit on that Job only.

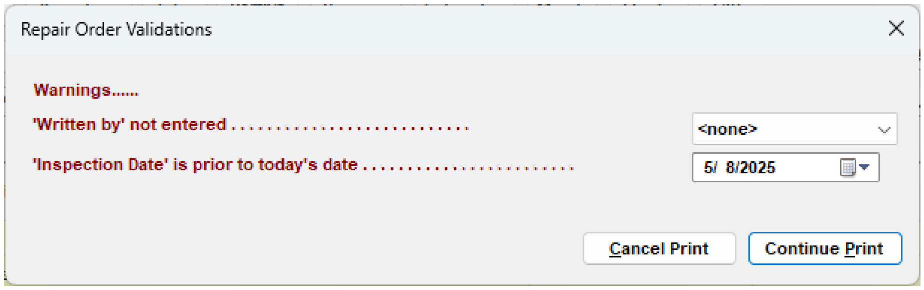
3. Click **OK** to close the Profit Wizard.

Note: Miscellaneous & Overhead are entered in Setup and don't impact INV totals. They can be used to make pie chart more realistic beyond part costs & tech pay.

Printing the Repair Order

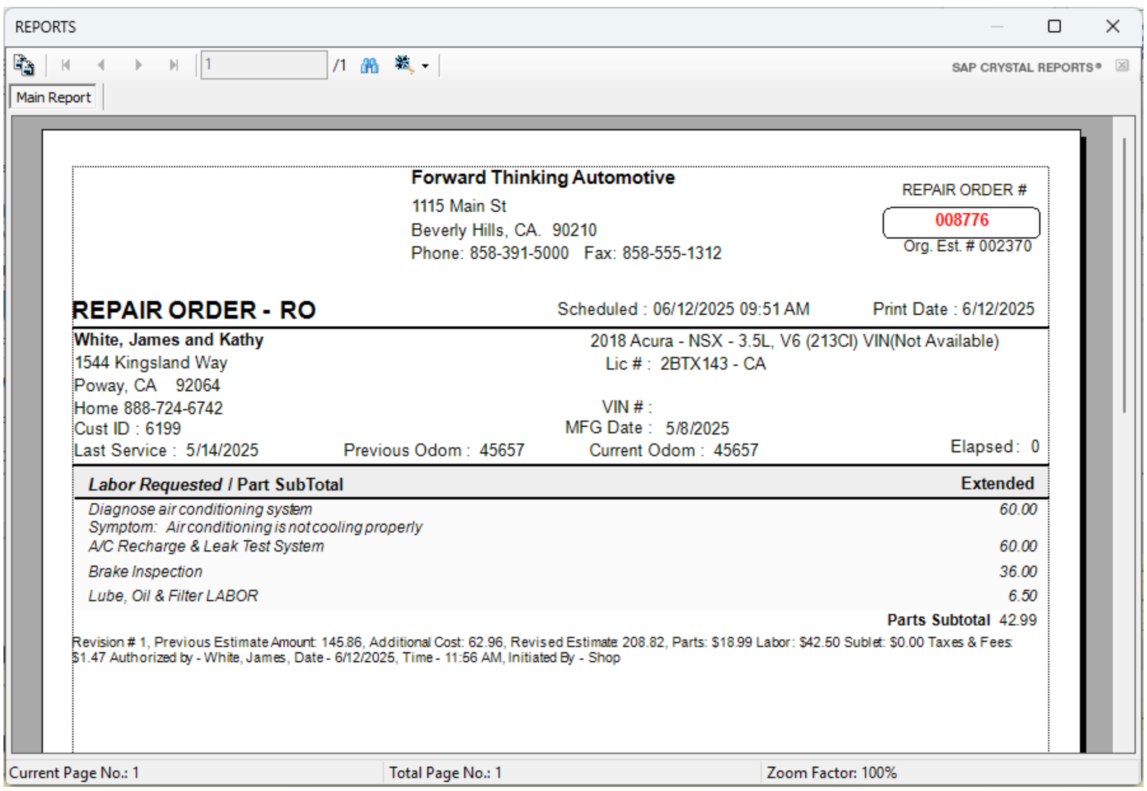
1. Choose **File/Preview** to preview the Repair Order on-screen.

   You may get a validation warning.

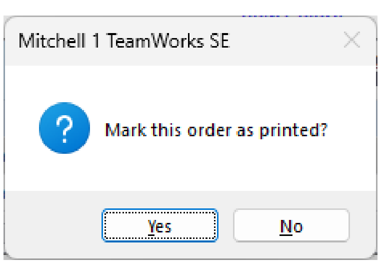


2. Depending on system settings, there may be more validations; just click on **Continue Print (**or press **Enter)** and continue to the print preview for the purposes of this exercise.

   Inspect the Repair Order content in the Print Preview window.



Note: You may also increase/decrease (zoom) the preview size by changing selected in the top line icons as shown



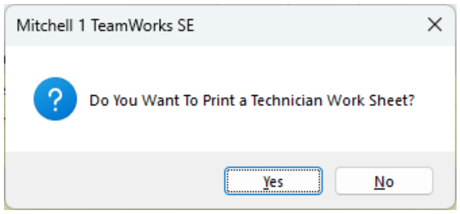
3. Click on the X in upper RH corner of screen **(Alt + F4)** to close the Preview.
4. Next you will be prompted to mark this Repair Order as Printed.
5. Click on **Yes** to mark this Repair Order as printed.

Note: Marking the Repair Order as 'printed' triggers two important things:

Sets Time/Date In field (visible in WIP Detail) as start of actual work.
Parts become Committed and visible to Pick List / Purchase Order process. You don't have to actually print to paper; automated setting TIP shown below.

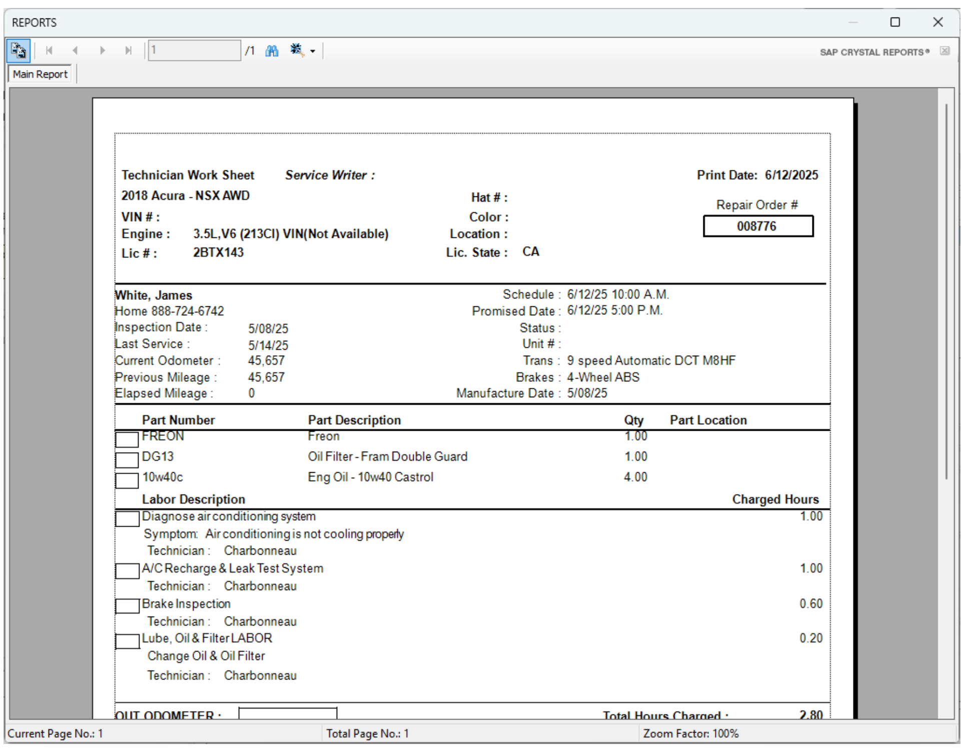
Tip: It is also possible to automatically **Mark All ROs As Approved/Printed** in the **Screen View** settings under **Configuration > Shop Data**. This time-saving setting bypasses the RO "printing" steps as shown previously. You will want to enable this feature now f your shop doesn't typically print Repair Orders.

During the Convert Estimate to R.O. sequence, you'll be prompted for printing a Technician Worksheet.



6. Choose **Yes** to preview the Technician Worksheet. This worksheet includes details on services to be performed and space to record inspection findings.

Note: You cannot print the worksheet in SE Demo Mode, ordinarily you would print a copy for the Technician

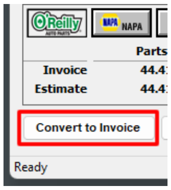


You can close the window by clicking the **X** in the right corner of the screen.

Note: Invoices use the same # assigned during R.O. An INV can be changed back to an R.O. if last minute items are added.(Configurations > Shop Data > Default Settings tab option)

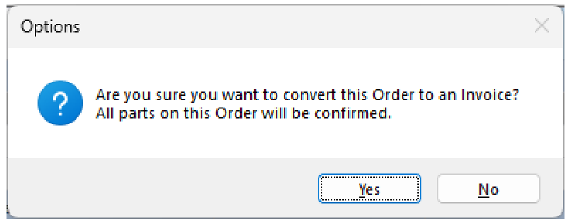
NEXT: Converting a Repair Order to an Invoice

Converting the Repair Order to an Invoice



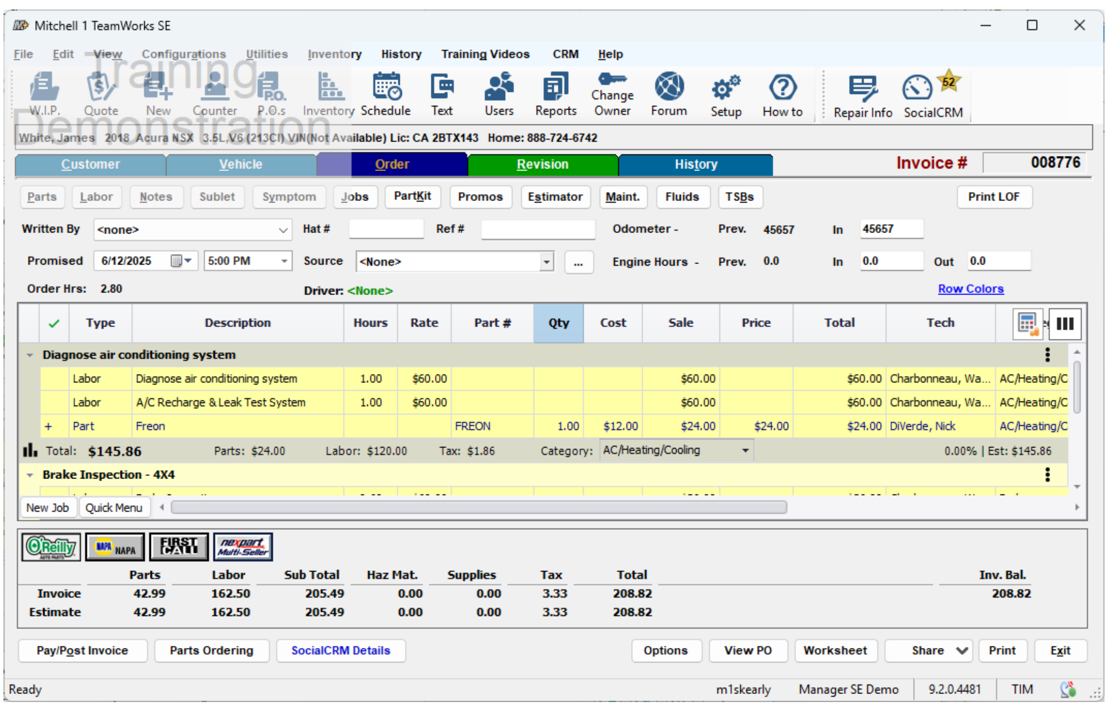
Once the repair has been completed, you will need to convert the Repair Order to an Invoice.

1. Click on **Convert to Invoice (Alt + O)** (lower LH corner of Order screen). You are asked to confirm your request.



2. Click on **Yes (press 'Y'** or **Enter)** to confirm conversion from R.O to an Invoice. Program **confirms** parts previously committed to the order were installed and subtracts them from inventory where applicable.

   The Invoice screen looks <u>exactly</u> like the R.O. screen; the only difference is that it now displays as **Invoice** #.



   Before we advance to Pay & Post phase, try two WIP Options with this Invoice.

3. Click on **Exit (or press Esc)** to return to the Work-In-Progress screen.

Work in Progress Screen

The 'WIP' screen provides access to all your current shop estimates, repair orders, and invoices. The grid area of the screen contains pertinent information about the order and is configurable to suit your shop's needs. This is the screen that should be open when you are not working directly with a specific order.

TIP: Use the Up/Down arrow keys and press ENTER as a shortcut to select any EST/RO/INV/SO item to open up on Order screen. When finished, press ESC key to return to the WIP screen.

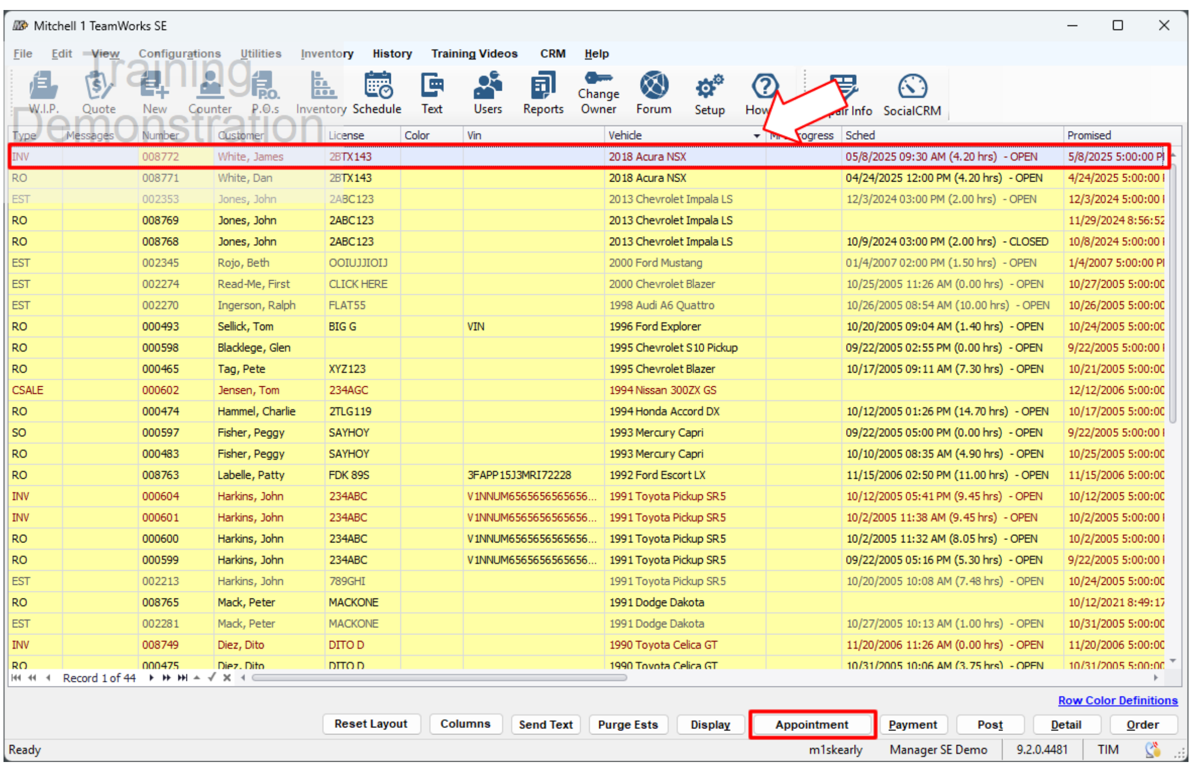
The WIP screen provides various tools for working with and making updates to orders. Two of these options, **Appointment** and Order **Detail** are discussed below:

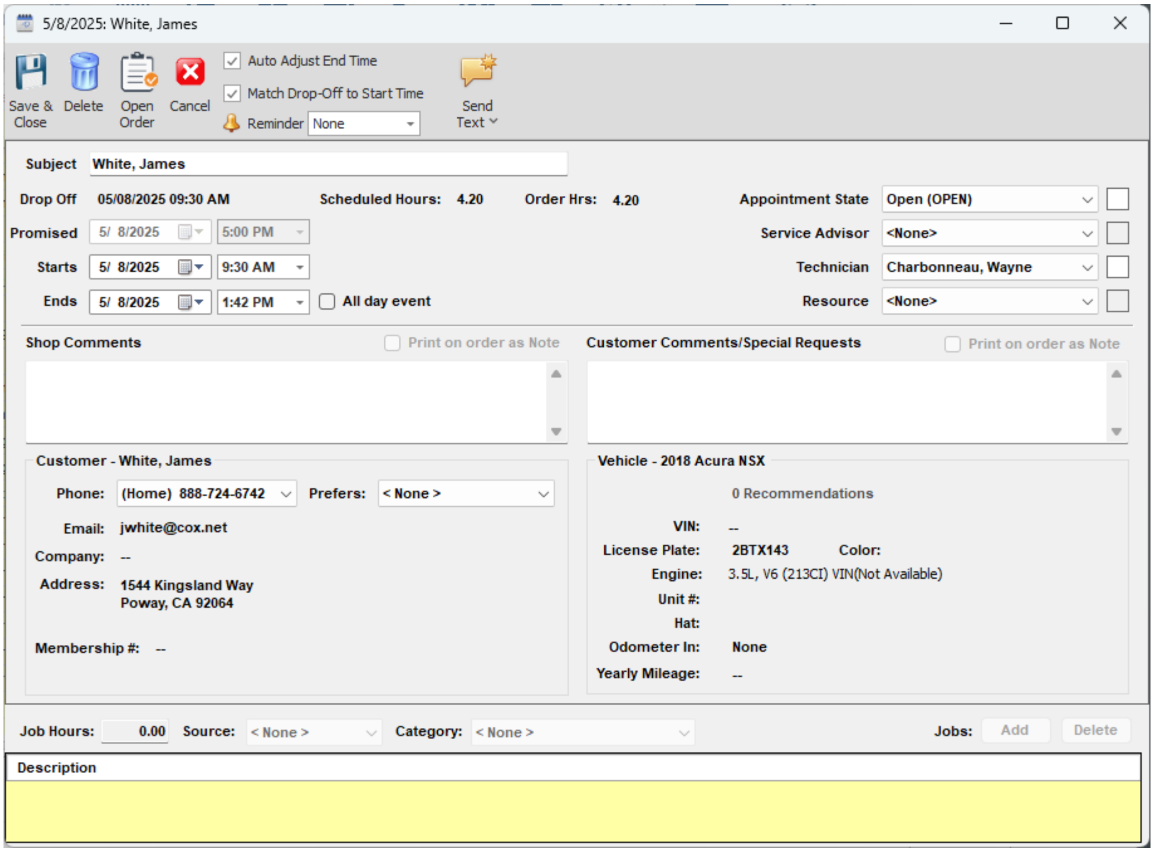
1. Click the W.I.P button to open the Work in Progress screen.
2. You will be looking for the Invoice for a 2018 Acura NSX.

Note: You can sort the Work In Progress grid by clicking on any heading. The grid is ordered in Ascending order. Click again to re-sort the grid in Descending order.

The WIP screen provides various tools for working with and making updates to orders. Two of these options, **Appointment** and Order **Detail** are discussed below:

1. Click the **Vehicle** column heading **Twice** to reorder the grid by Vehicle in descending order.
2. Select the order for **James White, 2018 Acura NSX**.
3. Click on **Appointment** to view scheduling details for this order in the Appointment Editor.





Look over the various options available for scheduling then click **Save and Close** or **X** to close the scheduler. Visit https://kb.mitchell1.com/articles/id-803/ for detailed information on working in the scheduler.

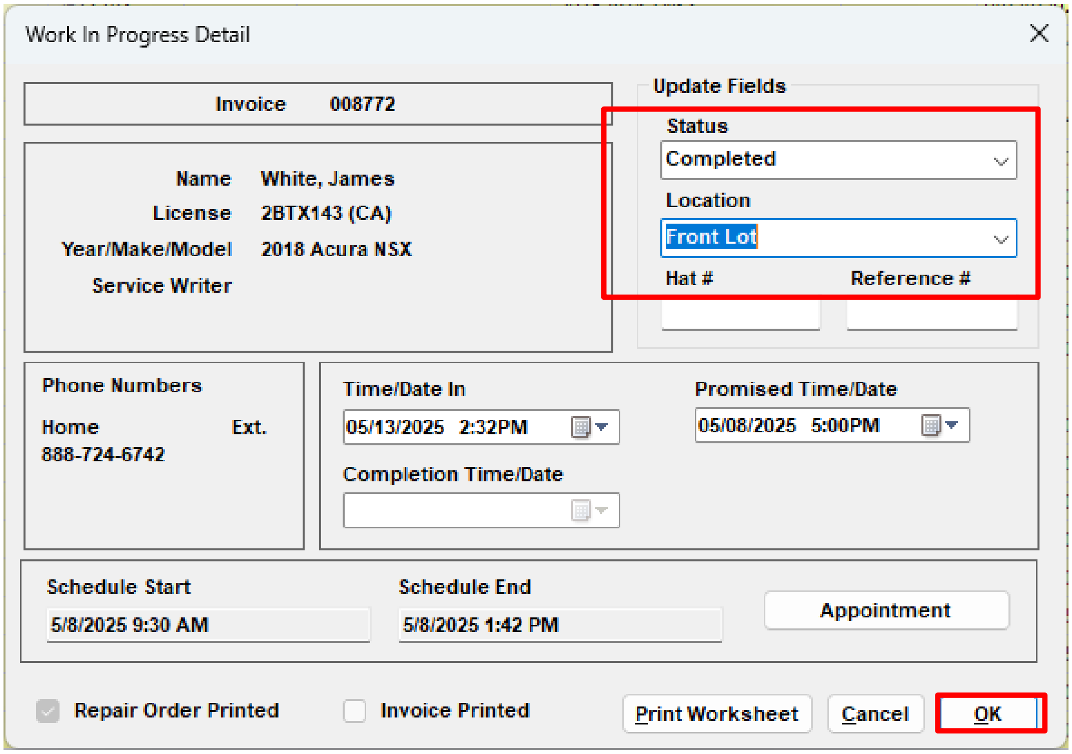
WIP **Detail** includes several fields to update.

4. Click **Detail** (or right-click mouse on that order). With ***White James*** still highlighted, update the status of details.

5. Click **Detail** to display details of Invoice. (Smith, Will)

   Update these WIP Detail fields:

   - **Status:** Completed
   - **Location:** Front Lot



6. Click on **OK** to save.

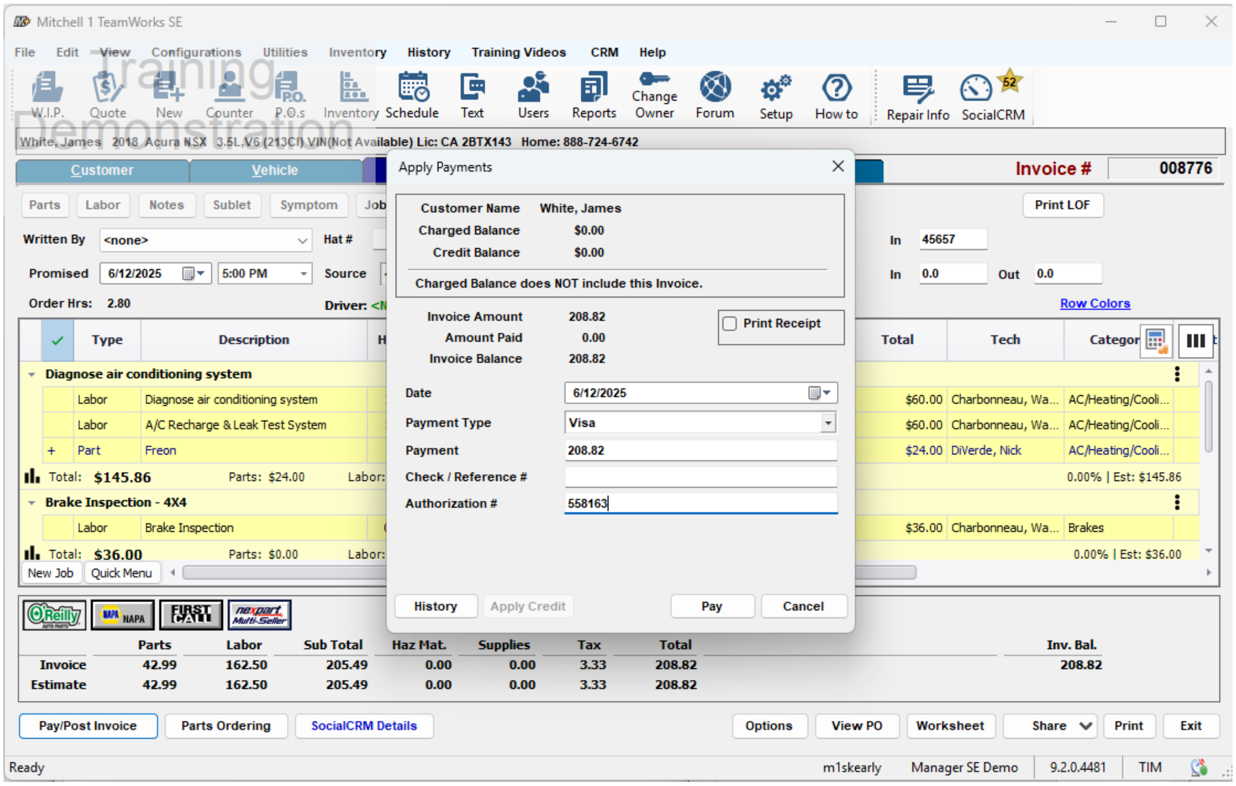
   The WIP screen is visible again with Invoice (White, James) highlighted.

7. Double-click (**Alt + O**) to open the White Invoice again.

NEXT: Apply Payments & Post the Invoice

Apply Payments & Post the Invoice

James White is here to pick up the vehicle and you will now complete the order cycle by collecting payment, printing a finished invoice and posting it to History.



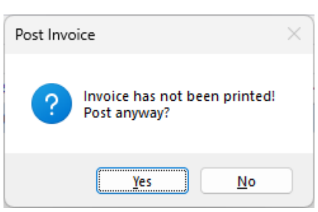
To Pay/Post Invoice:

1. Click on **Pay/Post Invoice (Alt + O)** at the bottom left corner of your screen to open the Apply Payment window. The Invoice Total is automatically entered for you as the Payment.
2. Enter Payment Type: 'V' selects **(Visa) + Authorization #: 558163**

Note: The Authorization # is filled in automatically with shops with Integrated Payments.

3. Click the **Pay** button.

Note: *Default payment type* is selected in Shop Data Setup. Payment Amount = defaults to INV balance due. Print Receipt is optional



4. When the Post Invoice dialog box displays, click on Yes **('Y' or Enter)** to continue.

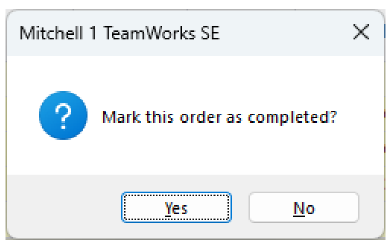
TIP: When work is completed but customer is not there to pick up the vehicle, post the invoice as Charge to keep the invoice off of your WIP screen. Then use Batch Payment (F5) when they arrive to pay the Invoice.

The system will automatically display the Posting Date dialog window below.

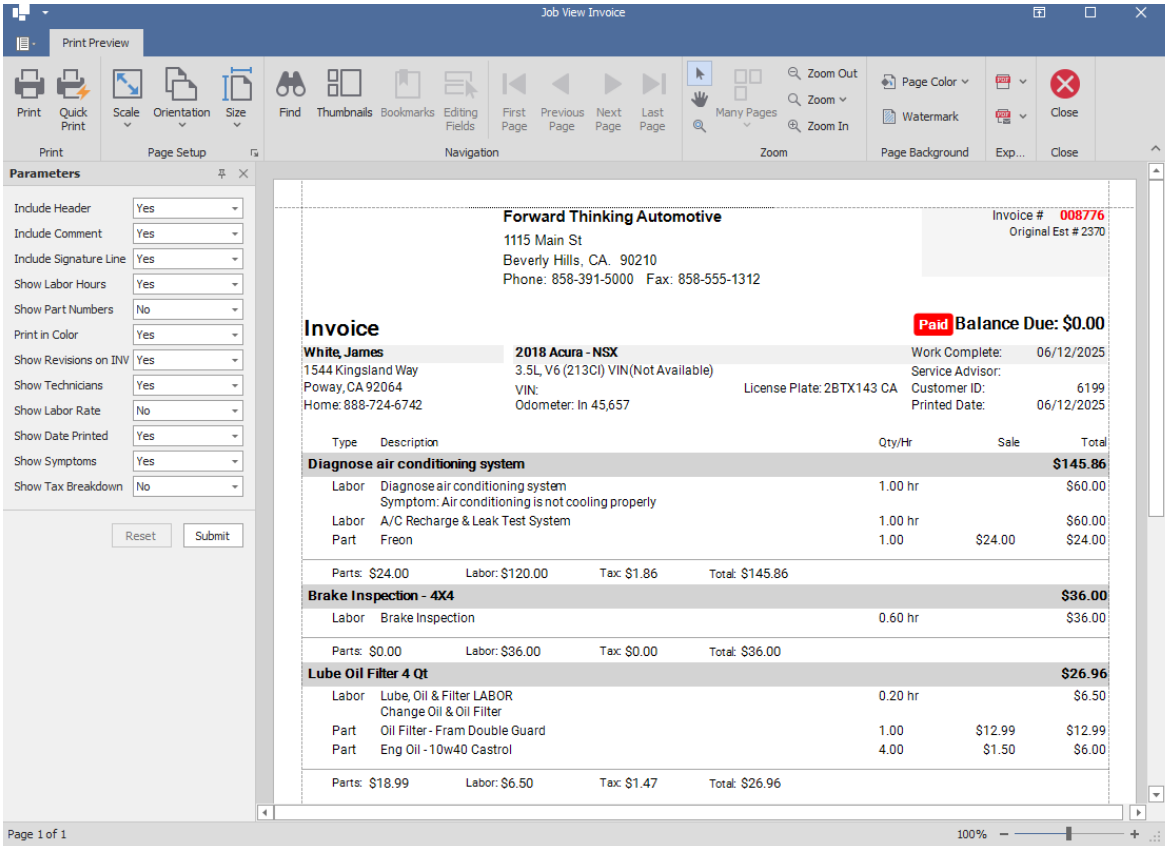
5. Click to place a check in the **Print Invoice before Posting** checkbox. This box <u>only needs to be checked once</u>; the system will *remember* this preference.
6. Click on Ok to continue the process of Printing and Posting.
7. Depending on system settings, there may be further Validations; just click on (**or press Enter**) for this exercise and continue to the print preview.

Note: Once comfortable with the program, you may go to Configurations – Reports/Printers area and turn off Default Print to Screen option to skip preview steps in the future.

8. You are prompted to **Mark this order as completed**. Click **Yes**.



The **Print Preview** displays what your final printed invoice would look like.

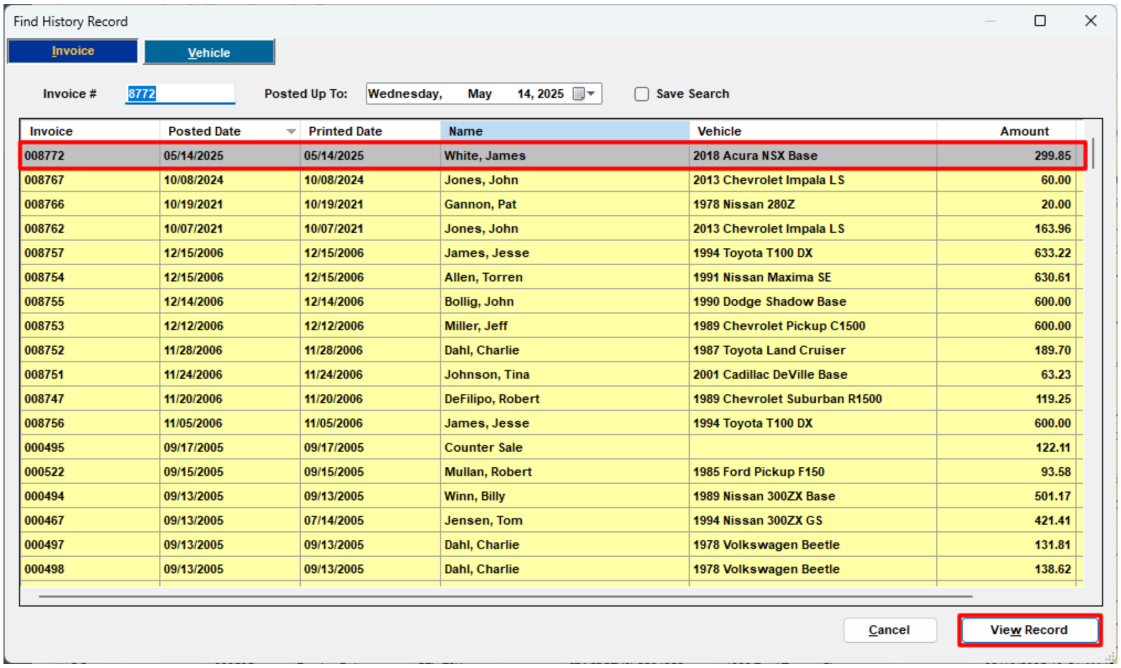


9. Click the **X** to close the print window. The Invoice is closed into Order History and you are returned to the WIP screen.

   Posting the Invoice permanently removes it from Work in Progress but the Invoice is permanently stored in Order History for future reference.

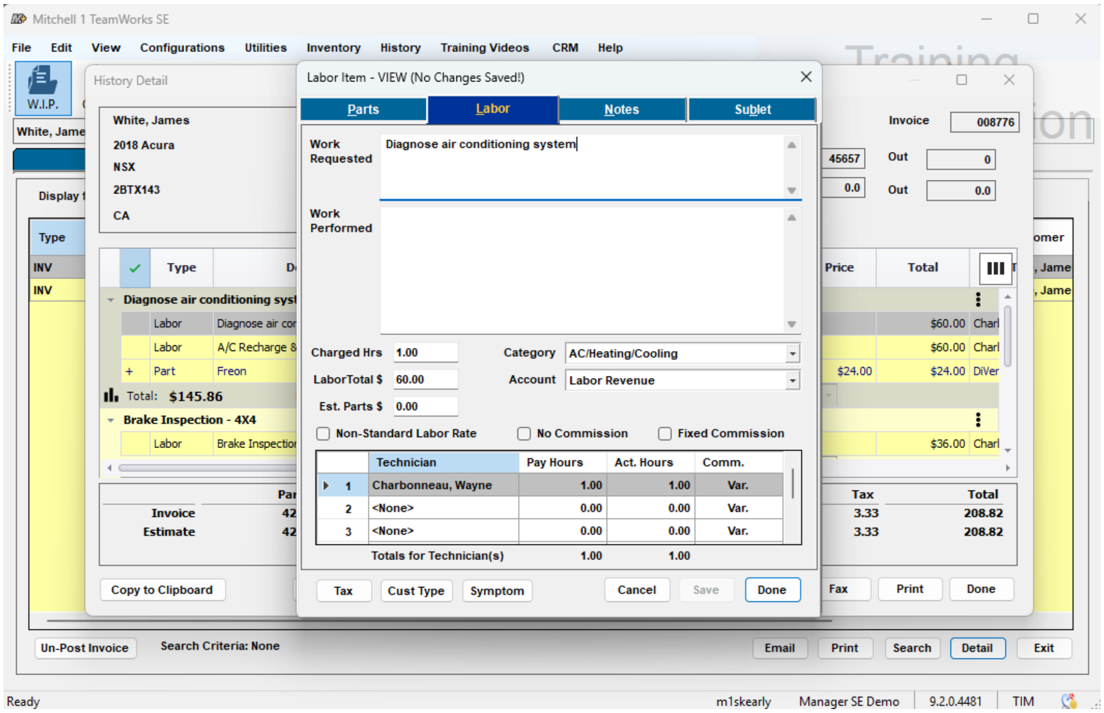
How to find the James White Invoice in the History file:

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



11. The White, James invoice should be the top entry in the grid. Double-click on the invoice or click **View Record** to open history for the customer.

    This allows access to view **Detail**, **Print** or **Un-Post** an Invoice.



12. Select the first line item **Diagnose air conditioning system** and **Detail** to view the Details of the line item (Labor) from the Posted Invoice in History.

Note: This step is for informational purposes only.

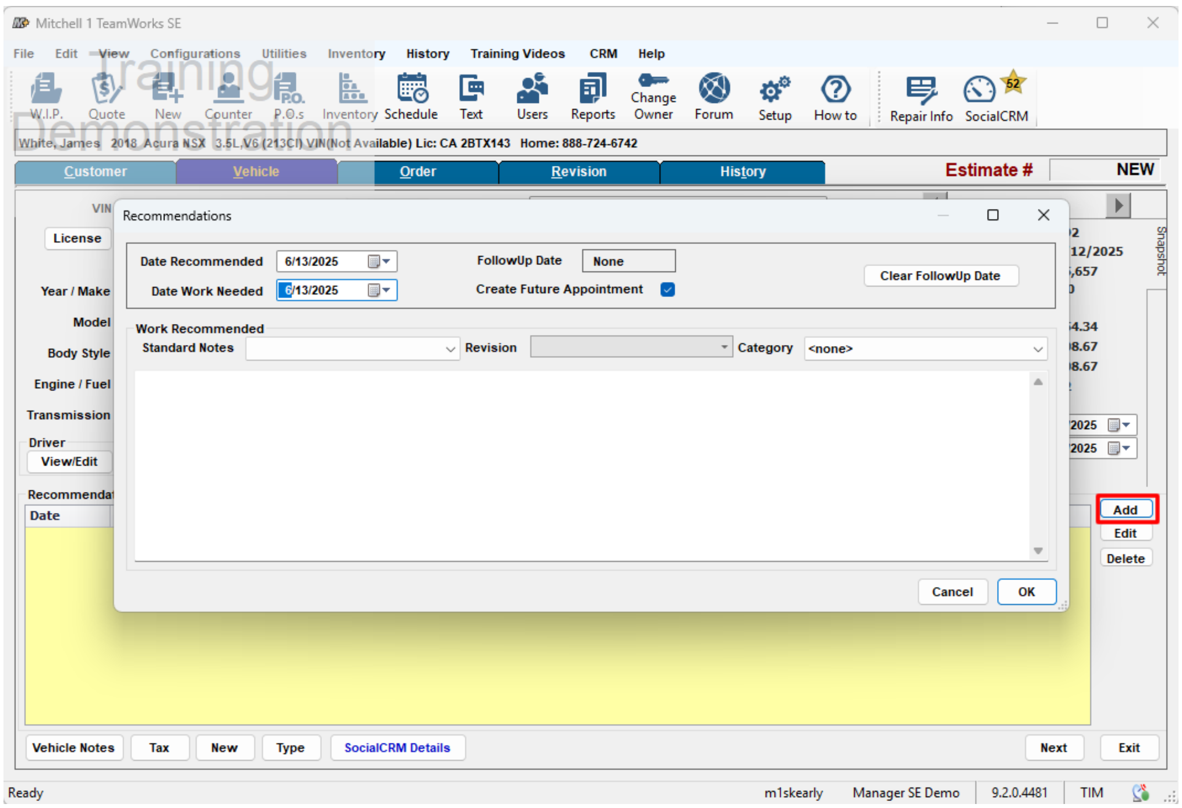
13. Press your **Esc** key to close the labor item and then **Esc** again to close History Detail. (Clicking **Done** or the **x** on the dialog box closes the window as well.)

Entering Recommendations

The Recommendations field is provided to enter service or repair needs identified for customer's vehicle. These findings are typically written on Tech Worksheets and returned to the Service Writer for entry. This information will be displayed within the Vehicle Screen as a reminder of noted repair needs, not performed as yet.

NOTE: Revisions for storing actual work details will be discussed after this.

1. Click on the **New** button **(F6)** type **ja** in the **First** (name) field and select James, White (any name will do)
2. Click on Vehicle **(Alt + V)** tab.

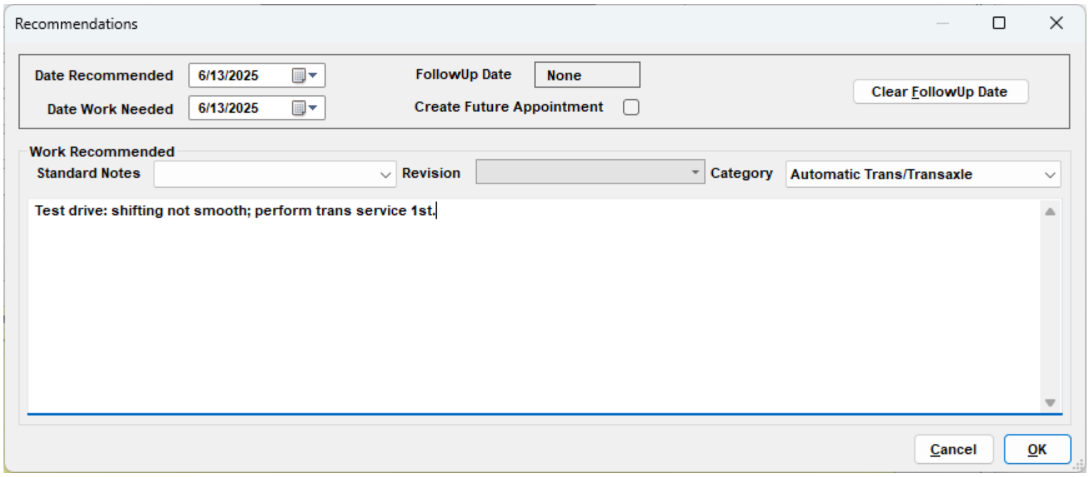


3. Click on **Add** in the Recommendations section to begin entry of your first Recommendation.

- Today's date (default) is fine; use drop-down calendars or type dates if desired.

TIP: Date Work Needed is usually same as Date Recommended; it is provided to input repair needs to be completed by future date (30 days later, etc)

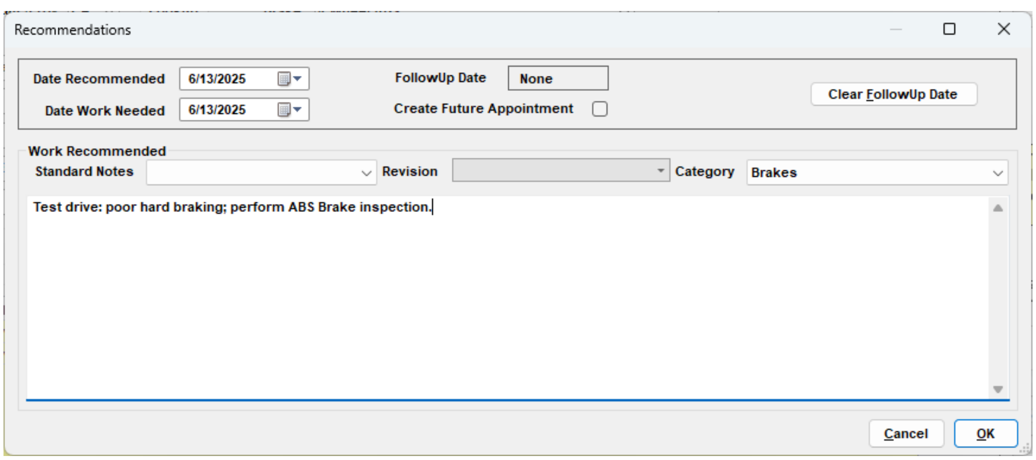
- Category: Select **Automatic Trans/Transaxle**.
- Type: **Test drive: shifting not smooth; perform trans service 1st.**
- Uncheck the **Create Future Appointment checkbox** (if checked) as we don't want to schedule the appointment yet.



4. Click **OK** in Recommendations to save your first entry and proceed to begin entry of the second recommendation.

Note: By creating separate Recommendations for each identified repair issue, your follow-up marketing can be more precisely focused and you streamline the process of adding individual repairs when the customer only wants part of the recommended work completed. The requirement to include a Category as a filter is part of this approach.

5. Click on **Add** button **(Alt + A)** again to enter a second Recommendation.
6. Press the Tab key to move down to the Category field. Scroll down the Category list and select **Brakes**. Type: **Test drive: poor hard braking; perform ABS Brake inspection**.



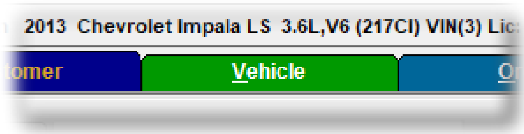
7. Click **OK** to save this Recommendation.

   The two recommendations display.

Date	Need by	Description
6/13/2025	6/13/2025	Test drive: shifting not smooth; perform trans service 1st.
6/13/2025	6/13/2025	Test drive: poor hard braking; perform ABS Brake inspection.

Tip: Saving Recommendations as Standard Notes saves time. To create and store repeatable Recommendations text, go to Setup – Standard Descriptions - Notes tab. It will still be necessary to select Category when applied to vehicle.

All recommendations will be listed within the Vehicle screen as shown above. When tab is green, it indicates Recommendation(s) are on file for this vehicle.



Note: The Vehicle tab will **not** turn green until you actually leave the Vehicle screen.

On future service visits for this vehicle, this visual reminder will also appear when a new order is started:

End of the Assisted Program Basics section

This concludes the assisted portion of management training. Users should continue with the Self-Instruction portion of the book to learn more about the software and about additional help and video training options available to help you become a Shop Management software power user..

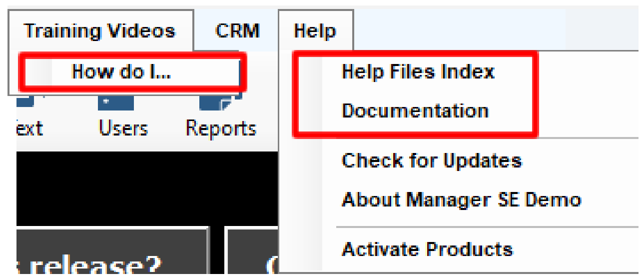
Self-Instruction

The **Assisted Training** portion of this workbook gave you the basics on the program workflow from Estimate through Invoice as well as the process of creating and adding vehicle-specific recommendations to an order. The **Self-Instruction** sections of this workbook delve a little deeper into important subjects like adding parts to the Inventory List, Creating Canned Jobs, and Scheduling.

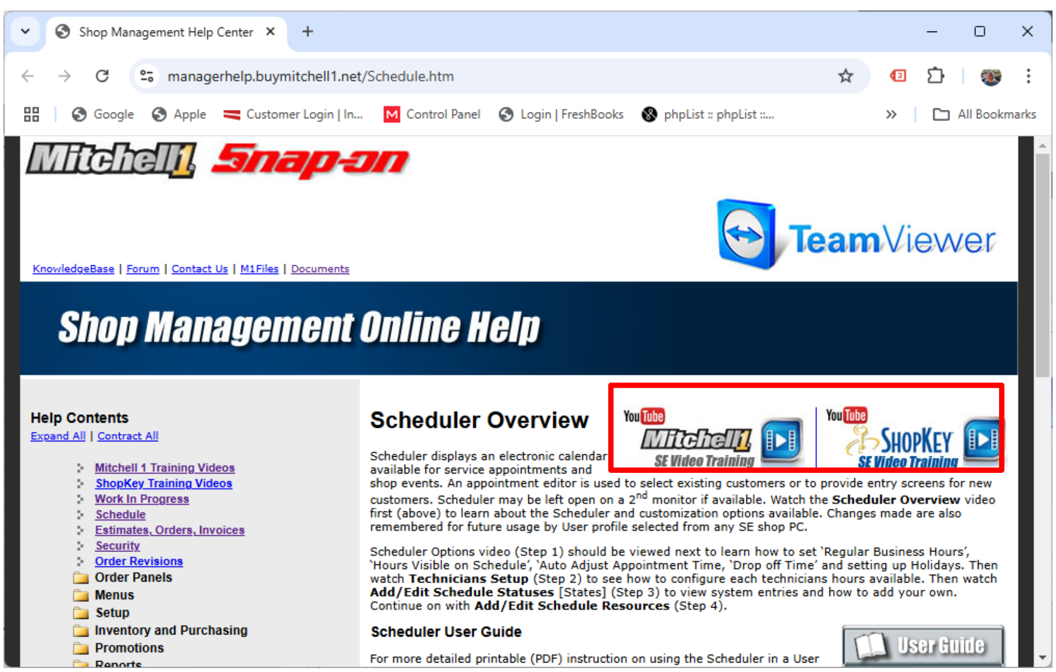
Help/Training Video Resources

Before launching into the self-instruction portion of this guide, please take a moment to familiarize yourself with the help/and Training Video resources that are readily available to you within your management system.

- The **How do I** link under **Training Videos** provides access to more than 100 training videos covering every important program function.
- The **Help** menu provides access to the **Help Files Index** (Home Page) and **Documentation** (Document Central) which includes the most current versions of the program workbooks and other guides for working in the shop management system.



- Finally, ***context-sensitive* (F1) help** is available within almost any of the management system screens and dialog boxes. What this means is that you can access help that is specific to what you are working on simply by pressing the **F1** key. Also, if there is a training video available for the screen you are in, a link to it will be provided at the top of your help screen.



Now that you have reviewed the basic online help options, we'll continue with the Self-Instruction tutorial exercises.

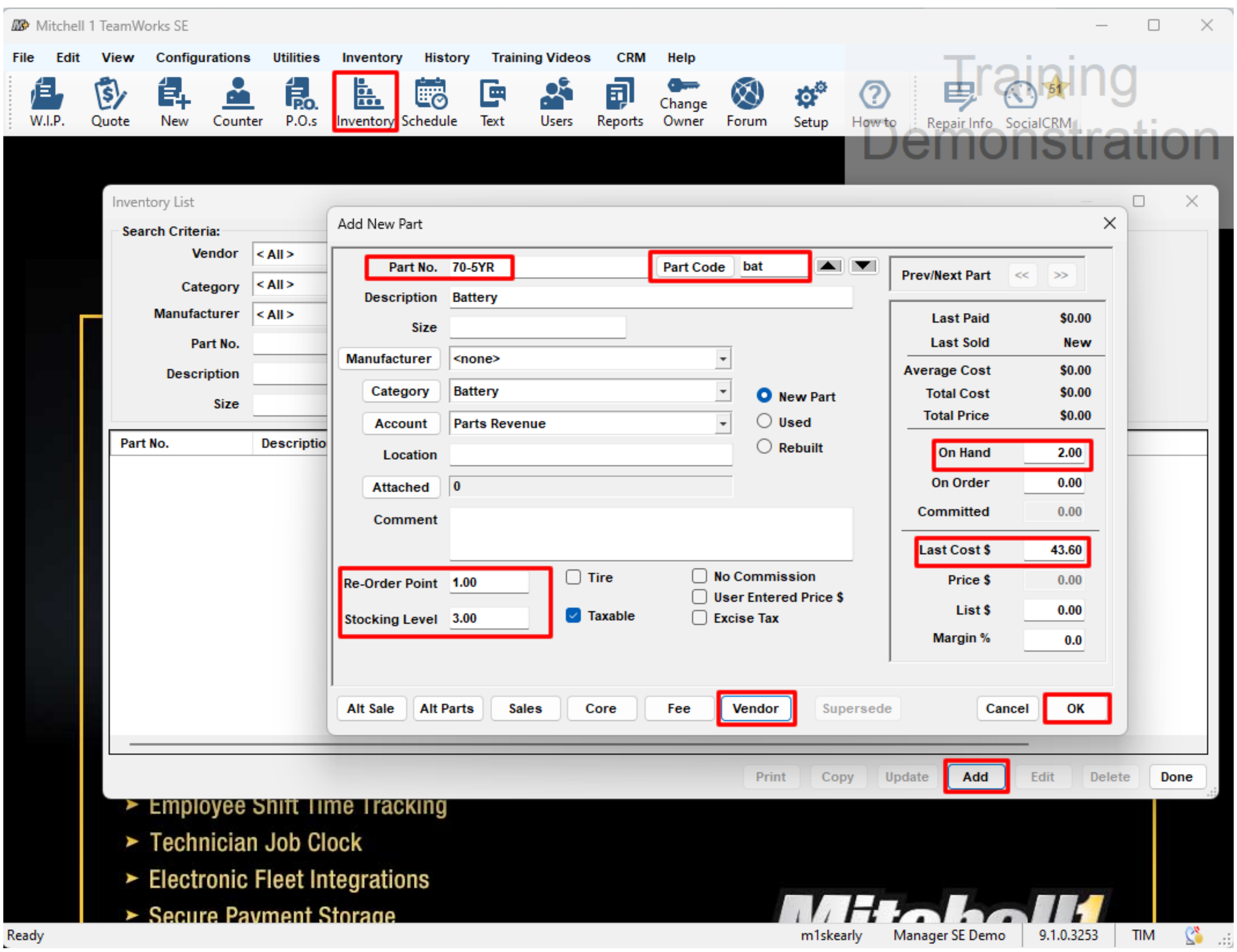
Adding a Part to Inventory

The **Inventory List** screen has two primary functions:

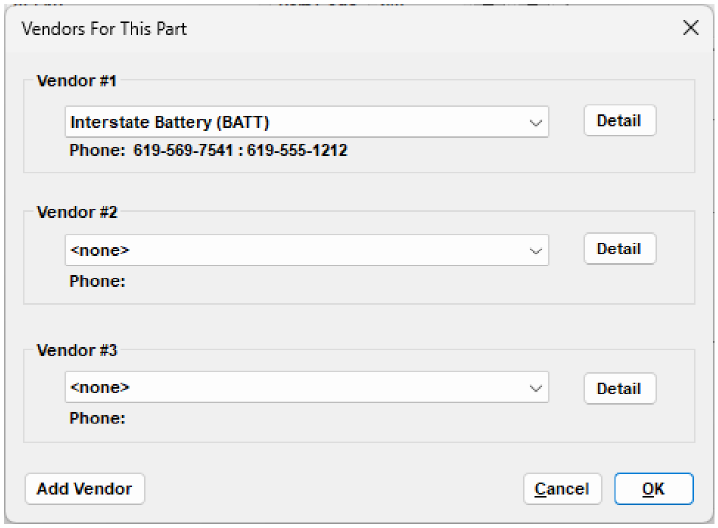
- Searching existing Part records
- Entering new Part Records

The SE Search function is used to find existing parts and add them to an Order or Revision; it also serves as an input screen to add new part records that can be applied to orders repeatedly.

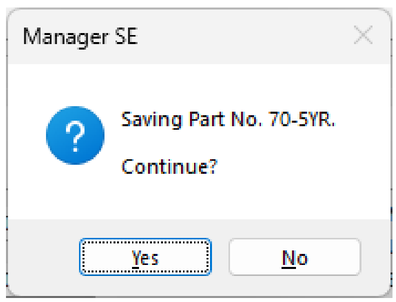
1. Click on the **Inventory** icon.
2. Click on **Add (Alt + A)** to begin the new part entry process.
    - Part No.: **70-5YR**
    - Part Code: **bat** [*auto-fills Description + Category*]
    - Re-Order Point: **1**
    - Stocking Level: **3**
    - On Hand: **2**
    - **Last Cost $: $43.60** (**Note:** when your Price/Markup Matrix has been completed in Setup, the Price will calculate automatically.)



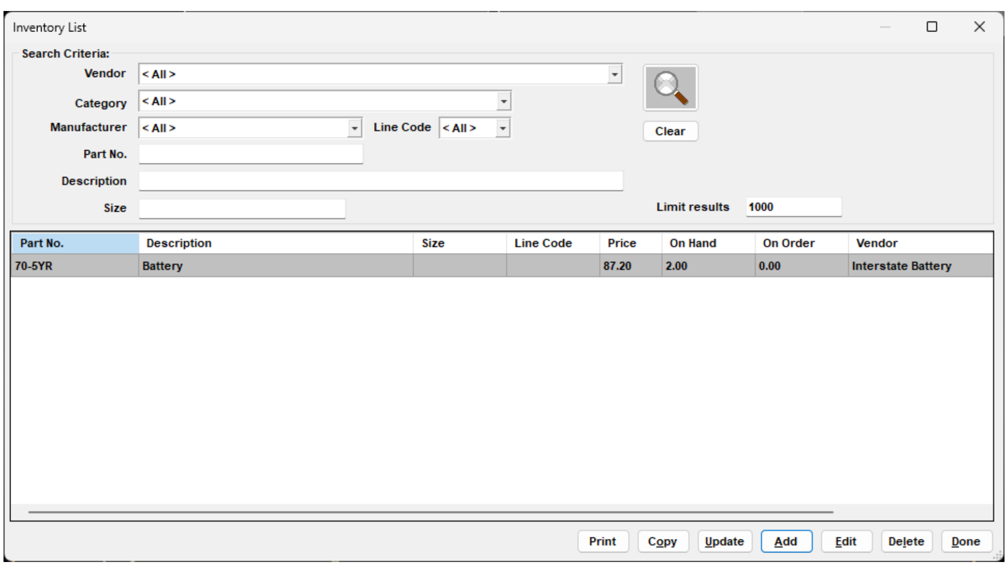
3. Click on Vendor; select **Interstate Battery (BATT)** from list and click OK.



4. Click **OK** in the Add New Part dialog box. You are prompted to confirm the new Part.

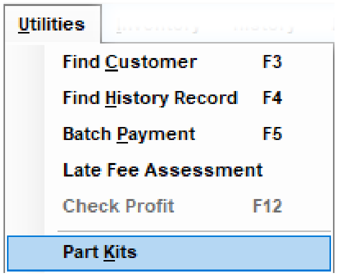


5. Click **Yes** to complete the part entry process. The Inventory List screen displays the new part record.



6. Click **Done** to close Inventory List screen.

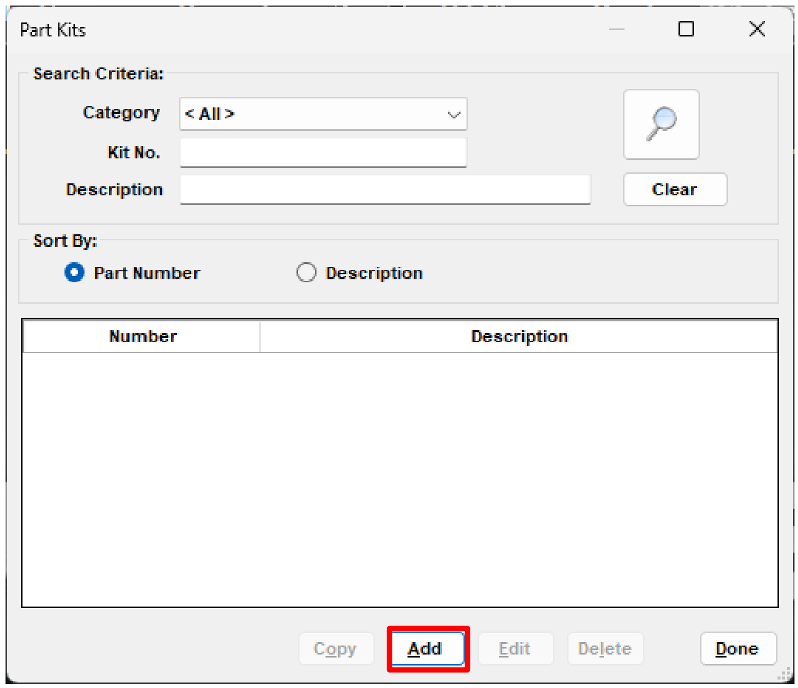
Creating a Part Kit



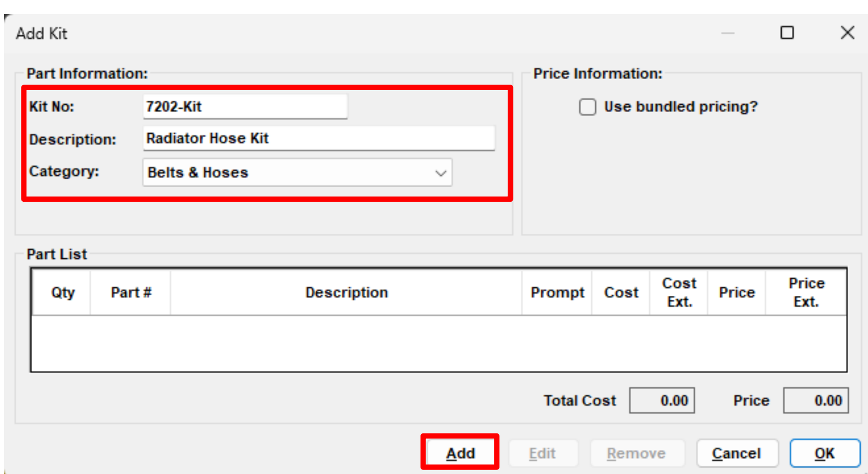
Part Kits save time by grouping any number of items that are frequently sold together. (Examples: tune-up parts, lift kits, etc).

This exercise will create a 'Radiator Hose' Part Kit from part records existing in the Inventory List.

1. From top menu, click on **Utilities**, **Part Kits**. This is whre you go to add, edit, or delete a Part Kit. In this Exercise we will be adding a new Part Kit.



2. Click on **Add** (Alt + A) to open the Add Kit screen.
3. Enter/choose the identifying Kit information.
    - Kit No.: **7202-Kit**
    - Description: **Radiator Hose Kit**
    - Category: **Belts & Hoses** (type 'B' twice)

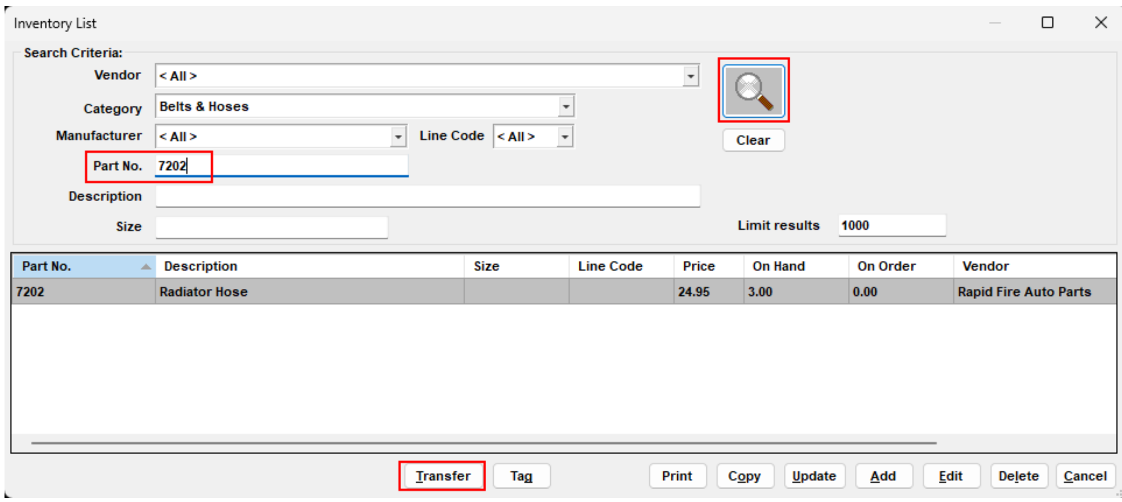


Now that you have named the kit, you will want to add some parts to it.

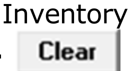
4. Click on **Add (Alt + A)** to open Inventory to add part to a new part kit.

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

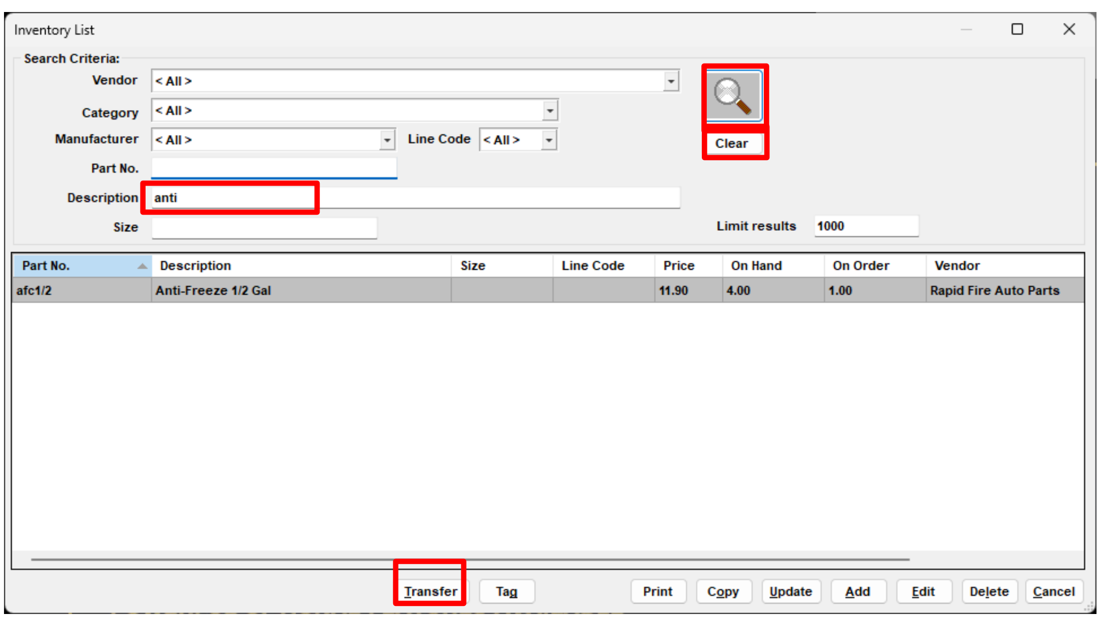
5. Click on **Search** (or press Enter).
6. Click on **Transfer (Alt + T)** to place a copy in the Part Kit.



Note: The Program also automatically transferred two hose clamps that had been "attached" to the radiator hose part record.

7. Click on **Add (Alt + A)** to open Inventory to transfer a 2nd part into kit.Click on 'Clear' to add a part from a different category. 

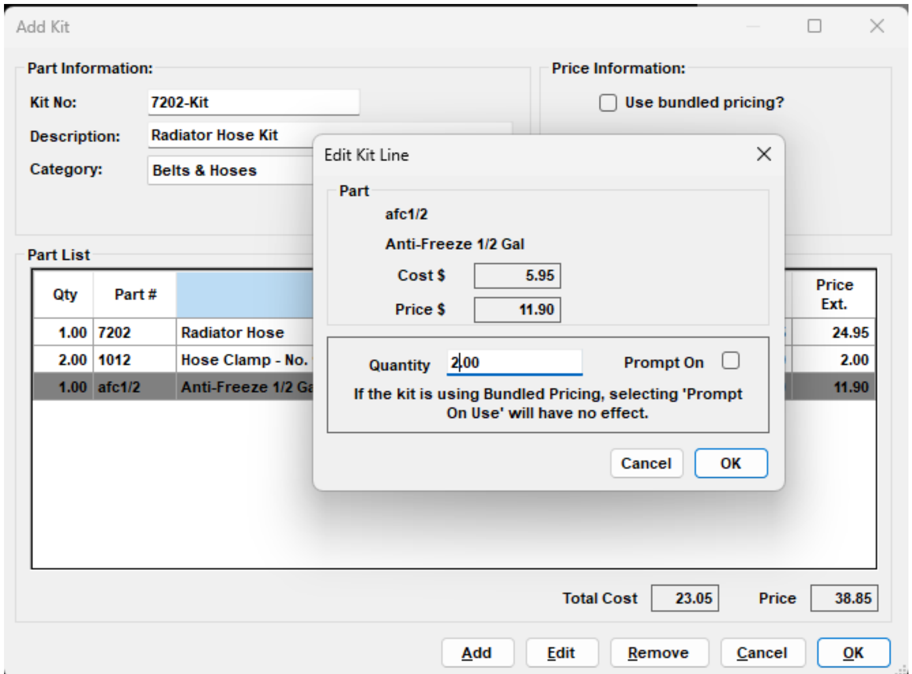
8. With Category cleared, enter '**anti**' in Description.
9. Click on **Search (press Enter)**; 'afc1/2 Anti-Freeze Coolant ½ Gal' is located automatically.



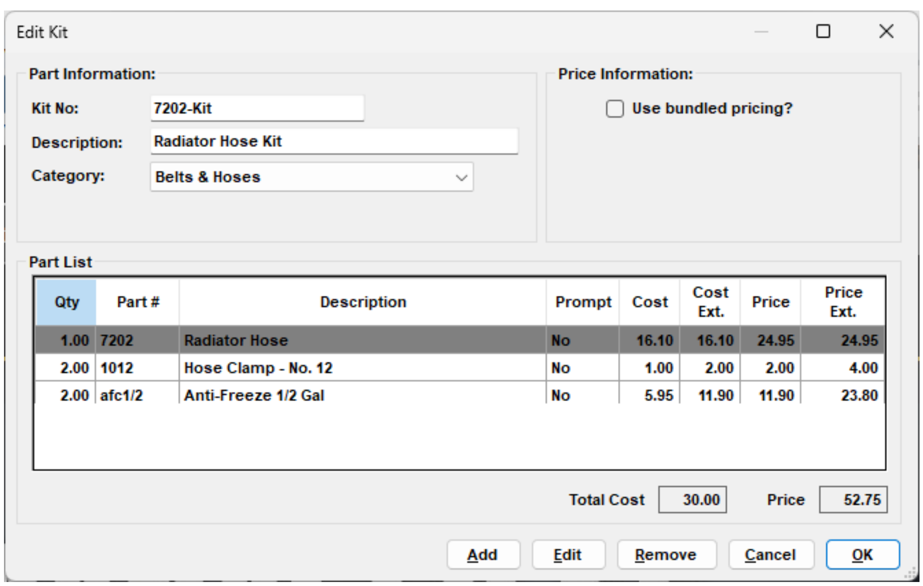
10. Click on Transfer **(Alt + T)** to copy 'afc1/2' part record into the part kit. Add Kit displays with transferred radiator hose, hose clamps and Anti-Freeze.

A simple adjustment is required; change quantity of anti-freeze to <u>2 units</u>.

11. Double-click on the Anti-Freeze line (or click Edit). The Edit Kit Line dialog box opens.
12. Change the Quantity to **2 (2.00)** and click OK .



The Add Kit window displays with the adjusted Anti-Freeze quantity

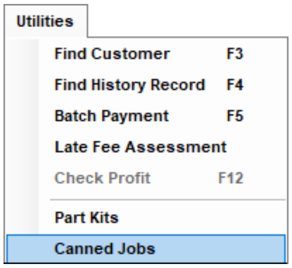


13. Click OK in the Add Kit window to save your input work.
14. Click on Done **(Alt + D)** in Part Kits window to close.

The 7202 Kit is now included in the Part Kit list and ready to use.

TIP: Part Kits can also be used to manage part options when attached to Canned Jobs.

Creating a Canned Job



Canned jobs save time entering work onto orders by grouping parts and labor that are used in repeated combinations. In this exercise, we'll build a canned job to perform a Cooling System Flush & Pressure check.

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

2. From the Canned Job List screen, click **Add (Alt + A)** to open the Canned Jobs creation screen. From the Canned Job List screen, enter the following:

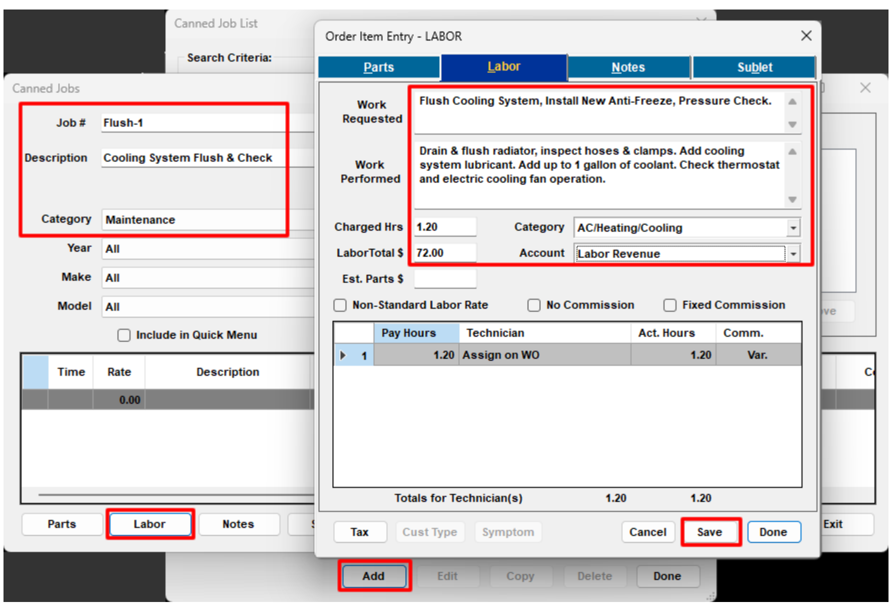
- Job #: **Flush-1**
- Description: **Cooling System Flush & Check**
- Category: **Maintenance**

3. Click Labor **(Alt + L)** to add labor content to the Canned Job.

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

- 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.**
- Charged Hrs.: **1.2**
- Category: **AC/Heating/Cooling**
- Account: **Labor Revenue**

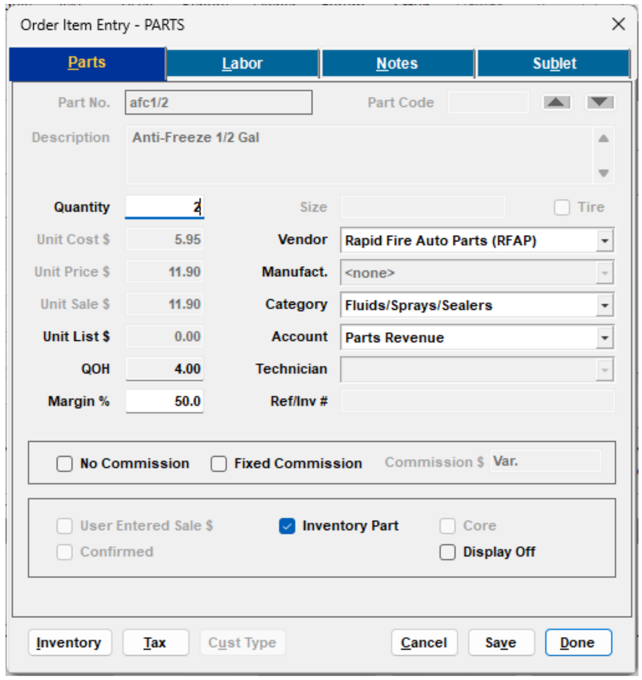
Click on **Save (Alt + V)**.



This copies Labor item to Canned Job, keeping entry box open for next entry.

Now begin adding Part items to the Canned Job.

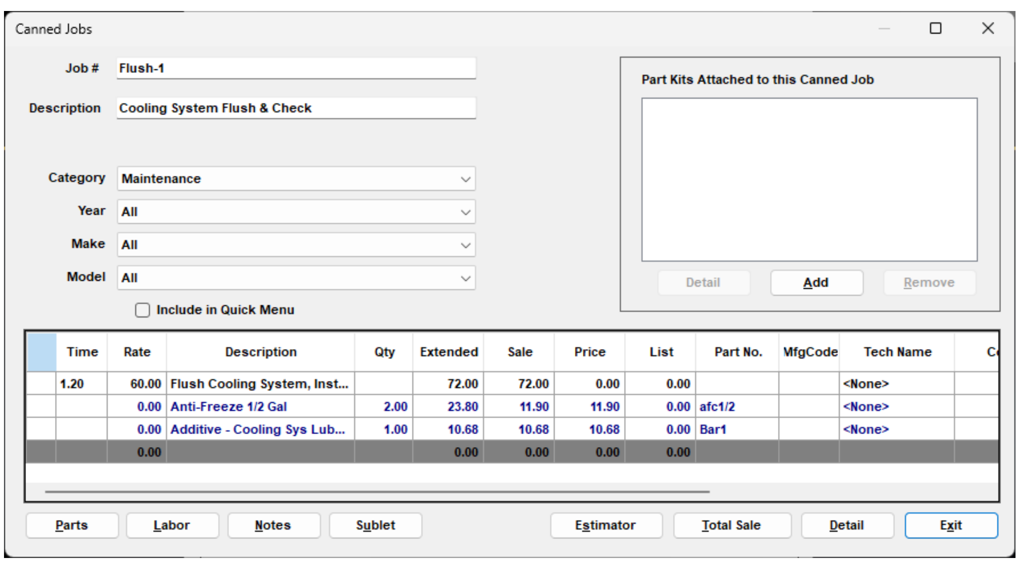
1. After saving the Labor item, click on the Parts tab to begin adding parts.
2. In the Order item entry – PARTS screen enter the following information:
   - Part No.: **afc1/2**
   - Quantity: **2**



3. Click **Save (Alt + V)**. This keeps the entry box open for the next part selection or entry.
4. Enter the following: Part No.: **bar1**
5. Press **Tab** key and part details fill in automatically. (Quantity: 1 is fine)
6. Click on **Done (Alt + D)** to save the part and close entry screen.

The completed Canned Job displays.

Note: We recommend that Year-Make-Model be left 'All/All/All' so that the Canned Job Search would always find it, no matter which vehicle is selected.



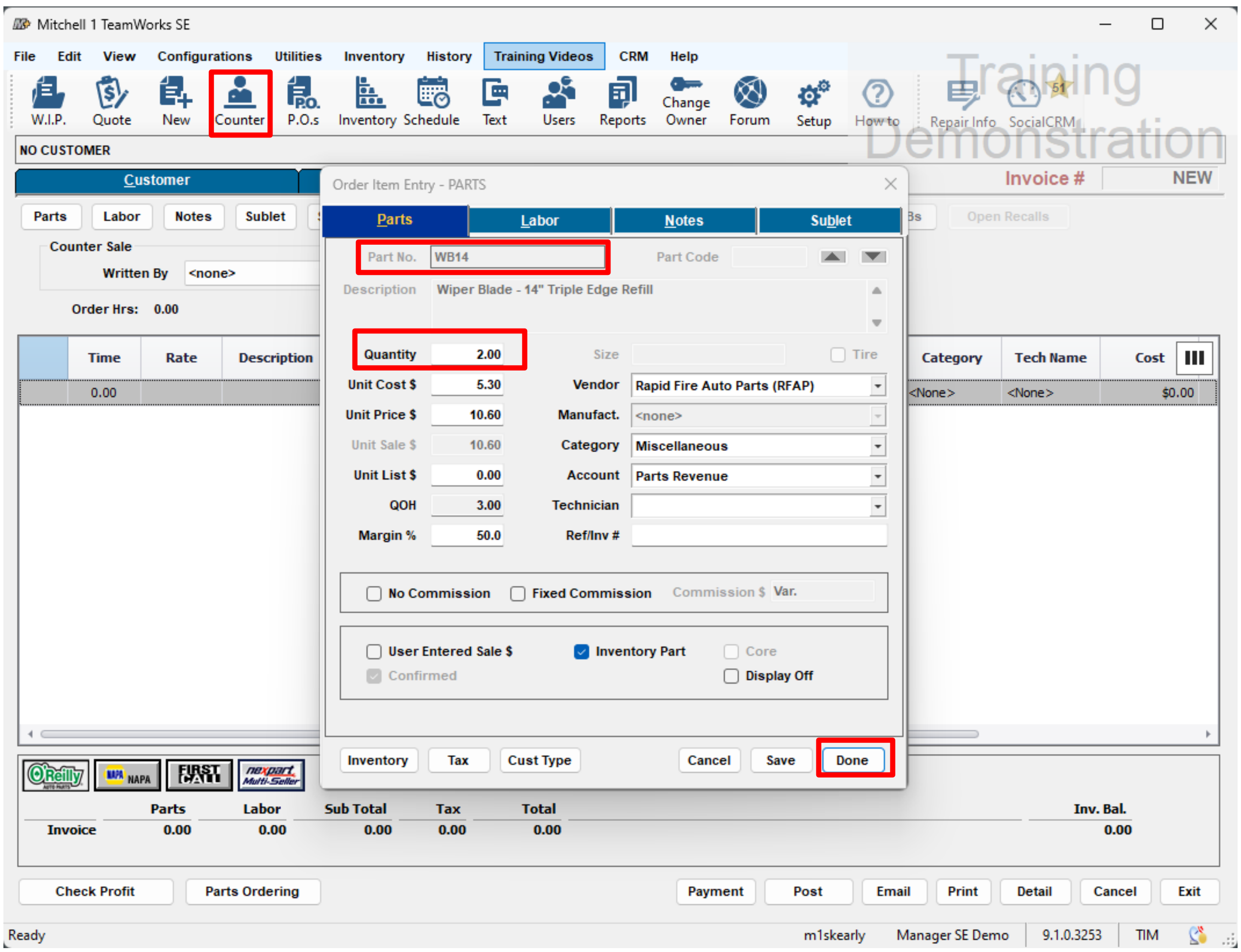
Click on **Exit** (Alt + X) to close the Canned Job list window and return to the screen you were working on.

TIP: Parts & labor items may also be copied and pasted into Canned Jobs from an existing Order or Revisions sub-estimate.

Writing a Counter Sale

Counter Sale provides a fast method to sell parts to walk-in customers. This exercise will show you how to write a basic Counter Sale and (optional) how to add an existing Customer name to the transaction.

1. Click on **Counter** (or press F11 key) to begin.
2. Click on **Parts** (Alt +P).
3. Type “wb1”. A popup listing of all parts beginning with WB1 is displayed. Choose WB14 from the list. (Part record details fill in)
4. Change **Quantity: 2** and press tab.



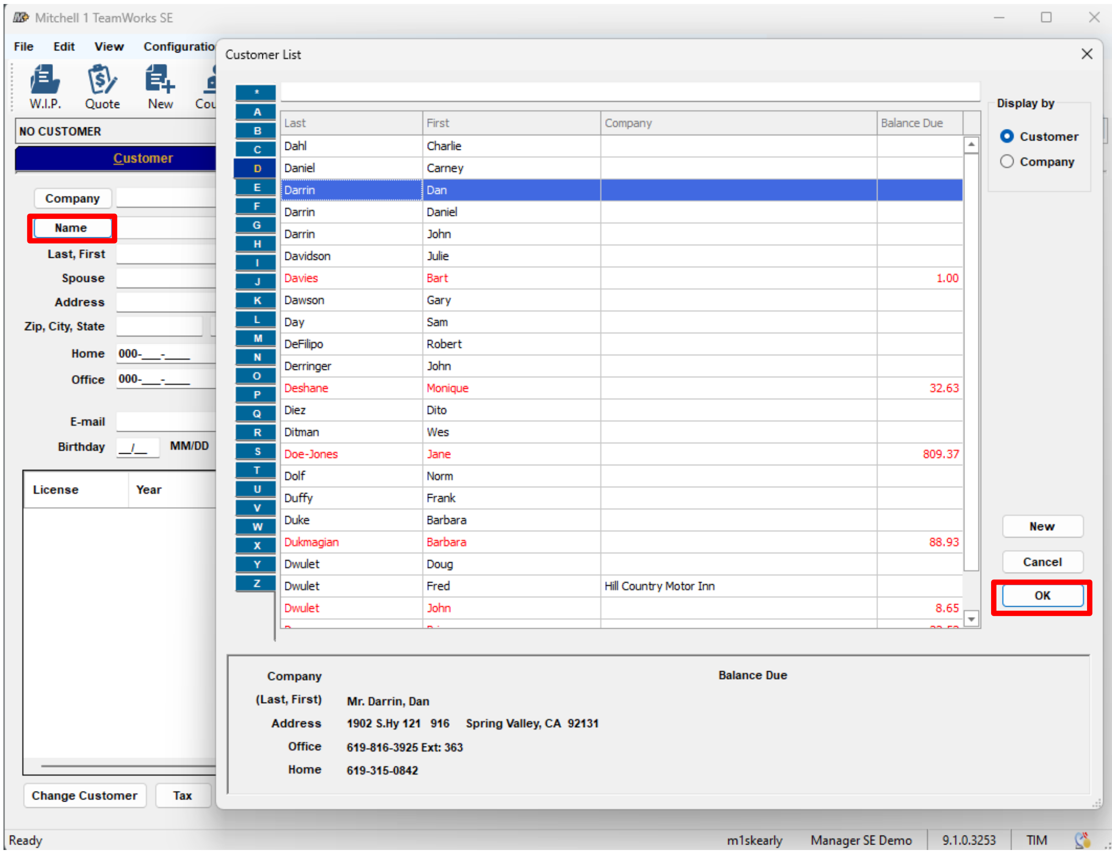
5. Click on Done **(Alt + D)** to save part to the sale & close the entry screen. With the part added to this Counter Sale, you could collect payment from this “Cash” customer, print an invoice and be done.

Next we’re going to show how to add an existing customer’s information; this is useful for tracking items with warranties, such as batteries.

6. Click on the Customer tab to access list of existing customers.

   The Customer screen displays for this Counter Sale (no name included yet).

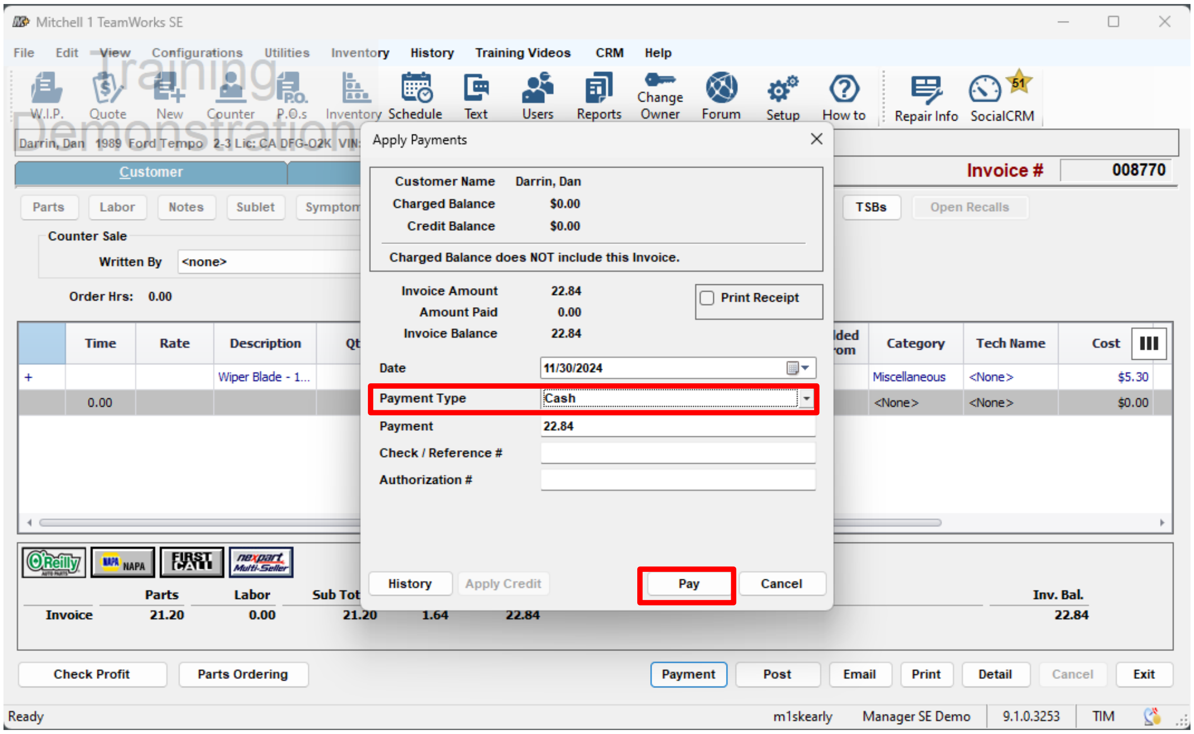
7. Click on Name **(Alt + A)** to open the list of existing customers.



8. Select a name from the customer list and then click **OK** or just double- click directly on the name itself, as this will also select it. You are returned to the customer screen with the Customers name and info and his Vehicles displayed.

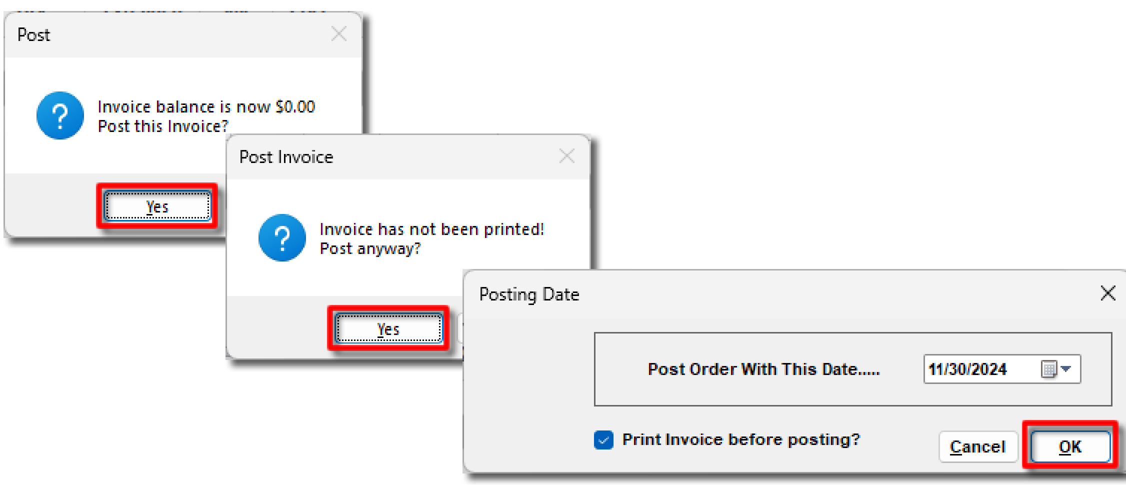
Note: You could also click **New** to add a new customer if a name is not found.

9. Click on Order **(Alt + O)** to Pay, Print & Post this Counter Sale.
10. Click on Payment to process the customer payment. In Payment Type, type a '**C**' (shortcut for Cash payment type or select Cash from the menu.

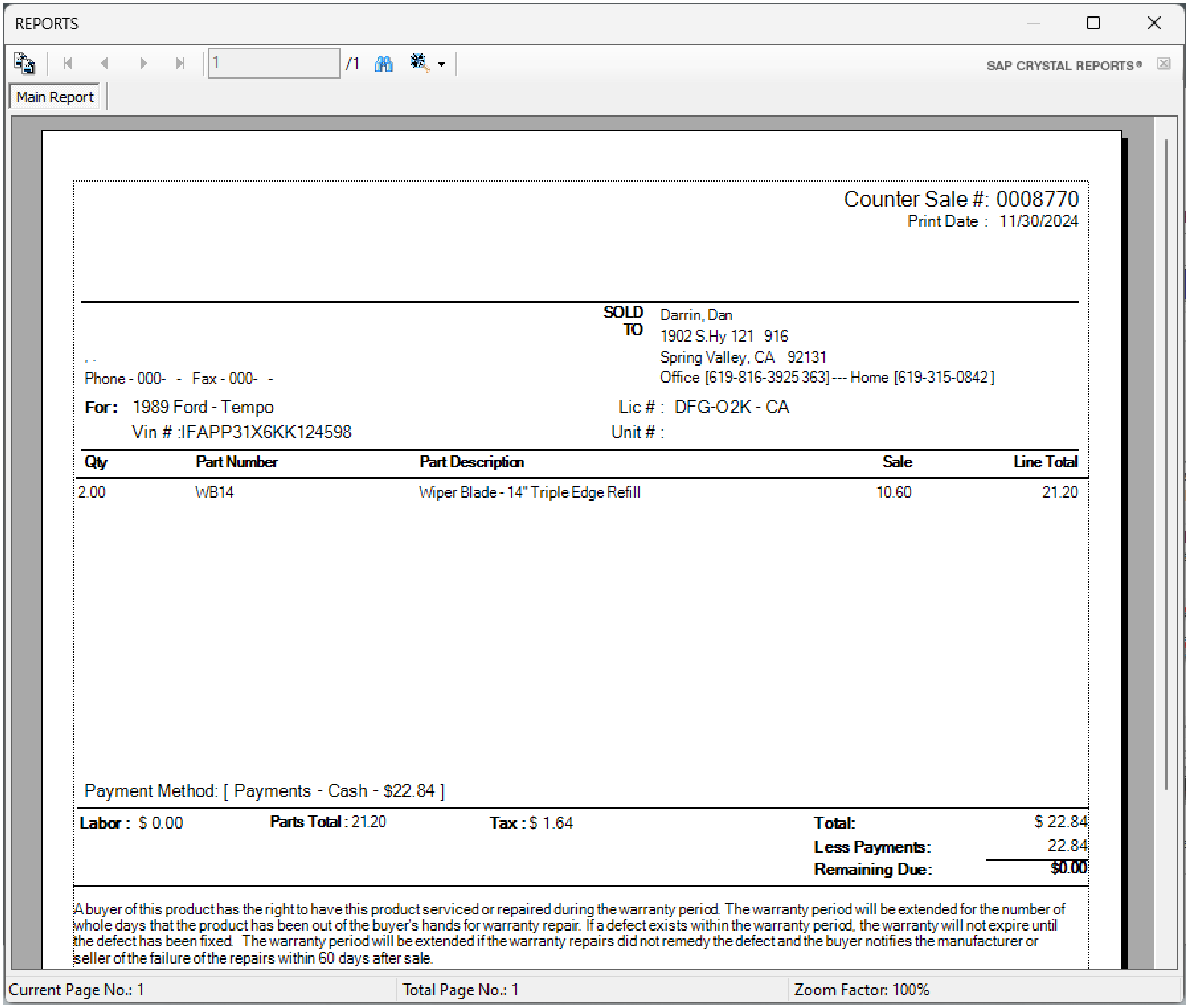


11. Click on **Pay** to record the payment.
12. Answer affirmatively to the next three questions (**Yes, Yes, OK**):

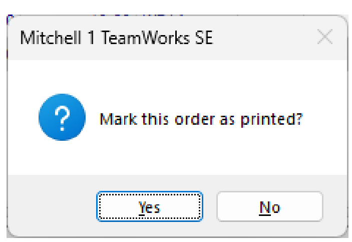
Make certain there is a check mark in "Print Invoice before Posting?" box. (this only has to be done once; users can print invoices reflecting payment info)



The Counter Sale displays in Print Preview [next page]



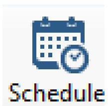
13. Click on X in upper RH corner of screen **(Alt + F4)** to close Preview. You are asked to confirm the order as printed (and therefore complete).



14. Click on Yes **('Y' or Enter)** to mark Counter Sale as printed.

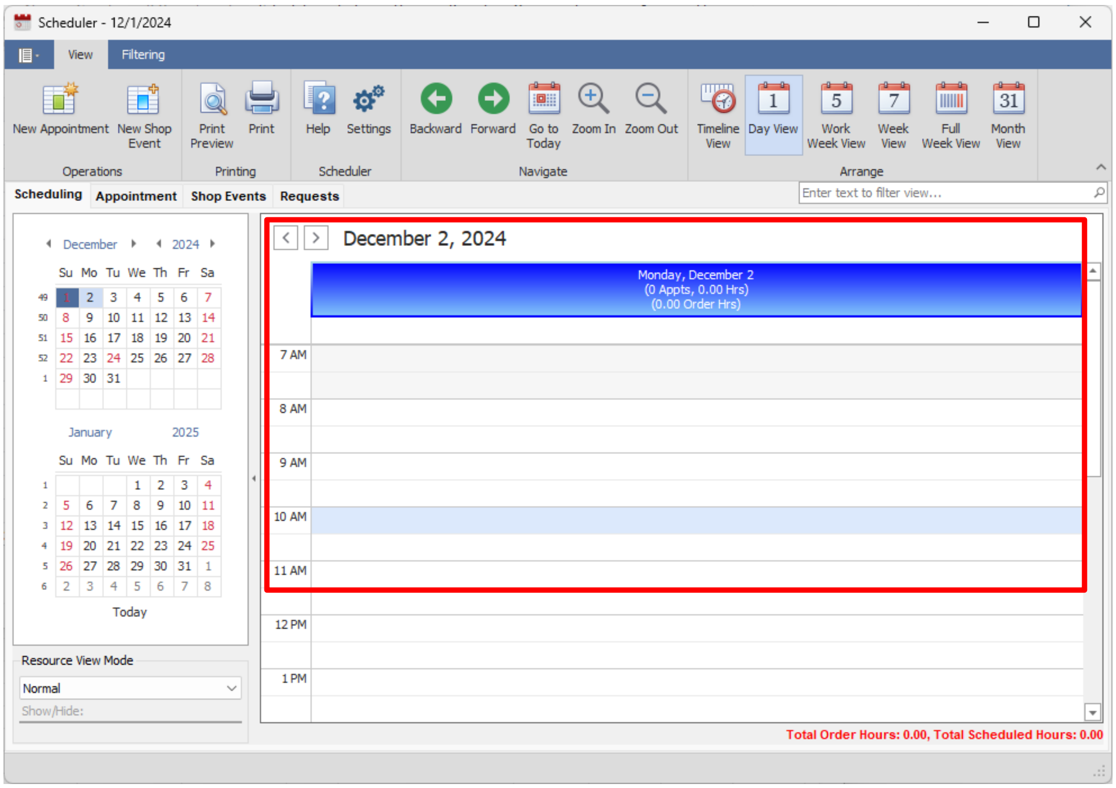
The Counter Sale is closed and posted to History.

Create an Appointment

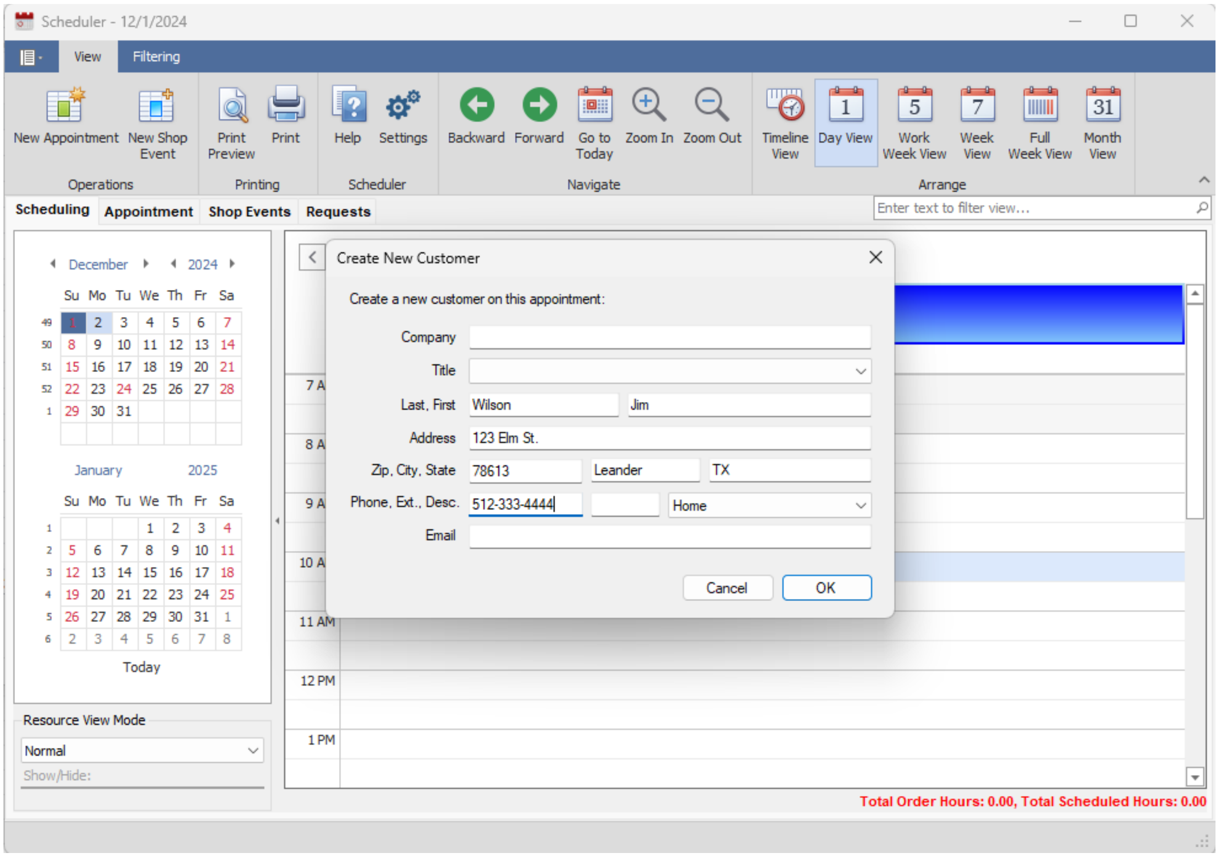


Scheduler events (appointments) are created when you start an Estimate or Repair Order. The exercise below demonstrates how you can create an appointment for a customer in advance of their visit to the shop. The subsequent appointment can be converted to EST / RO from the Appointment Editor screen.

1. Click the Schedule button to open the Scheduler.



2. Scroll to Tomorrow's date and double-click on it. The Find Customer for Schedule dialog box displays.
4. Click on **New Customer** to open the Create New Customer dialog box.
5. Type the **Last and First Names (Wilson, Jim)** and an Address (123 Elm St.).
6. Enter the **Zip Code** and press **TAB**.
7. The City and State are entered automatically for you. Enter **512-333-4444** as the phone number.
8. Click **OK**.



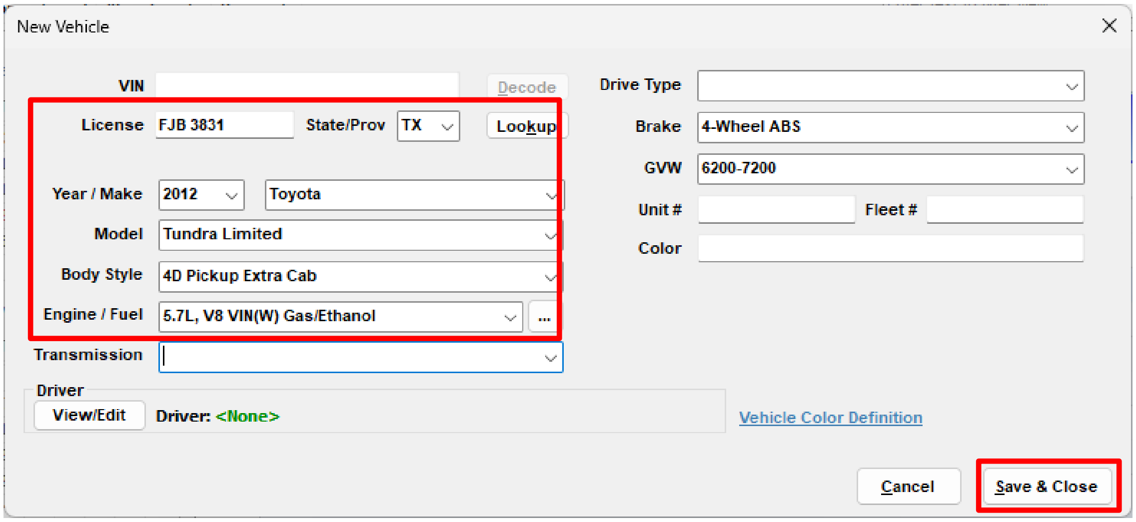
The Vehicle Selection dialog box opens. Because it is a new customer, there are no Vehicles displayed.

9. Click on **Add Vehicle**.

   The New Vehicle dialog box displays.

Note: VIN Decode and License lookup are not available in Demo mode, so you must manually enter your vehicle.

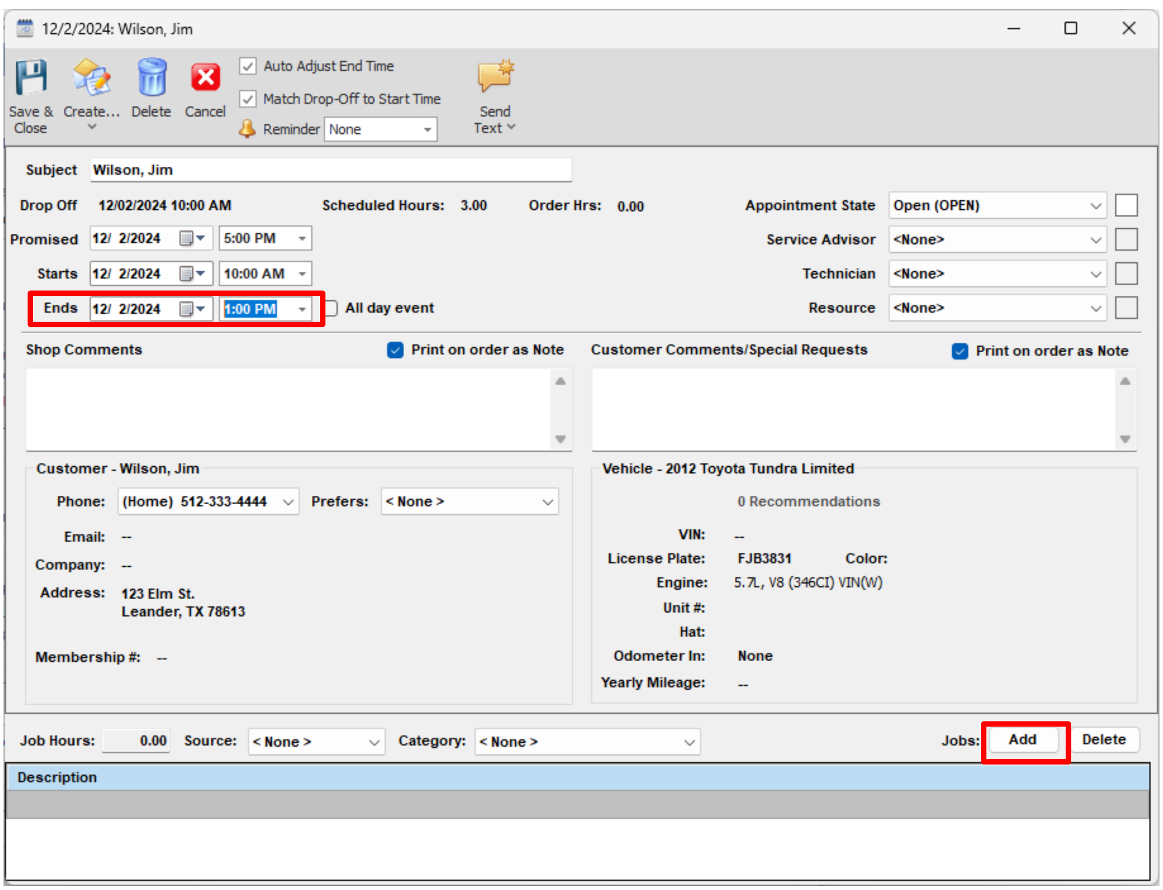
10. Fill in the vehicle fields:
    - **License: FJB 3831**
    - **State: TX**
    - **Vehicle: 2012 Toyota Tundra Limited**
    - **Body Style: 4D Pickup Extra Cab**
    - **Engine: 5.7 L V8**
    - **Trans: 6 Speed Automatic AB60E**



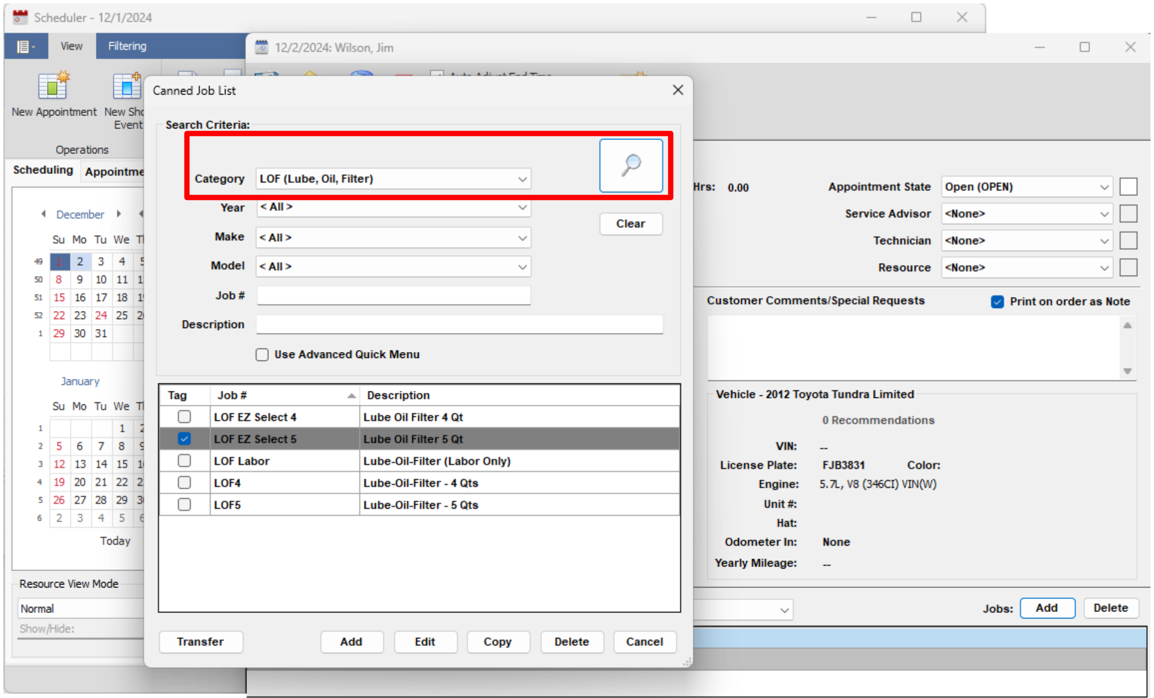
11. Click **Save & Close**.

    The Appointment Editor dialog box displays. Tomorrow's date and the drop-off time of 10 am is automatically scheduled.

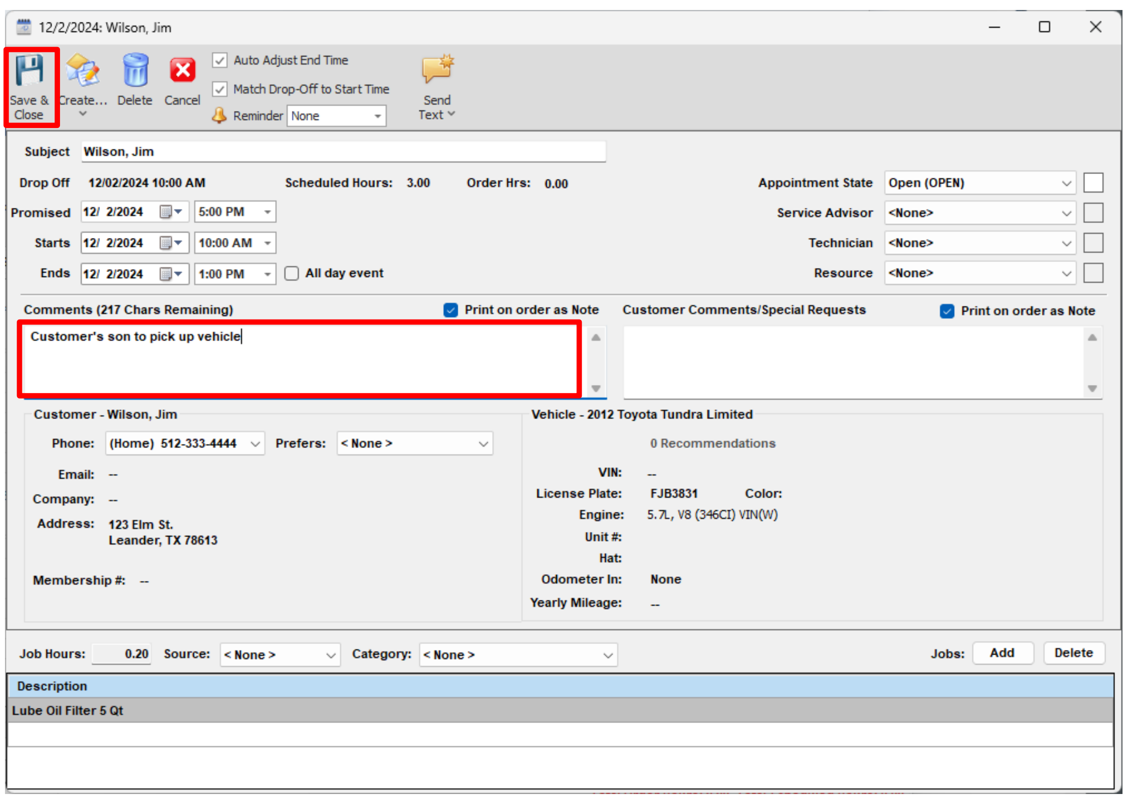
12. Change the End Time to 1:00 PM.



13. Click **Add** in the **Jobs** section to add a Canned Job to the scheduled appointment. The Canned Job List displays.

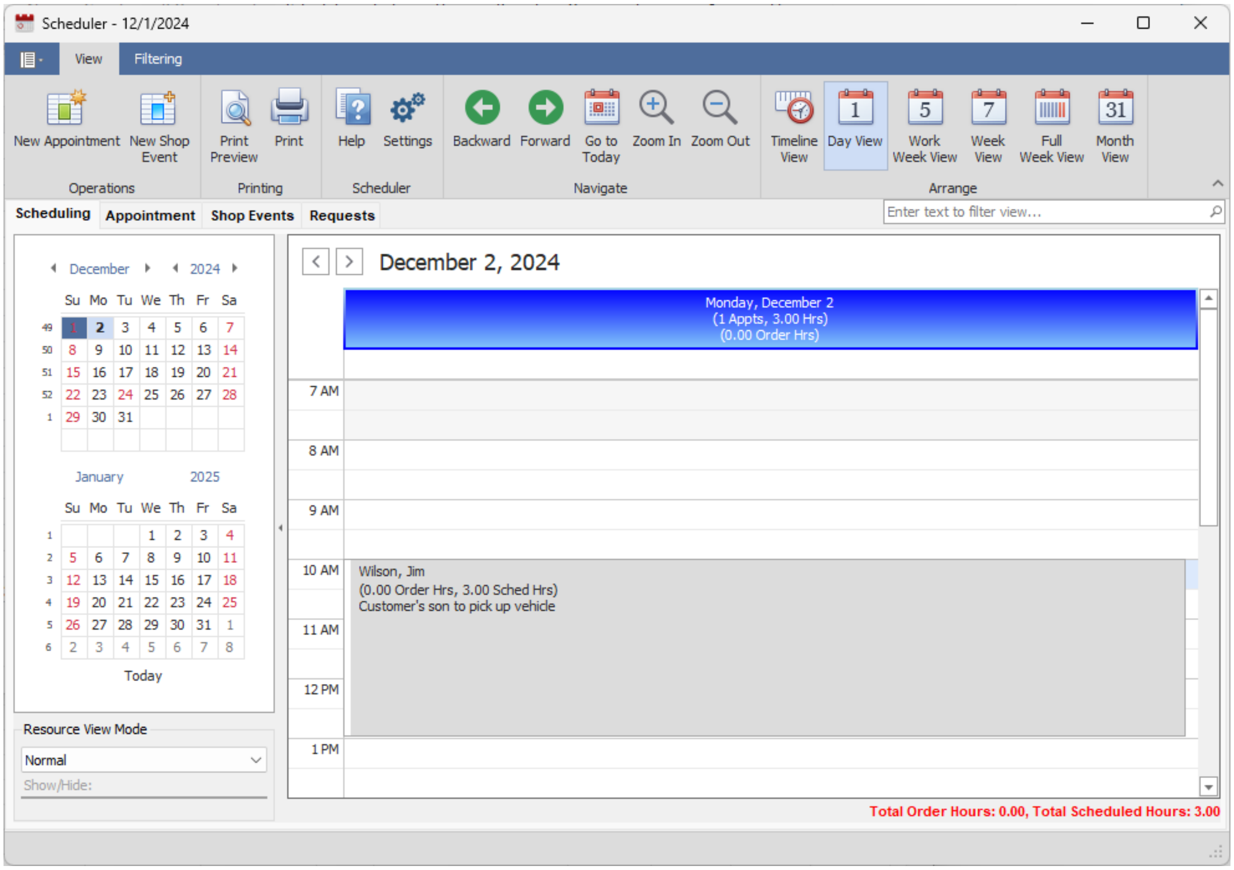


14. Choose **LOF** as your Category and click the **Search** button. Matching jobs displays in the lower grid area.
15. Choose **LOF EZ Select 5.**
16. Click **Transfer**. The Canned Job is added to the Appointment detail.
17. Add a note **Customer's son to pick up vehicle** to the Shop Comment section.



18. Click **Save and Close**.

The Appointment now appears in the Scheduler under tomorrow's date.



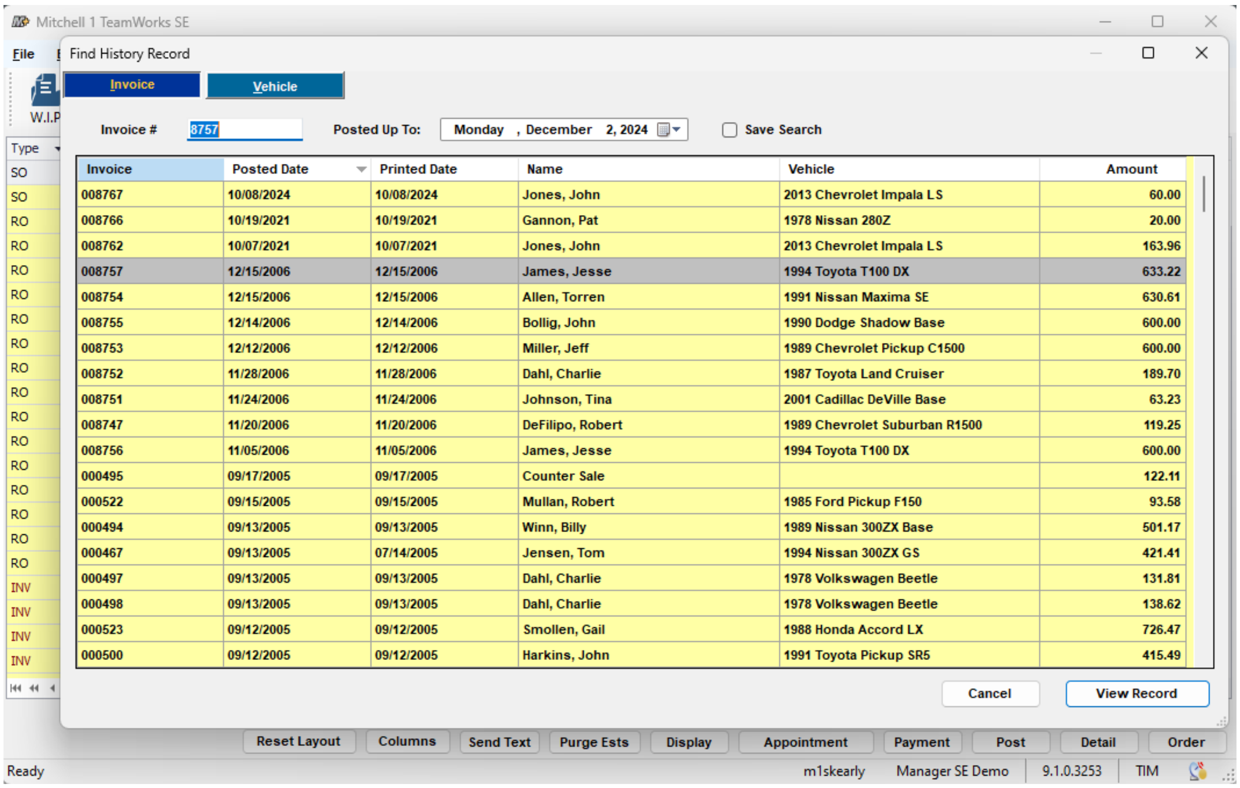
It is highly recommended that you watch the detailed videos in the SE online help system. Simply click Help [F1 key] in any Scheduler screen to access the videos. Click the icon to the right to view the demo Appointment Scheduling video.

Invoice History

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

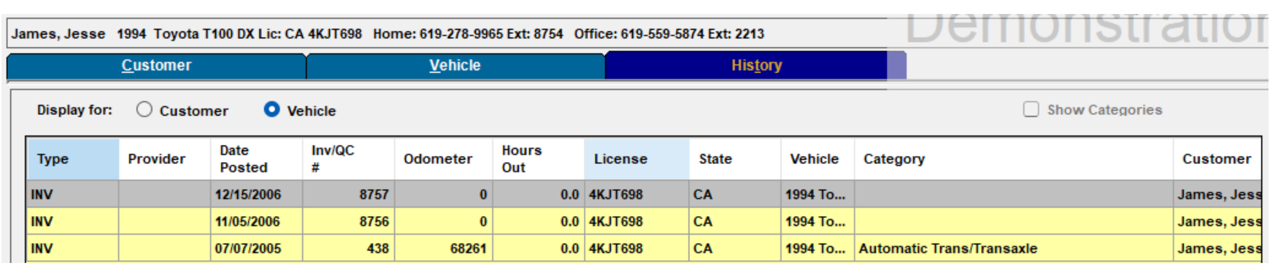
1. Click **F4** or choose **Find History Record** from the Utilities menu.

   The Find History Record screen displays in Invoice view.



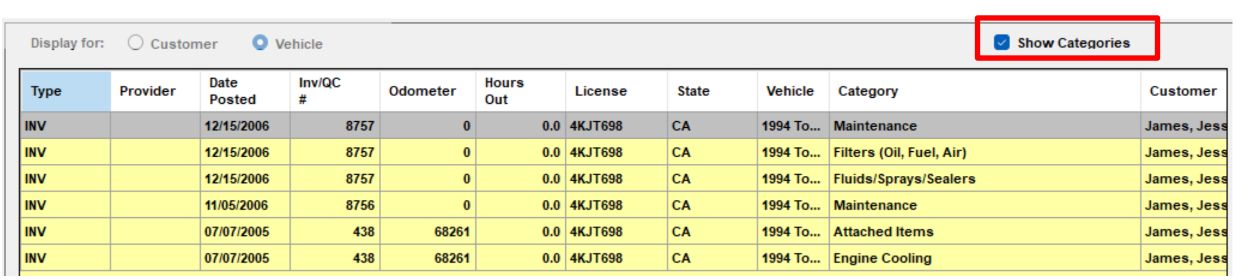
Invoice	Posted Date	Printed Date	Name	Vehicle	Amount
008767	10/08/2024	10/08/2024	Jones, John	2013 Chevrolet Impala LS	60.00
008766	10/19/2021	10/19/2021	Gannon, Pat	1978 Nissan 280Z	20.00
008762	10/07/2021	10/07/2021	Jones, John	2013 Chevrolet Impala LS	163.96
008757	12/15/2006	12/15/2006	James, Jesse	1994 Toyota T100 DX	633.22
008754	12/15/2006	12/15/2006	Allen, Torren	1991 Nissan Maxima SE	630.61
008755	12/14/2006	12/14/2006	Bollig, John	1990 Dodge Shadow Base	600.00
008753	12/12/2006	12/12/2006	Miller, Jeff	1989 Chevrolet Pickup C1500	600.00
008752	11/28/2006	11/28/2006	Dahl, Charlie	1987 Toyota Land Cruiser	189.70
008751	11/24/2006	11/24/2006	Johnson, Tina	2001 Cadillac DeVille Base	63.23
008747	11/20/2006	11/20/2006	DeFilipo, Robert	1989 Chevrolet Suburban R1500	119.25
008756	11/05/2006	11/05/2006	James, Jesse	1994 Toyota T100 DX	600.00
000495	09/17/2005	09/17/2005	Counter Sale		122.11
000522	09/15/2005	09/15/2005	Mullan, Robert	1985 Ford Pickup F150	93.58
000494	09/13/2005	09/13/2005	Winn, Billy	1989 Nissan 300ZX Base	501.17
000467	09/13/2005	07/14/2005	Jensen, Tom	1994 Nissan 300ZX GS	421.41
000497	09/13/2005	09/13/2005	Dahl, Charlie	1978 Volkswagen Beetle	131.81
000498	09/13/2005	09/13/2005	Dahl, Charlie	1978 Volkswagen Beetle	138.62
000523	09/12/2005	09/12/2005	Smollen, Gail	1988 Honda Accord LX	726.47
000500	09/12/2005	09/12/2005	Harkins, John	1991 Toyota Pickup SR5	415.49

2. Double click on ***James, Jesse***; displays history records for his selected vehicle.



Type	Provider	Date Posted	Inv/QC #	Odometer	Hours Out	License	State	Vehicle	Category	Customer
INV		12/15/2006	8757	0	0.0	4KJT698	CA	1994 To...		James, Jess
INV		11/05/2006	8756	0	0.0	4KJT698	CA	1994 To...		James, Jess
INV		07/07/2005	438	68261	0.0	4KJT698	CA	1994 To...	Automatic Trans/Transaxle	James, Jess

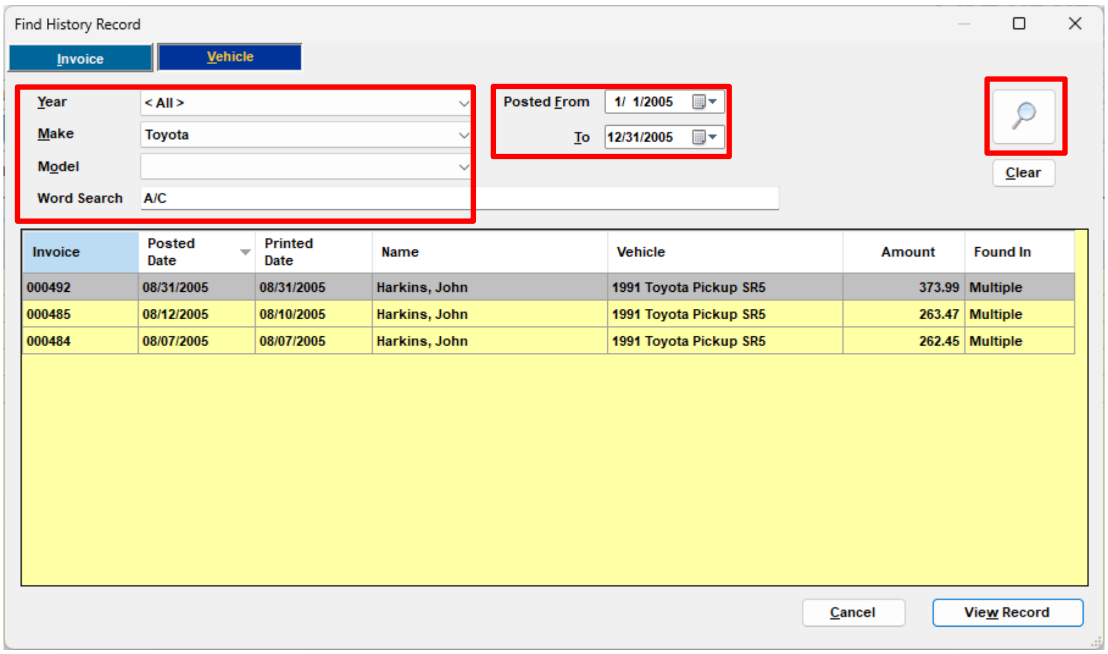
3. Click **Show Categories** to show all Categories included on each invoice.



Type	Provider	Date Posted	Inv/QC #	Odometer	Hours Out	License	State	Vehicle	Category	Customer
INV		12/15/2006	8757	0	0.0	4KJT698	CA	1994 To...	Maintenance	James, Jess
INV		12/15/2006	8757	0	0.0	4KJT698	CA	1994 To...	Filters (Oil, Fuel, Air)	James, Jess
INV		12/15/2006	8757	0	0.0	4KJT698	CA	1994 To...	Fluids/Sprays/Sealers	James, Jess
INV		11/05/2006	8756	0	0.0	4KJT698	CA	1994 To...	Maintenance	James, Jess
INV		07/07/2005	438	68261	0.0	4KJT698	CA	1994 To...	Attached Items	James, Jess
INV		07/07/2005	438	68261	0.0	4KJT698	CA	1994 To...	Engine Cooling	James, Jess

Vehicle View

1. Click **F4** to open the Find History Record dialog box.
2. Find past work in history by any combination of Year-Make-Model and/or Word Search. [enter a make without years or models if you like]
3. Select the Vehicle tab.
4. Set up your Search Criteria. In this instance, do a Word Search for **'A/C'** for **'Toyota'**with a Posted Date of 1/1/2005-12/31/2005.
5. Click the **Search** button. Your results display in the grid below.



6. Press the **Esc** key to close the Find History Record screen and return to the History screen.

Other History screen options

- **Unpost Invoice -** Allows un-posting an invoice for corrections. (Do NOT answer Yes to 'use Current Rates'; may affect existing totals when reposted.)
- **Search** - Filters History invoices list based upon key word(s) entered. Searches parts and labor descriptions of each invoice to find matches and narrow the list.
- **Detail** - View selected invoice parts and labor detail with history of payments. History Detail window allows viewing individual order lines.

This concludes the self-instruction portion of workbook exercises. On the following pages you will see how to visit **managerforum.net** and also where to access the **SE Training Video Modules/Quizzes** certificate program.

Managerforum.net Discussion Board

Answers, Tips and Ideas 24/7, Visit Managerforum.net and join us now!

Q. What is a forum account?

A. It's used to identify members (security); it's how the forum can know what you've seen, what's new and which email address to use for your notifications.

Q. How do I get started?

A. Click on the Forum icon and start browsing. To post questions and replies you need to do a one-time registration using the **Register** link on the site as shown below:

Q. What happens after I click Register?

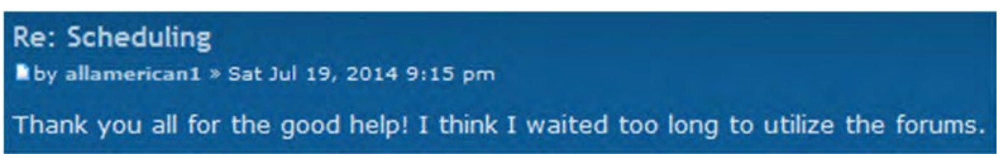
A. You are sent an automated email with a link to "complete the circuit". Once you click that link, you may log into the forum.

NOTE: If you do not see the activation email within a few minutes, please check your spam folder. If not found, click on Forum Administrator link found at the bottom of every forum page.

Q. What do users say about using the Forum?

A. *"A meeting place where you can interact with others like yourself, get answers to questions and tips on how to use Manager to its fullest. It's one of the best tools in your toolbox."*

"One thing I love about this forum is all the great input we get from shops like us. I wish I would've started on here sooner" The insights and fellowship provided is unbelievable!"



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Shop Management Modules & Quizzes

To develop a more thorough understanding of SE software concepts, we recommend taking advantage of our 4 modules/quizzes certificate program accessed as follows:

- Manager SE: http://m1training.net
- ShopKey SE: http://sktraining.net

and click on the Manager SE or Shop Management SE link.

We highly recommend you complete all of the video modules and pass the quizzes. A certificate is available for each quiz passed with 85% or higher grade